

final report

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1. Abstract

The best opportunity for Australia's Primary Industries to realise value-adding growth is perhaps in the area of snacking. Within the overall food market, it is in the area of snacking and on-the-go meals that there continues to be the greatest long term growth. Datamonitor reported that in 2011 overall 'main meal' was in steady long term decline at 0.5% per annum, where as snacking was in growth at 2% per annum. So much so, that we now see some 'innovative consumers' who prefer to graze throughout the day, rather than structure their lives around 'proper meals'.

To realise this opportunity, any new snack offerings will need to:

- Deliver to changing expectations - what people now want from snacks
- Target a particular consumer segment, as consumers become more diverse in their preferences
- Understand how they can fulfil a role in consumers lives, by focusing on a particular occasion within their overall repertoire
- Ensure they are readily available, via relevant channels and in the most desired form to be appealing

Consumer expectations of how snacks should perform are changing, with this realisation of their overall significance – we are all coming to terms with just how much snacking we are doing. Thus expectations of snacks are shifting, so whilst not willing to compromise enjoyment, people are seeking far greater functional benefits and emotional associations in their snacking choices. Consumers are also expecting snacks to be available at different points throughout the day, whether they be at their desk, or commuting. Thus much of the snacking opportunity is ensuring it is delivered through innovative supply chains and built on new business models.

Relationships with snacks are varied and evolving – no longer dominated by impulsive urges and cravings that lead to poor decisions, and for many, subsequent regret. Many consumers are becoming more conscientious snackers, pre-planning snacking occasions, either adopting habitual behaviours or anticipating future needs and having solutions on-hand for this time. There are even consumers who have a completely different relationship with snacks, one where they stay very much 'in control', snacks fulfilling a food like nutrition and wellbeing role.

Snacking is truly multi-dimensional, with consumers having different reasons for snacking, across different occasions throughout the day. Thus what they look for as a mid-morning snack is likely very different to what they seek later in the evening. Successful snack offering must recognize the unique nature of each occasion and address those consumer needs, that are at the fore.

The opportunities for new snack offerings are to deliver to these emerging consumer desires, to provide snacks that meet their changing expectations. In particular, consumers are looking for snacks that are healthier, deliver more functional benefits (such as sustained energy) and are made from more wholesome and natural ingredients, that consumers feel better about.

2. Background, Objectives & Approach:

Background

Snacking is something most of us do on a daily basis. From its special occasion origins: 'popcorn at the movies' nearly a century ago, it has grown to become a dominant force in our day-to-day food behaviour. So much so, that in 2012, the ABS's study into 'A Snapshot of Australians Daily Food Choices', found that 35% of Australians daily calorie consumption takes the form of what they describe as 'discretionary foods', consumed outside of meal occasions, primarily made up of snacks. Nielsen explored our snacking habits as a nation and found that it was no longer purely the domain of children and the under 30's, with 96% of Australians consuming some sort of snack on a regular basis. They also found that Australia's most popular snack is no longer chips or chocolate, but fresh fruit, with a piece of cheese in 3rd place.

Consumers food choices continue to evolve; for many people, dinner is no longer the focal point. Whilst snacking has been well established for over 40 years, the role it plays in our lives has evolved. Snacks are no longer an occasional sweet or savoury treat, with little impact on our overall wellbeing. They are now an ever present part of our lives, many believing leading to our overall BMI downfall.

The pace of change in snacking is accelerating, representing a next generation of future opportunity. Snacking is a global phenomenon, with the US leading the snacking landscape, with all 'developed' food markets having significantly developed snacking sectors.

Young people (20 to 32) are the snacking innovators – if new offerings don't resonate with them, there is little chance of them gaining acceptance with other consumer segments. As we look forward, to the emerging future, many consumers are making snacking their primary food choice – eating on the go, grazing as part of their daily socializing and getting the nutrition they desire thru their snacking choices.

Work to date (A.RMH.0021) has been somewhat limited in scope; insights developed were based upon 'joining the dots' from 3rd party research reports and interpreting why new offerings are finding success in the market place. As such the identified opportunity spaces were hypothesized - not based upon primary research / direct consumer understanding. In particular, we have very little understanding of holistic consumer snacking behaviour. With snacking being a repertoire market, success will not come from trying to be 'the next best thing' in the world of snacking, but by finding a relevant role in a target segments repertoire, one which provides the scope to significantly value-add.

Objectives

This project's purpose is to provide the platform from which value-adding and sustainable snacking solutions can be developed, using a design led approach. Fundamental to this is having a detailed understanding of consumers 'real world' snacking behaviours, plus how they source snacks, the importance of portability and 'ideal form' on this occasion. Against this picture, opportunities to better meet their needs can be identified and new snacking solutions developed.

To facilitate this purpose, ethnographic research was undertaken amongst innovative snacking consumers to build up this detailed picture.

These objectives span the following key areas:

1. Understand the key drivers of innovative snackers – on what occasions they seek to snack, what role they expect snacks to play in their lives and what properties they most value from a snack offering, at this time.
2. Identify key offerings that resonate with consumers' needs, delivering on these properties, on these occasions.
3. Define segment based snacking personas – from their broader life values and life style traits, through to their repertoire of snacking occasions and choices and how they source snacks at this time
4. Identify attractive opportunity spaces – consumer occasions, where either their needs are not being fully met, or emerging or dynamic occasions, where existing offerings have failed to evolve to this changing world.

Approach – Ethnographic Research

Consumer research usually takes the form of understanding consumers perceptions of different snack options (what they like). This is useful for understanding an idealised sense of what people are looking for from a snack, but tends to paint a rationalised picture of how consumers perceive their own snacking behaviour.

The reality of most people's snacking is that they snack across a variety of different occasions, at which time, they have different snacking needs and thus what they look for from a snack is vastly different. This explains why people typically consume a variety of snacks, which often appear at odds with each other and even with that persons overall snacking values.

An ethnographic research approach allows us to understand consumers actual snacking behaviours, by viewing their real world snacking occasions.

Make-up of the research sample

Consumers aged 20-32 are not only the largest consumers of snacks, but are also the innovators in the snacking market. For any new offering in the snacking market to establish itself, it must first find some level of success amongst this leading group, otherwise it will doubtfully 'catch on' with others. (Source: New Nutrition 2015, Julian Mellentin).

Our going in hypothesis was that consumers 'snacking relationship' would be the most telling basis for segmenting consumers (one that has not changed). However, there is a realisation that many other dimensions are also important in distinguishing contrasting snacking behaviours.

Our approach was designed to focus on these snacking innovators (Australians aged 20-32), covering off dimensions on which differences are likely:

- Male vs Females
- Early 20's vs. Later 20's
- White vs. Blue collar vs. Students

However, we also looked to explore more interesting and progressive dimensions

Restricted Snackers – those who have little freedom at work to take a break, or to source snacks, so tend to get pushed towards planning in advance (i.e. school teachers)

Performance Snackers - Those who have an expectation that snacks will contribute towards physical performance benefits they are looking for

Snacking led life - Those whose preference is to lead a snacking-led life, characterised by grazing throughout the day / preferring a number of smaller meals.

Keeping a 1-week snacking diary

Without shadowing someone over the course of a week, it is not possible to take a full ethnographic approach to understanding their snacking behaviour. Whereas for other categories, relevant 'events' are predictably structured into a specific part of the day (i.e. cleaning one's teeth, or preparing the main meal), snacking is inherently on-the-go and typically spread out throughout the day, across multiple occasions and often at unpredictable times.

The obvious approach to take would be to get people to record their snacking behaviour at the end of each day (the way one would normally keep a diary). However, we felt that many people forget how much they snack through the day and tend to over-rationalise why they snack – "I was hungry".

Thus it was decided to invest in creating a phone based 'window on their snacking behaviours' approach that allowed us to get as close as feasibly possible to real world understanding of day-to-day snacking behaviours. Every time the respondent had a snack, they took photos of:

- Where they were sourcing the snack from
- What other snacking options were open to them / did they consider
- What they chose – the snack they ate
- The context of where they consumed the snack

They also answered a series of questions in an around this snacking occasion, which was recorded at the time. This provides a useful real world record of their actual

snacking behaviour.

One we had received their full diary, and having had the opportunity to review it, we conducted a face-to-face interview with them:

- Get an holistic understanding of their life style, values and attitudes that shapes their snacking behaviour
- Delve a little deeper into snacking occasions, getting more of the story behind each occasion and exploring the underlying dynamics (it's hard for people to admit 'why they snack' unless prompted)

As a result, across the 26 snackers that form this study, we have over 200 actual snacking occasions that were recorded and explored at a deeper level.

3 Snacking Theme Areas & Market Drivers

Introduction

This project used an ethnographic approach to gain a deeper insight into peoples' world of snacking. 'Observing' their snacking behavior over an extended period of time, and having the opportunity to subsequently question them more deeply, provides a unique perspective into what drives their behaviour and the choices they make.

This research covered a breadth of people in terms of contrasting life styles, personalities and life circumstances. In observing their snacking occasions and as a result of subsequently interviewing them, a great deal of understanding has been built up as to their individual snacking behaviours and choices. However, beyond this individual understanding a number of key themes emerged that provides insight into the dynamics and drivers of the snacking market. These perspectives are based upon people's desired experiences, actual behaviours and their evaluation of how well snacks are working for them on each occasion.

3.1 People snack a lot.

For this project, people were recruited to participate on the basis that they snack at least 2x per day, which is on a par with the average for this age group in Australia (Source: Datamonitor – Mealtime & Snacking trends in Australia 2012). However, we found that it is not uncommon for people to snack on 5 occasions per day. This clearly shows that snacking is not a peripheral part of many people's lives, but on some days has become a key part of their day-to-day behaviour and food considerations.

Whilst some people are consistently heavy / frequent snackers, others tend to be more variable in the amount they snack, from day to day. People snack a lot as a result of having many snacking occasions through the day and sometimes snacking more than once, on a particular occasion (i.e. mid-morning). In particular people tend to snack more when their normal daily routine is disrupted and are thus unable to fit in their normal meal occasions. Or they just feel like snacking more – particularly as the week wears on.

3.2 People have diverse snacking behaviours

Most people snack at different times throughout the day, spanning everything from first thing in the morning to late at night. Underpinning these occasions are very different personal needs, for example:

- Driven by feelings of hunger
- Needing a break from what they are doing
- Satisfy a sweet or savoury craving
- To cheer themselves up
- To share with others

Snacking can be driven by more rational needs, or emotional triggers, or most often a combination of both. Thus the reason we tend to snack so much, is because snacking fulfils a diversity of daily needs, and is far from only fulfilling a singular role.

3.3 Much of snacking is habitual and mundane

Given the number of occasions that people snack on, it makes sense that these occasions are not only different, but some are more 'exciting' than others. Many of people's snacking occasions have become habitual, to some degree the underlying rationale has become lost and people go into an auto-pilot mode.

Note: It is for this reason that we got people to keep a snacking diary, to log all of their snacking occasions, as these types of occasions would tend not to be recalled when looking back.

On these particular occasions, people place greater value on having a snack, rather than caring too much about what they specifically snack on. Thus in this instance, it is the 'act of being able to snack' in which there is the greatest value, not the choice of snack – accessibility being the key to adding value to the consumer occasion. This is in contrast to other snacking occasions, when people place far greater importance and value on their choice of snack.

3.4 People seek to 'stay in control'

The fundamentals of snacking is been characterised by the idea that most people snack as a result of an impulsive urge. This also implies that for most people snacking is not desirable, but rather something people would try and resist against (source: Neilsen Snack Attack, global snacking benchmarking, 2014).

However, based upon the people we interviewed for this project, it seems that many pre-plan their snacking occasions, purchasing suitable products in advance, to have them on hand, when required. These consumers have developed a different relationship with snacks, embracing them, rather than trying to resist or deny themselves, making them a part of their daily lives.

Whilst we cannot conclusively say that the snacking markets 'centre of gravity' has shifted to become dominated by Planned Snackers, amongst our sample of more innovative snackers, that is almost certainly the case. This would suggest, that in time, other snackers will follow suit.

Note: This dynamic is fundamental to our recommended segmentation, as detailed in the next section.

3.5 People's snacking choices are affected by how they feel

Whilst many people have fairly regular patterns of snacking, few make the same choices on the same occasion, every day. What might seem the perfect choice one day, might well not 'hit the spot' on another. This is largely due to people feeling

different – some days they feel on top of the world, whilst on other days they wish they could have stayed in bed.

Thus people's snacking choices are mostly influenced by how they are feeling - this change in mood and mindset has a significant impact on shaping people's choices.

3.6 People snack differently on the weekend

Over the course of the working week people's snacking behaviour changes, but only in a minor way. Typically, a person's snacking occasions stay the same, but what they chose to snack on, on those occasions does change.

In contrast, when comes to the weekend, people's snacking occasions are completely different. This is driven by two main factors:

- People's days are structured very differently, with the resultant impact on food and meal behaviours, most clearly characterised by people who brunch on the weekend, rather than having breakfast and lunch.
- People are far more stressed in their working lives and in need of taking a break, from their long and arduous day - snacking is often used as a means of offsetting one's work.

3.7 Different people have different relationships with snacking

Compared to our overall food behaviour, people's relationship with snacking is more diverse. Whilst not all people have exactly three meals a day, nor place the same importance on those meals, their meal behaviours are broadly similar.

In contrast some people snack a lot, whilst for others, snacking is something they only do occasionally. But beyond this behaviour, people have very different relationships with snacking, which shapes their behaviours and choices in different ways. Whilst people don't exclusively adhere to one particular snacking relationship, it is clear that it drives the majority of their snacking behaviour.

We found 3 distinct groupings of snackers, across our respondents, which will be gone into, in more detail, in the next section:

- **Spontaneous snackers** – their need to snack is a reaction to how they are feeling at any particular time of the day.
- **Planned snackers** – they anticipate how they are going to be feeling over the course of a day and ensure they have appropriate snacks to hand to meet those needs.
- **Purposeful snackers** – they seek to shape how they are going to be feeling and recognize at what level they need to perform at any particular time, making snacking choices accordingly.

3.8 People face a contrasting spectrum of channel choices

Much of a person's choices when it comes to snacking, are driven by the accessibility of different options. As the breadth of snacking options has grown, so has the range of channels that people would consider as a viable option from which to source snacks.

All of the following are relevant options and groupings:

- The work kitchen typically has free snacks available – biscuits and the like
- Vending machines / snack boxes provide sweet and savoury treats – at a cost
- Many work venues have a café or canteen of some description, that is only a short walk
- There are often a range of lunch type places that also offer snacking options – i.e. sushi bars, café's
- Many people would have access to a corner store / news agent, or even a 7-11
- For people 'on the road' there are petrol stations, which most consider to be a poor option
- There are also fast food outlets, which are prominently positioned, and for all their failings, people know what they are going to get
- Finally, there are supermarket options, from which people predominantly pantry shop, though with small format stores, such as in the CBD, they also provide an immediate solution

Many people have a preferred channel that they associate with a particular occasion (for example the local café) - much of snacking is driven by the desire to 'take a break' from what one is doing.

3.9 The importance of accessibility – what's most readily to hand

Rarely would someone go 'out of their way' past a convenient option in pursuit of something they greatly preferred. However, with the majority of occasions being facilitated by the pre-planning of snacks, a major driver of this desired behaviour, is whether people feel their desired options are available.

Many people related how if they had more options available to them, they would make other choices. In contrast, other people feel they have a wealth of choices. This breadth of choice is not just across different types of food outlets (Japanese sushi, Café's, 7-11) but the storage options (fridges etc.) and food preparation (a fully set up kitchen) available to them.

3.10 How people evaluate snacks that are 'better for you'

On many occasions people seek snacks that are healthier options. Yet how they evaluate a snack's 'healthier credentials' differs according to their relationship with snacking and the role snacks play in their lives. Broadly speaking, there are two contrasting approaches:

‘Simplistic Snackers’

The majority of people evaluate snacks in a simplistic manner – is it good or bad. They are not looking for snacks to make any positive contribution to their health & wellbeing, but rather alleviate a problem (hungry, bored, ...) Thus, in their world, their choice comes down to weighing up the following alternatives:

- A desirable snack, that I feel that I deserve
- A healthy snack that overcomes my misgivings about snacking, on this occasion

For these people, a compromise snack, one which notionally delivering @ 80% on both enjoyment and health fronts, fails to deliver in either area. For these people, portion control is their main strategy against over-indulging when it comes to snacks.

