



THE THIRD ANNUAL STATE OF SNACKING

2021 Global Consumer Trends Study by:

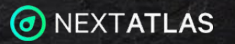


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MESSAGE FROM DIRK VAN DE PUT



CEO and Chairman Dirk Van de Put on the evolving role of snacking and how the company acts on these trends – to continue delivering the right snack, for the right moment, made the right way.

As the global leader in snacking, we remain obsessed with uncovering the evolving role snacking plays in our lives today – keeping a close pulse on the trends that will inform how we snack in years to come.

Our third annual State of Snacking report builds on our deep insights into the important and ever-changing role snacking plays in our everyday lives. As we live our **purpose to empower people to snack right** – putting consumers at the center of all we do – this annual survey, conducted in partnership with The Harris Poll, helps deepen our vast knowledge estate – both informing and affirming our strategy to become the global snacking leader.

As the world continues to adapt to changing dynamics, staying **close to our consumers remains our top priority**. Doing so allows us to better understand the evolving role that snacking plays in consumers' lives; to explore how we can better connect with them to meet their physical, mental and emotional well-being needs; to understand where they get their inspiration for snacking; and to uncover how their snacking and shopping habits are evolving to more fully align with their values.

In our 2021 State of Snacking Report, we again **surveyed thousands of consumers across 12 countries** and examined the findings by generation to ensure our insights reflect our truly global company and brands. Our report highlights the expanding role snacking plays in the lives of consumers, which further emboldens our team of nearly 80,000 employees **to continue to deliver the right snack, at the right time, made the right way**.

As consumers' lives changed over the past few years, their **definition of what a snack can be has evolved** (79%) and snacking has begun to take on new meaning. Even more consumers today are replacing meals with snacks, with 64% of consumers reporting replacing at least one meal with a snack (up 5% from pre-pandemic figures reported in 2019) and higher adoption among younger generations (Gen Zs 75% and millennials 69%).

Snacking is so much more than purely a **source of nutrition and indulgence**. **Snacking continues to play an expanding role in social connection, inspiration, and purpose**, and we are proud to be able to produce the right snack for each of these occasions. Consumers are **seeking out snacks as a source of well-being**, and not just from a physical standpoint. Consumers are looking for snacks to improve physical (80%), emotional (80%), and mental (75%) health, as well as their social (65%) health as snacking serves as a way to connect with others.

Consumers also expect to be able to **shop for snacks anytime, on a wider array of platforms**, with the majority expecting to be able to buy the snacks they want whenever they want (80%) and using any channel they want (74%). This is why **channel expansion** is a key priority for Mondelez International. We're working hard to continue meeting consumers where they are and on the platforms they choose.

Finally, these findings affirm what we know to be true: **consumers are becoming more intentional about their purchase decisions and aligning their snacking preferences, behaviors and purchasing decisions with their values**. Consumers are migrating toward seeking out brands and companies that align with their own values. They are becoming more discerning over how the



“
Consumers are becoming more discerning with their snacking choices and the finding of this report help inform our strategy
”

snacks they purchase impact the planet and people, with a reduction in waste being top of mind. Consumers say the number one environmental consideration on their food selection is availability of low waste packaging (78%). This gives us confidence in our efforts to source our ingredients sustainably, respect everyone across our value chain, and package and deliver our products in ways that use less energy, water and waste – ultimately contributing to a more circular economy.

The findings of this report will once again help inform our strategy so that at Mondelez International, we **can continue to meet the evolving tastes and preferences of the global consumer** and become the global leader in snacking. I hope you enjoy!

Dirk

EXECUTIVE SUMMARY



“Staying close to the consumer is at the heart of all we do. As a leader in snacking we’re staying in front of some of the seismic shifts taking place in snacking driven by consumer demand including an uptick in conscious consumption, a trend toward balanced diets now often including a little indulgence and continued preference for snacking occasions throughout the day over traditional mealtime as a growing behavior throughout the course of the ongoing pandemic.”

Martin Renaud, EVP and Chief Marketing Officer, Mondelez International

THE EXPANDED ROLE OF SNACKING

79%

“My definition of what a snack is has evolved over the last 3 years.”

84% imagine there will be more snack options to choose from in the next 3 years.

86%

“It’s important to me to have control over my snacking choices such as what portion sizes I buy and eat and what ingredients are in the snacks.”

64%

prefer to eat many small meals throughout the day, as opposed to a few large ones.

(up 5% from 2019)

PERMISSIBLE INDULGENCE

80%

Consumers are looking for snacks to improve physical (80%), emotional (80%) health equally.

85%

eat at least one snack for sustenance and one snack for indulgence each day.

88%

“A balanced diet can include a little indulgence.”

(up 7% from 2020)

CONTEXTUAL COMMERCE

80%

expect to be able to buy the snacks they want whenever they want.

More than half report shopping more *using at least 3 emerging channels* – such as delivery apps and DTC websites – more in the last year.

70% Gen Z | 71% Millennial

55%

Say social media has inspired them to try a new snack in the past year.

