

INTRODUCING THE

STATE OF

SNACKING

2019 GLOBAL CONSUMER SNACKING TRENDS STUDY BY:

Mondelēz
International
SNACKING MADE RIGHT



The Harris Poll

Harris Insights & Analytics LLC, A Stagwell Company

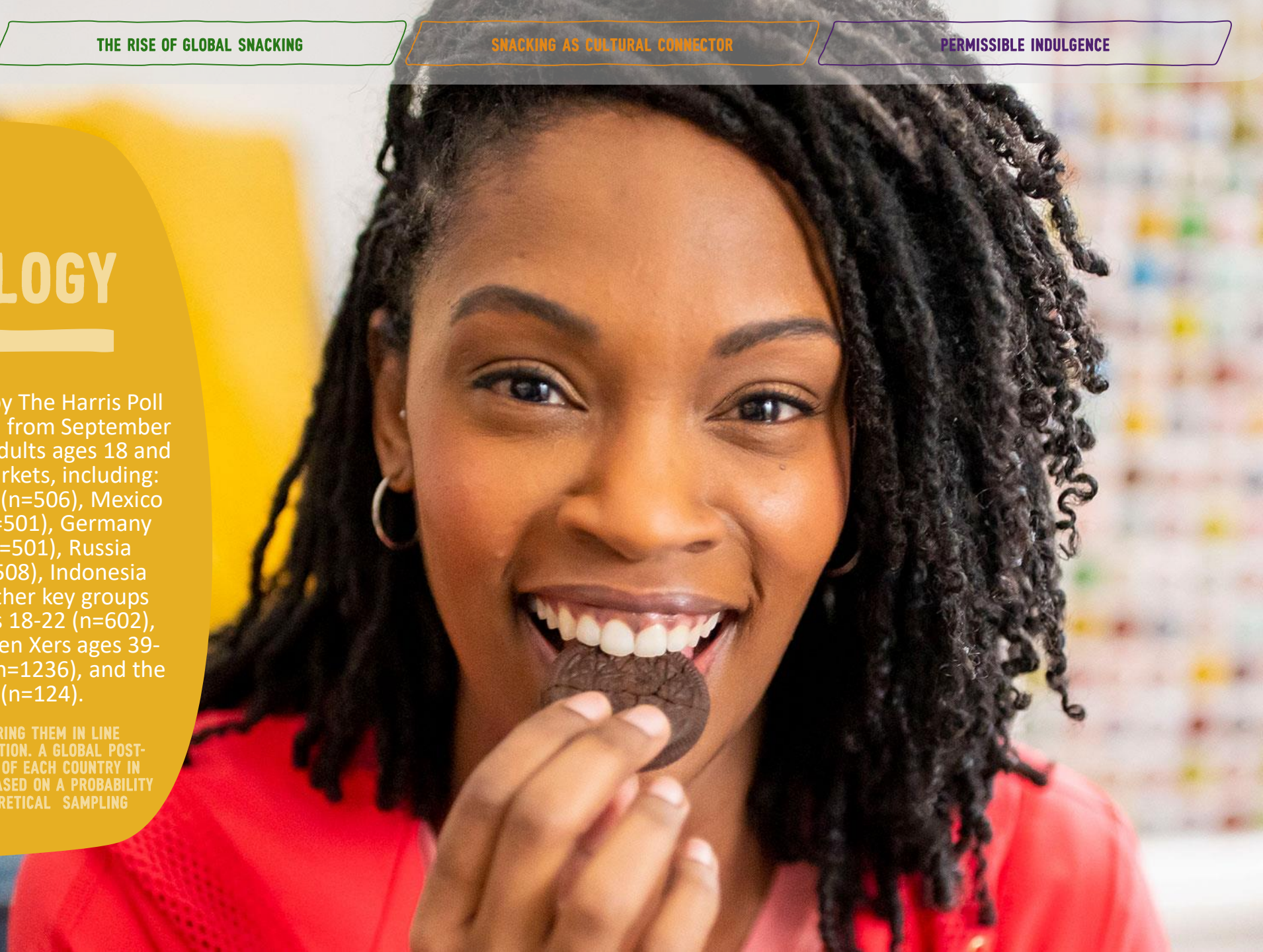
TABLE OF CONTENTS

- 1 INTRODUCTION:**
METHODOLOGY, INTRODUCTORY LETTER & EXECUTIVE SUMMARY **PAGE 3**
- 2 THE GLOBAL RISE OF SNACKING:**
PRIORITIZING CONVENIENCE, PEOPLE AROUND THE WORLD OPTING FOR SNACKS OVER MEALS **PAGE 6**
- 3 SNACKING'S ROLE IN CULTURE & IDENTITY:**
BITE-SIZED TRADITIONS CONNECTING PEOPLE TO SENSE OF SELF, FAMILY & COMMUNITY **PAGE 10**
- 4 PERMISSIBLE INDULGENCE:**
SNACKERS OF THE FUTURE SEEKING BOTH TASTE & NUTRITION **PAGE 13**

METHODOLOGY

This survey was conducted online by The Harris Poll on behalf of Mondelez 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 POST-WEIGHT 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.



