

Indulge me: How to target mid-morning snacking in the moment

April 2022

Introduction

Mid-morning snacking is on the rise

Despite take-up of the vaccine and the easing of restrictions, many of us are not rushing back to the office. Hybrid working is here to stay, and the home office is becoming a permanent fixture. As a result, our kitchens and cupboards are now in touching distance throughout the day. Snacking occasions, particularly in the morning, have seen huge growth in the last six months.

Combined with the whirlwind of emotions we've all experienced over the past two years, this has many of us reaching for things that make us feel better.

If you've found yourself craving more sweet or salty snacks, you're not alone. In this report, we'll explore why and when consumers are turning to more indulgent treats. 56% of us have been purchasing



Who are the bees?

Our bees are 4.5 million mobile app users around the world who share details about their emotions, behaviours, purchasing decisions and more with us.

They share experiences using their own words, photos and videos, at the moment of consumption to give us insight that's rich with context and emotion.



4.2k



6.1k



3.7k



4.9k



3.4k

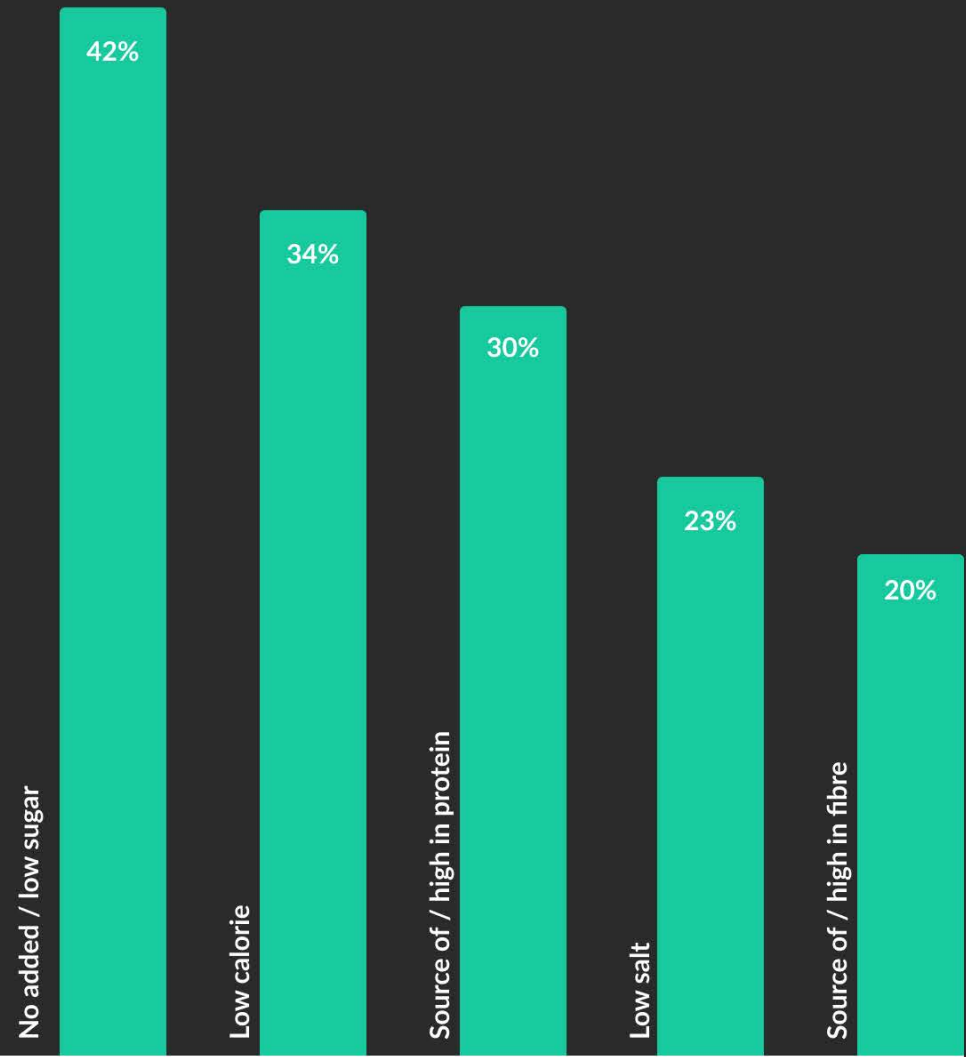
comfort food more regularly since COVID-19 hit and our research suggests that we'll continue to gravitate towards 'treats' in 2022. So, how can you grow your offering in the indulgent snack space and what occasions can you play in? The key here is balance, which we'll explore in the three growth opportunities in this report.