(up 5% from 2019)

82% GEN Z

enjoy food content on social media, as do 62% of global consumers overall.

SUSTAINABLE SNACKING

80%

have become more in touch with their values in the last year.

#1

environmental impact on consumers’ food choices is availability of low waste packaging.

85%

either buy or would like to buy snacks from companies that are working to offset their environmental impact.

This report is supported by videos and in-depth research on future trends - explore online here



FOR INFORMATION ON THE FUTURE OF SNACKING CLICK HERE

The evolution of snacking

Snacking's broadening role

THE EXPANDED ROLE OF SNACKING

As definitions of what a snack can be broaden, the role snacks play in consumers' lives takes on new meaning

 [CLICK HERE FOR VIDEOS AND DATA ON THE FUTURE OF SNACKING](#)

THE EVOLUTION OF SNACKING

In the wake of the pandemic's pause, consumers around the world are reassessing what snacking looks like, tastes like, and what it means to them in the context of their lives. **Strong majorities say their definition of what a snack is has evolved over the last 3 years to include more or different types of foods, occasions for eating, or other elements (79%). This evolution is particularly strong in Mexico (91%), Brazil (91%), Indonesia (89%), China (84%), the U.S. (84%), and India (83%)** where consumers are particularly likely to say their snacking palettes have evolved.

Consumers attribute some of this snacking evolution to life stage, as **82% attest that "snacks have served different purposes for me at different phases of my life."** This also comes to life in the data as different cohorts demonstrate different motivators for snacking. For example, **Gen Zs are more likely to snack to relieve anxiety (86%, vs. 76% total) and boredom (79%, vs. 69% total), while millennials are the most likely generation to snack to meet their nutritional needs (85%, vs. 78% total), and Gen X cites comfort as a top motivator (85%, vs. 82% total).**

As consumers' life stages and palates evolve, the crave choices across all of the products they consume. **Food products are the #1 item consumers are looking for choice when buying, over clothing, personal care, household goods, entertainment, and media.** Global majorities say they eat different snacks today than they ate 3 years ago (76%) – and an even greater number **imagine there will be more snack options to choose from in the next 3 years (84%).**

82%

attest that "snacks have served different purposes for me at different phases of my life."



84%

imagine there will be more snack options to choose from in the next 3 years.



The evolution of snacking

Snacking's broadening role

SNACKING'S BROADENING ROLE

This year's data reveals that snacks are replacing meals for a majority of people around the world. **64% of global consumers say they prefer to eat many small meals throughout the day, as opposed to a few large ones, up 5% from 2019** – a statistically significant jump. A similar percentage indicate that **they replace at least 1 meal each day with a snack (62%), including stronger majorities of Gen Zs (75%) and millennials (69%).**

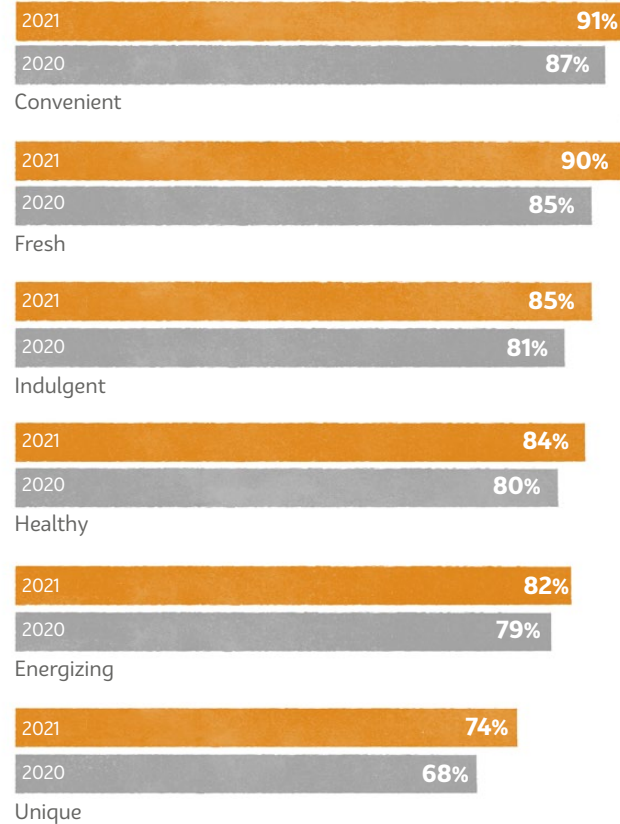
Moreover, consumers are looking to snacks to meet a variety of needs to a greater degree than they were even just 2 years ago. Convenience and freshness are top rising impactors of snack choices, but consumers are also more likely to seek both indulgent snacks and healthy snacks, both comforting bites and energizing ones. As consumers turn to snacks to meet an increasing array of needs, we also see that category consumption is up significantly across those who regularly eat sweet and savory biscuits, chocolate, crisps/chips, and snack bars.

