



# Digital Bytes

Healthy Snacks and the Internet

March 2013



# Methodology

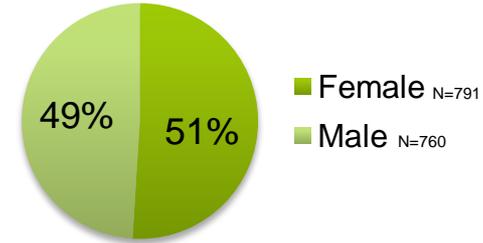
## STUDY OBJECTIVE:

Identify the attitudes and behaviors surrounding healthy snacking and specifically, what role does the Internet play in this realm?

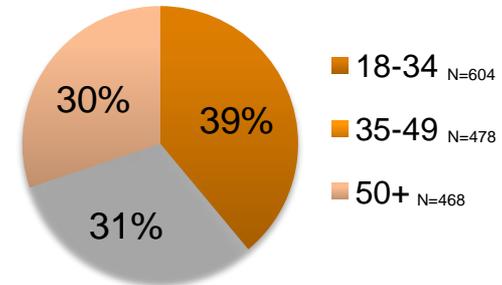
### Yodelers Panel

- Panel of Yahoo! users (18 yrs +)
- Total Participants n=1550
- 10 minute online survey
- Income distribution
  - Less than \$50K, n=593
  - 50-99,999K, n=45
  - \$100K+, n=265
- Parent w child <18 in HH, n=508 vs. Non-Parent, n=1042

