



Snacking with Substance

Functional and Healthier Nibbles for the Holidays

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Functional Snacks: How to win friends and influence snacking consumer

Walking down a snack aisle can be overwhelming, with ever-changing and expanding options. There are new snack bars, innovative sweets, new chip formats—all sorts of new ways to ingest your health benefits.

While snacking used to be seen as an optional, even decadent, treat between meals, today's health-forward snacks are more integrated into even well-established diets. As we have seen in functional beverages, consumers have rising expectations about their snacks. The question is, which ingredients and benefits are most important? Are they functional, emotional, or both?

In this report, we look at emerging snacking conversations on social media, along with our latest consumer survey data, to identify some of the growing snacking trends and consumer expectations as they approach the snacking occasion.

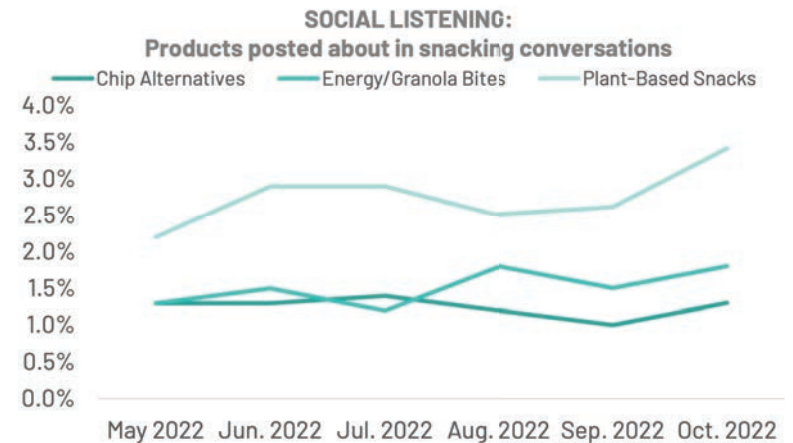
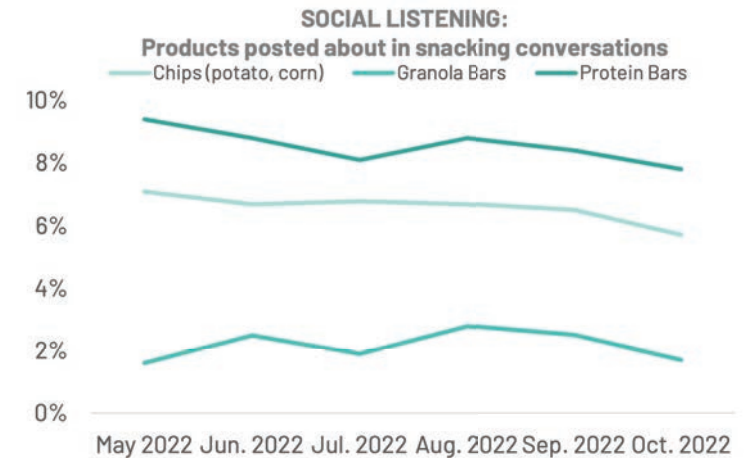
Snack Trends start and grow on social media

At Evergi, we use social listening to learn about emerging trends just beginning to rise in popularity.

In snacking conversations over the last six months, we see an increase in talk about health trend-forward or alternative snack formats, like chip alternatives (lentil chips, or chickpea puffs, beyond your traditional potato or corn), or energy/granola bites (balls are the new bars).

And plant-based snacks have been a huge talking point lately! Mushroom jerky, anyone?

Conversely, talk about traditional snacks like chips (corn, potato) and protein bars have been in steady decline for the past six months. With these innovative recreations of traditional favorites rising in the chatter, we can expect to see more expansion of these functional alternatives in market.



But what is underneath these changing choices?