64%

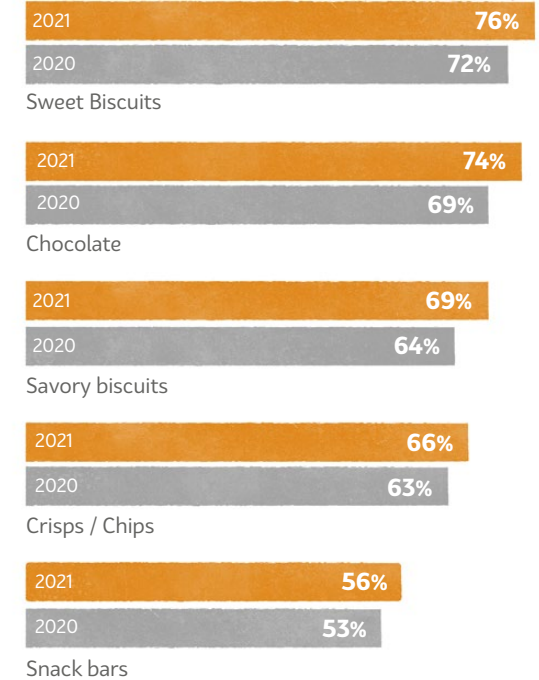
“I prefer to eat many small meals throughout the day, as opposed to a few large ones.”

(up 5% from 2019)

Attributes that regularly impact snacking choices



% who eat snack biweekly or more



A nuanced approach to nourishment

Honoring indulgence

The fun of functional food

PERMISSIBLE INDULGENCE

Consumers are seeking snacks as well-being boosters throughout their daily lives

“Consumers are more aware of the food they’re connecting to, [and connecting] the food that they eat to how they feel.”

Brigette Wolf, VP, Global Head of SnackFutures, Mondelez International



CLICK HERE FOR VIDEOS AND DATA ON THE FUTURE OF SNACKING

A nuanced approach to nourishment

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The fun of functional food

A NUANCED APPROACH TO NOURISHMENT

Well-being is top of mind for consumers around the world, as they embrace a broader definition of nourishment. Majorities say their physical (76%), mental (78%), and emotional (79%) health are very important, with **two-thirds attesting that all 3 pillars of health are very important (63%)**. This is especially true in Eastern markets where 76% of consumers are prioritizing all 3 areas, compared to only 54% in their Western counterparts.

Across markets, snacking is a key booster to nourishing each of these areas as consumers say they are looking for snacks to improve physical (80%), mental (75%), and emotional (80%) health. Two-thirds also say they are looking for snacks that help them improve their

social health (65%), craving bite-sized ways to connect with others.

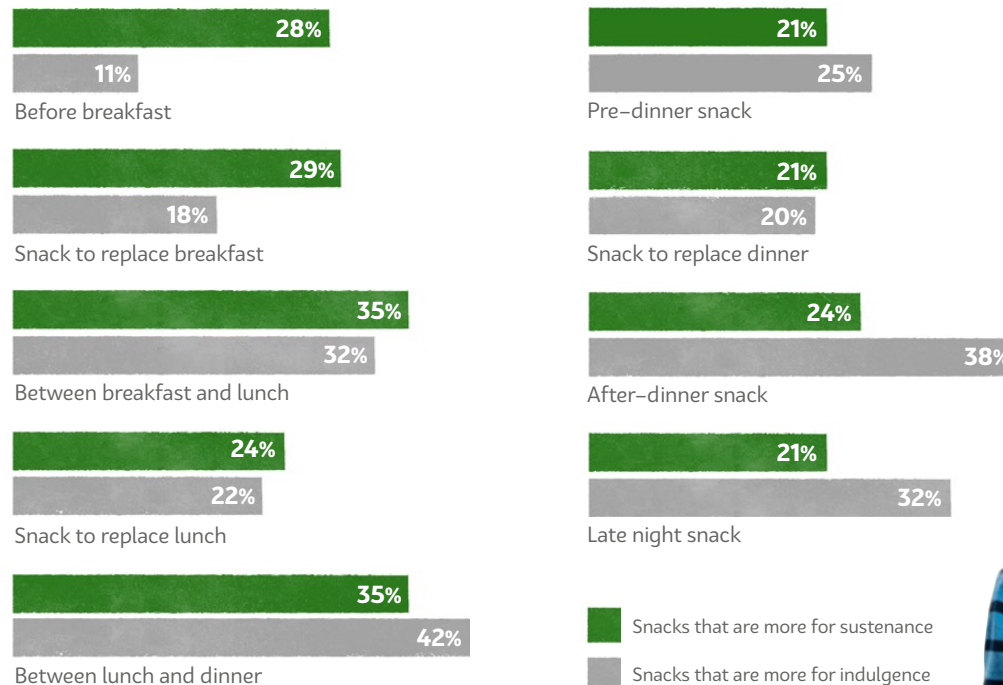
However, this multi-faceted nourishment equation is not one-snack-fits-all. Over three-fourths of global consumers attest that they **look for different snacks when they are seeking physical nourishment than when they are seeking emotional nourishment (76%)**. In order to meet all of their needs, consumers are seeking a variety of snacks that can ultimately deliver balance in their lives. Majorities acknowledge the benefits of both functional and indulgent foods, stating, **“it’s important that my diet includes foods that are for nutrition (88%), as well as for satisfaction (81%)**.