### Gender



### Age

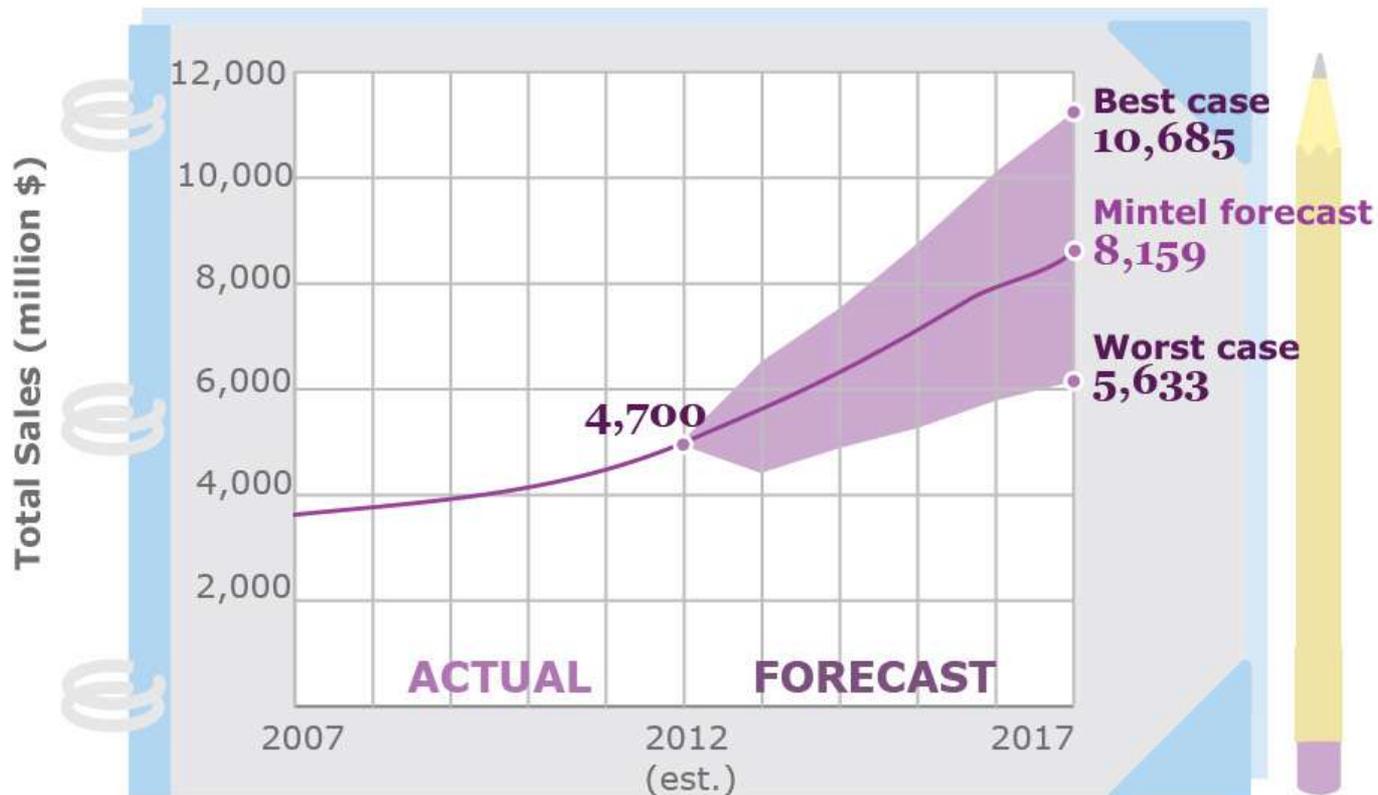


## › Industry Trends in Snacking



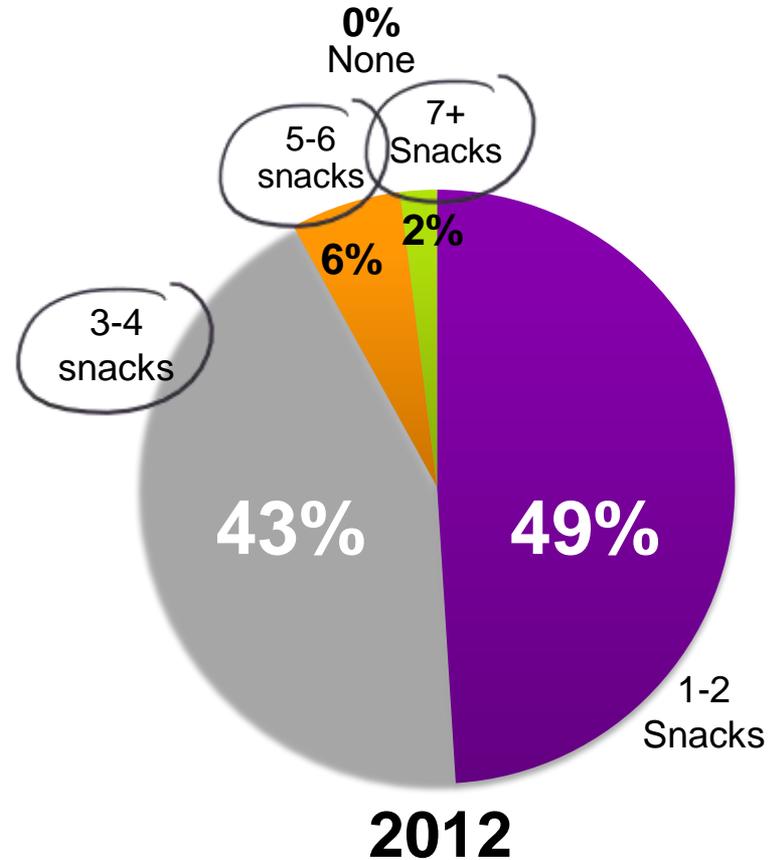
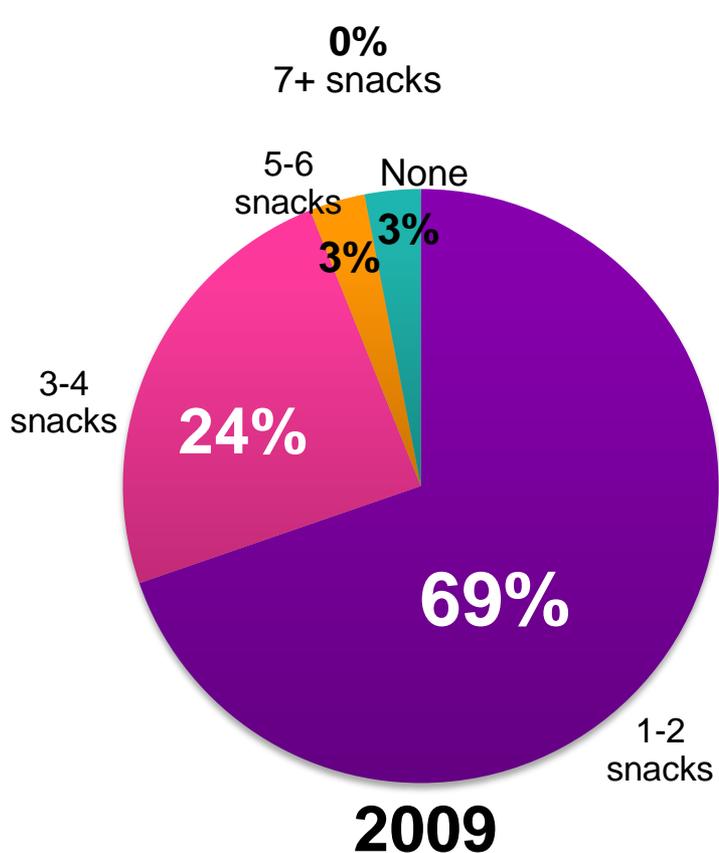
# The 'nutritional' food and drink market grew 15.6% yoy in 2012 and is expected to hit \$8.1 billion by 2017.

TOTAL U.S. SALES AND FAN CHART FORECAST OF MARKET, AT CURRENT PRICES, 2007-17



# Frequency of Snacking has increased significantly from 2009 to 2012

Daily Snack Frequency 2009 vs. 2012



- › **What are the attitudes and behaviors surrounding healthy snacking and exercise?**