‘Sophisticated Snackers’

Other people have a more developed / sophisticated view of snacks. To them, snacks are part of their overall food consumption, so they evaluate snacks in a different way.

At one level, they recognize the properties of different types of foods / snacks and the inherent benefits they deliver / how they can perform as a result. Thus they recognize whether a snack will sustain them through to the next meal, as against ‘blowing up’ their energy levels, but then crashing. A more developed version of this person is able to see the positive contribution a snack can make to their overall health & wellbeing,

Thus a protein ball, is seen by a ‘simplistic snacker’ as being a compromised offering, really only consumed to convey a positive image to others, as it does not deliver on taste, nor health. In contrast a ‘sophisticated snacker’ recognizes the inherent benefits that protein offers within a snack – providing enduring energy and a contribution to building them up.

The implications of this are that a snack with a health based benefit, in order to maximize its appeal, must develop a proposition that resonates with both mindsets, given they evaluate offerings in different ways. The dynamic of the market suggests that the majority are ‘Simplistic Snackers’, yet the growth and opportunity to value-add on a health / nutritional platform is amongst the smaller, but growing group of ‘Sophisticated Snackers’.

3.11 The pros and cons of ‘hot snacks’

There are polarized perceptions towards hot snacks, with little grey area between these differing views:

- Some people don’t accept ‘hot food’ as being a snack. Particularly white collar workers have this view. Barriers to some white collar workers having hot snacks is the belief that they are inappropriate in an office environment, being messy and intrusive (smelly).
- Others see ‘hot food’ as being a step above other offerings and being the only type of snack that can ‘truly deliver above & beyond’. Particularly blue collar workers who seek food that is filling and sustaining, the major challenge they face is in terms of accessibility.

3.12 Snacking limitations

The majority of people we spoke to, did not feel they were especially lacking or compromised in their snacking choices, on a day to day basis. However, on deeper discussion and the exploration of other concepts, a number of themes did emerge.

Prepared snacks are expensive – people feel that they are paying an excessive premium to have snacks made available to them, whether through a café or corner store. This price differential vs. pantry stocking from the supermarket, is a key motivator for this type of behaviour.

Choices are somewhat limited – this is hard, as most people aren't aware of other snacking options, but those people who had experience from foreign markets did express surprise that there was not more choice – street food from Asia (i.e. satay sticks), the US does tasty finger food (chicken wings, flavoured corn, stuffed chili's) and Biltong from South Africa.

New channels / hot food – many people mentioned that they had had experience with food vans and liked the idea that hot food could more quickly and cheaply be accessed than provided by existing options.

4. Defining Snacking Segments

Introduction

The range of offerings in the snacking market is sizeable and diverse, for a reason – different people like different kinds of snacks. Defining snacking segments is important as the starting point for developing targeted strategies. Whilst all people of this age share a number of characteristics, there are other dimensions that distinguish groups of people in important ways.

This project used an ethnographic approach to gain a deeper insight into peoples' world of snacking. 'Observing' their snacking behavior over an extended period of time, and having the opportunity to subsequently question them more deeply, provides a unique perspective into what drives their behaviour and the choices they make.

Determining the most appropriate snacking segmentation is through identifying what distinguishes people who snack across the following dimensions:

- The roles snacks play in their life – particularly the occasions on which they snack
- How people source their snacks – what is most important to them at these times
- The snacking choices they make – the channels they use and offerings that resonate

Snacking Segmentation:

1. The Spontaneous Snacker
2. The Planned Snacker (incl. restricted snackers)
3. The Purposeful Snacker (incl. performance snackers)

Other key dimensions of consumer differences:

4. Contrasting Under 25's vs. those 26 to 32
5. Female vs. Male Snacking – where are the differences?
6. White vs. Blue Collar Workers – the cultural context
7. Chinese Students – are the fundamentals of snacking the same across cultures?

4.1 The Spontaneous Snacker

The origins and fundamentals of snacking, is the belief that people act spontaneously. Simplistically, people don't want to snack, but they act in the moment and to some degree, can't help themselves. At this time, whether they are responding to physical needs, like hunger, or are more emotionally driven, such as feeling a bit bored, or both, they see a snack as providing an immediate solution.

In fact, for a long time, many have labelled the category as 'The Impulse Sector', a reflection of the belief that people are acting in an impulsive or spontaneous manner. Much of the snacking industry is driven by the creation of 'new news', whether it be new flavours or promotional offerings, to sway their snacking choices, or even prompt people to have snacks, when they were perhaps not intending to.

Given that Spontaneous snackers are felt to be the default option for consumers, it is easier to describe those who are not Spontaneous snackers. However, typically their relationship with snacking spans one or more of the following:

- They don't like to snack too much, really only when they need to, such as having a craving, or missing a meal (however, they may well do)
- They don't want the temptation of having snacks on hand – the more they are accessible, the more they are likely to eat them
- They don't want to snack, but when they come across them, they oftenb can't help themselves
- Snacking is a welcome break from what they are doing – the opportunity to head down to the downstairs café / newsagent
- Desirable snacks require such a level of preparation - relying upon others to prepare them into their ideal form for – i.e. Tradie's who require a hot pie mid-morning
- They don't tend to think ahead – they react to how they are feeling at the time and make their choices accordingly, with little regard to future implications

The channels that people typically utilize for spontaneous snacking are:

- Café – when getting a coffee, the snacks are often displayed to tempt one
- Newsagents / milk bar / 7-11 – in high traffic areas
- Petrol stations – when people go in to pay for their petrol they are often tempted as they walk through a plethora of snack options
- Vending machines – positioned as accessible options in many work places

However, due the nature of snacking being a repertoire category, there are occasions when all people tend to become spontaneous snackers:

- mid-afternoon, as few people admit to themselves that they are going to want to

snack on that occasion, so tend not to plan ahead, or have these types of snack on hand

- social snacking occasions, when they are offered a snack by a colleague, which for most people is 'hard to say no to'
- drinking occasions are a time when many people, particularly on seeing others snacking, can't help themselves but have the urge to have a savoury snack

4.2 The Planned Snacker (incl. 'Restricted')

For many people, snacking is now an ever present part of their life, to the point where they accept they are habitual snackers on many occasions throughout their working day. Thus they buy snacks in advance and take them with them, or have them readily available, for those occasions when they want a snack. This new dynamic delivers to them a number of benefits, though also one significant disadvantage:

The pro's that people say they experience from being a planned snacker are:

- With many people buying lunch and some even breakfast, as part of their working day, the extra cost of snacks really starts to add up, as the impulse buying of snacks is generally expensive
- Many people don't want the hassle of having to go and seek out a snack, but would much rather have it to hand
- Having accepted that they are going to have a snack, many people find that they can exert much greater control over their choice of snacks, have pre-determined what they are going to have at that time. This is the primary strategy people adopt to having 'healthy snacks'

These same people also mentioned that there are draw-backs to adopting a planned approach to snacking:

- Having snacks readily to hand, does tend to mean that one snacks more frequently – i.e. as one's bag of cashew nuts seems to just go
- Sometimes, how one feels on a particular day, might make a pre-determined choice inappropriate – one then reverting to being a spontaneous snacker

Key channels that facilitate planned snackers are:

- The supermarkets, Coles & Woolworths. Most people go there on a weekly basis and realise that they can buy the same snacks for around a third of the cost (if they buy multi-packs), than if they bought them spontaneously
- Other people have snacks that they purchase on an habitual basis, such as from

their café / canteen

The other great facilitator of people's planned snacking behavior, is the availability of kitchen facilities at many work places. As a result, people are able to store perishable goods in the fridge (i.e. yoghurts), quickly heat up a snack (i.e. soup) or make some toast. Many work places also provide a number of snacks, such as biscuits.

Key occasions when people tend to act as Planned snackers, are particularly the mid-morning occasion. This is by far the occasion that most people have and most people know they are going to have. Plus, the desire to be healthy on this occasion, means that many people facilitate this occasion with a pre-planned snack.

People are also predominantly planned snackers at home. Few people have the options, or can be bothered to 'pop out' to source snacks, when the moment arrives. Instead, most people have a selection of snacks / grazing type options available to them at home.

4.3 The Purposeful Snacker (incl. 'Performance')

It is believed that the greatest growth in the snacking market is amongst those who are termed 'Purposeful snackers'. These people view snacks differently, having a far more positive role for them in their lives. They typically don't see their daily food intake as being structured around three main meals, with snacks being something that breaks up the gaps between them. Instead they prefer to graze through the day, ideally having six smaller meals / snacks, or they eat according to how they feel through the day, without having a pre-determined idea of what their daily food pattern will look like.

These people are more sophisticated as snackers, as rather than viewing healthy snacks as being 'less bad' than indulgent alternatives, they have a positive view as to the role they can play in delivering nutrition and functional advantages. These people tend to be very conscious of how they are feeling and the role snacks can play in keeping them on top of things:

These purposeful snackers see snacks as:

- Making an important nutritional contribution to their overall diet, such as delivering essential fats / oils in their diet
- Maintaining optimum energy levels, to see them through their day, particularly through low GI or high protein snacks
- Setting them up for particular physical challenges, or for physical performance generally, such as endurance athletes, or sports people generally
- Having the right snacks enables them to not need such large meals, a state of

being that they prefer (not being overly full, which can happen, if one waits until one is really hungry, before eating)

Channels that are particularly prevalent for these people are:

- A new breed of healthy cafes, which often have a very hip following, with wholesome and nutritious snacks that also promise great taste
- Health food stores offer a range of wholesome and nutritious snacks
- Supermarkets are increasingly recognizing the sizeable opportunity that snacks with a 'positive nutrition' proposition represent
- Cafes and other impulse channels are also recognizing the customers desire for these offerings

The occasion on which people are most likely to act as purposeful snackers, is late afternoon, when they are intending to do some sort of exercise / play some sort of sport after work. In this case, they not only don't want to leave themselves feeling full, requiring a 'less-bad' snack, but actually demand a snack that puts them in the mood to exercise and provides some extra energy.

4.4 Contrasting Under 25's vs. those 26 to 32

There are clear life stage differences between those who are in their early 20's vs. those in their late 20's:

- Many of those in their early 20's are still living with their parents, and though leading an independent life, many things are still provided for them – i.e. well-stocked fridge
- Those in their early 20's feel 'bullet proof' – no matter what they put themselves through, they will wake up to a new day tomorrow.
- Females in their late 20's are conscious that there are repercussions to leading a life of excess – namely an increase in weight
- Many of those in their late 20's are in 'established relationships' – much of their life is as a couple, rather than a socially oriented single
- Whilst those in their early 20's spend all the money they have 'now', as they get more settled in life, they start to look to the future and want to save, such as to get into the property market.
- Those in their late 20's typically have a more structured life (working 9 to 5), as they look to progress their careers, unlike students

Thus whilst none of these shifts in personal values and life style factors are directly relevant to snacking behavior, they all have some indirect influence.

- ➔ Those in their early 20's are more likely to live in the moment, choosing snacks that reflect how they are feeling, in the here and now, rather than thinking ahead to when their next meal might be
- ➔ Those in their late 20's are more conscientious of the impact of poor snacking choices on their body shape
- ➔ In seeking to make savings in their life, those in their late 20's are more likely to realise the scale of their weekly expenditure on snacks and take remedial actions – more likely to be Planned Snackers, taking snacks with them to work
- ➔ Those in their early 20's not only lead more unstructured lives but have a more relaxed attitude about what they eat & when.
- ➔ Those in their late 20's have more established snacking repertoires, whereas those in their early 20's are more prone to experimentation, still working through their preferred choices for different occasions
- ➔ Healthy snacking in one's early 20's is more motivated by projection a desirable image to others, whereas in one's late 20's one feels it is doing you good / the right thing to do for oneself

4.5 The contrasting behavior of Male vs. Female snackers

There is an expectation that males and females snack quite differently, based upon different physiological needs and contrasting personal tastes.

We decided not to make the males vs. females split a priority, but to ensure we had an even mix and good spread across the groupings.

In the research it was identified that in some areas there was little difference in snacking behaviours between males and females, whilst in other areas it was far more pronounced:

- In terms of the occasions on which people snack, there was little difference between males and females. Both parties tend to snack mid-morning and many snack mid-afternoon as well.
- Similarly, the proportion of people who are spontaneous, planned or purposeful snackers did not seem to be fundamentally different between males and females.
- There are great differences in the types of snacks that are chosen on these occasions. The most obvious difference, is that females are far more likely to eat a yoghurt, if they are after a significant snack, as they believe it to be healthier, whereas males are more likely to have a sausage roll.

4.6 Contrasting dynamics of White vs. Blue Collar workers

At the physiological level, the needs of these contrasting groups of workers is clear. White collar workers typically have a more mentally demanding and stressful job,

whereas Blue collar workers are more inclined to have physically demanding and strenuous jobs.

This difference clearly has implications for the types of food choices and snacks that would work for each group, with Blue collar workers having a greater need for filling and sustaining snacks.

But at the most basic level, in terms of the actual snacking occasions, both White and Blue collar, largely seem to have the same pattern of snacking behavior – having both a mid-morning and mid-afternoon snack. Beyond this basic difference there are other social dynamics going on which shape further differences.

White collar workers feel that their snacking choices are constrained in the following ways:

- Their snacking choices should not overly disturb others, by being overly smelly or even noisy – many is the time people regret their choice, or feel they have to eat it before returning to their desk
- Their snacking choice is overly messy or cumbersome, as most people like to, at least, read emails whilst they take a break
- Their snacking choice creates a poor impression of the kind of person they are / would be frowned upon by others. Whilst this is certainly true for bringing fast food into some offices, the same also applies for some types of snacks (particularly for the mid-morning occasion)

This tends to limit the desirability of pies and sausage rolls, in this context. Whereas yoghurts are seen as bring a perfectly acceptable thing to eat at one's desk, even though it requires a spoon.

The jury is out as to whether hard boiled eggs cross the line ...

The social dynamic surrounding Blue collar workers is markedly different:

- There is a long tradition that the most junior member of the team has the task of sourcing the snacks from whatever location is most readily accessible.
- There is a desire to prove oneself and be one of the team – similarly enjoying what others partake in
- For some, their opportunity to take a break is not of their own volition – their breaks are imposed upon them from the outside, meaning that many have long-since passed the time when they would have liked to have snacked, and so resort to more extreme compensatory behavior

4.7 Asian Students – fundamentals of snacking across cultures?

Note: In allocating two of the student sample, as Asian students, living in an Asian microcosm, that is the RMIT (Dominated by Asian students) & China town enclave, we sort to get an initial read on their snacking behaviours. This was done to test our snacking models and assumptions – to 'know what we don't know' about snacking in export markets.

Asian students that come to University in Australia, typically come from a somewhat privileged family, able to afford the fee's and living expenses. Thus they are living away from the controlling influence of the family home and typically have 'their parents credit card' and are not pressured to undertake part-time work (they have a charmed life).

There are no obvious signs that Chinese students have a different pattern of meals to other Australian students, recognizing that most students, given the choice, don't see the morning. Thus their patterns of meals and the roles of meals are not fundamentally different.

However, they do seem to snack a lot at night time – though maybe this is because they are staying up late into the night and their first meal of the day, is technically lunch.

In terms of the role snacks play in their lives, there is some level of difference - Snacks seem to be far more relevant as:

- a Treat
- for a Reward
- to satisfy a Craving.

This is in contrast to the rest of our sample for whom this form of snacking is more the exception, with far more focus on snacks fulfilling a more functional role – i.e. sustaining between meals.

