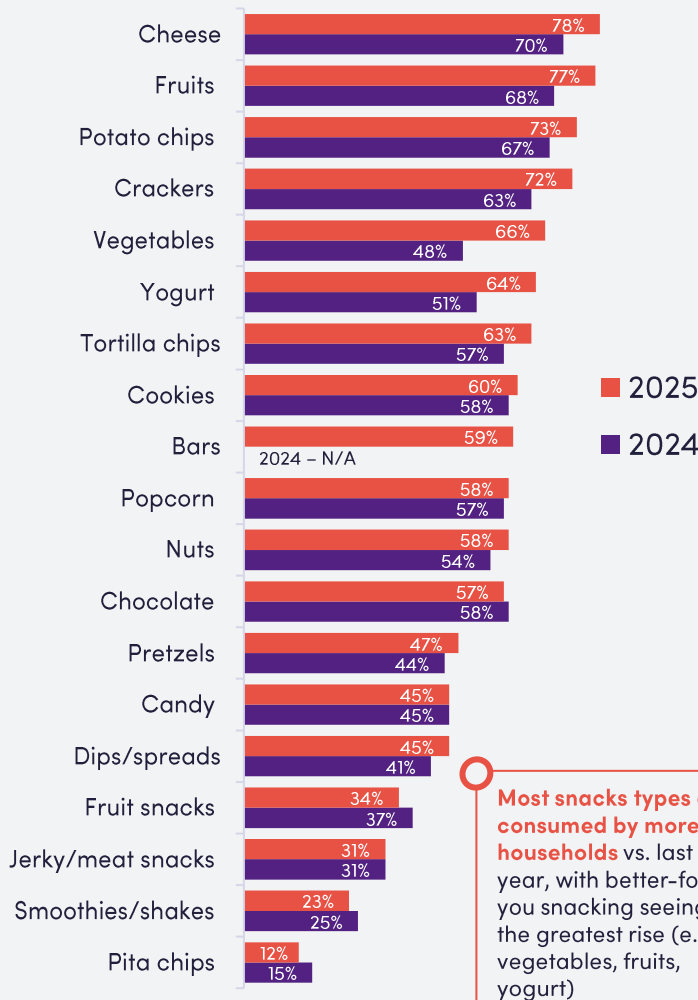


Welcome to the April Consumer Digest, our monthly newsletter where we provide relevant, informative, and actionable insights around consumer trends. This month, we'll take a bite out of snacking, including what shoppers are snacking on, where they do their snacking, and what time of day sees the most munchies. We also dig into snacking habits and drivers, as well as what shoppers are seeking in new product innovation. Lastly, we took an extra peek at pretzels in honor of National Pretzel Day!

Snacking: What are shoppers eating & Where

What types of snacks are shoppers eating?



Most snacks types are consumed by more households vs. last year, with better-for-you snacking seeing the greatest rise (e.g., vegetables, fruits, yogurt)



Snacking location: Home is where the heart is ... and where the snacking occurs

Across all snack types consumed, home is the #1 consumption location

Outside of the home, **top location** for each snack type:



WORK

Bars (43%), Fruits (36%), Nuts (36%), Pretzels (32%), Crackers (31%), Jerky (31%), Candy (30%), Yogurt (28%), Cheese (28%), Chocolate (27%), Vegetables (25%)



PARTIES

Pita chips (34%), Dips/spreads/nut butters (31%), Potato chips (29%), Tortilla chips (29%), Cookies (26%)



WHILE COMMUTING

Smoothies/shakes (22%)



SCHOOL

Fruit snacks (38%)



OTHER ACTIVITIES

Popcorn (16%)

Q: What types of snacks do you or members of your household regularly consume? (n = 400)

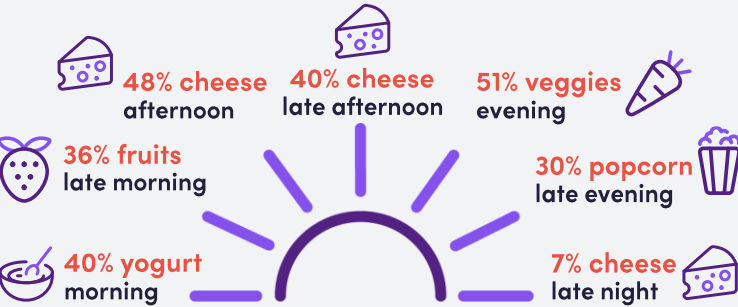
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Q: Where do you or members of your household consume these types of snacks? (n 47-313)

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When & how often are shoppers choosing to throw down

Nothing cheddar than this...favorite snacks throughout the day – spoiler: cheese is a hit!