**78%**

are trying to  
snack healthier

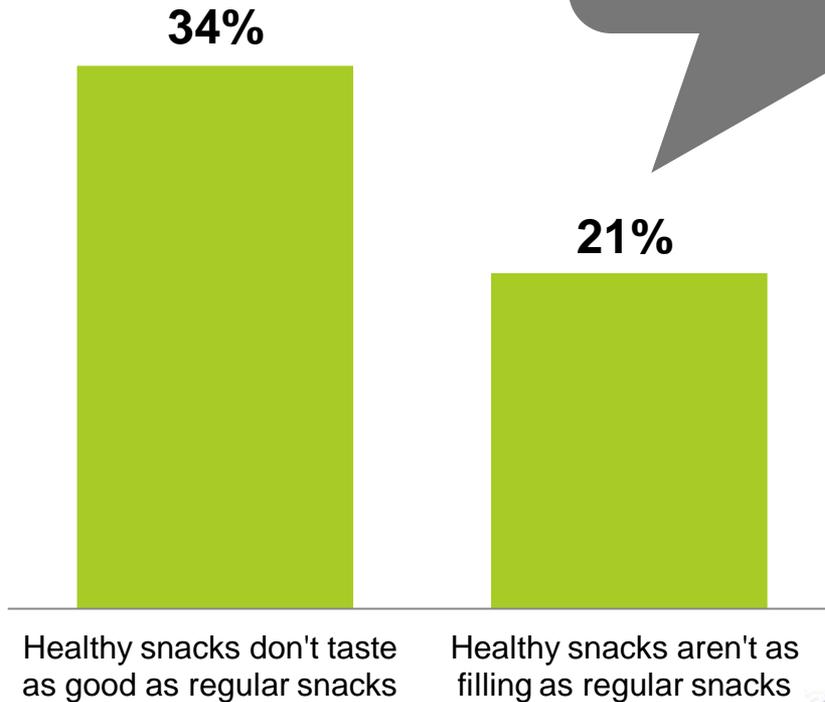
Base: All respondents, n=1550

Q10. When it comes to healthy living and eating, please tell us how much you agree or disagree with each of the statements below. (% strongly/somewhat agree)



# ...But perception of taste/satisfaction is still a barrier

% strongly/somewhat agree



MEN are more inclined than women to think healthy snacks don't taste as good *and* that they aren't as filling!



Base: All respondents, n=1550

Q10. When it comes to healthy living and eating, please tell us how much you agree or disagree with each of the statements below

# Most believe that healthy snacks are more expensive, yet nearly half are willing to pay the extra cost

% strongly/somewhat agree

**68%**

...say healthy snacks are more expensive than regular snacks

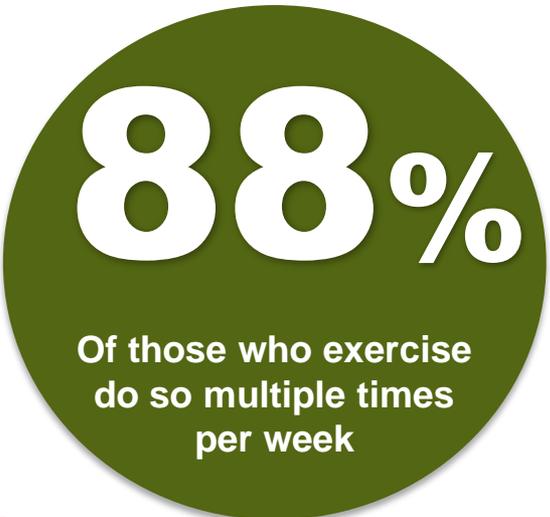
**44%**

...say they would pay more for healthy snacks



# A majority of respondents say that they exercise and of those who do, they do so frequently!

Incidence and Frequency of Exercising



Q8. Do you exercise?  
Base: All respondents, n=1550  
Q9. How often, if at all, do you exercise?  
Base: Respondents who exercise, n=1085



# Consumers exercise regularly because *feeling good* is more important than looking good

% strongly/somewhat agree



84%

Exercise regularly because how they feel is important

68%

Exercise regularly because how their body looks is important

72%

Diet to feel better about health and body



# Casual dieting is *IN*...

# Strict dieting (i.e., organized program) is *OUT!*

Do you...

**68%**

Follow a **casual diet** to stay healthy and maintain their current weight



**10%**

Follow a **strict diet** to lose weight

Base: All respondents, n=1550

Q8a. Do you 'follow a strict diet to lose weight (e.g., Atkins, weight watchers, etc.)