Predominantly, on their snacking occasions, Asian students are most likely to turn to Sweet treats, with more gregarious flavours:

- A tendency to more full-on and 'over-the-top' sweetness
- Even their savoury choices, seem to have a sweetness overlay – i.e. pork buns
- A diversity of interesting and alternative flavours

Another observation, was that in social snacking occasions, there was little sharing of snacks, not being inclined to having similar things. Thus channels that had a diversity of offerings seemed to be favoured because of this – McDonalds (Big Mac vs. McFlurry), or Grocery stores.

Viewing snacks in this way, when seeking to be healthier, tends to be interpreted as eating less of something, not making a healthier choice.

Savoury snacks don't seem to be prominent in their repertoires for another reason. When they want something savoury, they tend to turn to Street Vendors, who cook up fresh, tasty offerings, such as chicken wings, dim sims and fish balls. However, unlike everywhere you go in Asia, this highly accessible channel is only present in shopping center's (where both respondents did hang out).

Asian Opportunities:

If one accepts that Asian snacking markets are well developed in terms of the array of sweet and interesting flavoured offerings, then opportunities lie in how one would expect other areas of the market to develop in future:

1. Savoury snacks that provide interesting flavours. Pringles is a good reference point, as both Asian students mentioned it was part of their snacking repertoire, but did not eat much here, as they found the flavours limiting and boring.
2. Healthier snacks which either deliver functional benefits or deliver nutritionally. With cheap and small portions of food seemingly so accessible, snacks have not had much of a look-in, in this area.
3. More late night food options – currently McDonalds does well, as there are few other places open late and that they feel comfortable in

5. Occasion based Opportunity Spaces:

Introduction:

Snacking occasions are the 'focal point' for a design led process, as the same person tends to act differently across occasions. Through developing this occasion focus it is possible to understand actual consumer snacking behaviours as they occur throughout the day, both during the working week and on the weekend / at home. Observing people's behavior on these occasions, and by undertaking personal interviews into their underlying habits, motivations and requirements, means key insights can be developed. This depth of understanding into occasions forms the basis for new snacking solutions (product, channel & packaging) to be developed that better delivers to consumers' needs, or the design of new supply chains or business models to create new value.

The nature of the snacking market, with people typically snacking at many different times, and in many different ways, means that there are a multitude of occasions.

Occasions are characterised by:

- First and foremost, the time of day that they occur – i.e. mid-morning
- The context – are they at work or home, or are they doing something (i.e. at the movies)
- They are further refined by 'Who' people are – not everyone snacks the same at a particular time – i.e. Blue collar blokes mid-morning snacking is very different

Opportunities are defined by:

- Expectations of what the snack must deliver
- Channel implications, such as advantages in terms of preparation or accessibility
- Packing performance requirements – for example, transportation or storage
- Supply chain implications – what is most important to delivering consumer satisfaction

Snacking Occasions:

1. Breakfast on the go – our changing life styles and priorities
2. Mid-morning snacking – getting through our hectic daily lives
3. Mid-afternoon snacking – when cravings get the better of us
4. The socially imposed snack – when it would be rude to say no
5. Early evening social drinking – part of the crowd
6. Pre-dinner delight – a little of what people most enjoy
7. Night time snacking – rewarding ourselves at the end of the day
8. The social context – casual entertaining at home
9. Energy for endurance – Maintaining performance, i.e. all-day hiking

5.1 Breakfast On-the-go – Our changing life styles & priorities

What was once the exception, or only an occasional occurrence, has become a far more consistent part of many people's lives. For a number of reasons, breakfast on-the-go has become far more prevalent.

Exercising in the morning has become popular, with many believing it to be the best way to start the day. Most people would say they need something beforehand - though nothing too heavy.

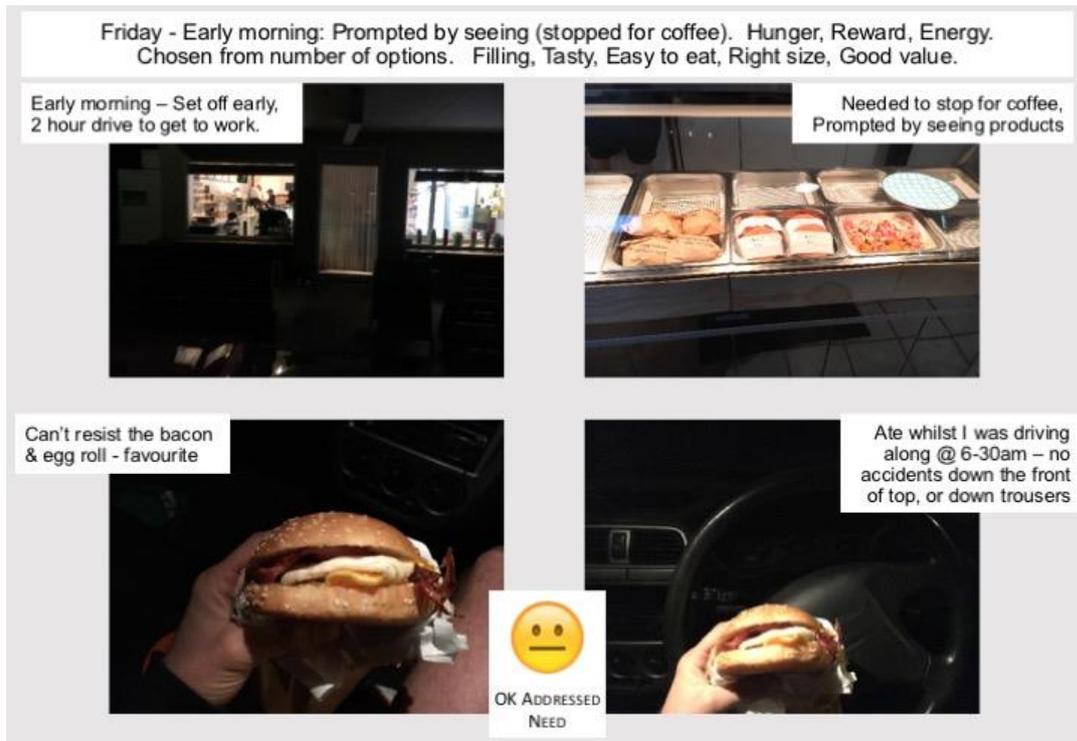
Some workers have early start times, particularly Tradie's for whom it is not unusual to be on the job by 7am, or even earlier. Many are rushing out the door with breakfast in their hand, or stopping off at a suitable channel, along the way.

As our cities grow, many people make the choice to live further out and commute into work. Particularly for those wanting to get away at a reasonable time, they like to get in early. This leaves little opportunity to have a proper breakfast at home - sourcing breakfast close to work and eating at one's desk is often preferable.

Some people just don't feel like having breakfast and prioritise other things in the morning, before they need to be at work - such as getting more sleep. For many of these people, breakfast might be taken whilst sitting at their desk.

What does seem to be consistent is people's belief that breakfast is an important meal that sets one up for the day (maybe not some students). Thus with all of these different life style factors, the major challenge / choice is in how breakfast is accommodated into their life.

Note: This is the 'grey area' of snacking, more accurately defined as an 'on-the-go' meal occasion. Simplistically offerings must deliver meal like benefits, but through snack like properties.



Occasion Dynamics:

The breakfast on the go occasion is, by definition, prompted by missing / being unable to have breakfast at home. However, for many this has become an habitual part of their working life style.

The primary needs at play are:

- To satisfy hunger – the important role of breakfast
- To enhance energy levels, get yourself going – fire up one's metabolism
- To nourish yourself – the nutritional role of breakfast remains

In order to source snacks for this occasion, people tend to:

- Have planned for the occasion – be able to take something with them as they leave the house
- Chosen from a number of accessible options – going to a favourite café or pie shop

Snacks that work well on this occasion are:

- Up & Go works for many people – seen as being good value & as a beverage has

distinct advantages

- Fruit is particularly good for those wanting something to get them started, before exercising
- Toasted sandwiches are particularly popular, as are bacon and egg rolls
- Sweet treats like scroll rolls or chocolate croissants are also desirable

On this occasion, satisfaction levels were recorded as moderate, as in many situations people felt they had limited choices and existing offerings were not catering to their needs.

Opportunities for On-the-go Breakfast offerings

For many people Up & Go fulfills an important role in their life. It allows them to get more out of their day; enabling them to “hit the ground running” rather than stopping to have breakfast. The advantage a liquid breakfast offers, is not only its on-the-go consumption, but its ‘instant impact’, filling someone up and getting them going, far more rapidly than ‘solid-food’.

A number of respondents had used Up & Go in the past, and spoke positively about it. However, they felt it no longer worked for them – largely because their expectations of what they thought a liquid breakfast should be, had been enhanced (and Up & Go had stood still). A number of females commented that they had come to the realisation that it was too high in calories, even the ‘low carb’ version being only a marginal improvement. Whilst there are terrific but expensive options from Juice Bars & Cafés (which people love), these are \$7 or \$8, which is too expensive for daily consumption. Thus the opportunity is to find the middle ground between Up & Go and these Juice Bar offerings:

- A more premium version – authenticity, freshness, real ingredients
- More nutritious, through more wholesome and natural ingredients
- Accessible to when required – on route to where heading
- Designed for more specific audiences & / or purposes – target market specific
- In the right form – i.e. chilled and able to drink on-the-go
- More specific benefits / versions - high protein, low carb, low GI, ...

The other great advantages that drinks have is not only their portability, but people’s willingness to consume in transit: many people would feel embarrassed / ‘lots of eyes on them’, if they were eating something whilst travelling on public transport

For some people, even though they can’t do breakfast at home, this doesn’t lessen their desire for a proper breakfast. If anything, they are more likely to have a big day ahead of them, needing to get an early start.

Many people believe that a hot snack is far superior for this occasion – some people wished they were organized enough to pre-prepare a toasted sandwich, to cook up the next morning. Ambient offerings that are substantial, typically require too much ‘messing around’ – i.e. a bowl of muesli, fruit and yoghurt. These people are less price sensitive at this time, given the importance of their need:

- Accessible to when required – on route to where heading
- Easy to eat on the go – won’t slow someone down, in getting an early start on the day
- Supported by functional ingredients – protein content, Low GI energy and fiber
- Pre-prepared – delivering a hot solution
- Easy to prepare - as quick and easy as putting something in the microwave
- More interesting than a ham & cheese toastie – different flavours

Notionally this opportunity is less ‘goats cheese and avocado on toast’ and more ‘bacon & egg roll’ / toasted sandwich – people are more interested in the product delivering functional benefits, than a sophisticated taste experience.

Fruit is well recognized for the role it can play in the morning. People see it as being particularly good for kick-starting their metabolism and addressing an immediate need (filling the hole in their stomach), without restricting them from doing active exercising.

Note: Fruit based opportunities are an extension of the mid-morning occasion.

5.2 Mid-morning Snacking – Getting through our hectic daily lives

Mid-morning snacking is something all 20-32 year olds do – it seems few people seem able to survive from breakfast to lunch without having a snack to see them through. Whilst few people have an official morning tea-break, where they ‘down tools’ for 15 minutes or so, but that does not lessen the need to have a break. The desired ‘modern working’ balance is not going over the top at this time, and having something that is going to impinge upon lunch time.

With the habitual nature of this occasion, and being earlier in the day makes it easier to allow for, most people tend to make plans accordingly. They typically bring a snack or two with them for the day, or have made plans for the whole week – filling the work fridge / desk drawer. The alternative is to go to the local café and get something hot & tasty. Whilst this is appealing, it is both expensive and often ‘over the top’ – eating beyond one’s needs.

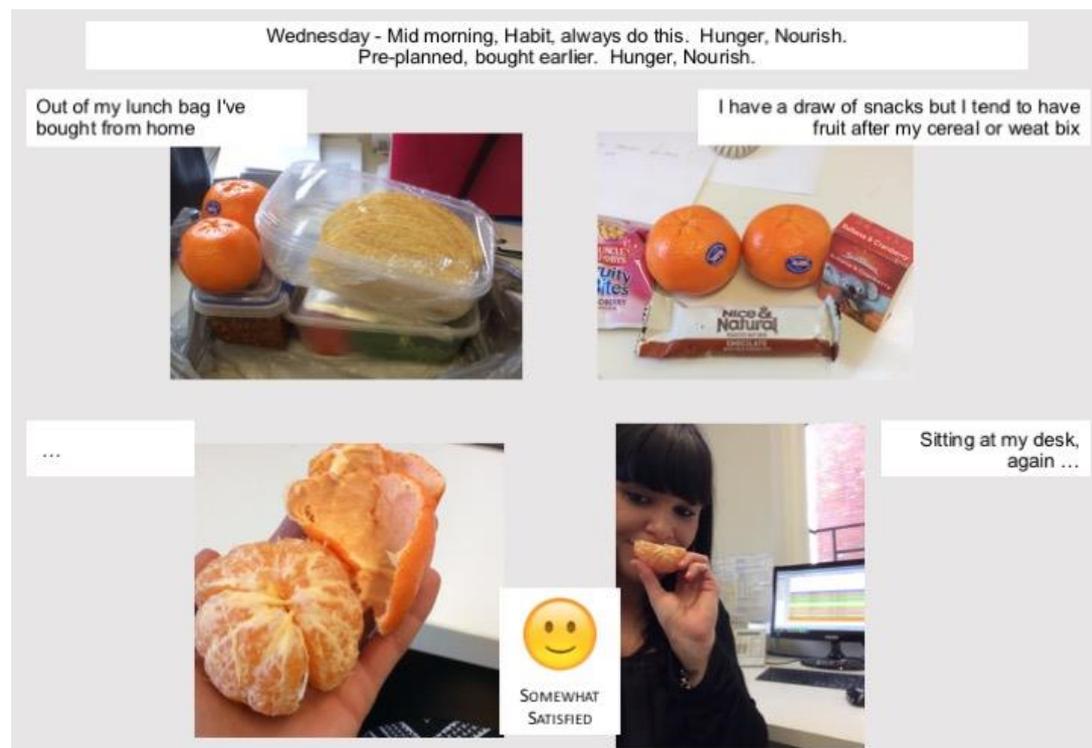
Occasion Dynamics:

The mid-morning occasion is most often prompted by:

In need of a snack – particularly those who start early, or hit the ground running

Habit, always do it at this time – the underlying rationale has become a little lost

Missed a meal – for some people breakfast was not possible



The primary needs at play here are:

Hunger – many people need something to make it through until lunch time

Having a break – for many having a break is more important than the actual choice of snack

Nourishing oneself – not just healthy, but nutritionally beneficial

Snacks that work well on this occasion are:

- A piece of fruit – banana, apple etc.
- A yoghurt – most sit at their desk and read emails whilst eating
- Something more substantial / late breakfast like – toasted sandwich, a sausage roll or a hard-boiled egg

Many describe the ideal snack at this time, as being a fruit based smoothie, but with a substantial component – oats, protein powder, chia, ...

Barriers at play

The main challenges, or barriers at play, is that although the occasion is habitual (some say they can set their watch by it ...), how one is going to be feeling on any one morning can be quite variable. Thus one's pre-conceived choice of snack might be inadequate, forcing one to make further choices.

Opportunities for Mid-Morning Snacks

For the many people who enjoy a piece of fruit on this occasion, what seems like a great option at the start of the week, can become a bit un-inspiring as the week wears on. However, they don't want to compromise on the natural, nutritious and healthier choice that they perceive fruit to be.

These people don't want to compromise on getting something that is Nutritious and that they feel good about having. Currently a fruit flavoured yoghurt is seen as the best way of trading up at this time, with pots of 'preserved fruit' being deemed as only suitable for kids and very much a compromise.

Thus they seek:

- A more premium and desirable offering
- Natural fruit – not in a processed form
- Nutritious – the higher the level of key vitamins / minerals the better
- Easy to eat – it should be easy to eat at one's desk
- Not overly filling – don't want to compromise having lunch

The most desirable options would be fresh cut fruit, or a fruit smoothie. However, both of these are seen as being relatively pricy and inaccessible options. Whilst people feel they can make these things at home, it would be too challenging to do so at their place of work.

