

ATTITUDES TO SNACKING – INDIAN CONSUMER – 2018

Give snacks a health makeover by adding better-for-you ingredients in convenient packaging to capitalise on the growing snacking culture of urban Indian consumers.



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Report Content

EXECUTIVE SUMMARY

- What you need to know – Summary
- Justify snacking indulgence by offering nutritional elements in a playful way
- Ride on the wellness trend and showcase snacking as a healthy habit by incorporating healthy ingredients
- Call out ingredients to highlight taste and health features in snacks
- Take cues from unorganised players and cater to local tastes
- Focus on communicating 'Indianness'
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Growing snacking culture yields opportunities beyond traditional snacks
 - Graph 1: Snack food volume consumption per capita (population), 2008-21
- Offer functional indulgence to make it easier for urban consumers to justify snacking
- Offer on-the-go snacks as commuting becomes the new 'TV time'
- Three Indian metros feature in the top 10 cities world-wide with long one-way commute times

Global trends and how they are playing out in India

- Help consumers feel good about snacking
- Elevate mood the natural way with better-for-you snacks
- Focus on healthy on-the-go products
- Indian packaging and product innovations address need for healthy on-the-go snacks
- Stimulate a variety of senses
- Doritos Blaze sets fire to the snacking experience
- Ritz Crackers communicates the crunch through texture and sound in South Korea
- What's happening in India
- In India, snacks appeal to the senses through regional flavours, different shapes and textures
- The street comes to you – Indian traditional snacks in a pack

CONSUMER INSIGHTS

- What you need to know

Why Indian consumers snack

- Snacking satisfies emotional cravings as well as functional needs
 - Graph 2: Reasons for snacking, February 2018
- Emotional and functional snacking motivations/themes
- Offer snacks that are not pure indulgence, but justify indulgence

Attitudes towards snacking

- Introduce health into snacks without compromising taste or convenience
 - Graph 3: Attitudes to snacking, February 2018
- Three pillars of snacking
- Target female snackers – particularly homemakers – who snack for myriad reasons with a variety of positioning claims
- Use health and energy as a hook to appeal to 35-44 year-olds
 - Graph 4: Reasons for snacking, by age, February 2018

Important factors for choosing a snack

- Deliver health and nutrition via natural ingredients and entice with new flavours
 - Graph 5: Most important factors while choosing a snack, February 2018
- Redefine 'food snacks' and target meal occasions
- Snack in a bottle: blurring the line between snacks and beverages offers opportunities for 'snack drinks'
- Oat-based dairy drinks can be positioned as an anytime snack in India

The curious case of 'super snackers'

- Identify super snackers to target with snacks across multiple day-parts
 - Graph 6: Demographic profile of super snackers, February 2018
- Super snackers are largely women
- Educate consumers about snacks' many functional benefits to convert them into super snackers
- Offer variety of healthy snacks to target health snackers and convert them to super snackers
 - Graph 7: Attitudes towards snacking – Select statements, by daily snacking frequency, February 2018
- Focus attention on regular snackers as well with more health offerings
- Highlight taste and downplay health for super snackers, since 'health foods' are perceived as being less tasty
- Provide new formats, innovation and convenience to elevate snacks up to the meal pedestal
 - Graph 8: Attitudes towards snacking – Select statements, by daily snacking frequency, February 2018

MARKET APPLICATION

- Opportunities: key areas of focus

Opportunities

- Go nutty, grainy or fruity to give snacks a health makeover
 - Graph 9: Snack sub-category product launches, 2013-17

Attitudes to Snacking – Indian Consumer – 2018

- Fit in with existing local tastes and snacks

Who's innovating

- Get inspired by regional and traditional flavours from around India
- 'Patanjalification' of diet snacks
- Kellogg's goes beyond breakfast, expanding to an all-day snack position

Global innovations

- Indulgence is the name of the game
- Playful snacking and indulgence woo snackers
- Super snacks with the power of nuts, seeds or dried foods
- South Africa: Food solution for an active, on-the-go lifestyle

APPENDIX

- Consumer survey data
- Definitions and terms

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