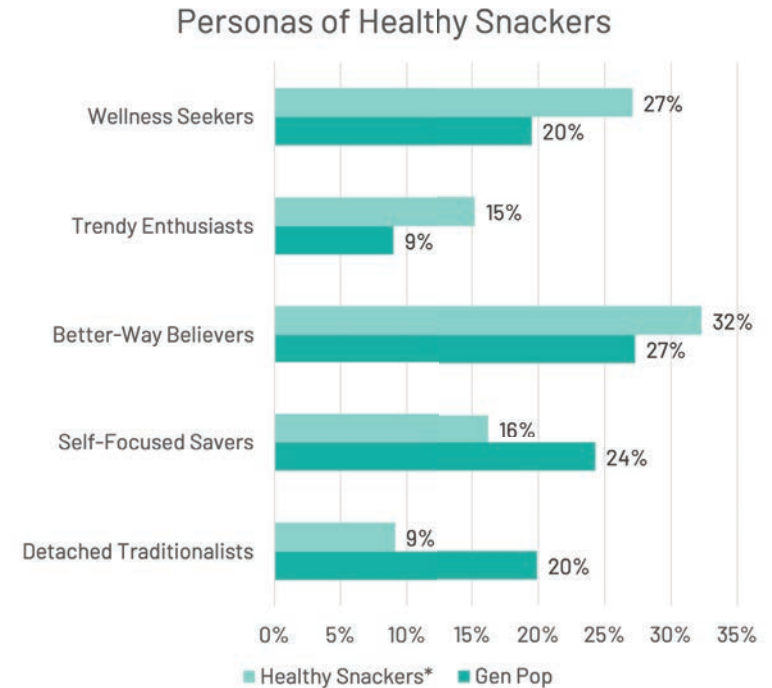
Healthy Snacker Personas

Healthier snackers typically likely fall into two main personas: Wellness Seekers and Trendy Enthusiasts.

Trendy Enthusiasts are the people at the cutting edge of health and wellness trends who are the first to try new products and diets they hope will better their minds, bodies, and spirits.

Wellness Seekers are fast-followers who pay attention to wellness trends but aren't on the bleeding edge. They know what's capturing the attention of more tuned-in Trendy Enthusiasts so they're poised to jump on the trend when at the right time.

There's a third persona, our Better-Way Believers, who are also ripe targets for healthier snacks. This group strives to better their bodies and the planet. They're open to trying new things out once they have been proven to be effective. While open to and interested in new snacks, they are not as invested or trendy as our top two personas.



*Healthy snackers include those who have purchased snacks healthier snacks in the past 3 months

What are health-focused snackers looking for?

The snack types trending on social media also happen to over-index among our more health-conscious consumer personas, the Trendy Enthusiasts and Wellness Seekers. Our consumer data suggests these consumers want snacks that deliver more than just great taste and convenience. As functional foods continue to become the norm, and as inflation-struck consumers seek to stretch their dollars further, they'll come to expect more from their snacks.

We see in our social listening data that traditional snacks like regular potato chips and packaged cookies under-index among these consumers, suggesting their preference for more health-forward versions.

The snacks preferred among this group offer a range of healthy ingredients and a range of positive benefits, with label claims like protein or energy-boosting caffeine. While they place importance on more whole body health claims like Sleep Aiding, Stress Reducing and Energy Boosting, they are just as focused on maintaining some basic nutritional guardrails in their snacks, seeking label claim reassurance of low sugar/sodium/fat/carb.

Snacking Purchases	Gen Pop	Health-Conscious Snackers*	Over index
Energy / Granola Bites	9.1%	15.6%	+6.5%
Meat-based Snack Bars	3.8%	9.0%	+5.2%
Savory Snack Bars	4.9%	9.6%	+4.7%
Meal Replacement Bars	6.5%	11.0%	+4.5%
Sports Gummies or Jellybeans	3.2%	7.7%	+4.5%
Plant based snacks (Plantain, Chickpea, Kale, Seaweed)	6.8%	11.2%	+4.4%
Protein Bars	17.0%	21.2%	+4.2%
Sports / Endurance Gels	2.7%	6.9%	+4.2%
Caffeinated Snack Bars	2.9%	7.0%	+4.1%
Dehydrated / Freeze-dried Cheese or Cheese Crisps	4.7%	8.2%	+3.5%
Keto Cookies	2.8%	5.7%	+2.9%
Chip Alternatives (Bean, Cauliflower, Veggie)	8.9%	11.6%	+2.7%
Granola Bars	17.8%	20.4%	+2.6%
Regular Packaged Cookies	38.2%	26.4%	-11.8%
Chips (Potato, Tortilla)	55.0%	36.6%	-18.4%

*Health-conscious snackers include those from our Trendy Enthusiasts and Wellness Seeker personas who have purchased snacks in the past 3 months

Social chatter and consumer insights on health needs, claims & ingredients reflect consumer demand for power-packed, multi-benefit snacks.