Health and wellbeing is still top of mind

These days, many of us are driven by a desire to feel healthy in our everyday lives. The pandemic has shone a light on our health and how we look after it. But it's more than just physical. Our mental wellbeing is just as important and consumers are looking for ways to nourish their *whole* selves.

In fact, 4 in 10 have changed their health and wellbeing behaviours since COVID-19 began. Consumers are becoming more and more sophisticated in their understanding of the way diet impacts their mind and their body. As such, they're actively seeking out foods with certain attributes in a bid to consume the right benefits at the right time.

Top attributes sought when deciding what to eat / drink



Streetbees Food Go Dashboard
47,390 SAMPLE SIZE Global

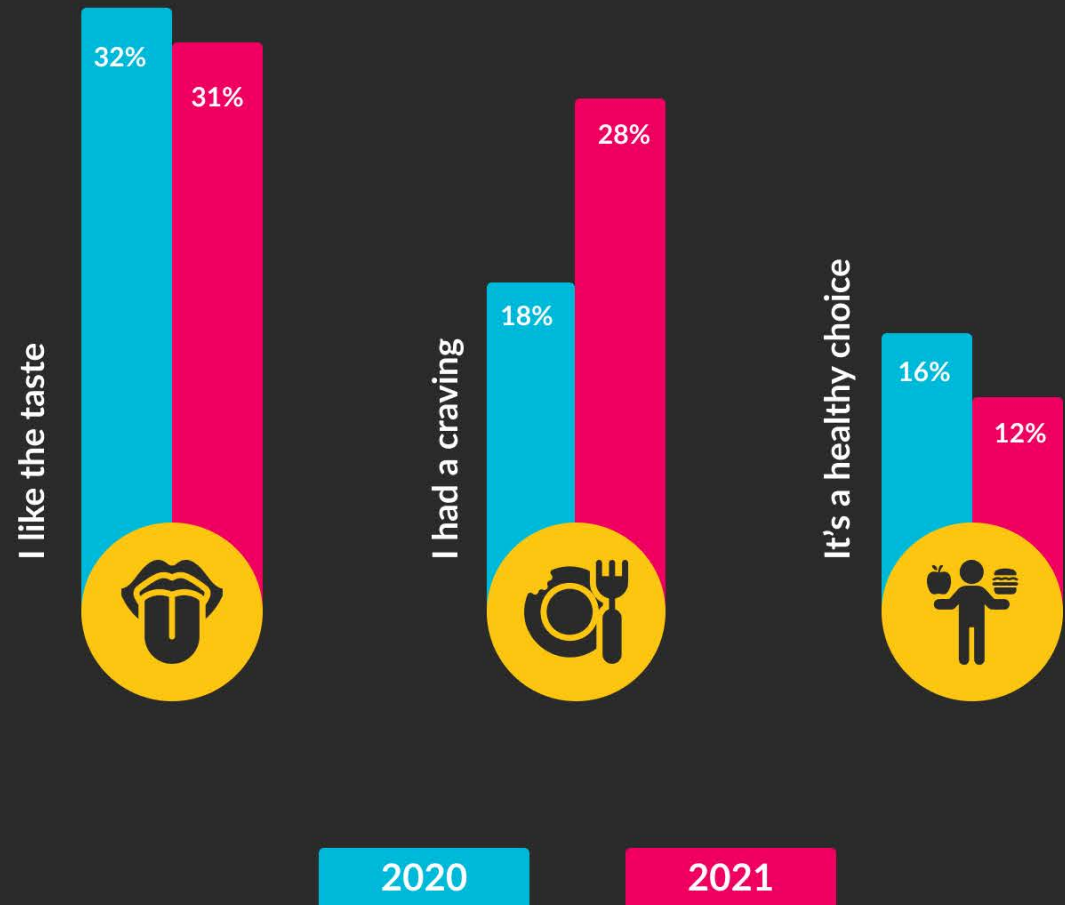
But there's an increasing 'knead' for indulgence

This renewed focus on health has shifted the snacking landscape. 2 in 10 of our bees told us they're seeking healthier options when it comes to food. However, this means that when they do decide to treat themselves, they want something more indulgent.

