



Healthy Snacking: A Trend with Great Growth Potential

Dear Readers,

In our fast-paced world, eating habits are evolving rapidly. In the out-of-home market, we particularly observe a measurable shift towards smaller, health-oriented meals. A more flexible, time-saving, and mindful eating pattern is gradually replacing the traditional rhythm of three main meals a day. This trend, known as "Snackification," is primarily driven by iBrains and Millennials.

Health as a Driver of Consumption Changes

Health is a central driver behind the changes in eating and drinking habits. 24% of shoppers plan to change their snacking habits to live healthier lives.¹ Young consumers, in particular, value healthy snacks such as ready-to-eat fruits and vegetables, nuts, smoothies, and functional bars.

¹ In % | Behavior Change | EU-20 spring 2024 n=14.996

The revenue from these healthy snacks in the out-of-home market has increased by 24% from 2020 to 2024.²

This health trend offers diverse opportunities for various formats in the out-of-home market. Quick-service restaurants focusing on salads, bowls, wraps, and similar offerings are well-positioned to capture this growing market.

A good example of this development is the concepts of Dean & David and immergrün. In the past twelve months, their guests visited the restaurants on average three times and spent approximately €43 per customer — with double-digit growth compared to the previous year. The average check of €13 per visit is comparable to competitors like Subway and Nordsee.³

The Motivation Behind the Snackification Trend

When consumers are asked about the reasons for changes in their eating and drinking habits, health ranks first for main meals, followed by the desire to save money and time. For snacks, however, health comes in second place — with price playing a decisive role. Given the increased cost of living due to high inflation and the additional price hikes in the gastronomy sector caused by the VAT increase on meals consumed on-site, this focus on price is understandable. A survey conducted in September confirms this: 36% of iBrains and Millennials, as well as 33% of Baby Boomers, cite lower prices as an important factor driving their increased consumption of snacks and mini-meals.

Growth potentials through snacking can be found in non-price-driven motives. Healthier and lower-calorie options are crucial for 35% of younger generations and 29% of older generations⁴. On average across all generations, higher-quality and more natural ingredients (☑ 26%), a stronger regional origin of ingredients (☑ 14%), environmentally friendly packaging (☑ 13%), and better animal welfare labelling (☑ 12%) are additional important aspects that could enhance consumption.⁵

² DE YouGov Consumer Panel OOH individual

³ DE YouGov Consumer Panel OOH individual, MAT September 2024 vs. previous year

⁴ younger generations = iBrains + Millennials; older generations = Baby Boomers

⁵ YouGov Profiles | n = 8.209 | Question of the day from the 03rd of October 2024

Growth Opportunities Through Snackification

Changing consumption habits are forcing restaurateurs to continuously adapt their offerings to meet the evolving needs of their guests. The declining consumption of red meat, the increasing avoidance of alcohol among younger generations, and the growing demand for vegetarian and vegan products require menu expansion with suitable alternatives.

Non-alcoholic beer and cocktails cater to the trend for alcohol-free beverages, while vegan patties are a popular option for meatless dishes in burger restaurants. Bowls, wraps, and creative salad creations also serve as potential responses to the growing health trend. This offers enormous opportunities for the retail food sector, convenience manufacturers, and gastronomy. A stronger focus on healthy, practical snack options that also appeal to guests can not only increase sales but also promote the health of consumers.

Conclusion

Healthy snacking is here to stay. Younger households, in particular, are increasing their demand for corresponding items and dishes, but older generations are also becoming more open to snacking. These are ideal conditions to expand your healthy snack range now. Our studies can help ensure you don't overlook any relevant aspect of this trend.

Early Trend Detection with the First FMCG Trend Map

In addition to healthy snacking, other trend dimensions also highlight the far-reaching changes in consumption behaviour. Our study, conducted in collaboration with *pressrelations*, connects future FMCG trends and narratives with current product trends.

It enables the identification, classification, and quantification of current trend topics in the FMCG environment using the innovative early-topic detection methodology *FirstSignals®* by *pressrelations*.

Quantification is achieved by categorizing trend topics based on their newsworthiness into four size classes. With our specially developed FMCG Trend Map, which also includes quantification, we are

first movers in this field. We provide clear added value in consulting on your brand and category, underpinned by the extensive knowledge of our FMCG experts in the market.

➤ [PLEASE GET IN TOUCH WITH US](#)

Kind regards

Bianca Corcoran und Sebastian Walter

Your YouGov Out-of-Home-Team:

Bianca Corcoran and Sebastian Walter

YouGov

+49 911 9503 4741

outofhome@YouGov.com