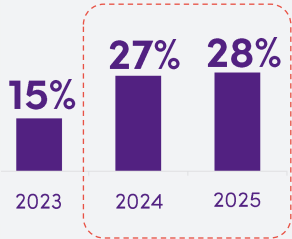


Q: At what times of day do you or members of your household typically consume these types of snacks? (n = 47-313)

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Snacking frequency amongst shoppers **is stable** compared to last year despite inflationary concerns.

Shoppers claiming to snack **multiple times a day**:



Q: How often do you or members of your household consume these types of snacks? (n = 397)

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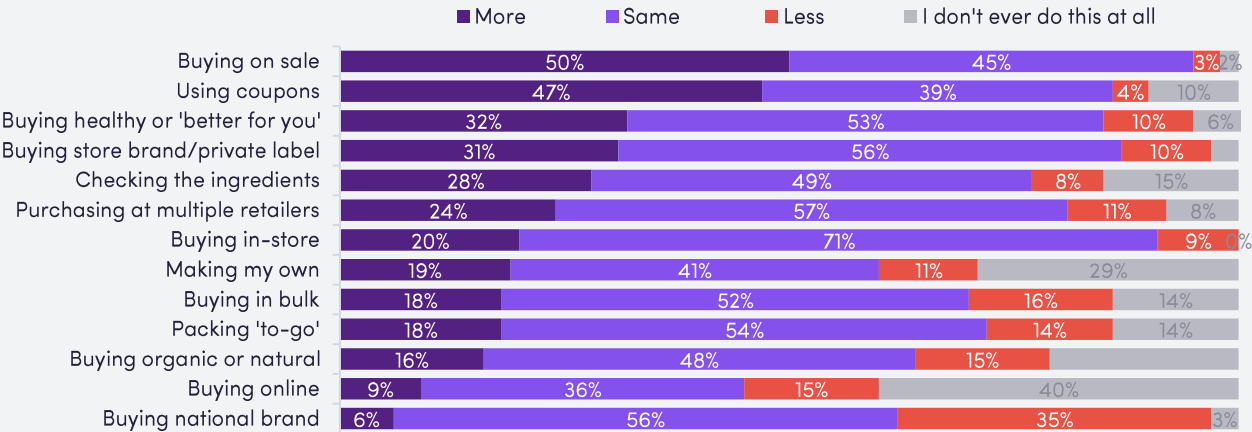
The grocery store is the #1 location for snack purchases

90%	Grocery Store
60%	Mass Retailer (e.g., Target, Walmart, etc.)
38%	Club Store (e.g., Sam's, Costco, etc.)
29%	Convenient Store / Gas Station / Rest Stop
29%	Dollar Store (e.g., Dollar General, Dollar Tree, etc.)
26%	Online (e.g., Amazon, Walmart.com, Target.com, Kroger.com, etc.)

Q: Where do you typically purchase snacks? (n = 397)

Shoppers ages **35-44** are more likely than any other age group to purchase snacks **online**.

How have shoppers' snacking habits changed versus last year



Data labels under 5% are not shown.

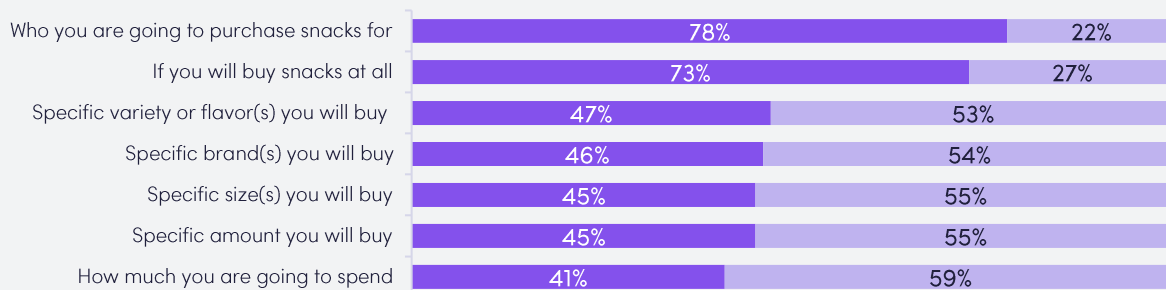
Q: How would you say your overall snacking habits have changed, if at all, now compared to a year ago when it comes to the following? (n=397)