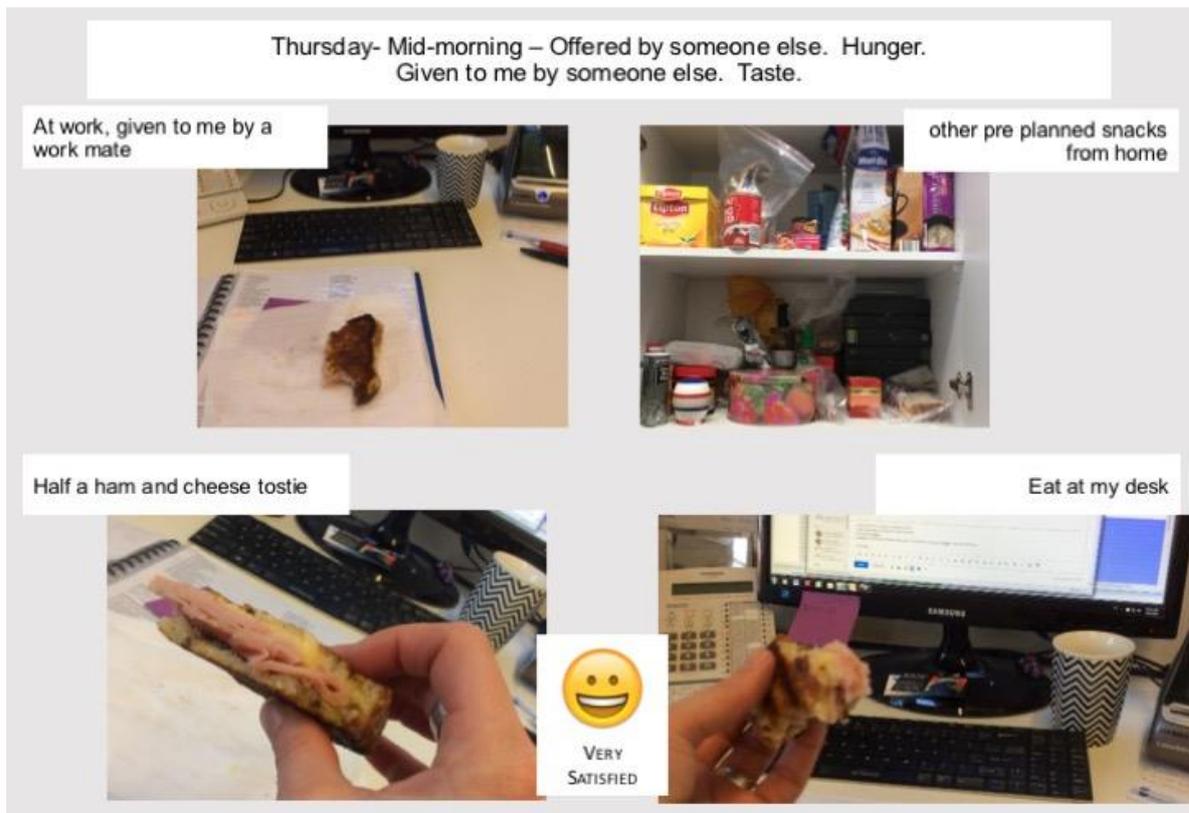
Many White Collar workers feel that their behavior, at this time, is particularly under scrutiny, with an expectation that they will do the right thing – have a 'good for you' snack.

Particularly for those consumers who are 'morning people' for whom a piece of fruit is just not enough, they feel their options are limited in terms of more substantial snacks, with many desirable offerings being frowned upon.

- Not too messy – need to be able to eat at it your desk

- Not too smelly – don't want to impinge upon others
- More premium – overcome any negative 'Tradie' / hang-over stereotypes
- Filling / satisfying – ideally warm & tasty

Toasted sandwiches are the best option currently fulfilling this role, but they have limitations in terms of accessibility. For many a meat based offering would be ideal, so long as it was not too substantial, impacting their lunch in a few hours.



For Blue Collar workers, particularly those that are part of a 'small business', the expectation is to push on through, rather than take a mid-morning break. In many people's mind, a break involves heading down to the local pie shop – a hot snack is highly desirable, but a journey that knocks a big chunk out of the day (hence why the apprentice is always sent).

Yet failure to re-fuel results in diminishing levels of energy and subsequent 'lunch regret', as you over-do and make poor choices at lunch time (with resultant mid-afternoon consequences). A snack would need to deliver:

- Ideally warm – nothing else quite hits the spot
- Accessible – delivered to where and when it is needed
- Easy to prepare – would not require too great a set-up, or handling
- Quick – able to be eaten on the job

- Moderately wholesome – not too processed (as against overtly healthy)

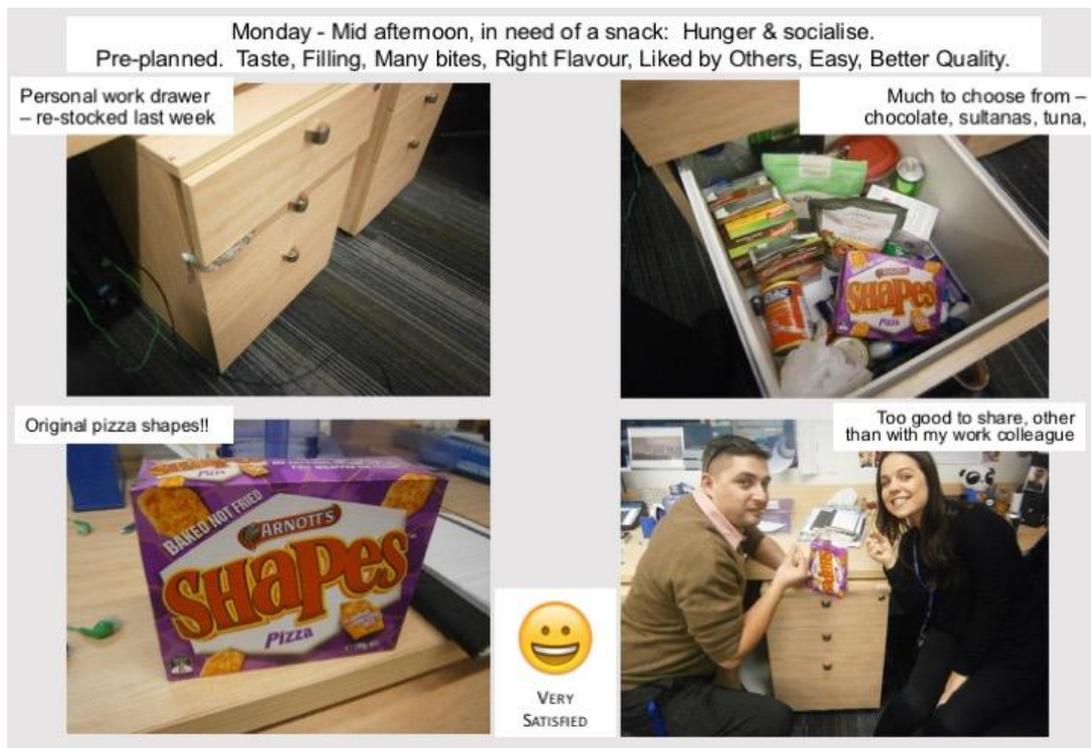
Some blokes mentioned they used to have pot noodles at this time, as it only required a kettle – which whilst it would soon get trashed, you could buy a new one for \$10 from Kmart!

5.3 Mid-afternoon snacking – when cravings get the better of us

Mid-afternoon snacking is recognized as the original snacking occasion – a time when people typically sought out a sweet treat, for which chocolate and other confectionery items were created. So whilst people’s snacking behaviours have broadened out extensively from this occasion, it still remains one of the most popular occasions.

Many people struggle to get through the afternoon; either they start to flag a bit – needing something to lift their spirits, or they have a craving for something and find it hard to keep going without satisfying it. The challenge with the afternoon occasion, is that it is inherently more variable. Not everyone needs to have a snack at this time, every day. Also people’s repertoire of options is broader.

This occasion is relevant to all groups within the population – white & blue collar, as well as male & female. However, whilst blue collar males are more inclined to hoe through anything they fancy, females are more conscientious about their choices at this time.



Occasion Dynamics:

The mid-afternoon occasion is most often prompted by:

Needing to have a snack - as against a habit thing, people feel they have to have something

Prompted by seeing the product – people experience a ‘moment of weakness’ at this time

Offered by someone else – people feel a connection with others who are similarly affected

The primary needs at play here are:

Satisfy a Craving – for some people it is a sweet craving, for others savoury

Cheer Up / Feeling Flat – many people get the ‘post lunch blues’, or ‘mid-afternoon dip’

Share / Social – a shared empathy with how others are similarly feeling at this time

Note: The Large Group Social occasion is separated out as a discrete occasion.

In order to source snacks for this occasion, people don’t tend to have planned specifically for the occasion, but rather:

Take a break from the work they are doing and assess a number of accessible options – making a trade-off based upon how they’re feeling

They have a ‘stash of snacks’ (such as a desk drawer) that they can choose from

Snacks that work well on this occasion are:

- Chocolate whether a chocolate bar, or something ‘chocolatey’ from a café
- Sweet treats, like lollies (or ice cream in the summer)
- Chips (Crisps) are a sure fire way of addressing a savoury craving
- Shapes, or some other baked snacks are seen as being a more permissible alternative

More than any other occasion, our research indicates that it is on this occasions when people are the least satisfied with the outcome from their snack. This is largely because either they’re trying to resist having a snack at this time – but their cravings get the better of them (and hence are obviously peeved at themselves). Or the product they have selected is ‘over the top’ and leaves them regretting the choice they’ve made.

Opportunities for mid-afternoon snacks

For those people that get a sweet craving in the afternoon, nothing else will do other than something that is sweet and indulgent (i.e. the desire for chocolate). Thus, in order to fulfill the requirements of this occasion, and not leave people needing to go back for more, a snack needs to deliver on this sweet craving.

Rather than trying to dissuade people that they don't really want a treat, or 'water down' the sweetness of an offering, the challenge is to make a product more permissible, through delivering the same enjoyment and experience – more from less:

- A richer, more intense flavor – maybe delivered through a smaller offering
- A more premium and desirable offering – so that it is seen as being more special
- A more involving eat – too often snacks feel inconsequential / soon forgotten
- Able to be shared – alleviate some of the individual guilt
- Appeal of a Hero Channel – people seek places that excel at something (i.e. donuts)
- Enhanced experience – products that deliver more (i.e. hot or 'frozen')

The problem for those who love savoury snacks, at this time, is once you start, it's hard to stop. When they buy a bulk pack of something savoury, one seems to go through them, without really noticing – just grazing on them. However, not everyone likes smaller, portion control packs, as they believe they are paying an excessive premium for them.

People feel that developments in savoury snacks have been staid - largely 'new flavours', rather than interesting new offerings – A savoury snack offering needs to deliver:

- First & foremost, it must deliver in terms of flavour
- An offering that contains many bites, which also means it is good for grazing
- More intense and interesting flavours would make a product more involving
- An offering that is more premium / special, helps with portion control
- A product that is slower to eat, would also enhance its 'long lasting' nature
- There is more scope / social acceptance that a snack can be messy at this time
- An enhanced experience is valued – i.e. Pop chicken, as a hot product

It is interesting to note that most people don't believe Vegie Chips offers something fundamentally new to the snacking market. They provide interesting new flavours, but deliver the same health properties, or lack thereof, as they are still 'chips', cooked in the same way.

Many people's intentions of after-work exercising, or generally going out, are 'scuppered' by poor choices of snacks in the middle of the afternoon. Driven by their cravings, they often choose something that whilst it provides an initial energy boost, ultimately leaves them feeling more lethargic.

No matter what, people still want a snack that will address their cravings – whether they

be sweet or savoury. The ideal snack in this instance would need to:

- Satisfy their desire for a treat
- Deliver a sustained energy benefit – not a short sugary hit
- A natural / wholefood offering would have strong appeal
- A clean label / minimal ingredients would be an advantage
- Smaller size but enduring taste would also help deliver the proposition

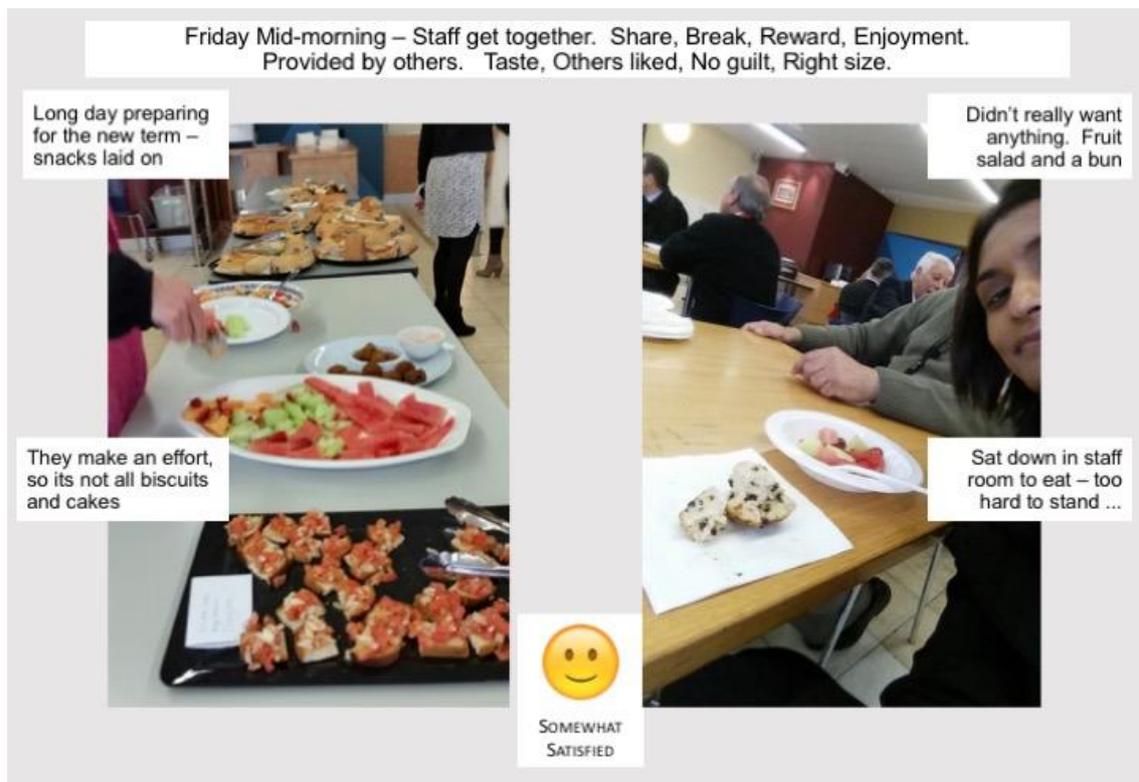
5.4 The Socially Imposed Snack – when it would be rude to say no.

In many work places across the country, snacks are freely offered up by others, as part of an open and friendly work culture. Whereas in the past, it might have been more normal to socialize after work, over drinks, changing societal norms and with the pressure of commuting, much of this informal team building happens during work hours, in and around snacking.

These snacking occasions take many forms, but the underlying drivers are all similar:

- More formal monthly birthdays, for the whole department / floor – the large chocolate cake
- In the name of a good cause, people making and selling their own offerings – i.e. cup cakes
- Teams doing their own social get together – whose turn is it to outdo / shine
- Individuals taking it upon themselves to initiate the occasion – doing their infamous ‘home baking’
- Or someone heading downstairs, returning with a tray of donuts, or a large bag of lollies (though this occasion comes with far less social expectation).

What was once the exception, for many, has become a part of weekly life. Thus despite one’s best intentions, or planning and structuring one’s food / snack choices for the day, these snacks come at people from left field. The problem with this form of snacking for most, is that it is ‘hard to say no’.



Occasion Dynamics:

The Socially Imposed snack, is by definition:

- Offered by someone else
- Though it can also be habit / we always do at this time of the week (i.e. Friday afternoons)

The primary needs at play are:

- Treat / reward myself, or ourselves – enjoyment is felt to be important
- Share / socialize with others – shared enjoyment is fundamental

In order to source snacks for this occasion, people tend to make a significant effort and / or go to great expense:

- Pre-planned / made earlier – people dedicate their Sunday afternoons to the task
- By-passed other options – send someone out to the cupcake shop, in the next suburb

People fall into two broad groupings:

- Those who feel powerless to resist. They feel that it is out of their hands, some

even have a semblance of responsibility, that the person would be offended, if their 'banana bread' was not all finished (even when just left on a plate in the kitchen)

- Others are more inclined to 'grin and bear it', trying to position themselves at the back of the group, so they only receive a small piece.