Q8b. Do you follow a causal diet to stay healthy and maintain current weight

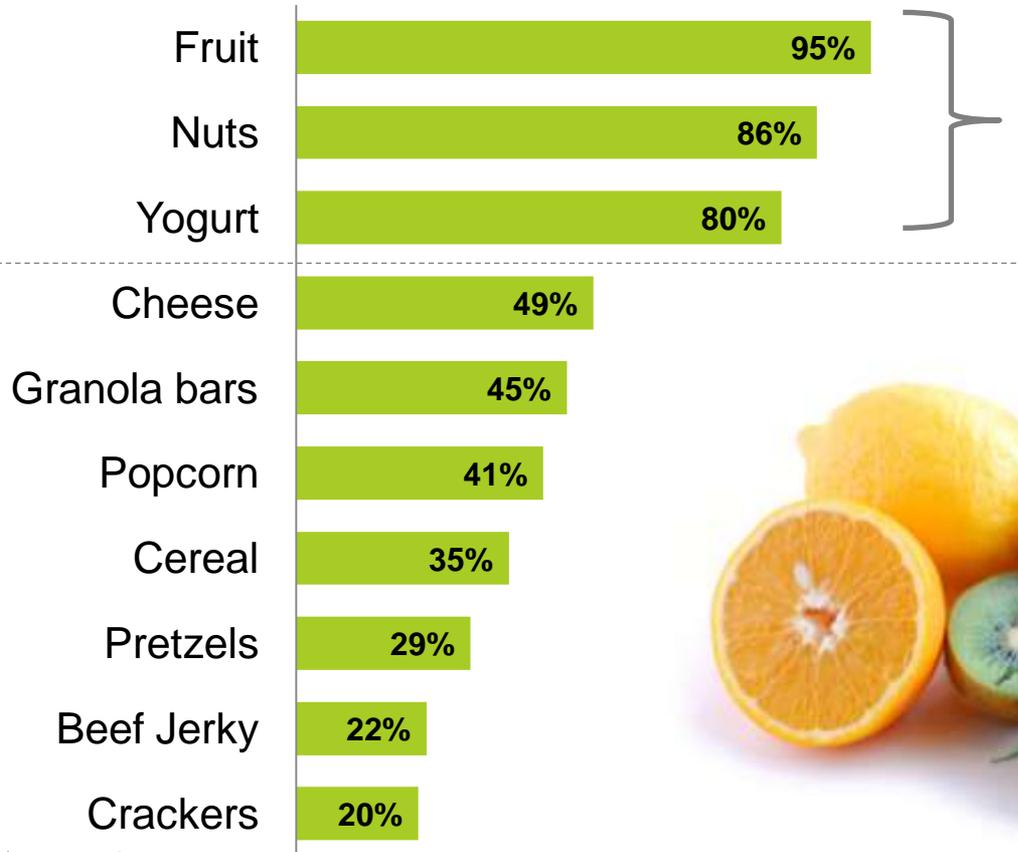


- › **What snacks are perceived as healthy?  
How often, where, and when are they  
being consumed?**



# Fruits, nuts and yogurt are perceived as the healthiest snacks...and the experts agree

Snacks perceived as healthy



Academic Research agrees!  
Yogurt, Fruit, and Nut dishes are listed as part of what makes up the “healthiest meal”



Base: All respondents, n=1550

Q1. Looking at the list of snacks below, which of these do you perceive as healthy?

<http://www.dailymail.co.uk/health/article-2160831/Healthiest-meal-After-editing-thousands-claims-scientists-serve-superdish.html>



# Women are more likely than men to believe that yogurt, popcorn and pretzels are healthy



## *Snacks perceived as healthy...*

	<b>Women</b>	<b>Men</b>
Yogurt	<b>85%</b>	<b>76%</b>
Popcorn	<b>51%</b>	<b>30%</b>
Pretzels	<b>36%</b>	<b>21%</b>

Base: Men n=760, Women, n=791

Q1. Looking at the list of snacks below, which of these do you perceive as healthy?

Differences are statistically significant at the 95% level





**1 in 4**

**Adults 50+**

perceive chocolate as  
healthy

Base: Adults 50+ n=468

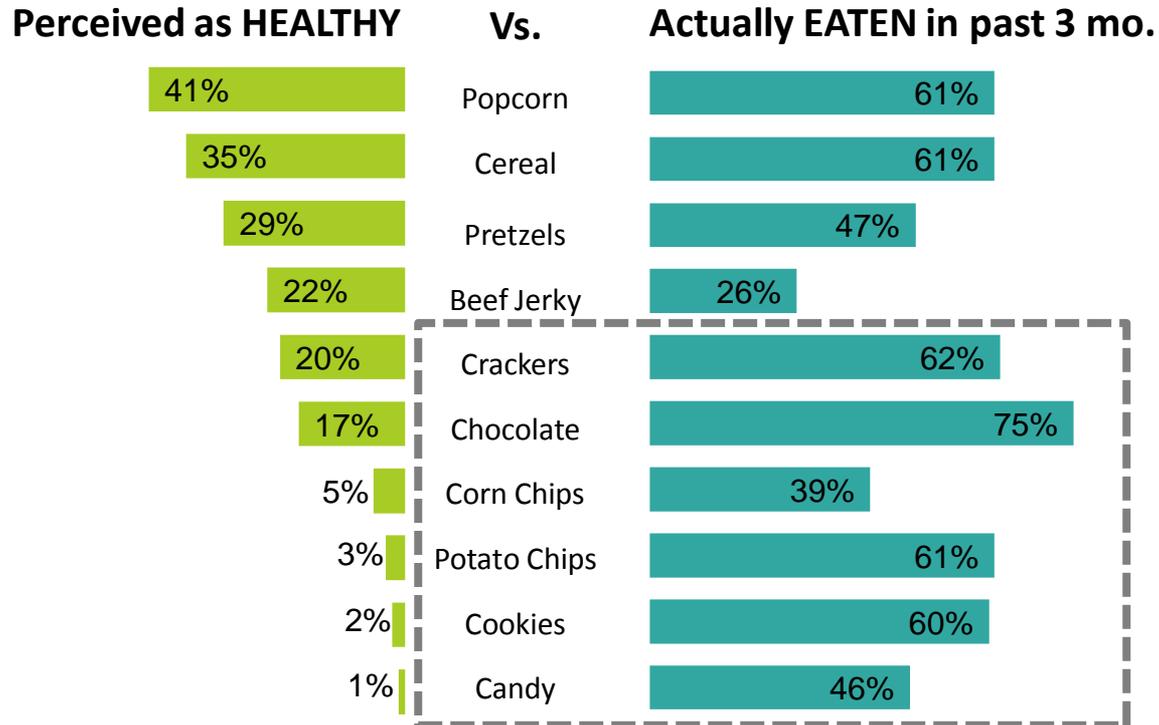
Q1. Looking at the list of snacks below, which of these do you perceive as healthy?