While consumers care more about health now than they did pre-pandemic, the way this comes to life in snacking is different to other categories. Taste and cravings still reign supreme here. Cravings in particular have become more important as a driver of snacking choice year-on-year, which has been key in shaping the desire for indulgence.

In fact, all of the markets we've featured in this report have seen growth in cravings when it comes to snacking. France and China, in particular, have seen a notable uplift since 2020 (17% and 14% respectively).






Main reason for snack choice



Streetbees Food Go Dashboard
18,402 SAMPLE SIZE Global

Consumers are indulging these cravings for lots of different reasons. A brief distraction from a long work day. A permissible treat after a home work-out. A small boost to tide them over until lunch. What they choose to snack on ultimately depends on the context of the moment and their taste preferences. *To be considered, your brand must meet their needs within these specific consumption moments.*

Let's dive deeper into this by exploring the five 'indulge me' moments we've identified through consumption tracking in our snacking dashboards.

					
2020	15%	19%	16%	21%	18%
2021	29%	36%	23%	36%	26%
% change	+14% ↑	+17% ↑	+7% ↑	+11% ↑	+8% ↑

Streetbees Food Go Dashboard
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CONSUMER TREND 1:

Morning treating

Consumers crave snacks earlier in the day

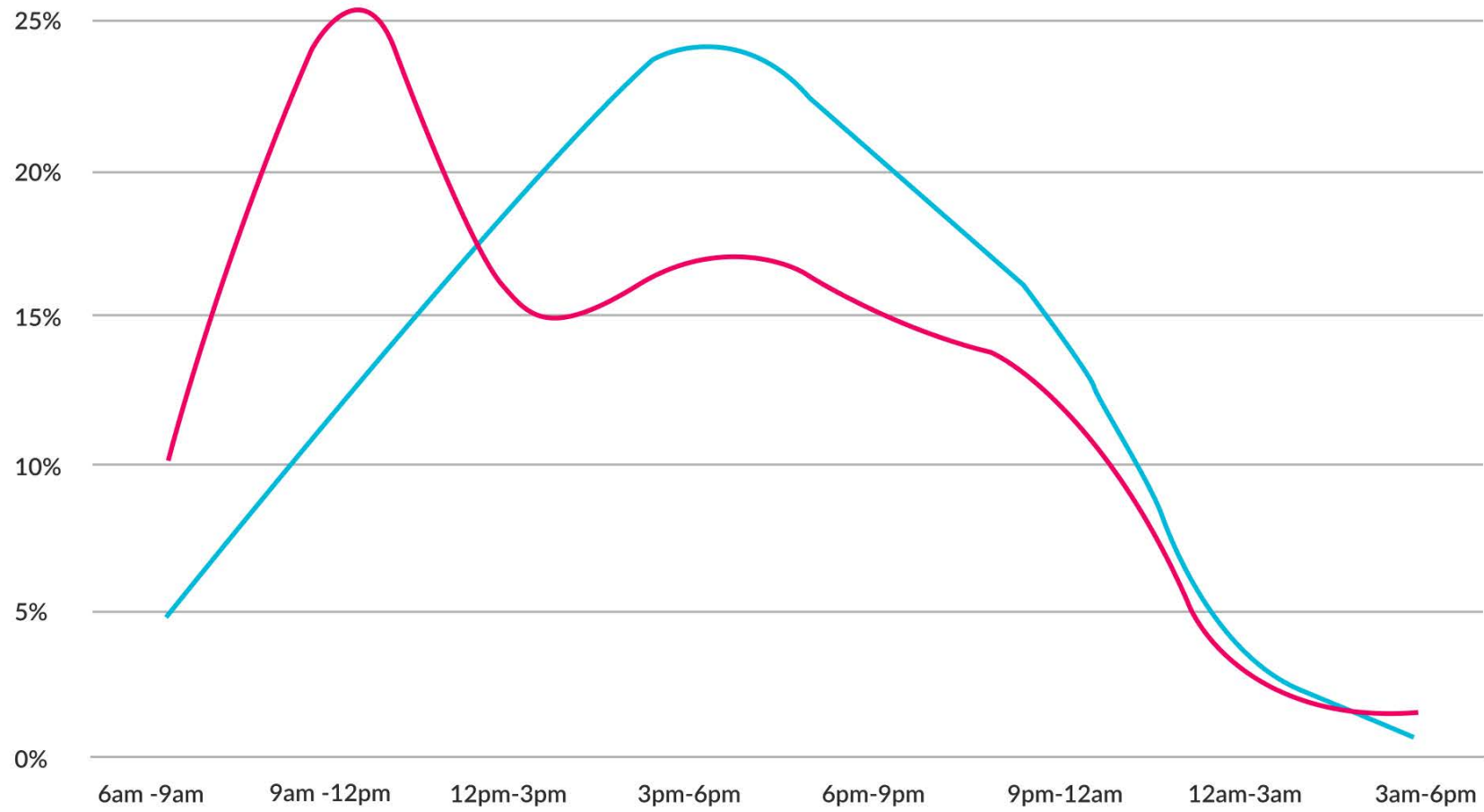
In 2020, cravings were traditionally experienced and fulfilled in the afternoon, specifically in the what-feels-like-a-lifetime stretch between lunch and dinner. But in 2021, we saw a notable shift in this timeline. While afternoon cravings are still very much a thing, mid-morning cravings have skyrocketed. The desire to indulge a craving is now happening earlier in the day. In fact, 4 in 10 snacking occasions were in the morning (6am-12pm) in 2021 vs. 2 in 10 in 2020.