Consumers’ habits also indicate that both sustenance and indulgence are part of a balanced lifestyle. **Nearly nine in 10 say they eat at least one snack for sustenance and one snack for indulgence each day (85%)**, with the former being more popular earlier in the day, and the latter being more popular in the evening. While **seven in 10 consumers say they eat sustaining snacks in the morning, only around half do so in the evening (52%)**. On the other hand, just under half (49%) of consumers eat indulgent snacks in the morning, while **62% indulge in the evenings**.

85%
of global consumers eat at least one snack for sustenance and 1 snack for indulgence each day.



Dayparts for sustaining vs. indulgent snacks



End of day serves as peak moments where people look to satiate their emotional well-being with a little snacking indulgence.



HONORING INDULGENCE

As consumers seek different snacks for different well-being needs, they acknowledge the important and unique value indulgent snacks offer. Many view it as a time to escape the mental load of food choices that surround us every day, as eight in 10 agree that **some snacks should be just for enjoyment or satisfaction without worrying too much about nutrition (79%)**.

When snacking for indulgence, flavor and enjoyment are the priority. Consumers agree that when they are looking for indulgent snacks, they just want to enjoy them without focusing too much on the ingredients (76%). **Over eight in 10 also attest that, when looking to indulge, they don't want to sacrifice on flavor (85%)**. These sentiments were particularly strong in Canada, where **90% of consumers say they don't want to sacrifice flavor, and 87% are looking to enjoy without focusing too much on the ingredients**.

Moreover, this appetite for indulgence appears to be on the rise, as nearly nine in 10 tell us, **"a balanced diet can include a little indulgence" (88%) – up 7% from last year**, a statistically significant jump. Consumers tell us these bite-sized moments of flavor and enjoyment are increasingly indispensable as **68% say they could not imagine a world without a sweet treat during their day** – including 80% of those in Mexico. Majorities of global consumers say they feel the same way about chocolate (74%) and birthday cake (62%, including 72% of millennials).

74%
say, "I can't
imagine a world
without chocolate"



88%
say, "A balanced diet can
include a little indulgence"
(up 7% from 2020)



A nuanced approach to nourishment Honoring indulgence

The fun of functional food

THE "FUN" OF FUNCTIONAL FOOD

Just as indulgent snacks occupy a unique and valuable place in consumers' diets, so too do foods that are geared toward sustenance. Considered year over year, consumers' number one rising motivator for snack choices is finding bites that "take care of their body" or serve "nutritional needs." **78% of consumers say they snack regularly for this nourishing purpose – up 8% from last year.**

Not only are sustaining foods increasingly important, they are also more celebrated. AI trend data analysis reveals that – rather than a drab salad or expressions of boredom – the emoticons association with "better-for-you" food are bright, festive, and flavorful.

Consumers are increasingly seeking snacks that can help meet a variety of needs, as 87% imagine seeking snacks with special ingredient or health qualities in the near future.

Consumers are also seeking guidance and assistance in the form of packaging and portion control. **72% tell us they look for snacks that are portion-controlled – up 9% from last year,** a statistically significant jump. In addition to portion size, packaging cues are gaining notice, as a similar percentage say they typically read the labels on the snacks they buy (73%).

Health cues on packaging are an opportunity to meet consumer appetites for knowledgeable nourishment. Majorities say it would help them make better snacking choices if there were...

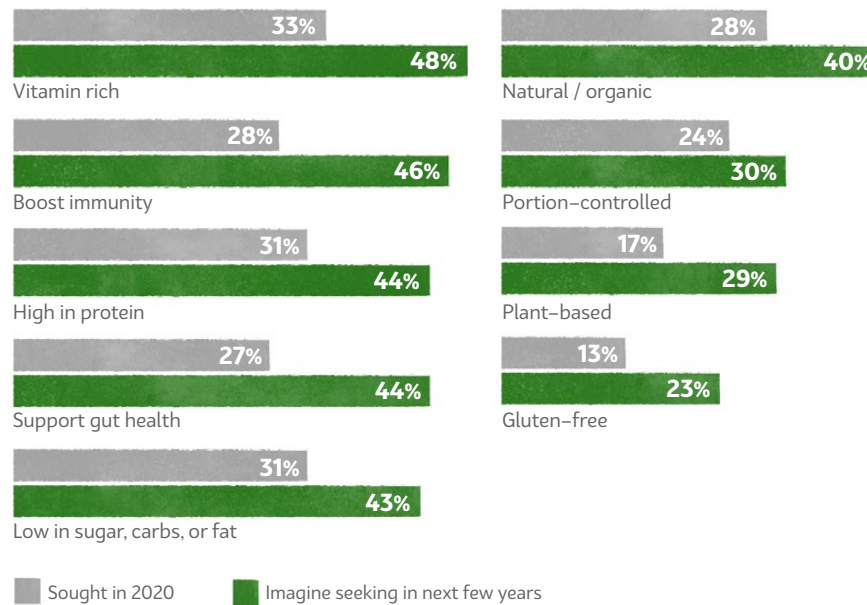
- Easier indicators of a snack's health on the packaging such as a letter grade or traffic light indicator that show snacks as "green" for very healthy, "yellow" for somewhat healthy, and "red" for not as healthy (78%)
- Visual indicators of portion size on the packaging such as how many cookies equals a single serving (75%)
- Mindful snacking tips on the packaging focusing on topics such as how to savor the snack or incorporate it into a balanced diet (74%)