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How & Why shoppers purchase Snacks

Impulse vs Planned

Most shoppers decide ahead of time they'll be buying snacks and for whom, but only about half of shoppers know what and how much they'll be buying. This indicates there is room to inspire and engage shoppers with snack brands both before and during the shopping trip.



Q. At what point do you typically know the following when purchasing snacks? (n=397)

● Before shopping ● While shopping

The top reason for purchasing snacks *impulsively* is because the item was on sale

54%
They are on sale

47%
To treat myself/my family/my children

41%
To satisfy my hunger

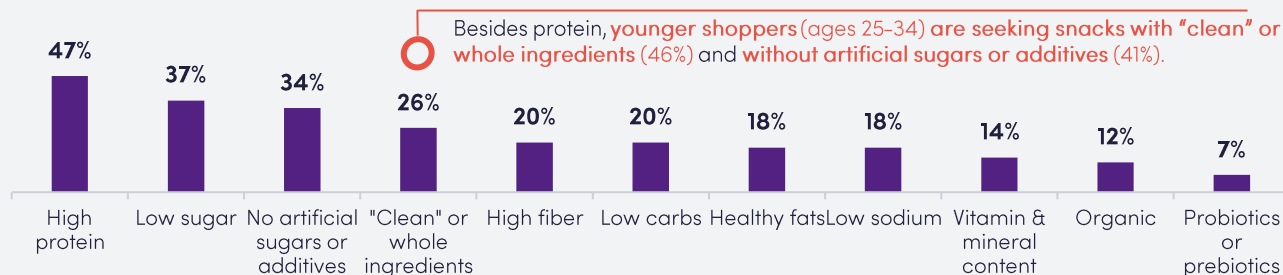
35%
I saw a new or unusual snack

33%
I got a coupon for the snack

Q. What are the reasons you make unplanned snack purchases? (n=106)

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Protein is king when it comes to "healthy snack" attributes shoppers want

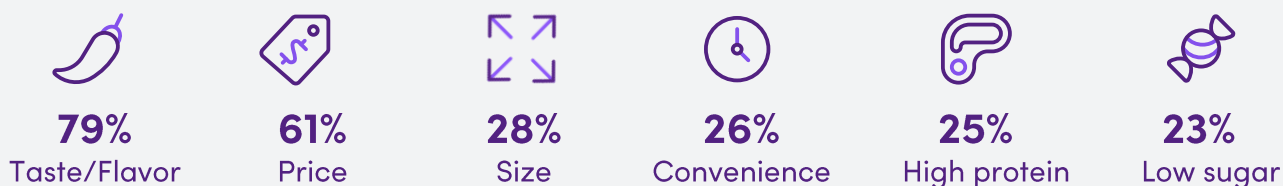


Besides protein, **younger shoppers** (ages 25-34) are seeking snacks with "clean" or whole ingredients (46%) and without artificial sugars or additives (41%).

Q. Which of the following are most important to you when choosing 'healthy snacks'? (n=348)

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What is important when choosing which snacks to purchase? (Top 2 Box on a 7-point scale, where 7 = "Extremely Important")



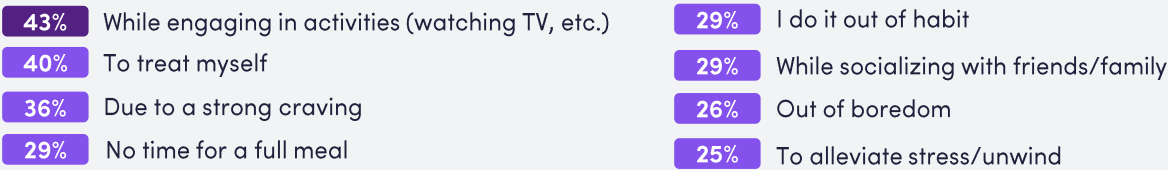
While **Taste/Flavor** is the most important attribute, **Price** is a close second compared to all other attributes.