A close-up photograph of a hand reaching towards a plate of cookies. The hand is slightly out of focus, while the cookies are sharp. The background is a soft, neutral color.

4 in 10

snacking occasions are now in
the morning (vs 2 in 10 in 2020)

I Had a Craving by Day Part



2020
2021

Streetbees Food Go Dashboard
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CONSUMER TREND 2:

Enjoyment time is priority

Emotion-driven snacking occasions are rising

Snacking is still tongue-led, and satisfaction tends to rest in the taste or the snack's ability to meet a craving. But the category is also becoming more emotion-led. Consumers are turning to snacks to feel a moment of enjoyment. A quick 'treat' or a little 'pleasure'. A bite-size moment of happiness. We've seen an increase in the number of during-work (5% in 2020 vs. 15% in 2021) or during-housework (5% in 2020 vs. 9% in 2021) snacking occasions in particular, as consumers are using these moments to take a break with something they enjoy.

Top reasons are tongue hunger and craving



Taste 32%



Craving 28%

I eat this because it is my little pleasure after my day just before going to dinner tonight and really enjoy the delicious chocolate and caramel

Male, 33, FR



Reasons for satisfaction outside of taste, satisfying craving and filling



Healthy 6%



I feel better 9%



I enjoyed it 9%

CONSUMER TREND 3:

Enhance mood and wellness

Indulgence has become a form of self-care

In a world where things feel increasingly out of our control, food plays a large role in giving us something we can directly influence. A constant we can control. As such, indulgence has become a form of self-care and comfort during the pandemic. We're actively seeking things that boost our mood and our sense of wellness - and this includes food. In fact, the top reasons for satisfaction after 'taste', 'satisfied a craving' and 'filling' are **'it made me feel better'** and **'I enjoyed it'**. Consumers are giving themselves more permission to indulge as a way of dealing with the rollercoaster of emotions we've experienced during the pandemic.



Because I got to eat exactly what I was craving for, while applying minimum effort. And it tasted super delicious, satisfied my little hunger and also, made my mood better.