A MESSAGE FROM DIRK VAN DE PUT

CHAIRMAN & CEO,
MONDELÉZ INTERNATIONAL



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 Mondelez 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 Mondelez 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.

A stylized, handwritten signature in dark ink that reads "Dirk".

EXECUTIVE SUMMARY

THE GLOBAL CITIZENS OF SNACKING

GLOBAL STUDY COMBINING MONDELÉZ INTERNATIONAL'S GLOBAL SNACKING INSIGHTS WITH NEW CONSUMER RESEARCH FROM THE HARRIS POLL REVEALS THE RISE OF THE \$1.2 TRILLION SNACKING OPPORTUNITY AND EXAMINES THE EVOLVING ROLE SNACKING PLAYS IN THE FUTURE OF FOOD: FROM CONNECTING ACROSS CULTURES, DEFINING IDENTITY TO DELIVERING ON TRENDS LIKE FUNCTIONAL AND EMOTIONAL HEALTH AND WELLBEING.

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 and sense of wellbeing.

Key research findings include:



SNACKING IS ECLIPSING MEALS GLOBALLY AS APPETITE FOR SMALLER BITES GROWS

The average adult now eats more snacks than meals on a given day, with younger consumers and those in developing markets particularly leaning into snacks as a meal replacement. The majority of global adults say they “prefer to eat many small meals throughout the day, as opposed to a few large ones” (59%), including 72% of those in developing markets and 70% of millennials.



SNACKING OFFERS BITE-SIZED RITUALS CONNECTING US TO CULTURE & COMMUNITY

Snacking is a key way people around the world connect to their culture and share their sense of identity with their communities and families. Over 7 in 10 global adults say snacking is a way to remind themselves of home (71%), more than 8 in 10 parents use snack time as a small way to connect with their children (82%), and 3 in 4 want to pass cultural snacking rituals on to their children (76%).



SNACKS NOURISH BODY, MIND, & SOUL WITH INDULGENCE REMAINING A PRIORITY

Two-thirds of global adults see snacking as a way to help “improve their quality of life” (68%), including 76% of those in developing countries. The majority also say snacks are just as important to their mental (71%) and emotional (70%) wellbeing as their physical wellbeing. The majority of global adults acknowledge the need for balance, saying they “appreciate having the option of both healthy and indulgent snacks depending on the moment of need” (80%). Two-thirds often look at portion control when selecting snacks (65%), and 83% of people agree a balanced diet can include a little indulgence.

KEY RESEARCH FINDINGS, PART 1

THE GLOBAL RISE OF SNACKING

PRIORITIZING CONVENIENCE, PEOPLE
AROUND THE WORLD ARE OPTING FOR
SNACKS OVER MEALS



SNACKING OUTPACES MEALS AS APPETITE FOR SMALLER BITES GROWS

6 IN 10 ADULTS GLOBALLY SAY THEY "CAN'T IMAGINE THEIR LIFE WITHOUT SNACKS" (61%)

6 IN 10

GLOBAL ADULTS "PREFER TO EAT MANY SMALL MEALS THROUGHOUT THE DAY, AS OPPOSED TO A FEW LARGE ONES" (59%).

“

At Mondelez International we are consumer obsessed and on a mission to offer our consumers the right snack, for the right moment, made the right way. The inaugural **State of Snacking Report** is yet another way we're step changing our understanding of consumers' busy lives and how our brands – both global and local – can play an important role. Around the world, snacking serves a greater purpose than nourishing body and mind. Our brands have had an important place in consumers' lives for generations. Ensuring our brands remain relevant means recognizing that one-size-fits-all no longer works with consumers who want authenticity, meaning-for-me and local connections.”