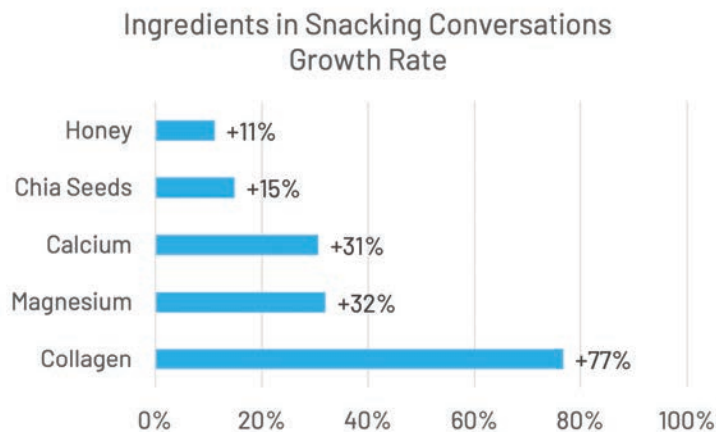
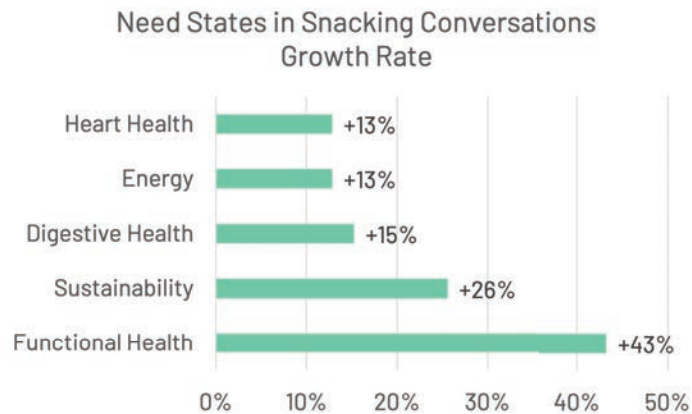
Looking at growing need states and important health claims for these snackers, we see that they view health and wellness holistically (mental, emotional, and physical), with an outsized focus on reducing stress, getting enough sleep, and boosting energy.

To complement these findings, we see growth in social conversations around Functional Health (+ 43% over last 6 months) as well as Digestive Health, Energy, and Heart Health. This stands as evidence that consumers want as much bang for their buck as possible from their snacks.

That said, snacking brands should never lose focus on great taste, or they risk losing repeat purchase!

The expectation that brands show a commitment to Sustainability also continues to grow (+26% last 6 months) through environmental and social claims like Locally Grown, Sustainably Farmed and Supporting Local Businesses. This reflects the near-universal desire, especially among younger consumers, to feel good about their brand choices. While neither a new trend nor the top purchase driver, these factors have become table stakes. Brands should prioritize and tout their environmental practices to ensure consumers feel good about their choices, inside and out.

Conversations also reflect growing consumer savviness around functional ingredients, featuring both traditional like calcium or honey, and increasingly, less established ingredients like magnesium, collagen, and chia seeds. These new players have growing mainstream appeal. These ingredients hold a high or growing share-of-voice. Ultimately, the ingredients people talk about most tend to be familiar and accessible, but emerging stand outs are always on the horizon.



New twists on salty, crunchy snacks, with added pop

Functional snacks are expanding in both familiar and newer flavors. We're seeing more examples of alternative grains or bases (like cassava, mushrooms, or kelp seen here), often paired with health claims like Immunity or Brain Health.



Sweet snacks to satisfy cravings while feeding the body

For the sweet tooth snacker, there is no shortage of options out there. Between fruit snacks combined with new grains and seeds, and "healthy" dark chocolate, snack companies are finding more ways to incorporate functional ingredients into their healthier treats.



Key Takeaways: Snacks must be multidimensional to satisfy!

With the sea of available snack options and pricing pressures, competition for snacking dollars is at a fever pitch. Insight into what consumers want now, and clues to what they might want in the future, is vital to getting products into carts and winning repeat purchasers.

As snacking needs vary widely, with different choices made by the day, usage occasion and mood of the eater, it will continue to be quite a balancing act for product developers to deliver on the wide range of benefits and claims consumers have come to expect if they want to enter and remain in the snacking rotation.

As with any food product, and even more so with Snacks, ensuring great taste should be the paramount priority. As accessible and cost-effective as many more indulgent snacks are (think about all the chips at every convenience store), consumers still want to enjoy the same delightful experience and satisfaction when choosing healthier options.

With new snack forms and ingredients regularly breaking onto the scene, focusing on a single hero ingredient, sustainability attribute, or functional benefit may not be enough to satisfy consumers. In the case of healthy snacking, more is more!

Most interestingly, perhaps, our insights reflect that consumers think beyond the functional when it comes to snacking. In addition to demanding snacks that are convenient, environmentally friendly, and great tasting, consumers are seeking deeper emotional satisfaction from snacks—to create balance, lift their mood, or facilitate relaxation.

At the end of the day, we all want snacks that make us happy!

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