Male, 35, IN



After eating my snack, my satisfaction is very high, I feel very comfortable, happy and physically and mentally better.

Male, 26, CN

CONSUMER TREND 4:

Permissible indulgence

Consumers need a reason to give themselves permission to indulge

The need for comfort is great and consumers will continue to gravitate towards indulgence in 2022. However, we're becoming more health-conscious about 'treats' and feel we need permission to indulge. You might assume 'healthy' is the opposite of 'treat', but the two are no longer mutually exclusive.

Indulgence must serve a purpose to justify permissibility, whether that's to make us feel a certain way, to bring something exciting into our daily lives or to benefit our health. In fact, 1 in 4 of the snack choices made by consumers in 2021 were driven by a desire for something healthy and tasty, e.g: satisfying a sweet tooth with something sugar-free.



This food is full of nutrition and less oily but has rich chocolate so i choose it as healthy.

Male, 31, IN



CONSUMER TREND 5:

End of the day

The evening is another key occasion for indulgent snacking

Mid-morning snacking is on the up. But you shouldn't disregard the end-of-day occasion. The evening is still a key time for consumers to snack, as they look for a way to wind down. The end-of-day snacking occasion is a time to recover, revive and relax. 2 in 10 consumers snack between 6pm and 12am and 15% of these occasions are done while relaxing.



Overall my mood is high, looking forward to relaxing and watching TV. It's Wednesday treat night so I thought why not having something a little more exciting.

Male, 64, CN



2 in 10
are consumed between
6pm-12am in 2021



15% of these are while
they are relaxing



32% of the snacks are
chosen to satisfy a craving

Our bees are more likely to consume drinks they deem to be a 'treat' in the evening, compared to the rest of the day. This includes carbonated soft drinks and alcoholic beverages. Similarly, they're more likely to kick back and watch a movie or catch one of their favourite shows. Consider pairing your snacks with 'treat' drinks, or creating a comms connection with popular films or shows to anchor your association with this time of the day.

i am hungry and love to eat
chips with cold drink.... and
dairy milk chocolate
Female, 56, IN



Three key opportunities for snack brands

Growth opportunity 1:

Guilt-free grazing

Make it easier to justify a mid-morning snack with a 'healthy twist'

The key here is to balance indulgence with health to help consumers feel better about their morning snack. Snacking between 9am and 12pm has risen by 12% year-on-year and consumers are no longer saving indulgent treats until later in the day. But they do need justification. Putting a 'healthy spin' on something indulgent will give them that. A morning snack that's good for the mind *and* the body.

Savoury snacks and biscuits/cookies are the top snacks at this time of day, so consider targeting consumers with healthier versions of these much-loved staples.

Brand spotlight: Believe it or 'nut', it's healthy and delicious

Rythm 108:

Rhythm 108 focuses on wellness to create snacks we love that also meet our needs. The brand balances a love of sweet treats with an emphasis on nutrition. Their biscuit range for example, is vegan, organic, gluten-free and has no refined sugar.



The Gut Stuff:

The sisters behind snack brand, The Gut Stuff, aim to dispel fad diets in favour of scientifically-supported snacks that are good for your gut. They combine indulgent flavours with nutritional know-how to give you 1/3 of your daily fibre fix.



Growth opportunity 2:

Morning mood-boost

Meet the emotional desire behind mid-morning snacking with 'mood food'

This is all about balancing the physical and emotional sides of snacking. Increasingly, snacks are seen as tools to assist with mood enhancement and regulation. Given the heightened levels of stress we've all experienced in recent times, this is a much-needed boost.

We've seen relaxed snacking moments increase from 7% in 2020 to 11% in 2021, as more of us are turning to snacks as a way to unwind. As a result, this is the time to shine for brands that elevate indulgence through emotion.

Brand spotlight: How to find inner 'peas'



Rallies Nut Butter Bombs:

Nestle launched Rallies Nut Butter Bombs as a pick-me-up snack. Rich in flavour but made solely from natural ingredients, these bite-size snacks encourage you to “indulge in the sweet taste of a little self care”.