72%
look for snacks that are portion-controlled
(up 9% from 2020)

Mondelēz partnered with mindful eating & nutrition expert, Megrette Fletcher, Med, RD, CDCES and ProHabits behavior change technology to develop a web app, providing 30 days of consumer-centric Mindful Snacking tips, micro-actions and community-building.

Learn more at megrette.com and snackmindful.com

A rising appetite for functional snacks



Emoticons associated with "Better-for-you" food



Omnichannel expectations

Appetite for experimentation

#SocialSnacking

CONTEXTUAL COMMERCE

Consumers are craving seamless integration of purchase options and inspiration in their everyday lives

“To them it’s all just one thing. They slip seamlessly between online and offline”

Nick Graham, Global Head of Insights & Analytics, Mondelez International

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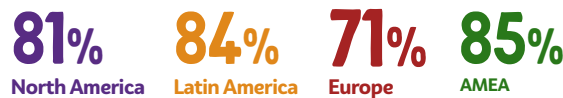
OMNICHANNEL EXPECTATIONS

As appetites for variety to nourish a variety of needs rise, so does the desire to be able to acquire these bites anywhere, at any time. Majorities of global consumers tell us they **expect to be able to buy the snacks they want whenever they want (80%)** and **using any channel they want (74%)**. This trend is especially strong in Asia and Latin America, where omnichannel snacking is the expectation for over eight in 10 consumers. AI trend analysis reveals the breadth of this trend, predicting that omnichannel in retail will steadily grow (+37%) over the next 6 months.

As part of this growing ecosystem of snack acquisition, consumers are experimenting with new channels to buy snacks. More than half report shopping more using at least 3 nontraditional or emerging channels more in the last year (53%). Convenience is a primary driver as 67% attest they are “always looking for more convenient ways to buy snacks.” Variety is also a necessity today as **90% of global consumers say they expect to be able to have a wide variety to choose from when they buy snacks**. Savings is also a motivator, as two-thirds attest, “I find it easier to find great deals/ prices during online or mobile shopping” (66%).



I expect to buy the snacks I want...
Whenever I want

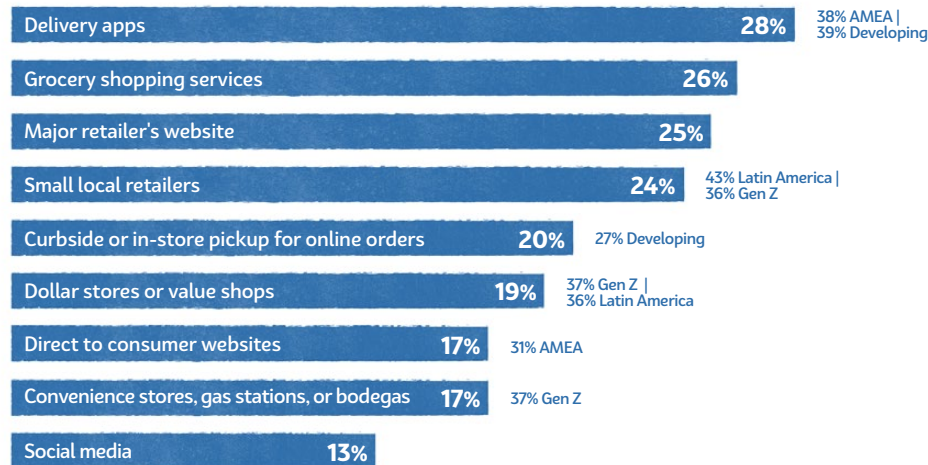


I expect to buy snacks using any channel I want...



Rising sources of snack consumption

% shop more for food in last year



53%
have used 3 or more of these channels more often in the last year.