- MARTIN RENAUD, CHIEF MARKETING OFFICER, MONDELEZ INTERNATIONAL



72% OF THOSE WHO LIVE IN THE DEVELOPING WORLD, 7 OUT OF 10 MILLENNIALS, AND TWO-THIRDS OF PEOPLE WHO MAKE HEALTH A TOP PRIORITY (66%) PREFER TO EAT MANY SMALL MEALS THROUGHOUT THE DAY, AS OPPOSED TO A FEW LARGE ONES.

SNACKING IS AN INDISPENSABLE PART OF CONSUMERS' EVERYDAY LIVES

7 IN 10 SAY, "SNACKING HELPS ME GET THROUGH THE DAY" (71%) AND THAT "IT GIVES AN ESSENTIAL BREAK IN MY BUSY DAYS" (73%)



"We've deepened our insights into consumer behavior and developed a new proprietary framework and knowledge base that takes a broader view of how consumers snack and what drives them. The emotional and often cultural connection people have with snacking is something we should never lose sight of. At Mondelez International, our role is not just to understand what's happening today, but to predict what consumers will need tomorrow and beyond. That means focusing on big trends in food like wellbeing and premium, and creating new experiences for consumers that disrupt the state of snacking."

**- STEFANIA GVILLO, GLOBAL HEAD OF STRATEGIC INSIGHTS & ANALYTICS,
MONDELEZ INTERNATIONAL**

MORE THAN HALF

of adults say "quick, on-the-go bites are more suited to their lifestyle than full meals" (53%), including two-thirds of millennials (66%), while convenience ranks as the #1 driver of snack choices for adults around the world.

TWO-THIRDS

of adults globally say they tend to snack around the same time each day.

71%

of adults say snacking gives them time to connect with themselves—and more than half look forward to the snacks in their day more than the meals (53%).

3 IN 10

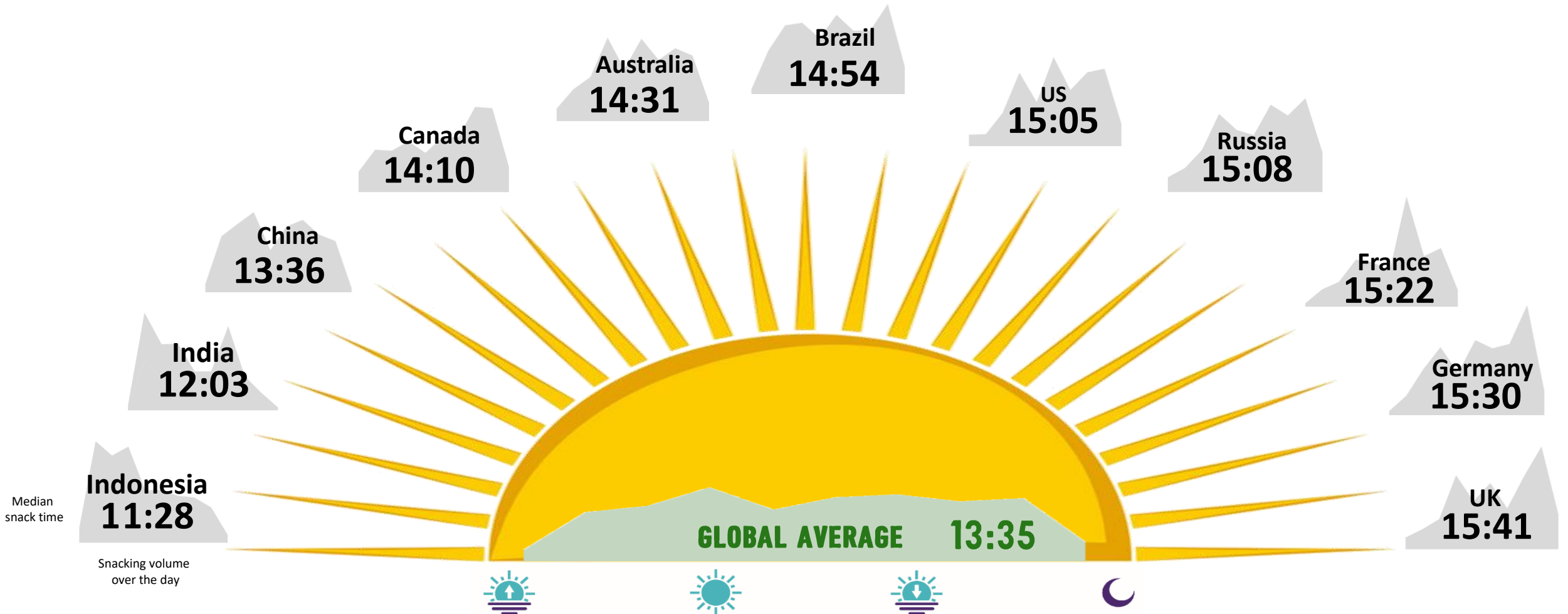
adults worldwide would give up social media for a month to have their favorite snack every day (30%), while 1 in 5 would give up their cell phone (20%).