Statistically significant from A18-34 (12%) and A 35-49 (16%) at the 95% level



# Perceived 'healthiness' doesn't trend with increased consumption

Snacks perceived as healthy vs. snacks eaten past 3 months



Base: All respondents, n=1550

Q1. Looking at the list of snacks below, which of these do you perceive as healthy?

Q2. Which of the following snacks have you eaten in the past 3 months? Please drag and drop the images of the snacks you have eaten in the past 3 months in the grocery cart.



# Half consume fruit daily, while snacks like crackers are eaten more on a weekly basis

Frequency of snack consumption

Snacks most consumed DAILY

**50% Fruit**

29% Yogurt

27% Cheese

Snacks most consumed WEEKLY

**59% Crackers**

57% Cereal

56% Cookies



Base: Have eaten type of snack in past 3 months  
Q3. How often do you eat the following snacks?  
Note: percentages of those who eat each snack type



# Most snacks are consumed at home, but the top type of snack differs by location

Top snacks by location consumed



**Home**

-  Cereal 96%
-  Cheese 94%
-  Crackers 90%



**Work**

-  Granola Bars 53%
-  Fruit 44%



**In Transit**

-  Beef Jerky 24%



**Movies**

-  Popcorn 29%
-  Candy 21%

Base: Have eaten type of snack in past 3 months  
Q4. Where do you typically eat these snacks?  
Note: percentages of those who eat each snack type

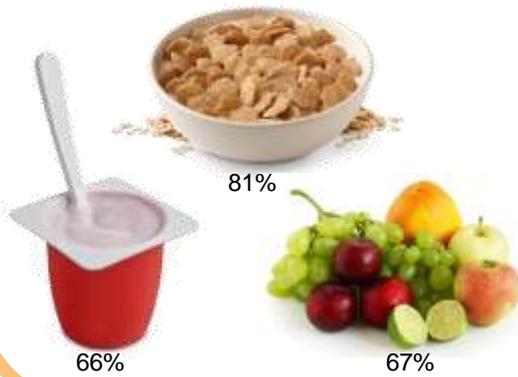


**And when we look at snacks eaten by daypart, consumers like to start the day by eating something sweet, moving to salty in the afternoon and both in the evening!**



**Morning = SWEET**

**cereal, yogurt, & fruit**



**Afternoon = SALTY**

**beef jerky, crackers, & potato chips**



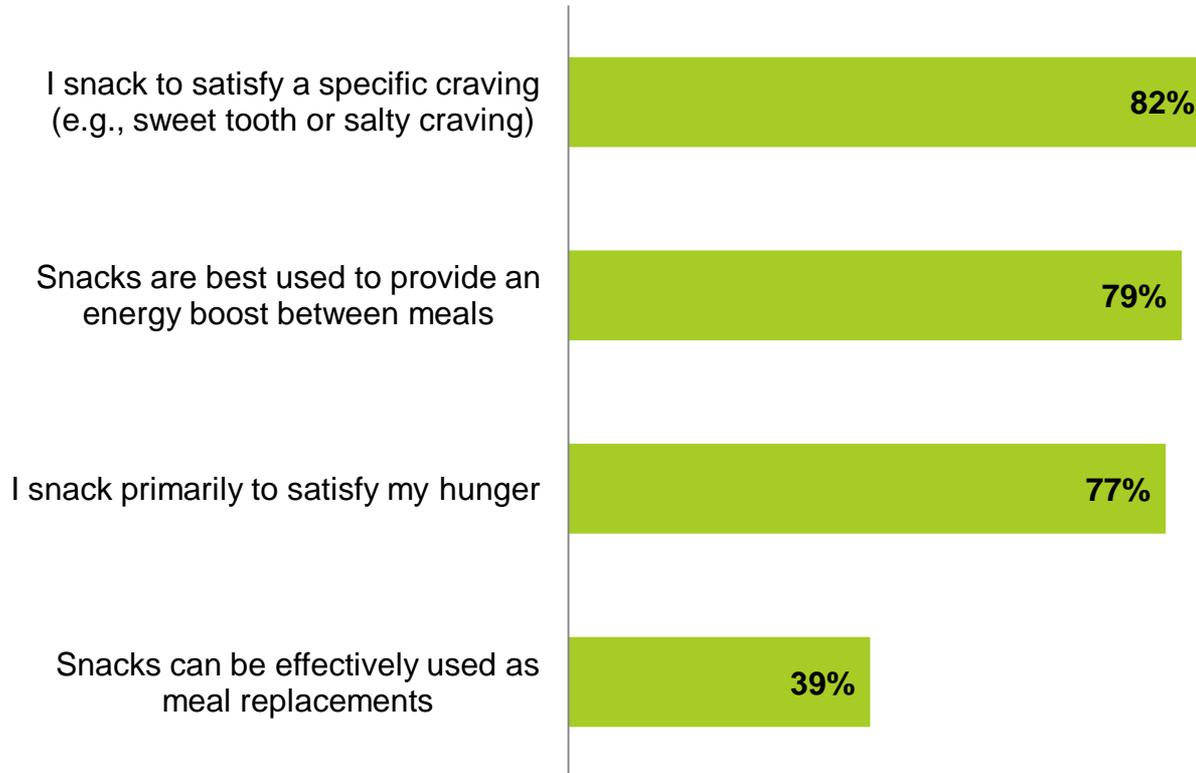
**Evening = SALTY-SWEET**

**popcorn, chocolate, cookies**



# A large majority snack to satisfy a specific craving or to provide an energy boost between meals

% strongly/somewhat agree



WOMEN are more inclined than men to snack to satisfy a specific craving (88% vs. 76%).