Snacks that are used on these occasions are:

- Trays of donuts or cupcakes are the most prevalent
- Banana bread, cookies, or something else that people are capable of making
- Some form of chocolate treats – blocks or bars of chocolate
- Sweets or lollies are generally popular

The Opportunity:

The opportunity is to overcome the excessively, indulgent nature of the snacks that are offered up on these occasions. The greatest barrier is the entrenched belief that something like chocolate cake or lollies will delight all; young & old, male & female. In this instance, most people would prefer:

The majority of people would appear to utilise a 'simplistic' approach in their evaluation of what makes snacks healthier, and conversely, what makes them a treat. For these people, to justify the occasion, it is hard to compromise the degree to which the product needs to deliver.

The most direct route to enhancing permissibility is by not trying to re-write the rule book, but finding new ways to deliver the same level of enjoyment:

- A smaller, but more premium taste experience
- Existing taste expectations, with a twist – more surprising or sophisticated
- More intense flavours and interesting textural delivery
- Delivery channels that bring unique offerings closer – i.e. direct delivery
- Tailoring of offerings to be 'fit for purpose' – crowd pleasers
- Enhancement of the experience through other sensory dimensions – i.e. visual appeal

A reduction in the size of offerings, countered with a premium ingredients story, has proven to be a successful approach to make offerings more special in many categories.

For those people who are less 'simplistic' in how they view snacks, there is far more potential to re-invent snack offerings for these occasions. There are a number of other factors that are enablers to this: Employers can no longer claim to be oblivious to recent medical warnings, nor to the idea that productivity is lost amongst its workers. These 'sophisticated' snackers are looked on aspirationally by others – once they show the way, others are liable to follow.

Thus, the opportunity is to take an alternative path to realizing the required delicious enjoyment, a snack offering that delivers:

- Something interesting & healthy
- Make a positive statement about workers' health & wellbeing (i.e. Cotton On HQ)
- Leverage cosmopolitan tastes to create 'specialness'
- Intense savoury flavours
- Likely need some variety, as intense savoury, has polarized appeal

Whilst in our 'food life' we have embraced a variety of healthy food regimes (Japanese, Mediterranean) the same has not happened in the snacking domain.

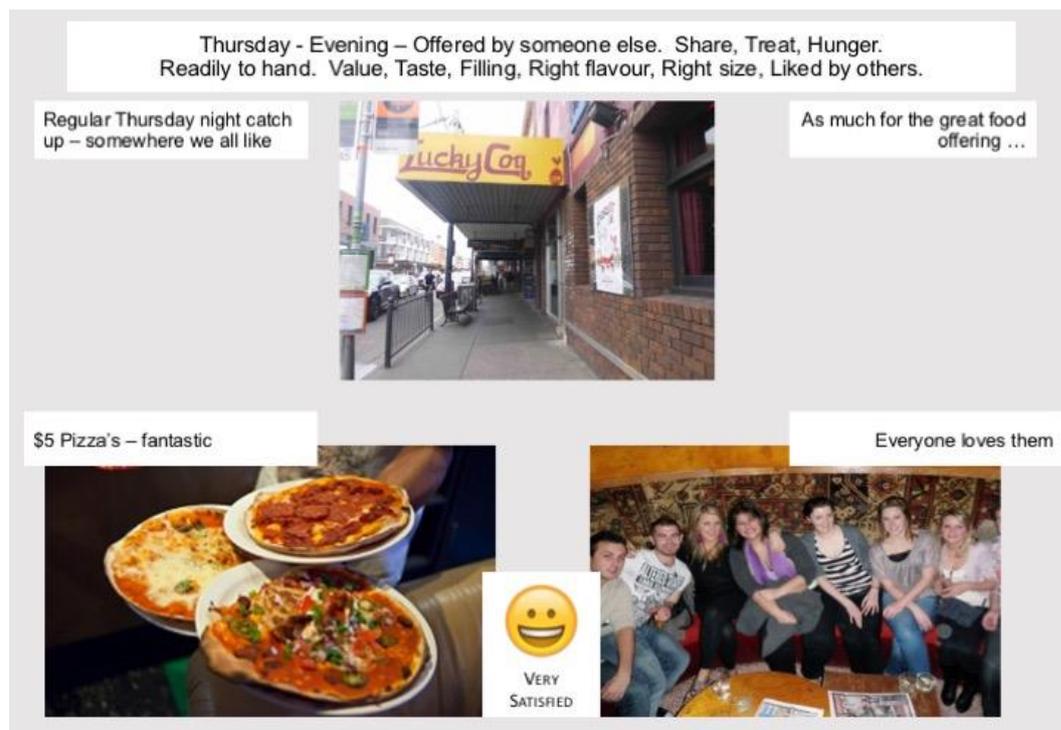
Note: Some places are starting to offer people a choice – i.e. Stuffed Pitta breads, or mini pizzas.

5.5 Early evening, Social Drinking – part of the crowd

Many people enjoy an after work, or early evening drink particularly towards the end of the working week. At this time savoury snacks provide a good accompaniment to drinking, people finding they have a craving for something. But whilst this snacking occasion has been established for a long time, the offerings that are available have evolved little – most places only offering slightly nicer chips (i.e. Kettle chips).

A number of dynamics suggest there is an opportunity for new snack offerings and value-adding:

- People's drinking behaviors are changing, whether it is being more conscientious about not drink-driving, or a new generation who have less interest (per capita alcohol consumption is in decline amongst younger generations)
- Consumers are trading up in their alcoholic choices – i.e. regular beer is in decline, whilst premium / imported beers show strong growth, at a far higher price point
- Far more of drinking occurs in mixed company, rather than 'same sex' groupings, significantly changing the dynamic of the conversation / mood of the occasion
- Consumers are turning toward more natural and authentic offerings, whether it is craft beer or cider
- Consumers are seeking to be healthier – conscious of the amount of calories contained in their alcohol and accompanying snacks (this is also important for how they seek to portray themselves)
- There is far greater variety of tastes on offer, not just cider, but wine has come to the fore, dark spirits such as Canadian Club & Dry and Vodka based offerings.



Whilst towards the end of the evening their decision making is alcohol impaired, this is not true at the start of the evening. Thus people are starting to look for more than is currently on offer.

Occasion Dynamics:

The early evening, accompanying alcohol occasion is most often prompted by:

- In need of a snack to accompany alcohol
- Habit – always do so on these occasions
- Offered by others, or see others doing it – on the next table

The primary needs at play at this time are:

- To share / socialize with others – products are almost always for this purpose
- Satisfy a craving - people can't help themselves
- To treat / rewards ourselves – at the end of a hard week
- To relax / comfort ourselves – snacks make it easier to drink the alcohol

Sourcing snacks for this occasion, such is the immediacy of the need, people source snacks from the venue. Thus rather than looking for an alternative channel, they are more likely, if their choice of snacks is not available - to make do on this occasion but consider an alternative venue next time around.

Snacks that work well on this occasions are:

- Crisps and nuts – salty snacks that are easy to add to the drinks order, and served immediately
- Hot chips – popular favourite, but increasingly out of touch with occasion dynamics
- Wedges, Nachos and other such offerings add a twist to Hot Chips, but fundamentally the same
- Bar food type offerings – Arancini balls, or dips, some venues in seeking to be more upmarket, are seeking to portray more cosmopolitan tastes

Opportunities for Snacks that accompany Early Evening Drinking

Above all else, the occasion is about group social dynamics. It used to be the case that people drinking in a group would tend to make the same choice of alcohol / drink in rounds – this is no longer the case. Thus the role of the snacks, which is inherently

more shared, is to forge a connection within the group.

The greatest challenge is that many snacks seem outdated, thus for many venues looking to elevate themselves, their snack offerings is a great way to do it. The person choosing the snacks is looking for it to deliver:

- Liked by everyone – rarely in this situation would people order a variety of plates
- Easy to eat – most people have a drink in their hand ...
- Savoury and salty flavours – what works well with alcohol
- Not an overly dominant flavor – it is to accompany the alcohol
- More premium / cosmopolitan – appropriate for more sophisticated drinks
- Healthier – a conscientious choice in mixed company
- Value-adding – an opportunity for a venue to increase average customer spend

As a venue, the opportunity to lead with a hero snack offering, is a great way to bring people in at the start of the evening, rather than doing a 'happy hour'.

On this occasion, many people are spoilt for choice as to the venue. Whilst it has to be relatively close, it is critically important for setting the mood of the occasion.

In a world where most venues offer largely the same mix of alcoholic offerings, these businesses are looking for ways to pull customers in. Many invest extensively to re-fit a venue to give it a modern and contemporary feel. Borrowing from the 'open kitchen' trend in restaurants and the popularity of street-food fares, suggests it is worth exploring a snacking experience that delivers:

- Small / grazing plate options – accessible and shareable
- A street food type experience – add theatre to the experience
- Cosmopolitan tastes – Spanish, Turkish, etc.
- Enable people to start the night there, or support staying there a while
- Fresh & Healthy – a premium and contemporary approach

This approach can either be the 'loss leader' for a venue (i.e. Keegan - Le Coq & their small pizzas), to bring the crowd in, or can become a major source of customer profitability.

5.6 Pre-dinner snacking – a little of what people most enjoy

When people come home from work, they often need to sit down and put their feet up, relaxing for a while and watch the news, or something similar. For them, dinner is not typically a quick and easy meal – something they can just throw in the microwave and be ready in 5 minutes. They want something that will support their need to relax at the end of the working and commuting day, whilst also sustain them until they sit down to their dinner, which might well be an hour and a half away.

This occasion is grounded in pre-dinner, but in reality it occurs at many other times, when the same occasion dynamics are at play. Many people's changing relationship with snacks, has made this occasion far more prevalent. Gone are the days when we

only purchase snacks when the need arises or we are planning a particular occasion. Most people keep something at home, on hand to facilitate this occasion – casual and enjoyable personal grazing.

This occasion is largely unstructured, people preferring to mostly have a little taste of something, but sometimes having a bit more. Many people describe the thing that they have on this occasion as a personal favourite, something they can indulge in.



Occasion Dynamics:

The pre-dinner and other similar at-home occasions are most often prompted by:

- Habit / always have at this time – i.e. when get home from work & during meal preparation
- In need of a snack – need something to see through until dinner

The primary needs at play on this occasion:

- To cheer myself up / feeling flat
- To overcome stress / needing a break – catch your breath and have some 'personal time'
- To relax and comfort oneself – a personal pleasure

In order to source snacks for this occasion, people tend to have planned ahead, as it is not important enough to make a special trip, when the need arises:

- Pre-planned / bought earlier – typically as part of the weekly grocery shop

Snacks that work well on this occasion are:

- Dips and rice crackers – very easy to have a little and select favourite tastes
- Cheese and biscuits – often enjoying preparing each individual cracker
- Olives or other strong savoury nibbles
- Nuts work for many people, particularly flavoured ones

For many people it is quite a ritualistic occasion, which is why they don't mind cutting slices of cheese and laying them on individual biscuits, or taking a small amount of dip using a rice cracker.

Opportunities for Pre-dinner snacks

Above all else, this occasion is about personal pleasure - people are looking for a taste of something that they particularly enjoy. However, this is not normally something sweet, but rather some sort of taste / flavour they particularly enjoy.

Many categories have risen to prominence over the years, to meet this occasion and satisfy people's desire for new tastes and flavours – such as the wealth of dips that are now present in supermarkets. Other categories have also broadened their offerings and provided different quality levels – we now have a wealth of different types and styles of cheeses (i.e. Goats cheese). Yet meat based offerings either seem outdated in this space, or have largely failed to offer the desired choice to satisfy peoples tastes. People choosing snacks for this occasion are looking for it to deliver:

- Re-sealable packaging – pull something out of fridge, have a little & then put it back again
- Able to be stored for a week, or so, once opened – wastage is an issue
- Ritualistic in nature – in this instance, having an involved preparation is an advantage
- Ability to share – many bits allows it to be divided with another (not always equitably)
- Alternative flavours – provide variety within the category of choice (i.e. dips)
- Interesting textual qualities are also valued at this time

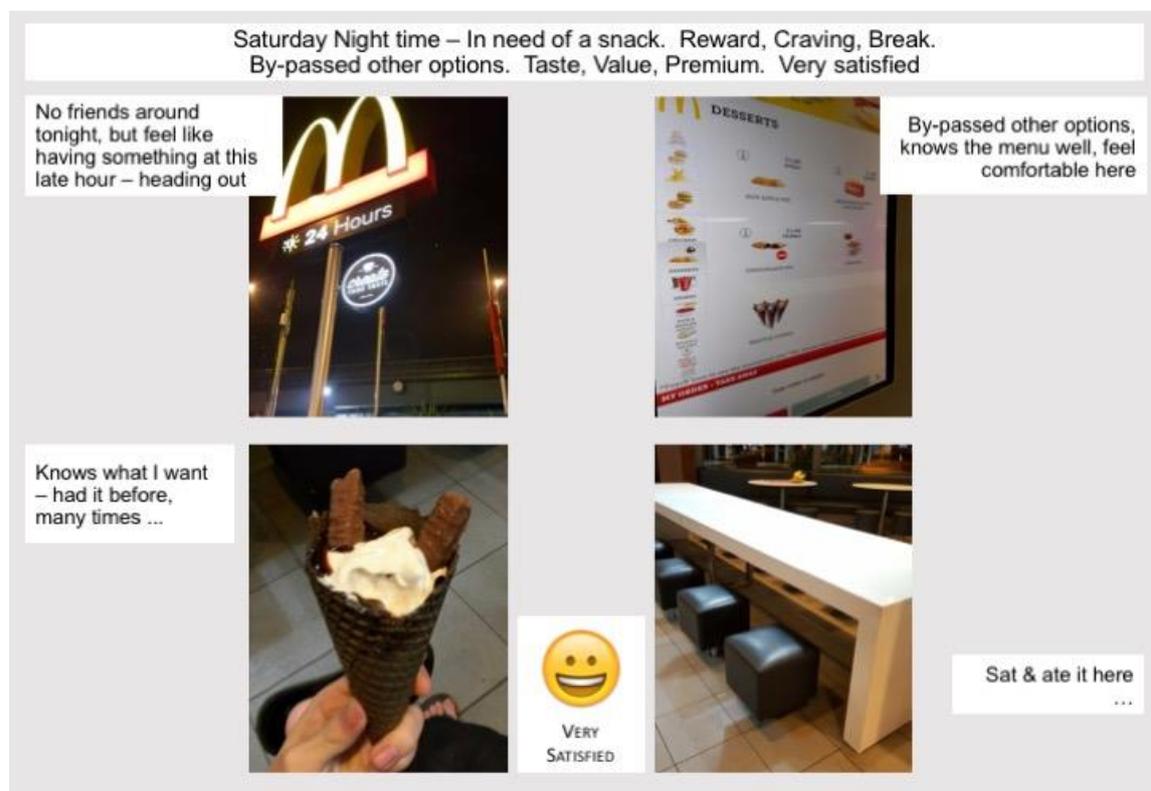
Having established a role in people’s repertoire of snacking choices, and being ever present in their fridge or cupboard, these snacks tend to get consumed for many other occasions throughout the week.

5.7 Night Time Snacking – Rewarding ourselves at the end of the day

This is the ‘secret snacking occasion’ – one that that many people have, but is very personal (only one’s partner might know – though even then, not always the degree to which it occurs). It happens almost exclusively at home, when people are on their own, or with their partner.

When snacking was dominated by people buying snacks as and when they needed them, having a snack on this occasion was quite arduous – having to head down the road to source something. But with far more people adopting ‘planned snacking’ behaviours, it means they have snacks available to them at home, whenever they feel like it.