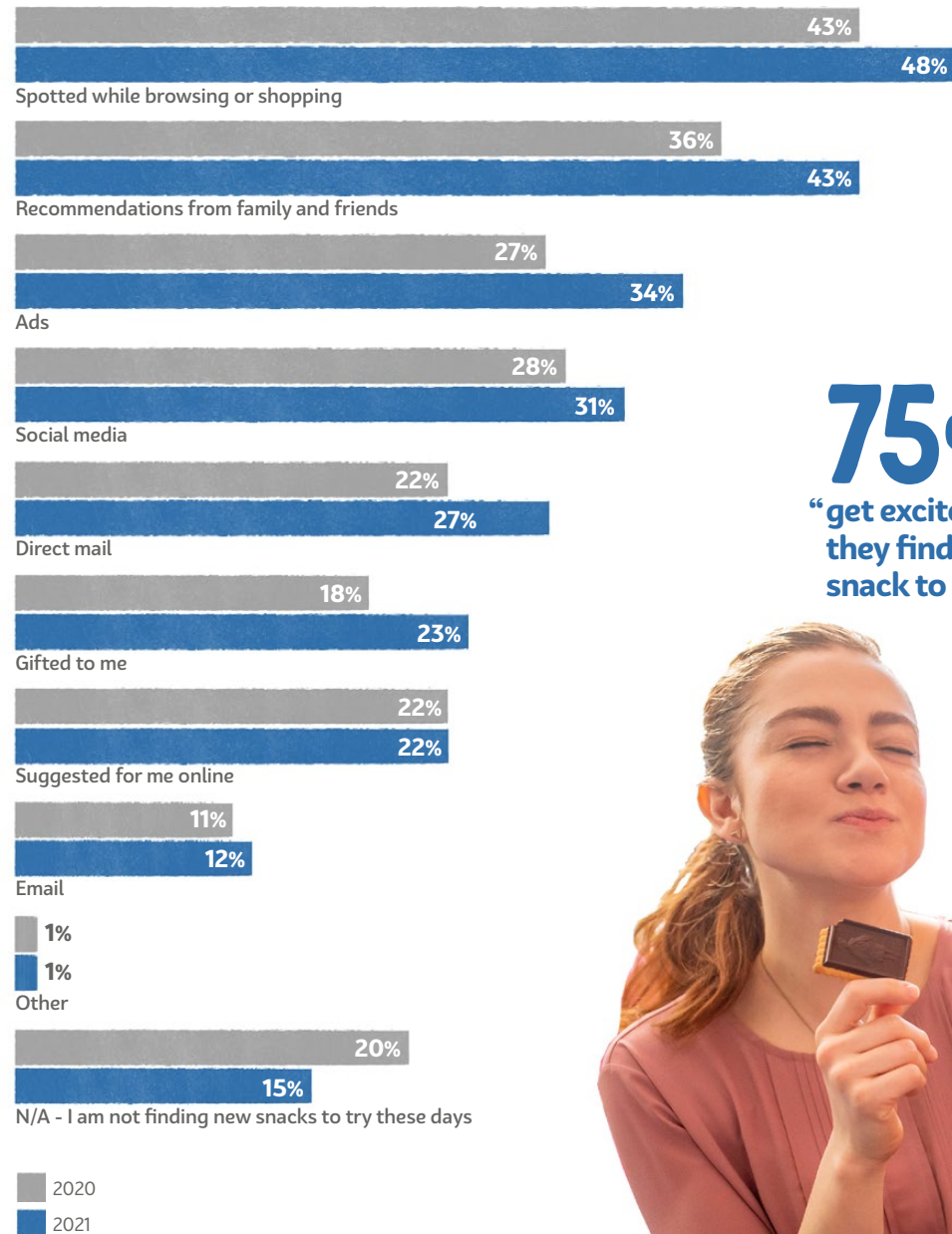


APPETITE FOR EXPERIMENTATION

After nearly two years of being more tethered to their own kitchens and recipe repertoires than ever before, new snacks are a source of excitement and variety to break up their everyday routine. 82% of global consumers say they “look forward to trying new snacks” – including 90% of millennials – while **three-quarters “get excited when they find a new snack to try” (75%).**

Year over year, our data shows that consumers are more likely to be actively looking for new snacks to try. Serendipitous discovery while browsing in-store is contributing to this lift, as are ads showcasing new snacks to try. Consumers are also increasingly finding snacks to try based on their communities, via trial of snacks that either recommended by family or friends or received as a gift. **Those in Latin America are especially likely to try snacks at the recommendation of others (55%, vs. 43% total),** while those in **Africa and the Middle East cite direct mail as a rising source of snack discovery (34%, vs. 27% total).** Meanwhile, **Gen Zs are especially likely to find new snacks on social media (45%, vs. 31% total).**

Sources of finding new snacks



75%
“get excited when they find a new snack to try”.



#SOCIALSNACKING

Social media is a rising source of discovery as consumers increasingly find food trends, inspiration, and connection on their feeds. Six in 10 consumers say they enjoy food content on social media (62%), with interesting food trends, grocery hauls, and sensory food content topping their list of priorities.

What's more is that, as food is increasingly in our feeds, it is inspiring real-life behavior. **Over half of global consumers say social media has inspired them to try a new snack in the past year (55%)** – including even greater majorities of Gen Zs (70%) and millennials (71%). A similar percentage tell us they have talked about food trends they have seen on social media at the dinner table (52%). Among those who say they enjoy food content on social media, these numbers jump considerably, as 76% attest their virtual viewing has inspired them to try something in real-life and 71% have talked about social media food trends at the dinner table.