Q. How important is each of the following when choosing which snack(s) to purchase? (n=397)

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What is driving shoppers to snack and try new snacks

The many motivations for snacking! (Top 2 Box on a 7-point scale, where 7= "Describes me completely")



Q. How well does each of the following statements describe your snacking habits? (n=397)



Sales and discounts are still the primary drivers of shoppers trying new snacks, although trending down year-over-year

	The snack is on sale	I have a coupon for the snack	Someone in my household asks for it	I want to treat myself/my family/my children	The flavor/texture of the snack is appealing	A friend/family member suggested I try it
2025	53%	43%	42%	40%	38%	32%
2024	59%	48%	40%	43%	46%	41%
2023	59%	51%	29%	N/A	58%	49%

Q. How do you decide what type of new snacks to try? (n=397)

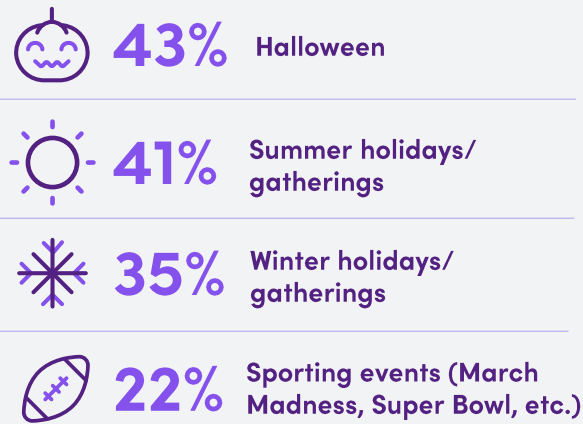
Someone in the household asking for it has increased as a driver over the years



Shoppers seek out larger pack sizes for certain occasions and gatherings

Go big or go home!

Top occasions for purchasing larger pack sizes for snacks



Households with children are more likely to purchase larger pack sizes across all occasions, with 90% of shoppers with children in the household claiming to purchase large pack sizes vs 66% of shoppers without children.

Q: For which of the following do you purchase larger pack sizes of snacks? (n=397)



Consumers are looking for a variety of benefits when it comes to snack innovation

- 1 **Health-conscious snacks**, including low-calorie, low-sugar, and nutrient-dense snacks.
- 2 **Protein-rich choices**, particularly in the form of bars or meat-based products not limited to just dried jerky.
- 3 **Unique and international flavors**, with diverse flavors from around the world, such as Indian, Filipino, and other global cuisine-inspired snacks.
- 4 **Varied pack sizes**, with mini sizes for portion control and bulk sizes for better value.
- 5 **Sweet and salty combination**, snacks that balance sweet and salty flavors.
- 6 **Natural and clean ingredients**, including snacks made with healthy oils, no preservatives, and clean ingredients
- 7 **Ready-to-eat & convenience**, with snacks that don't require refrigeration, have stable shelf-life, and are easy to consume on the go.
- 8 **Dietary-specific needs**, with snacks that cater to specific dietary restrictions such as low-carb, gluten-free, and dairy-free.

Q: What snack do you wish was available on the market? (n=397)