Thus an array of new offerings has appeared that are primarily targeting this occasions – such as premium ice cream tubs. But whilst this occasion is well established, there are opportunities to further develop the breadth of offerings. Fast food outlets have recognized the need to broaden their offering to include more dessert like options, in order to capture a greater share of this occasion.



Occasion Dynamics:

The night time occasion is most often prompted by:

- Habit / always have a snack at this time
- Part of a ritual – sitting down on the couch to watch a movie
- Offered by someone else – one's partner goes to the cupboard and brings something it

The primary needs at play here are:

- To treat / reward oneself – a personal treat at the end of a long day
- To satisfy a craving / can't help myself – feel like something sweet
- To relax / comfort oneself – sit back and wind down
- To share with another – relaxed time together

In order to source snacks for this occasion, people tend to:

- Have pre-planned – buying their favourites from the supermarket
- If out and about, at this time, then choose from a number of accessible options

Snacks that work well on this occasion:

- Blocks of chocolate / Maltesers – great to share and enjoy over a period of time
- Premium Ice Cream – eat directly out of the tub
- Cheese and biscuits – for those who feel like something more substantial / savoury
- McFlurry's and the like – treat like desserts

Opportunities for Night Time Snacking

This occasions is largely driven by the desire to treat or reward oneself. Unlike other occasions there is no social pressure to act or do anything – people can have what they like. The other unique thing about this occasion, is that many people don't consider or worry about the damaging effects of what they are consuming at this time – it's almost as if it doesn't count towards their overall food intake for the day. However, this dynamic is changing as people become more conscientious about their snacking choices.

The key challenges with this occasion, is many people find it hard to stop. Thus whilst people are not overly concerned with doing something bad at this time, in the choice they are making, they would prefer to make a more positive choice. Thus it would be great if a snack were to offer:

- More intense flavours – i.e. the success of dark chocolate at this time
- Small bite sized pieces – able to pleasurably graze on
- Sophisticated flavours – adapting existing products to adult tastes
- Better for you – making indulgent products less bad

Whilst this occasion is predominantly about sweet and indulgent flavours, there is the opportunity to blur the boundaries between sweet and savoury. Many Asian snacks take this route, with flavoured jerky, whilst brands like Lindt are increasingly making salty, ginger and chili flavoured chocolates

5.8 The Social Context – Casual Entertaining at home

The way people snack on the weekend is fundamentally different to during the week. Not only are the structure of meals quite different, most clearly demonstrated by people having brunch, but people's working lives also has a huge influence on their snacking behaviours through the week.

On the weekend, it is harder to identify consistent snacking occasions, as people's lives tend to be far more diverse, but a few consistent and key occasions are prevalent. A key occasion is the Casual Entertaining occasion, when people have friends and family round to their own house, at which time, snacks are typically served.

As with many aspects of people lives, the nature of this occasion has changed fundamentally, with formal entertaining becoming less frequent. In its place, casual entertaining has emerged as the most frequent occurrence – a time at which snacking fits well.

Within the overall Casual Entertaining occasion, there are a number of versions that make different types of snacks relevant. A number of key dimensions distinguish between these versions:

- How special is the occasions – 'Casual Sophistication' being at the upper end
- How diverse is the group – a mixed group and mixed generations being the most complex

Thus at the most 'basic level' on both dimensions, is having a few mates round, who all

have a shared interest in a particular sport (i.e. to watch the footy). At the other extreme is hosting an event for a more notable event (Such as a birthday), for which there is a diverse audience. Thus rather than people changing their preferences for snacks at this time, they have become more sophisticated in choosing snacks to suit the mood of the Social / Casual Entertaining occasion.



Occasion Dynamics:

The weekend, casual entertaining occasion is most often prompted by:

- Part of a ritual – offering up snacks when having entertaining
- Offered by others – in many instances guests help out by bringing snacks along

The primary needs at play are:

- To share/ socialize with others
- Feeling peckish – it takes the pressure off of having the food ready on time
- To cheer people up – enhances the mood / occasion

In order to source snacks for this occasions, most people would either:

- Make a special trip to a specialist store – such as a deli
- Make it part of their supermarket shop – planned a few days earlier
- Have snacks in the pantry - though only for the more casual of occasions
- Purchase as part of the alcohol – buy from the Bottle Shop

Products that do well on this occasion are typically seen as having a role for a particular version:

- Chips are popular and easy, and often to hand for casual get-togethers with a few friends
- Dips are good for more diverse groups, as they offer a range of tastes
- Mini Pies and sausage rolls are good when kids are included, or a sporting event is the focus
- Spring rolls, or other Asian delicacies, work well for a more sophisticated occasion

Opportunities for Casual Entertaining at Home – A Meat based focus

Simplistically, meat based snacks are failing to access the ‘volume – middle ground’ of this snacking occasion. Many people love meat based snacks, though as a host, they believe that not all their guests would find them appealing, so would need to offer other choices. However, many respondents made the comment that the meat based snacks would likely be the first to go:

- At one extreme are mini pies and sausage rolls, which are popular with kids (of all ages)
- At the other is a charcuterie plate, with olives and the like – it looks very impressive, but is only for the more special occasions

There are a number of versions that makes up this overall Casual Entertaining occasion. Focusing on some of the more important / frequent ones, with a particular view as to where new meat based snack offerings might have an opportunity.

Many occasions have a meal as a focal point – a spread of bbq meat offerings and salads etc. Often this occasion is not a big deal - the epitome of casual sophistication, as people would rather spend time with their guests, than slaving in the kitchen.

At this time, the hosts want to offer up snacks that are in keeping with the overall mood of the occasion, but don't want to go overboard (certainly not going to the trouble of preparing hors d'oeuvres). Thus they are looking for snacks that are:

- Relatively easy to prepare – i.e. spring rolls that can be oven baked
- More sophisticated – Veggie chips are colourful and a bit more interesting
- Popular – in a small-ish group, it is about offering up things that appeal to all

- Better for you – whilst not being healthy, it is good to make conscientious choices

This social occasion is also likely to lead to ongoing usage for other occasions, such as a person / couple, pre-dinner snacking. For example, the popularity of dips was borne from this social occasion, but have subsequently become used far more for personal consumption.

Many occasions that have larger numbers of people attending, often of both sex and mixed age ranges, particularly where kids are included. People are far more inclined to 'put on a spread', both to reflect the significance of the occasion, whilst also ensuring there is something for everyone.

At this time, there are plenty of snacks available that are 'crowd pleasers' – i.e. Pringles, or large bags of chips etc. However, people struggle to find foods that are a bit more impressive but not too much hassle. Thus people are looking for snacks that are:

- A bit more fun – nachos are a real crowd pleaser
- Look impressive – made an effort
- Easy to prepare – able to throw it together
- Not your everyday snack – flavoured chicken wings are very popular in the US

Currently meat based offerings that are designed for this occasion (party pies and mini sausage rolls), largely compete on price, as against adding value to the occasion.

5.9 Energy for Endurance – i.e. Sustained Exercising

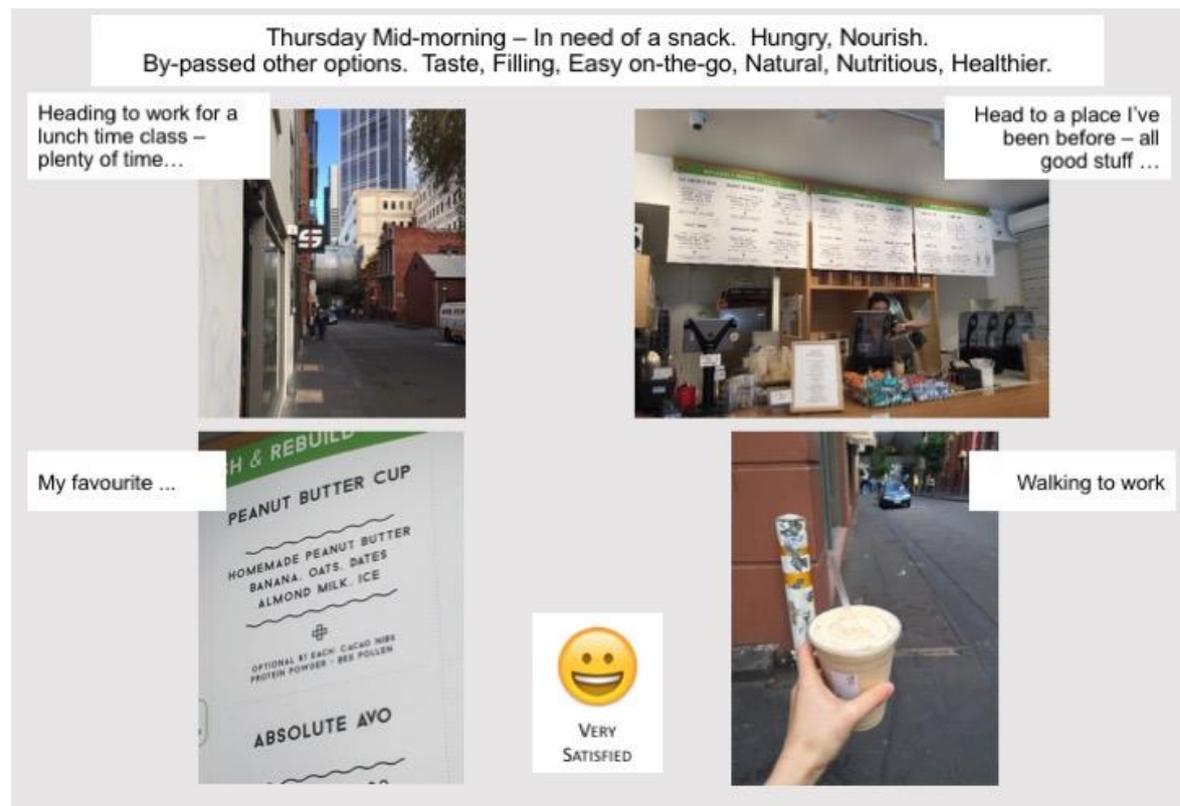
For a long time, there has been a snack offering that was designed to support those who are undertaking a long and sustained hike – 'trail mix'. This product has been available from camping shops, but also more broadly from supermarkets.

There are a number of factors have changed the dynamic of snacking, making the opportunity far broader than just for hiking:

- Many people's relationship with snacking is changing, seeing a positive role for snacks in their daily life
- Conversely, not everyone believes that the best way to prepare for an endurance task is by having a 'big breakfast', seeing elite athletes sucking on 'high energy gels' as they go
- Changing work practices, with many people pushing through meals when they have an immediately important task, making sustaining snacks more desirable
- People have a greater appreciation of the damaging side of sugar laden snacks – an initial sugar high, followed by an overall energy crash
- A greater appreciation of specific product attributes and the benefits that can lead to – i.e. protein and low GI
- There are positive image associations for being the type of person who leads an active & outdoor life at the weekend

Thus the concept has been established for a long period of time, but seemingly suffers from two limiting factors:

1. Whilst people felt that trail mix was generally wholesome and natural, they did not feel it was overtly credible, delivering a benefit significantly superior than other snacks.
2. Being labelled as 'trail mix', whilst giving it a clear role, has limited its use, only being seen as relevant to hiking.



Occasion Dynamics:

People's demand for getting Energy for an Endurance occasion is most often prompted by:

- Having a specific task / challenge to perform, like a long hike
- In need of a snack – when they are struggling to push on through

The primary needs at play, at this time are:

- To provide sustained energy – a recognition of the positive role snacks can play
- To cheer up / feeling flat – in a 'half way there' kind of way

- To share with others – often snacks are taken as a shared break
- To nourish my body – provide benefits beyond just energy to enhance wellbeing & recovery

To source snacks for this occasion, most people would plan ahead, purchasing something specifically for the occasion – typically they won't find much along the way.

Snacks that work well on this occasion are:

- Trail mix – recognized for their raison d'être.
- Muesli bars are seen as providing good portion control, easy to eat and portability
- Snickers bar – chocolate is recognized as having beneficial energy properties
- Bags of lollies – able to eat them over a long period of time

Opportunities - Energy for Endurance

For more serious sustained energy / endurance, people are re-evaluating what has gone before and seeking new solutions that give them a performance edge, so they can go further, harder and for longer.

The opportunity is to produce the next generation of snacks that deliver superior performance for sustained energy:

- Low GI, high protein and fiber, are all recognized as delivering sustained energy
- Wholesome and natural ingredients is a big plus
- Multiple bite sized pieces enable the snack to be grazed over a sustained period
- Strong and interesting flavours provide a welcome mental relief
- The feeling that one is doing oneself good is important – implied taste benefit
- Good tasting – provides a reward and a welcome rest bite from the challenge
- Portable and easy to carry – a small quantity packs a punch

Whilst dried fruit, grains, nuts and sugar based offerings have dominated the available choice, there is the opportunity for fundamentally new offerings to redefine performance expectations (as Guarana did vs. caffeine).

The most frequent occurrence of the 'Energy for endurance' snacking occasion is after work exercise. At this time people are setting themselves, after a hard day at work (usually mentally), to some form of physical exercise that requires 'pushing themselves'. There are two contrasting dynamics taking place:

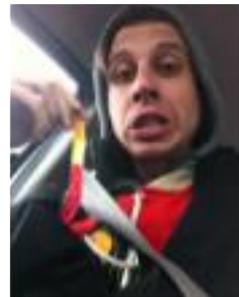
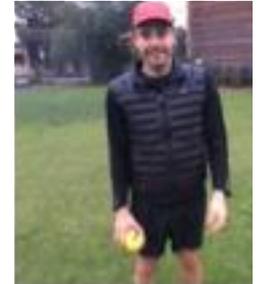
- a. People have a craving for something sweet or savoury, that could well undo their best intentions
- b. People need something that will provide a sustained energy boost, rather than a quick fix that will leave them feeling lethargic, a little later

Thus people still need a snack that addresses their immediate need, to meet their mid-afternoon cravings, but also sets them up for later on:

- Satisfy their desire for a treat
- Deliver a sustained energy benefit
- A natural / wholefood offering would have strong appeal
- Clean label / minimal ingredients, would be an advantage
- Smaller size but enduring taste would also help deliver the proposition



Snacking Segment Persona's





Keegan – Spontaneous Snacker: Female - Single, Aged 26, Grey collar – Hospital Admin

Personal Circumstances

Work – Admin role at a large hospital, no career prospects, generally gets bored
Home – shares a town house with 2 'Tradie blokes', they get on well but each do their own thing
Family – close to her mother, from NZ with a large group of friends, here is now home

Personal Values

Living for the moment – enjoys a hedonistic life style, going out & having fun

Connection with friends – shared experiences & adventures

Meeting Guys – single, but still looking

Goals & Motivations

Looking after herself – conscious that she is now starting to put weight on & needs to do something about it (going to the gym)

Frustration with her lack of career – planning on doing some studying, becoming qualified as a cosmetic surgery assistant / nurse

Lives conscientiously & frugally during the week, so she can enjoy herself more on the weekend

Life style

Outgoing personality – a people's person, wants to make more of these skills

Lays low during the first part of the week – Monday is her re-set & recovery day

Weekends start on Thursday night – pushes on through until Sunday afternoon (big drinker)

Local life – lives close to St Kilda, where all the action is & surrounded by her friends

Relationship with food

Enjoys cooking – she is the one who cooks the meal, for when the gang comes around (i.e. state of origin on the TV)

Trying to eat healthier – mostly takes her own lunch into work (pumpkin soup)

Fairly organized – does a weekly shop, prepares her own food, generally a full fridge / cupboard

Has a proper breakfast at home (porridge) and tries to do the right thing for dinner (Stir fries)

Commutes to work (E. Melb.) on the train – 30 mins, only passes a few cafes in transit



I tend to snack a lot at my desk – it helps me get through my day. I always have a snack mid-morning, when I try to be healthy, bringing some fruit in. However, it is not always enough and particularly as the week wears on I might ditch my fruit, or more likely, just have something else. Our team have a lot of fun, we're forever buying snacks and then regretting it – which means someone else has to help you out, which isn't so bad (toasted sandwich). I live for the weekend, which starts on Thursday night when I catch up with friends. We have a lot of choice of places to start the nights drinking – a pub that offers good cheap mini-pizzas (snacks) is one of our favourites. I suffer a bit the next day – but I can go down the road and get the snacks I need to make it through.