52%
“I have talked about a food trend I saw on social media at the dinner table in the last year”.

62% (82% GEN Z)
enjoy food content on social media, including videos or posts about:

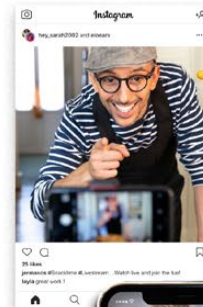
- Food trends or interesting flavor / texture combinations (37% /47% Gen Z)
- Grocery hauls (31% / 42% Gen Z)
- Sensory food (30% / 45% Gen Z)
- Pantry organization (26% / 37% Gen Z)
- Mukbang / watching others eat (21% /32% Gen Z)

AI Trend data reveals the following trends are rising on social media

Fruit based snacks



Food and beverage live stream



Dessert mash ups



Nostalgic food



SUSTAINABLE SNACKING

The acceleration of snacking with purpose amidst a broader global consciousness

“How are we going to understand the situation that we’re in today and figure out how we want to pivot for the future?”

Chris McGrath, SVP & Chief Global Impact and Sustainability, Mondelez International

[!\[\]\(4b7a79268f6ba26c1471d4232fffa85a_img.jpg\) CLICK HERE FOR VIDEOS AND DATA ON THE FUTURE OF SNACKING](#)

LOW IMPACT SNACKING

In the wake of the pandemic's pause, consumers have become more intentional about their purchase decisions, both big and small. Eight out of 10 global consumers said they have become more in touch with their values in the last year (80%), from being more aware of what's important to them in their career to what they prioritize in the products they buy.

The same percentage agree that, in the last year, they have become more conscious of what they are buying and why (80%), making an effort to learn more about the brands or companies they buy from and paying more attention to how many or how often they are buying items. Beyond their own nourishment, consumers are considering how their snacking impacts the world at large.

80% of consumers say they have become more in touch with their values in the last year.

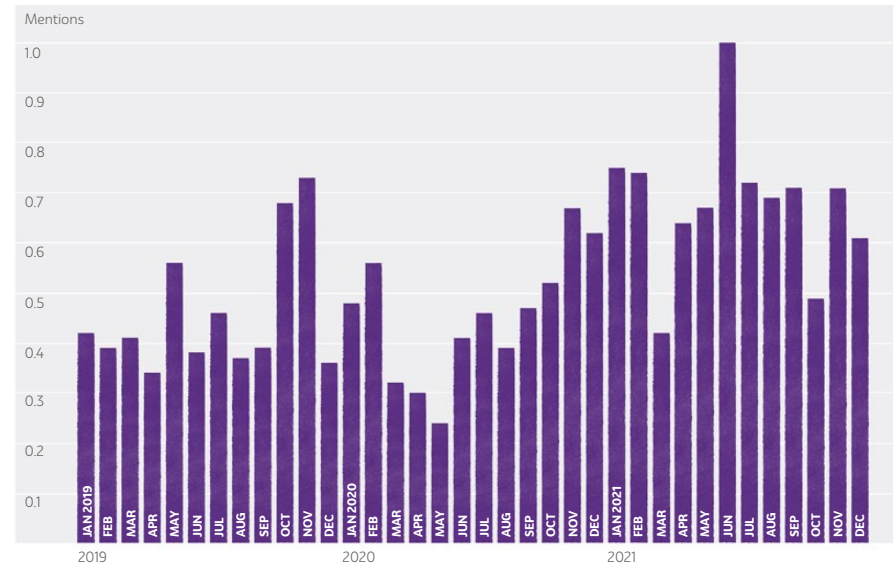
80% of consumers say they have become more conscious of what they are buying and why.

Reducing waste is top of mind as consumers say the number one environmental impact on their food choices is availability of low waste packaging (78%) – and this is reflected in consumers' purchase choices. Majorities say they either buy or would like to buy snacks that have low waste (88%) and easily recyclable packaging (87%). As consumers look for further ways to minimize their footprint, Google Trends reveals a rising interest in composting around the world.