Base: All respondents, n=1550

Q6. We'd like to understand what you care about when it comes to snacking, eating and living healthy. Please tell us how much you agree or disagree with each of the statements below.

# Besides satisfying the practical needs of hunger, about half use snacking as a rewarding break

% strongly/somewhat agree

**51%**

“snacking is an opportunity to indulge and reward myself”

**47%**

“I snack because I’m bored”

**46%**

“I snack to take a break from the daily grind”

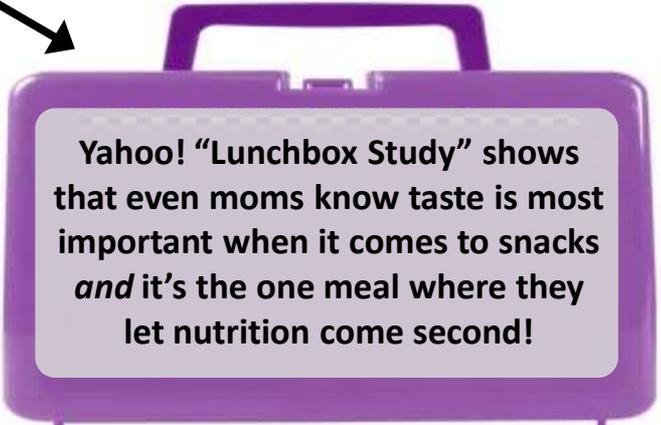
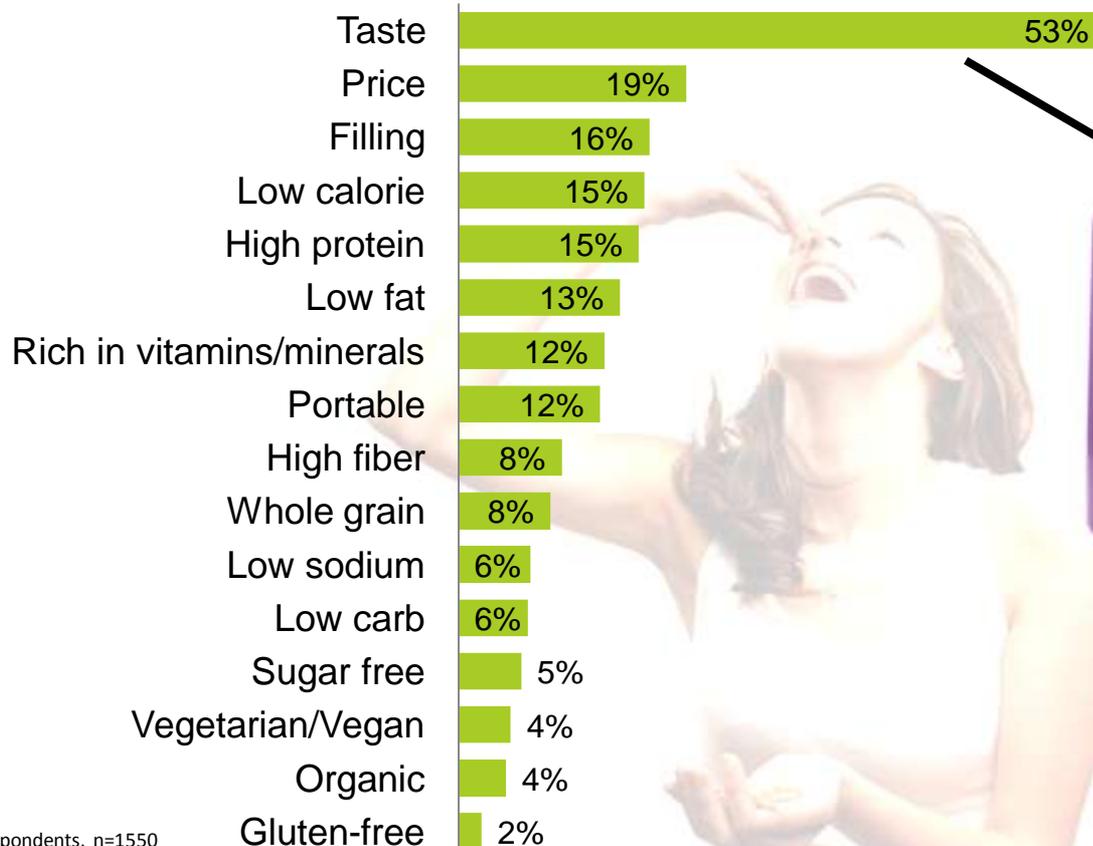
Base: All respondents, n=1550

Q6. We'd like to understand what you care about when it comes to snacking, eating and living healthy. Please tell us how much you agree or disagree with each of the statements below.