Role snacks play in life

Snacking is a big part of her life – she feels that she snacks a lot (she's right!)

Habitual – she knows she is going to be snacking at many times throughout the day
She gets hungry – cannot survive thru to the next meal

Snacking enables her to get thru the day – overcome boredom & provides emotional support

Social snacking – work friendships focus on sharing food & mutual support

Recognises that snacks are expensive – particularly hospital cafe

What type of Snacker?

Planned – starts the week off on the right foot – her stash of snacks dominates the work fridge

Saves her money – limited options within hospital, expensive to buy snacks as she goes
She can eat 'less bad' – if she waits until craving, will go for something more full-on
It gives her more control over quantities – portion control

Spontaneous (also) – she is also prone to switch or 'top up' snacks along the way

Work colleagues spring something on her – seeking her support (by eating half of it)

She cannot possibly plan for her bad days – reacts to how she's feeling
Her life outside of work involves a lot of social snacking – i.e. when drinking

Snacking barriers

Snacks are expensive if bought 'on the run'

More desirable snacks are the 'bad ones' – limiting opportunity is key

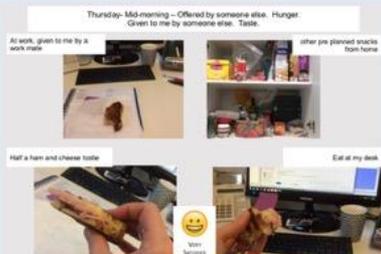
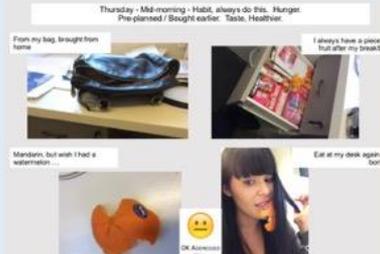
She is undone by her support of others – willing to step up to lend emotional support through shared snacking

Snacking enablers

Her work kitchen is well set up – fridge, microwave

She has no problem getting away from her desk

Happy to buy snacks at the supermarket and take with her to work



Perception of different snacks

She largely sees snacks as either being bad, or less bad – seeing little positive role in her diet

Through experience she has worked out what works for her and when to have it

Tries to eat a lot of fruit – a healthier choice, a tasty little snack

Yoghurts – she likes them and thinks they are the better choice when needing something more

Boiled eggs – she sees as the most nutritious snack

Social snacks come with different criteria – i.e. sharing hot chips when drinking (it's not good to drink on an empty stomach!)

She loves hot meat snacks (i.e. Sliders) but sees them as more of a semi-meal replacement. Her girlfriends would love it, particularly good for mixed company.



Julius – Planned Snacker: Male - Single, Aged 30, White collar – Corrections officer.

Personal Circumstances

Work – Corrections Officer with the Department of Justice – a desk job, but once or twice a week he has to travel to regional offices
Home – shares a St Kilda apartment with a friend, largely living independently when it comes to food
Family – his family lives locally, so he catches up with them most weeks, for dinner etc. No partner.

Personal Values

Those less fortunate – he puts a lot of himself into his job, it takes a fair bit out of him – he's drained by the end of each day

Time to himself – he likes his own company, happy just to do his own thing through the week

World affairs – the highlight of his day is sitting down and watching the world news of an evening

The finer things in life – he generally enjoys nicer things, such as premium cheeses & chocolate

Goals / Motivations

Giving up smoking – he is well entrenched in the process

Largely content with his life – he does not want for much (comes from a wealthy family)

Making a difference – he values the work he does

Life style

His drive to work is pretty easy – a 15-minute commute, against the traffic
On the weekend he goes out with friends, drinking etc.

He has little interest in exercising

His work colleagues are important to him, particularly his fellow case manager

Relationship with food

He enjoys his food – one of his great pleasures, with little concern for the consequences (expanding waistline)

He enjoys cooking – will cook up a storm on the weekend – i.e. Osso Buco

He makes himself a nice meal at night time – enough for 2, so he has lunch the next day

He is not particularly healthy, but he eats conscientiously and he eats good food



I admit I like to snack more than most, but with that comes a level of snacking knowledge and experience. I use my need to snack as an opportunity to get up from my desk and take a break, as work can be full on. I will duck out at lunch and head to the local shopping center to get lunch and stock up on snacks. A visit to the deli counter is a particular favourite – dips and \$20 of cut meats will provide plenty of snacks for a week or so. I like to have a good stash of snacks in my desk drawer, as I am never quite sure what I will feel like & take my fair share of the work fridge. I particularly like to share snacks with a colleague, we encourage each other on in our daily snacking adventures. I have a sausage roll every morning & love meat based snacks, having chocolate between as a palate cleanser.

Role snacks play in life

He is a serious snacker – he consumes a lot of snacks, with little concern for the volume he is consuming

He feels he needs to take breaks from work and get up from his desk – going out to get a snack is a good reason for doing this

Snacks save him when he is not able to have his proper lunch

Snacks are a great source of social connection with his work colleague – they enjoy being a bit naughty together over some shared snacks – it brightens up their day

What type of Snacker?

Planned Snacker – on a number of fronts it makes sense for him

He is cognisant of the cost of snacks, so he volume buys (i.e. multi-packs) and stores them

He enjoys getting out of the office and buying up big, filling up the work fridge

He can snack better if he has pre-planned it – he can have small goods and dips, rather than a second sausage roll

He takes pleasure in having an array of snacks available to him, when he opens his drawers, or the work fridge

Snacking barriers

His 'partner in crime' is a little more conscientious than him – he tries not to drag her down with some of his snacking choices (they end up sharing a lot of snacks)

He mostly loves savoury, so tends to need to have a sweet treat between, as a palate cleanser before his next savoury snack

Snacking enablers

He has an immediate snacking option out the front of his work – loves going down to the van out the front and getting a sausage roll most days

He has many 'somewhat accessible' options for his snacking – a shopping center with a good supermarket, as well as a diverse food hall

He has large desk drawers and no pencils etc. – thus he has a huge stash of snacks, readily to hand.

Similarly, a good office kitchen – he takes more than his fair share of the fridge space

He has a very accepting work environment – get the impression that nothing is off-limits for him to eat, whilst sitting at his desk

Monday - Mid-morning, in need of a snack. Hunger, Socialise, Craving
Pre-planned. Taste, Many bites, Eat on the go, Appropriate in circumstances.

Had this in the work fridge last week. A lot of stuff to choose from – bread, yogurt, oysters, olives... Full like some dips. Sitting at my desk. Smiling face icon. Van Service.

Monday - Mid afternoon, in need of a snack. Hunger & socialise.
Pre-planned. Taste, Filling, Many bites, Right Flavour, Liked by Others, Easy, Better Quality.

Personal work drawer – no stocked last week. Much to choose from – chocolate, sausage, kani. Original pizza shops? Too good to share, other than with my work colleagues. Smiling face icon. Van Service.

Wednesday - Mid afternoon, habit. Treat, Craving, Cheer Up.
Pre-planned – many options. Taste delicious & Right Flavour & Right Size. Solid collection of treats.

Always have a treat in my drawer. Not sure how long its been sitting there. Trying to get this writing report. Smiling face icon. Van Service.

Tuesday - Middle of the day, in need of a snack - Hunger, Social & Cheer Up.
Went out of my way. Taste, Many Bites, Others like, No guilt, Appropriate.

Drove down to local Woolies. A weeks worth of quality snacking supplies for \$20. Had it at my desk as a secondary lunch. Smiling face icon. Van Service.

Thursday - Middle of the day, missed a meal. Hungry, Shame, Craving, Cheer Up, Break.
Pre-planned. Value, Delicious, Many bites, Others like, Easy, Natural, Nutritious, Healthy.

Drove down to local Woolies. A weeks worth of quality snacking supplies for \$20. Del is a favourite section to browse. Had it at my desk as a secondary lunch. Smiling face icon. Van Service.

Thursday - Evening – in need of a pre-dinner snack. Hungry, Reward, Relax. Pre-planned.
Delicious, Many bites, Right flavour, Easy. Somewhat satisfied.

Get home from work, don't feel like cooking. Cheese is perfect for pre-dinner. Watching the world news - try and make sure I don't eat too much. Smiling face icon. Van Service.

Perception of different snacks

He loves meat based snacks and has travelled extensively, experiencing meat snacks from around the world – he loves Biltong, wishes it was available here

When he used to work in the city, he would visit the Asian Jerky shops, where he would buy

He does not consider 'hot snacks' to be snacks at all – hence his mid-morning sausage roll he considers to be a secondary breakfast / early lunch, not a snack



Gaia – Purposeful Snacker: Female – Partner, Aged 26, White / Grey collar.

Personal Circumstances

Work – Having trained as a dancer, she is now establishing herself as a Barre Yoga teacher
Home – she lives with her young son and an au pair who helps out looking after her son, given challenging working hours
Family – besides her son, she has a partner; with whom she spends the weekend

Personal Values

Family – bringing up her young son, as a single parent, is her priority

Career – she wants to make a success of her career, establishing herself as a yoga barre instructor

Partner – spending quality time at the weekend with him

Goals / Motivations

Establish herself in her career as a yoga teacher

Acting – she has aspirations to do more acting work, but sees it as being challenging to accommodate

Financial Independence – conscious that her choices are limited (i.e. does not have a car)

Life style

Her work requires her to be available at both ends of the day, for early morning and evening sessions, as well as lunch times

She has a fair amount of time at home, during the day, when she gets a bit bored and tends to graze on the snacks she has available

Her weekends are somewhat similar, as particularly on Saturday, she is in demand as a yoga teacher

Relationship with food

Sees breakfast as being important & so has a good breakfast, though not always able to have it

She goes to the health food store on the weekend, as well as the market / supermarket

With her partner, she tries to prepare much of the weeks' food, to get herself organized

She does not believe she is a very good cook – struggles with all but the basic things

She has a few intolerances, if she eats the wrong things it leaves her feeling bloated (which she is particularly conscious of, given her line of work) – thus tries to eat gluten free and limit dairy

Having been a dancer, she is very calorie aware, but does not worry about it so much these days – though knowing, means she can't help herself



Snacks are hugely important in my life – I would really struggle to get through my day, if I was not organised in having the right kind of snacks. Want used to be a chore – not being able to have set meals, has now become a preferred way of life, I am happy not to stuff myself and instead graze on healthy snacks, that I mostly buy before hand. I like to think of myself as fairly discerning snackers. I see other people making poor choices that you just know is not going to work out well for them. I used to feel I was the exception, but more and more I see other people and places which offer the kind of snacks that work for me. Whilst I don't treat myself in the same way that others do – having something sweet, I do enjoy my healthy 'Peanut butter cups' and raw cakes.

Role snacks play in life

Snacks are critically important for her being at her best - able to maintain her energy levels

Snacks are not a personal treat – only when she is with her son, would she enjoy 'treat-like' snacks

Makes her own snacks – 'bliss balls', with coconut, cocoa and chia, which she offers up to her yoga class

She is very aware of the properties of different snacks and the resultant benefits – the sustained energy that a handful of almonds offers

Grazing on snacks helps relieve the boredom that she has during the day

Snacking barriers

Price is a significant barrier – she tends not to buy too many snacks from the health food store

She seeks snack that are gluten and dairy free – whilst it is not essential (i.e. ice cream treat), she is mindful of not getting bloated prior to doing a yoga class

What type of Snacker?

Purposeful Snacker – she is very conscious of how she is feeling and the role snacks play in managing & maintaining her desired energy levels & overall wellbeing

Working strange hours, she feels she cannot rely upon 'meals' for providing all her nutrition requirements - snacks sustaining her through her classes

She sees that snacks are better at providing certain key parts of her nutrition – i.e. Omega 3

She has particular places that she likes to go to, that serve the kinds of snacks she enjoys

She is 'in-tune' with not only how she is feeling now, but how she will be feeling in the next few hours and what state she needs to be in at that time

She would most like to graze through the day – 3 small meals and 3 nutritious snacks

At home she is (planned snacker) organized & has all desired options

Snacking enablers

She feels lucky to work in the city, where there are a number of options for healthier / better for you snacks available

She is well stocked at home, whether it be bags of nuts, or the right ingredients for smoothies – spending a lot of time at home

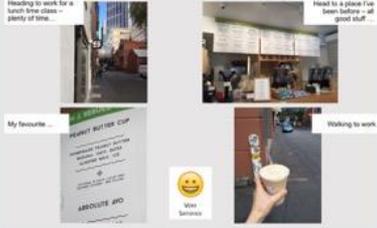
Tuesday Early morning – Missed a meal / on-the-go. To nourish and start my metabolism. Ready to hand. Value, taste, filling. Easy to eat on-the-go. Natural, No guilt



Tuesday Evening – Special Occasion. Reward, Share, Craving. By-passed other options. Taste, Right flavour, Premium, Right size, Others approve.



Thursday Mid-morning – In need of a snack. Hungry, Nourish. By-passed other options. Taste, Filling, Easy on-the-go, Natural, Nourious, Healthier.



Thursday Mid-afternoon – Social, Reward, Share. Number of accessible options. Taste, Right flavour, Others liked. Natural, Nourious, Healthier, Right size, No guilt.



Saturday Mid-morning – In need of a snack. Hunger, Nourish. Pre-planned / bought earlier. Value, Taste, Filling, Natural, Nourious, Healthier, Premium.



Saturday Evening – Missed a meal. Hunger. Most readily to hand. Filling, Easy on-the-go, Natural, Nourious, Healthier, Right Size, No Guilt.



Perception of different snacks

She is a big fan of smoothies – in particular they provide a big nutrition hit, without weighing her down over the following hours

She loves almonds – has multiple uses for a small handful of almonds, giving her sustained energy and staving off hunger for an hour or so

She likes natural snacks – crunching on a carrot, half an avocado or a boiled egg, are all useful snacks

She likes meat, but does not see any offerings in the market that she would eat – all too unhealthy & have imagery associations that she is not comfortable with

APPENDIX



Keegan – Spontaneous Snacker: Female - Single, Aged 26, Grey collar – Hospital Admin

Personal Circumstances

Work – Admin role at a large hospital, no career prospects, generally gets bored

Home – shares a town house with 2 ‘Tradie blokes’, they get on well but each do their own thing

Family – close to her mother, from NZ with a large group of friends, here is now home

Personal Values

Living for the moment – enjoys a hedonistic life style, going out & having fun

Connection with friends – shared experiences & adventures

Meeting Guys – single, but still looking

Goals & Motivations

Looking after herself – conscious that she is now starting to put weight on & needs to do something about it (going to the gym)

Frustration with her lack of career – planning on doing some studying, becoming qualified as a cosmetic surgery assistant / nurse

Lives conscientiously & frugally during the week, so she can enjoy herself more on the weekend

Life style

Outgoing personality – a people’s person, wants to make more of these skills

Lays low during the first part of the week – Monday is her re-set & recovery day

Weekends start on Thursday night – pushes on through until Sunday afternoon (big drinker)

Local life – lives close to St Kilda, where all the action is & surrounded by her friends

Relationship with food

Enjoys cooking – she is the one who cooks the meal, for when the gang comes around (i.e. state of origin on the TV)

Trying to eat healthier – mostly takes her own lunch into work (pumpkin soup)

Fairly organized – does a weekly shop, prepares her own food, generally a full fridge / cupboard

Has a proper breakfast at home (porridge) and tries to do the right thing for dinner (Stir fries)

Commutes to work (E. Melb.) on the train – 30 mins, only passes a few cafes in transit



I tend to snack a lot at my desk – it helps me get through my day. I always have a snack mid-morning, when I try to be healthy, bringing some fruit in. However, it is not always enough and particularly as the week wears on I might ditch my fruit, or more likely, just have something else. Our team have a lot of fun, we're forever buying snacks and then regretting it – which means someone else has to help you out, which isn't so bad (toasted sandwich). I live for the weekend, which starts on Thursday night when I catch up with friends. We have a lot of choice of places to start the nights drinking – a pub that offers good cheap mini-pizzas (snacks) is one of our favourites. I suffer a bit the next day – but I can go down the road and get the snacks I need to make it through.