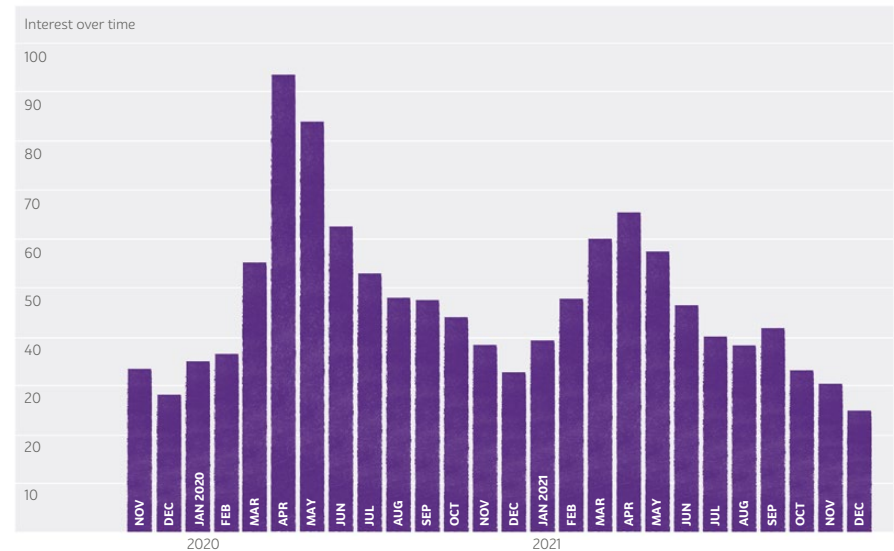


Recycling next frontier

AI trend data points to a rise in returnable packaging, which is increasingly being embraced by brands and consumers alike.



Google Trends analysis reveals a rising interest in composting



BROADER CONSCIOUSNESS

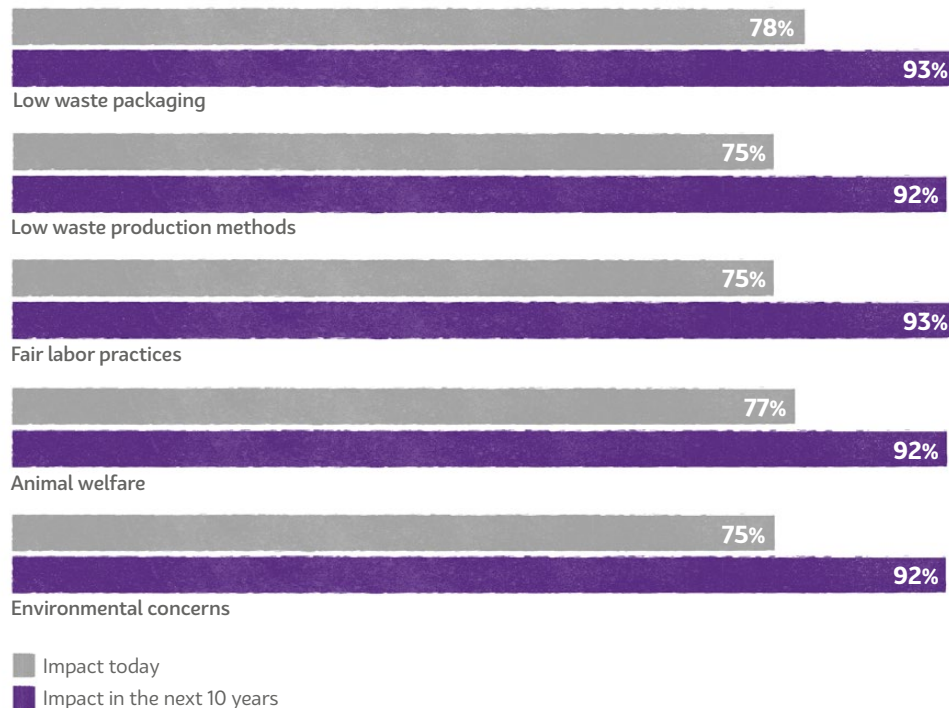
Consumers are also increasingly aware of the way their foods production impacts the world at large. Majorities say low waste production methods such as working to offset production carbon footprint and finding supply Recycling's next frontier: AI trend data points to a rise in returnable packaging, which is increasingly being embraced by brands and consumers alike. **Google Trends analysis reveals a rising interest in composting chain efficiencies (75%) as well as fair labor practices (75%), impact their food choices. Environmental concerns (75%) and animal welfare (77%)** are also equally impactful.

Consumers are also taking action to find snacks that are as net positive as possible. **Majorities say they either buy or would like to buy snacks from companies that are working to offset their environmental impact (85%) and that are produced in a way that is fair and lawful to all the workers involved (87%).** Moreover, our research indicates that this is not a fleeting focus, but rather a long-term reorientation of our global perspective. Looking ahead, over nine in 10 global consumers say they expect to maintain or increase focus across all of these areas in the next 10 years.

Mindset toward snack choices



Current and future impact on food choices



METHODOLOGY

This survey was conducted online by The Harris Poll on behalf of Mondelez from October 5-27, 2021, among 3,055 global adults ages 18 and older. The research spanned 12 markets, including: The United States (n=254), Canada (n=255), Mexico (n=256), Brazil (n=255), France (n=255), Germany (n=255), The United Kingdom (n=251), Russia (n=255), China (n=257), India (n=253), Indonesia (n=254), and Australia (n=255). Other key groups analyzed include: Gen Z /centennials ages 18-24 (n=397), millennials ages 25-40 (n=1,174), Gen Xers ages 41-56 (n=823), Boomers ages 57-75 (n=604), and the Silent Generation ages 76+ (n=57).

Data from 2020 and 2019 references similar studies conducted from October 6-20, 2020 among 6,292 global adults and from September 16 - 24, 2019, among 6,068 global adults. 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.



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