# Taste is the most important consideration when it comes to choosing snacks

Important attributes when choosing a healthy snack (% first and second rank summary)



Base: All respondents, n=1550

Q7. We’d like to understand what you care about when choosing a healthy snack. Looking at the list below, please rank your top 5 most important considerations – i.e., the top five attributes that you think about when choosing a healthy snack to eat.

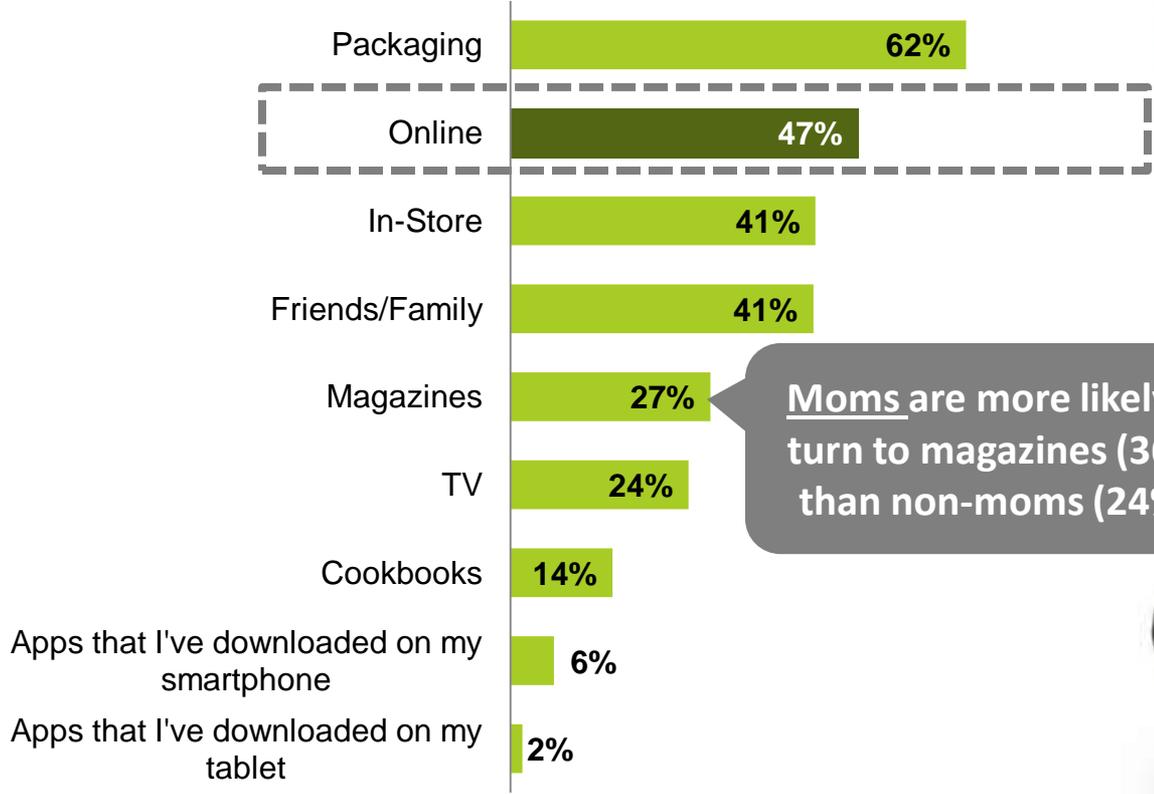


› **Role of digital in healthy snack consumption**



# After packaging, online is the most important source for healthy snacks information

Sources typically used to get information on healthy snacks



Moms are more likely to turn to magazines (36%) than non-moms (24%).