Kyoot:

Chocolate brand, Kyoot (pronounced 'cute') have also raised the 'bar' by using all-natural ingredients to create chocolate you can feel good about eating. It's what they call their 'feel-good formula'.



Growth opportunity 3:

Put fun into the familiar

Elevate the experience by combining bold new flavours or formats with familiar favourites

While we'll continue to gravitate towards the 'treats' we know and love in 2022, our dashboard has shown an increase in the desire for something new and different in the snacking arena. Elevate familiar flavours with new textures and experiences to keep things interesting.

Seasonal flavours are often tied to indulgence. They create greater permissibility with limited editions that compel consumers to 'get it while they can' and offer brands a way to spice up traditional offerings.

Flavours from around the world are also in high demand. Consider using global flavours to put a spin on familiar formats.

Brand spotlight: It's never 'chew' late



Snickers bar:

Mars launched a variation of its Snickers bar with an indulgent cinnamon bun filling, tying to the rising dessert trend and giving consumers a seasonal spin on a much-loved favourite.

PepsiCo:

PepsiCo's Frito-Lay division is launching a brand new product line in 2022: Lays Layers. The potato chips deliver a new multi-dimensional snacking experience by shaking up the format of familiar potato chips.



Streetbees GO - Always on. Always insightful. Always actionable.

Ready to find out more? Streetbees GO delivers consumer closeness and new growth opportunities to global brand teams in the food and beverage industry.

Explore

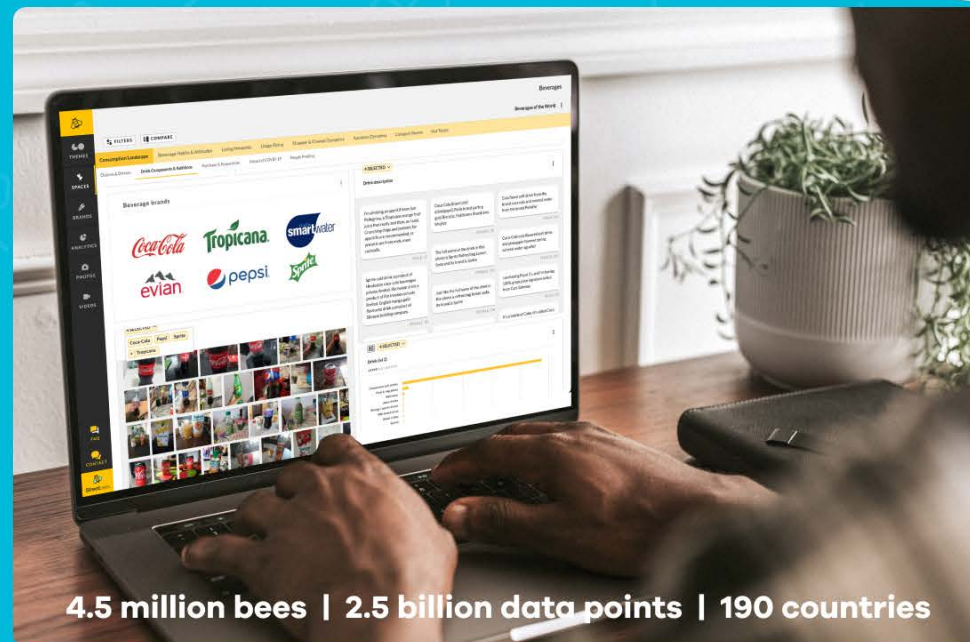
Streetbees GO connects brands to the lives of consumers with incredible depth of context and emotion. Always-on dashboards provide you with in-the-moment insights from consumers, in their own words, to help you make the right decision every time.

Understand

With insight from 4.5m engaged consumers, you need clarity. We use machine learning to turn billions of pieces of unstructured, chat-based language into an execution tool that informs your next brilliant decision. We're not interested in generalities, so we get as granular as you need.

Act

Take the right action at the right time - and never miss a growth opportunity! We share the truth of consumers' lives, so you can refine marketing campaigns, develop new products, extend critical categories and strengthen retailer relationships.



4.5 million bees | 2.5 billion data points | 190 countries

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