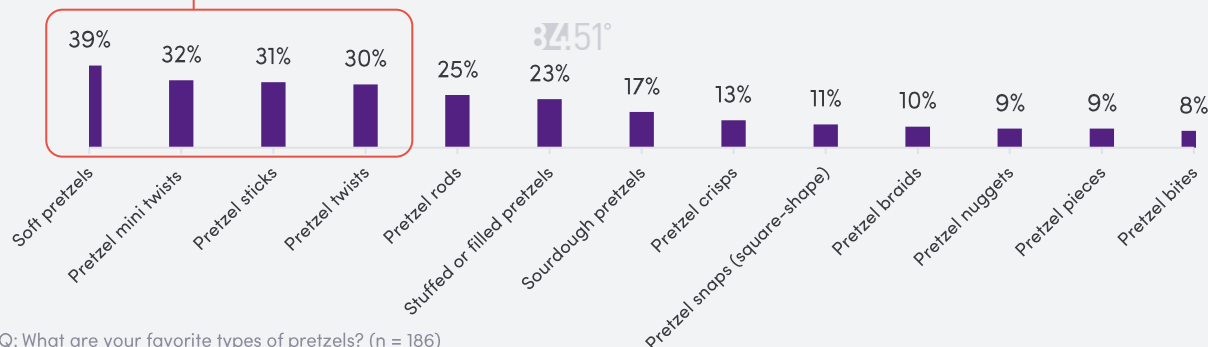
A Peek at Pretzels



National Pretzel Day

The people have spoken – and they love variety!

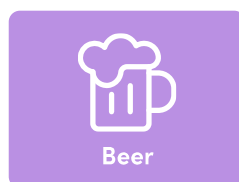
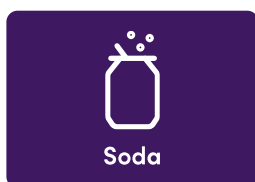
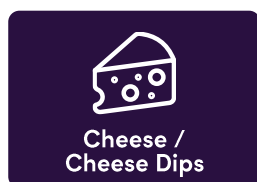
While **Soft Pretzels** are the **#1 choice**, **Pretzel Mini Twists**, **Pretzel Sticks** and **Pretzel Twists** all rise to the top among favorite pretzel types.



Q: What are your favorite types of pretzels? (n = 186)

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Most Preferred Pretzel Pairings (...say that 5 times fast)



Q: What other foods or drinks do you typically consume with pretzels? (n = 186)

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Powered by cutting-edge science, we use 1st-party retail data from over 62 million U.S. HHs to fuel a more customer-centric journey.

84.51° Stratum combines rich customer behavior insights with retail performance measures to deliver science-powered insights that drive results.



We know that reliable insights start with trustworthy data. That's why we've always prioritized quality—working exclusively with verified households (leveraging double-verified behavioral sample) to ensure accuracy and integrity at every step. These practices aren't new to us—they're just part of how we operate. It's our way of making sure the insights you rely on are grounded in reality, not noise. If you ever want to learn more about how we protect data integrity, we're always happy to share.



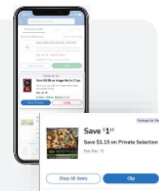
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Leverage Targeted Digital Coupons to create custom, tailored digital-only offers that utilize 84.51° personalization sciences to deliver your campaign specific objectives.

- Appeal to key **snacking** audiences, drive trial of new **snack** products, recapture lapsed **snack** households and re-engage repeat purchases.
- **Recommended:** Campaign length 4-6 weeks, with a 2-week post-period redemption window.
- Drive stronger sales uplift with media amplification and 84.51° Collaborative Cloud: 6.64x aROAS, 0.94x iROAS, +18.31% Sales uplift.

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Reach relevant shoppers through Product Listing Ads

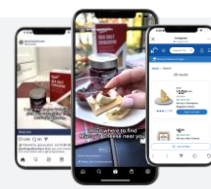


Product Listing Ads are a pay-per-click solution where brands can set a bid price to boost individual products across highly trafficked placements in search results and other personalized carousels across Kroger.com and mobile app.

- **Basket Builder:** Get your **snacks** in the basket via personalized, science-driven carousels across the site & app.
- **Search & Browse:** Boost products when users are actively shopping **snacks** and adding products to their cart.
- **Savings:** Re-engage past buyers or attract savings-oriented households with sales or digital coupons.

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Enhance brand awareness and expand reach through strategic influencer activations



Co-branded messages with category influencers inspires users to engage with and purchase your product through:

Influencer Unique Content: Tap into influencers to create custom **snacking** content endorsing value prop of product. Content posted and amplified from influencer handle.

Native Content: Influencer content is built to feel authentic and native to platform within influencer feed.

Inspire Usage: Through influencer content, show up to both Influencer followers and relevant Kroger households to inspire **snack** purchases.

Bonus opportunity, repurpose and extend influencer creative to own brand marketing initiatives as well as standard KPM campaigns from Kroger handle for additional scale.

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