3 IN 4

people around the world say snacking gives them an essential break in their busy days (73%), while 8 in 10 millennials use their snacking moments as an opportunity to slow down and find moments of quieter, mindful reflection (77%).

SNACKING IS HAPPENING DURING DIFFERENT DAYPARTS AROUND THE WORLD

WHILE DEVELOPING MARKETS PREFER SMALL BITES IN THE MORNING, DEVELOPED COUNTRIES TEND TO SNACK LATER IN THE DAY



KEY RESEARCH FINDINGS, PART 2

SNACKING'S ROLE IN CULTURE & IDENTITY

OFFERING BITE-SIZED PATHWAYS TO
CULTURAL & COMMUNITY CONNECTION



SNACKING IS FOUNDATIONAL FOR SHARING CULTURE & TRADITION

ADULTS EVERYWHERE ARE FINDING COMMON GROUND IN SNACKING FOR SHARED EXPERIENCES, CONNECTIONS AND IDENTITY

79%

**"FOOD IS OUR ONE TRUE
UNIVERSAL LOVE LANGUAGE
AROUND THE WORLD."**



As our collective sense of boundaries blur and the idea of 'home' evolves, food is becoming our universal language. It's a cultural connector, rooted in tradition and nostalgia and ever-present need for sustenance for body and mind. Snacking offers bite-sized moments to share tradition, connect with our sense of self, community and family. And for younger generations snacking addresses our wanderlust by allowing within-reach experiences of cultures other than our own.

- BRIGETTE WOLF, HEAD OF INNOVATION, SNACKFUTURES, MONDELÉZ INTERNATIONAL

SNACKING REPRESENTS...



NOSTALGIA

3 in 4 people say some of their fondest childhood memories include sharing a snack with their parents (74%) and that snacking on these childhood favorites makes them nostalgic (76%).



TRADITION

Most say there are snacks their family eats that have been passed down through many generations (70%) and that, to this day, they have traditions about how they eat certain foods that developed when they were children (77%).



IDENTITY

78% of millennials say food is a major part of their identity, while 82% say sharing a snack is a simple way to connect across cultures.



CONNECTION

7 in 10 people around the world make an effort to share their favorite childhood snacks with others (70%), even admitting that, "sometimes it's worth the extra calories to share a snack with someone I love" (74%).

PARENTS PRIORITIZE PASSING THESE TRADITIONS TO THE NEXT GENERATION

3 IN 4 PARENTS SAY, "THE SNACKS I GIVE MY CHILDREN ARE INSPIRED BY THE ONES MY PARENTS GAVE ME AS A CHILD" (75%)

PARENTS WANT TO PASS ON...



HEALTHY SNACK
TRADITIONS
(85%)



THEIR FAVORITE
CHILDHOOD SNACKS
(81%)



CULTURAL
SNACKING RITUALS
(76%)

71%

OF ADULTS SAY,
"SNACKING IS A WAY TO
REMINDE MYSELF OF HOME."

82% OF PARENTS GLOBALLY SAY, "SHARING MY FAVORITE CHILDHOOD SNACKS WITH MY CHILDREN IS A SMALL WAY TO CONNECT WITH THEM."

KEY RESEARCH FINDINGS, PART 3

PERMISSIBLE INDULGENCE

SNACKERS OF THE FUTURE
SEEKING BOTH TASTE & NUTRITION



“

Wellbeing is evolving to be more holistic and in line with people's lifestyle & values. Consumers are increasingly aware of the connection between what they eat and how they feel – physically and emotionally. We know people want convenient and delicious snacks they feel good about eating. At Mondelez International we believe our consumers shouldn't have to choose between snacking and eating right. That indulgence in moderation is an important part of wellbeing. And they shouldn't have to worry about the impact their snack choices have on the world. As the world's largest snack company, we're committed to transforming our portfolio to meet evolving wellbeing needs – removing what people don't want, adding more of what they do, expanding our offerings, and inspiring to Snack Mindfully. We're focused on redesigning the experience of snacking, to help our consumers get what they need from the snacks and brands they love. We are cultivating healthier eating habits by promoting a mindful approach to snacking, and inspiring more enjoyable snacking experiences.”