Role snacks play in life

Snacking is a big part of her life – she feels that she snacks a lot (she's right!)

Habitual – she knows she is going to be snacking at many times throughout the day

She gets hungry – cannot survive thru to the next meal

Snacking enables her to get thru the day – overcome boredom & provides emotional support

Social snacking – work friendships focus on sharing food & mutual support

Recognises that snacks are expensive – particularly hospital cafe

What type of Snacker?

Planned – starts the week off on the right foot – her stash of snacks dominates the work fridge

Saves her money – limited options within hospital, expensive to buy snacks as she goes

She can eat 'less bad' – if she waits until craving, will go for something more full-on

It gives her more control over quantities – portion control

Spontaneous (also) – she is also prone to switch or 'top up' snacks along the way

Work colleagues spring something on her – seeking her support (by eating half of it)

She cannot possibly plan for her bad days – reacts to how she's feeling

Her life outside of work involves a lot of social snacking – i.e. when drinking

Snacking barriers

Snacks are expensive if bought 'on the run'

More desirable snacks are the 'bad ones' – limiting opportunity is key

She is undone by her support of others – willing to step up to lend emotional support through shared snacking

Snacking enablers

Her work kitchen is well set up – fridge, microwave

She has no problem getting away from her desk

Happy to buy snacks at the supermarket and take with her to work

Wednesday - Night – In need of a snack. Share, Treat, Craving.
Bought earlier. Taste, Many mouthfuls, Right flavour, Liked by others.

Having got home early & cooked a roast chicken – later on that night, needed more



Checked out what we had in the fridge / freezer

We polished off the ice cream



VERY SATISFIED



Shared it – was better than the game

Thursday - Mid-morning - Habit, always do this. Hunger.
Pre-planned / Bought earlier. Taste, Healthier.

From my bag, brought from home



I always have a piece of fruit after my breakfast



Mandarin, but wish I had a watermelon ...



OK ADDRESSED NEED



Eat at my desk again ... boring

Thursday- Mid-morning – Offered by someone else. Hunger.
Given to me by someone else. Taste.

At work, given to me by a work mate



other pre planned snacks from home



Half a ham and cheese tostie



VERY SATISFIED



Eat at my desk

Thursday - Evening – Offered by someone else. Share, Treat, Hunger.
Readily to hand. Value, Taste, Filling, Right flavour, Right size, Liked by others.

Regular Thursday night catch up – somewhere we all like



As much for the great food offering ...

\$5 Pizza's – fantastic



VERY SATISFIED



Everyone loves them

Thursday - Mid-morning - Habit, always do this. Hunger.
Pre-planned / Bought earlier. Taste, Healthier.

From my bag, brought from home



I always have a piece of fruit after my breakfast



Mandarin, but wish I had a watermelon ...



Eat at my desk again ... boring



Friday - Mid-morning – In need of a snack. Hunger, Craving.
Pre-planned / Bought earlier. Taste, Flavour, Filling, Value.

On my way into work this morning, stopped off at Foodworks ...



Shop full of choices – never intended to get the Dim Sims



Wanted something to craze on to get me through the day



Also ate the Dim Sims at my desk



Perception of different snacks

She largely sees snacks as either being bad, or less bad – seeing little positive role in her diet

Through experience she has worked out what works for her and when to have it

Tries to eat a lot of fruit – a healthier choice, a tasty little snack

Yoghurts – she likes them and thinks they are the better choice when needing something more

Boiled eggs – she sees as the most nutritious snack

Social snacks come with different criteria – i.e. sharing hot chips when drinking (it's not good to drink on an empty stomach!)

She loves hot meat snacks (i.e. Sliders) but sees them as more of a semi-meal replacement. Her girlfriends would love it, but particularly good for mixed company.



Julius – Planned Snacker: Male - Single, Aged 30, White collar – Corrections officer.

Personal Circumstances

Work – Corrections Officer with the Department of Justice – a desk job, but once or twice a week he has to travel to regional offices

Home – shares a St Kilda apartment with a friend, largely living independently when it comes to food

Family – his family lives locally, so he catches up with them most weeks, for dinner etc. No partner.

Personal Values

Those less fortunate – he puts a lot of himself into his job, it takes a fair bit out of him – he's drained by the end of each day

Time to himself – he likes his own company, happy just to do his own thing through the week

World affairs – the highlight of his day is sitting down and watching the world news of an evening

The finer things in life – he generally enjoys nicer things, such as premium cheeses & chocolate

Goals / Motivations

Giving up smoking – he is well entrenched in the process

Largely content with his life – he does not want for much (comes from a wealthy family)

Making a difference – he values the work he does

Life style

His drive to work is pretty easy – a 15-minute commute, against the traffic

On the weekend he goes out with friends, drinking etc.

He has little interest in exercising

His work colleagues are important to him, particularly his fellow case manager

Relationship with food

He enjoys his food – one of his great pleasures, with little concern for the consequences (expanding waistline)

He enjoys cooking – will cook up a storm on the weekend – i.e. Osso Buco

He makes himself a nice meal at night time – enough for 2, so he has lunch the next day

He is not particularly healthy, but he eats conscientiously and he eats good food



I admit I like to snack more than most, but with that comes a level of snacking knowledge and experience. I use my need to snack as an opportunity to get up from my desk and take a break, as work can be full on. I will duck out at lunch and head to the local shopping center to get lunch and stock up on snacks. A visit to the deli counter is a particular favourite – dips and \$20 of cut meats will provide plenty of snacks for a week or so. I like to have a good stash of snacks in my desk drawer, as I am never quite sure what I will feel like & take my fair share of the work fridge. I particularly like to share snacks with a colleague, we encourage each other on in our daily snacking adventures. I have a sausage roll every morning & love meat based snacks, having chocolate between as a palate cleanser.

Role snacks play in life

He is a serious snacker – he consumes a lot of snacks, with little concern for the volume he is consuming

He feels he needs to take breaks from work and get up from his desk – going out to get a snack is a good reason for doing this

Snacks save him when he is not able to have his proper lunch

Snacks are a great source of social connection with his work colleague – they enjoy being a bit naughty together over some shared snacks – it brightens up their day

What type of Snacker?

Planned Snacker – on a number of fronts it makes sense for him

He is cognisant of the cost of snacks, so he volume buys (i.e. multi-packs) and stores them

He enjoys getting out of the office and buying up big, filling up the work fridge

He can snack better if he has pre-planned it – he can have small goods and dips, rather than a second sausage roll

He takes pleasure in having an array of snacks available to him, when he opens his drawers, or the work fridge

Snacking barriers

His ‘partner in crime’ is a little more conscientious than him – he tries not to drag her down with some of his snacking choices (they end up sharing a lot of snacks)

He mostly loves savoury, so tends to need to have a sweet treat between, as a palate cleanser before his next savoury snack

Snacking enablers

He has an immediate snacking option out the front of his work – loves going down to the van out the front and getting a sausage roll most days

He has many ‘somewhat accessible’ options for his snacking – a shopping center with a good supermarket, as well as a diverse food hall

He has large desk drawers and no pencils etc. – thus he has a huge stash of snacks, readily to hand.

Similarly, a good office kitchen – he takes more than his fair share of the fridge space

He has a very accepting work environment – get the impression that nothing is off-limits for him to eat, whilst sitting at his desk

Monday - Mid-morning, in-need of a snack. Hunger. Socialise, Craving.
Pre-planned. Taste, Many bites, Eat on the go, Appropriate in circumstances.

Had this in the work fridge from last week



A lot of stuff to choose from – bread, yoghurt, octopus, olives, ..



Felt like some dips



SOMEWHAT SATISFIED

Sitting at my desk



Monday - Mid afternoon, in need of a snack: Hunger & socialise.
Pre-planned. Taste, Filling, Many bites, Right Flavour, Liked by Others, Easy, Better Quality.

Personal work drawer – re-stocked last week



Much to choose from – chocolate, sultanas, tuna,



Original pizza shapes!!



VERY SATISFIED

Too good to share, other than with my work colleague



Wednesday - Mid-afternoon, habit: Treat, Craving, Cheer Up.
Pre-planned – many options. Taste delicious & Right Flavour & Right Size.

Always have a treat mid-afternoon



Solid collection of treats



Not sure how long it's been sitting there



VERY SATISFIED

Trying to get thru writing report



Tuesday - Middle of the day, in need of a snack: Hunger, Social & Cheer Up.
Went out of my way. Taste, Many Bites, Others like, No guilt, Appropriate.

Drove down to local Woolies



Deli is a favourite section to browse



A weeks worth of quality snacking supplies for \$20



VERY SATISFIED

Had it at my desk as a secondary lunch



Thursday - Middle of the day, missed a meal. Hungry, Share, Craving, Cheer Up, Break.
Pre-planned. Value, Delicious, Many bites, Others like, Easy, Natural, Nutritious, Healthier.

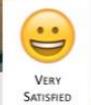
Drove down to local Woolies



Deli is a favourite section to browse



A weeks worth of quality snacking supplies for \$20



VERY SATISFIED

Had it at my desk as a secondary lunch



Thursday: Evening – in need of a pre-dinner snack. Hungry, Reward, Relax. Pre-planned.
Delicious, Many bites, Right flavour, Easy. Somewhat satisfied

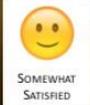
Get home from work, don't feel like cooking



See what I have in the fridge



Cheese is perfect for pre-dinner



SOMEWHAT SATISFIED

Watching the world news – try and make sure I don't eat too much



Perception of different snacks

He loves meat based snacks and has travelled extensively, experiencing meat snacks from around the world – he loves Biltong, wishes it was available here

When he used to work in the city, he would visit the Asian Jerky shops, where he would buy

He does not consider 'hot snacks' to be snacks at all – hence his mid-morning sausage roll he considers to be a secondary breakfast / early lunch, not a snack



Gaia – Purposeful Snacker: Female – Partner, Aged 26, White / Grey collar.

Personal Circumstances

Work – Having trained as a dancer, she is now establishing herself as a Barre Yoga teacher

Home – she lives with her young son and an au pair who helps out looking after her son, given challenging working hours

Family – besides her son, she has a partner; with whom she spends the weekend

Personal Values

Family – bringing up her young son, as a single parent, is her priority

Career – she wants to make a success of her career, establishing herself as a yoga barre instructor

Partner – spending quality time at the weekend with him

Goals / Motivations

Establish herself in her career as a yoga teacher

Acting – she has aspirations to do more acting work, but sees it as being challenging to accommodate

Financial Independence – conscious that her choices are limited (i.e. does not have a car)

Life style

Her work requires her to be available at both ends of the day, for early morning and evening sessions, as well as lunch times

She has a fair amount of time at home, during the day, when she gets a bit bored and tends to graze on the snacks she has available

Her weekends are somewhat similar, as particularly on Saturday, she is in demand as a yoga teacher

Relationship with food

Sees breakfast as being important & so has a good breakfast, though not always able to have it

She goes to the health food store on the weekend, as well as the market / supermarket

With her partner, she tries to prepare much of the weeks' food, to get herself organized

She does not believe she is a very good cook – struggles with all but the basic things

She has a few intolerances, if she eats the wrong things it leaves her feeling bloated (which she is particularly conscious of, given her line of work) – thus tries to eat gluten free and limit dairy

Having been a dancer, she is very calorie aware, but does not worry about it so much these days – though knowing, means she can't help herself



Snacks are hugely important in my life – I would really struggle to get through my day, if I was not organised in having the right kind of snacks. What used to be a chore – not being able to have set meals, has now become a preferred way of life, I am happy not to stuff myself and instead graze on healthy snacks, that I mostly buy before hand. I like to think of myself as fairly discerning snackers. I see other people making poor choices that you just know is not going to work out well for them. I used to feel I was the exception, but more and more I see other people and places which offer the kind of snacks that work for me. Whilst I don't treat myself in the same way that others do – having something sweet, I do enjoy my healthy 'Peanut butter cups' and raw cakes.

Role snacks play in life

Snacks are critically important for her being at her best - able to maintain her energy levels

Snacks are not a personal treat – only when she is with her son, would she enjoy 'treat-like' snacks

Makes her own snacks – 'bliss balls', with coconut, cocoa and chia, which she offers up to her yoga class

She is very aware of the properties of different snacks and the resultant benefits – the sustained energy that a handful of almonds offers

Grazing on snacks helps relieve the boredom that she has during the day

Snacking barriers

Price is a significant barrier – she tends not to buy too many snacks from the health food store

She seeks snack that are gluten and dairy free – whilst it is not essential (i.e. ice cream treat), she is mindful of not getting bloated prior to doing a yoga class

What type of Snacker?

Purposeful Snacker – she is very conscious of how she is feeling and the role snacks play in managing & maintaining her desired energy levels & overall wellbeing

Working strange hours, she feels she cannot rely upon 'meals' for providing all her nutrition requirements - snacks sustaining her through her classes

She sees that snacks are better at providing certain key parts of her nutrition – i.e. Omega 3

She has particular places that she likes to go to, that serve the kinds of snacks she enjoys

She is 'in-tune' with not only how she is feeling now, but how she will be feeling in the next few hours and what state she needs to be in at that time

She would most like to graze through the day – 3 small meals and 3 nutritious snacks

At home she is (planned snacker) organized & has all desired options

Snacking enablers

She feels lucky to work in the city, where there are a number of options for healthier / better for you snacks available

She is well stocked at home, whether it be bags of nuts, or the right ingredients for smoothies – spending a lot of time at home

Tuesday Early morning – Missed a meal / on-the-go. To Nourish and Start my metabolism. Readily to hand. Value, taste, filling, Easy to eat on-the-go, Natural, No guilt

Early morning, heading out, no time for proper breakfast



Favourite from the health food shop



VERY SATISFIED



With gluten free wholemeal bread

Tuesday Evening – Special Occasion. Reward, Share, Craving. By-passed other options. Taste, Right flavour, Premium, Right size, Others approve.

Out for a walk along the local high st.



Good selection – its all good



We all chose our favourite flavour ...



VERY SATISFIED



All very happy

Thursday Mid-morning – In need of a snack. Hungry, Nourish. By-passed other options. Taste, Filling, Easy on-the-go, Natural, Nutritious, Healthier.

Heading to work for a lunch time class – plenty of time...



Head to a place I've been before – all good stuff ...



My favourite ...



VERY SATISFIED



Walking to work

Thursday Mid-afternoon – Social. Reward, Share. Number of accessible options. Taste, Right flavour, Others liked, Natural, Nutritious, Healthier, Right size, No guilt.

At a cafe in the city



Checking out something to have with our coffee's



Raw chocolate hazelnut cake – sugar & gluten free Looks delicious, but large



VERY SATISFIED

We both like it, so decided to share



Saturday: Mid-morning – In need of a snack. Hunger, Nourish.
Pre-planned / bought earlier. Value, Taste, Filling, Natural, Nutritious, Healthier, Premium.

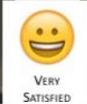
God to Yoga place early,
looking after reception



Brough snacks for
the occasion ...



...



VERY
SATISFIED



Sit and eat - plenty of
time to let it go down...

Saturday Evening – Missed a meal. Hunger. Most readily to hand.
Filling, Easy on-the-go, Natural, Nutritious, Healthier, Right Size, No Guilt.

Need to make
dinner, but running
late, so very hungry



Look what I can
find in the pantry ...



Find some gluten
free, sugar free,
coconut bread balls.



OK ADDRESSED
NEED

Ate at the bench
whilst unstacking
dishwasher



Perception of different snacks

She is a big fan of smoothies – in particular they provide a big nutrition hit, without weighing her down over the following hours

She loves almonds – has multiple uses for a small handful of almonds, giving her sustained energy and staving off hunger for an hour or so

She likes natural snacks – crunching on a carrot, half an avocado or a boiled egg, are all useful snacks

She likes meat, but does not see any offerings in the market that she would eat – all too unhealthy & have imagery associations that she is not comfortable with