- CHRISTINE MONTENEGRO MCGRATH, VP & CHIEF IMPACT SUSTAINABILITY & WELLBEING, MONDELEZ INTERNATIONAL

SNACKERS ARE BECOMING MORE MINDFUL & HOLISTIC

SNACKING MEETS A VARIETY OF NEEDS, FROM INDULGENCE TO WELLBEING WITH 77% OF ADULTS WORLDWIDE AGREEING, "THERE IS A TIME AND PLACE FOR HEALTHY SNACKS, AND A TIME AND PLACE FOR INDULGENT ONES"



SNACKING MOTIVATIONS

78%	To pamper / spoil / reward myself	85% MILLENNIALS
78%	For a sense of comfort	84% MILLENNIALS
76%	To boost my mood	84% MILLENNIALS
75%	To find quiet moments to myself or 'Me Time'	82% MILLENNIALS
74%	To stay alert / energized	83% MILLENNIALS
73%	To relax / calm down / relieve anxiety	81% MILLENNIALS
72%	To take care of my body / for my nutritional needs	79% MILLENNIALS

SNACKING GETS PERSONAL

6 in 10 global adults say, "the snacks in my day are more for my personal needs, while meals tend to meet the needs of others" (60%).

THE MAJORITY OF ADULTS SAY SNACKS ARE JUST AS IMPORTANT TO THEIR MENTAL (71%) AND EMOTIONAL (70%) WELLBEING AS THEIR PHYSICAL WELLBEING.

Those in developing markets are especially likely to seek holistic snacks that are supportive of gut health (39%), brain-boosting (34%), and mood-enhancing (33%).

MANY ARE LEANING INTO SNACKING FOR BUILT-IN PORTION CONTROL

TWO-THIRDS OF ADULTS SAY THEY “OFTEN LOOK AT NUTRITION INFORMATION ON SNACKS BEFORE BUYING THEM” (67%) AND MORE THAN HALF SAY SNACKS OF THE FUTURE WILL BE HEALTHIER THAN THEY ARE TODAY (54%)

71%

“Snacking helps me control my hunger and manage my calories throughout the day.”

79% DEVELOPING COUNTRIES
(VS. 66% DEVELOPED)

INGREDIENTS OF THE FUTURE

In the next 5 years, people’s top hopes for snack foods are that they become more functional to meet nutritional needs (47%) and provide more personalized nutrition (42%).

FRESH COMES FIRST

The top 3 qualities people around the world seek in their snacks are freshness (43%), low-sugar (36%), and low-fat (31%).

TWO-THIRDS OF ADULTS WORLDWIDE SAY...

- “SNACKING IS A GOOD WAY TO CONTROL THE PORTIONS I EAT” (66%)
73% DEVELOPING COUNTRIES (VS. 61% DEVELOPED)
- “I LOOK FOR SNACKS THAT ARE PORTION CONTROLLED” (65%)
76% DEVELOPING COUNTRIES (VS. 56% DEVELOPED)
- “SNACKING HELPS ME MEET MY NUTRITIONAL NEEDS FOR THE DAY” (65%)
76% DEVELOPING COUNTRIES (VS. 56% DEVELOPED)

MINDFUL SNACKING IS...

EATING WITH INTENTION AND ATTENTION, FOCUSING ON THE PRESENT MOMENT, AND SAVORING HOW THE FOOD TASTES SO YOU REALLY ENJOY IT



RELEVANT

More and more people use mindfulness for well-being and balance.



SUSTAINABLE

Mindful eating can be practiced by anyone, anywhere, and by all ages.



EFFECTIVE

Research clearly shows multiple benefits of mindful eating. The evidence continues to build.

“

Mindful eating is a behavior that encourages eating with conscious intention and attention. It is clinically proven to lead to healthier habits and a more positive relationship with food. Research also indicates that focusing attention while eating helps people enjoy food more and prevents overeating.

- DR. SUSAN ALBERS, PSY.D., CLINICAL PSYCHOLOGIST AND NEW YORK TIMES BEST-SELLING AUTHOR FOCUSED ON MINDFUL EATING

Snack Mindfully

HOW TO SNACK MINDFULLY...

- Minimize distractions
- Portion out your snack
- Focus on the smell and taste
- Notice the textures
- Chew thoroughly
- Finish one bite before starting the next





SNACKING MADE RIGHT

WWW.STATEOFSNACKING.COM

WWW.MONDELEZINTERNATIONAL.COM



For more information, please contact news@mdlz.com.