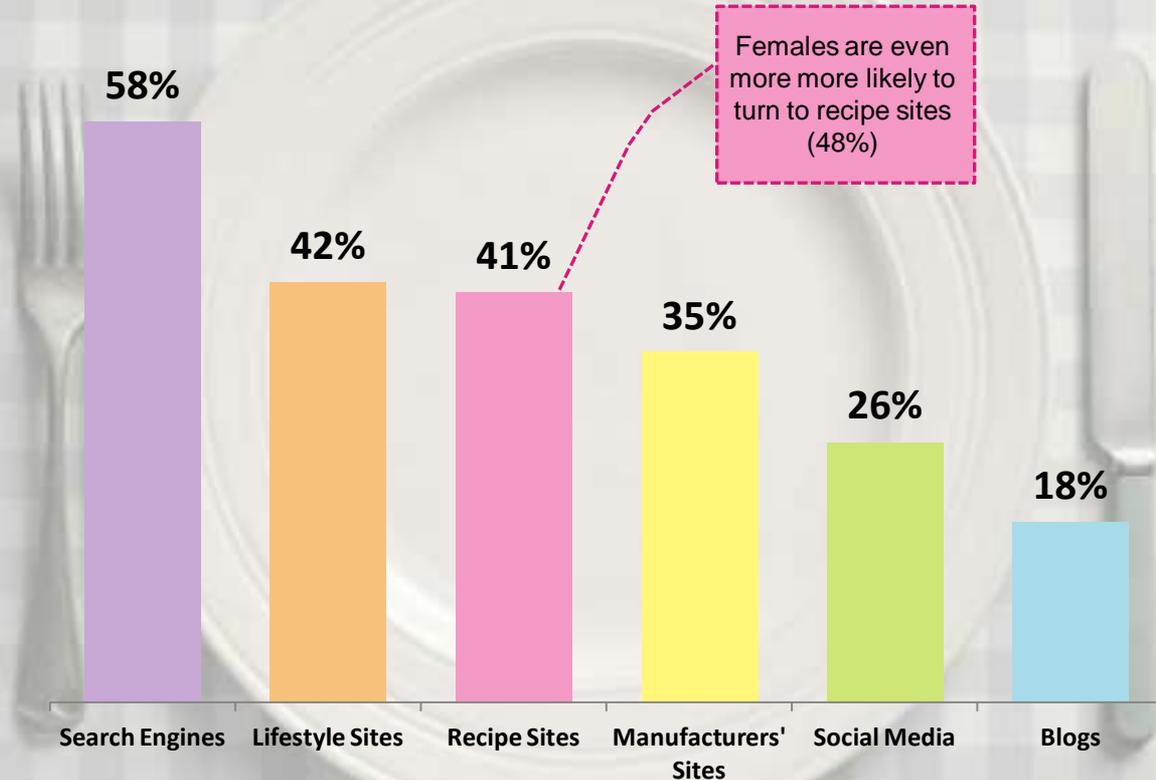


Base: All respondents, n=1550  
Q11. What sources do you typically use to get information on healthy snacks?



# Search and Lifestyle websites are the most widely used online sources for healthy snacks information

Sites typically used when searching for information on healthy snacks online



Base: Use online sources, n=731

Q12. Which of the following sites, if any, do you typically use when searching for information on healthy snacks online?



# 1 in 4

Say internet ads are “influential in helping decide which healthy snacks to purchase.”

Younger Adults are even *more likely* to agree that internet ads are influential

**1 in 3 Adults 18-34**



Base: All respondents, n=1550 and Adults 18-34 n= 604

Q13. How influential are the following types of ads in helping you decide which healthy snacks to purchase? (% very/somewhat influential)





# Discounts are attention grabbers for online ads, but specific health benefits and taste are also important

% strongly/somewhat agree

## 65%

I'm more likely to pay attention to online ad if it is accompanied with an e-coupon or discount



## 55%

I prefer ads that focus on specific health benefits of the product (i.e. 100 cal pack, 10G protein)



## 35%

I like it when online ads focus on taste



# Context and personal relevancy are also key for advertising healthy snacks online

% strongly/somewhat agree

**18-34 year olds (59%)** are more likely to prefer seeing ads for healthy snacks on webpages that discuss healthy eating and living (versus older age groups).

52%



I prefer seeing ads for healthy snacks on webpages that discuss healthy eating and living

33%



I have a good idea how healthy a snack is from the advertising

24%



I'm more likely to try a certain brand of snacks if I see an online ad for it

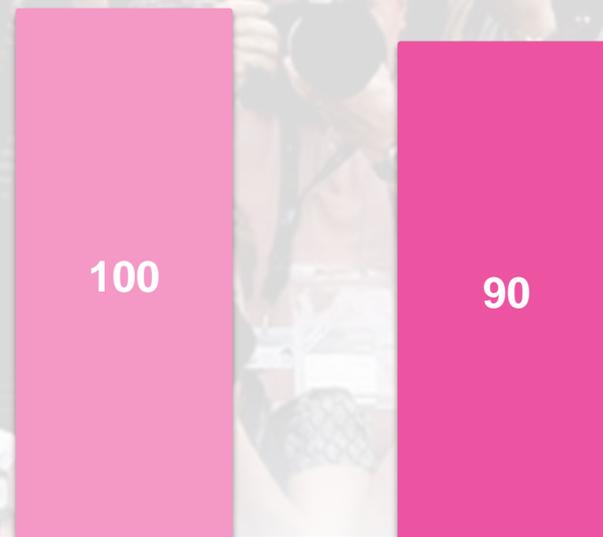


# Only 7%

are more likely to consider purchasing a healthy snack endorsed by a celebrity

## CPG Creative Best Practices Use of Celebrity Spokesperson Effect on Breakthrough

-10% lift



No celebrity

celebrity

# More than half will view a brand more positively if they sponsor healthy eating content online

Impression of snack brand due to sponsoring 'healthy eating' online content



56%

More Positive



4%

More Negative



# Many use online health management tools or apps to help them achieve their goals – higher among younger adults

Usage of online health management tools or apps by device

Smartphone



**26%**

**36%** of 18-34 yr. olds

**25%** of 35-49 yr. olds

**14%** of 50+ yr. olds

Laptop



**24%**

**29%** of 18-34 yr. olds

**23%** of 35-49 yr. olds

**19%** of 50+ yr. olds

Desktop



**20%**

*No significant age differences*

Tablet



**9%**

**12%** of parents

**8%** of non-parents



**75%**

Find online health tools  
or apps “somewhat or  
very” useful



## › Why Yahoo!?



# Yahoo! is a top online destination for Healthy Food Searchers...

**Yahoo! is the  
#2 Site for Healthy  
Food Searchers**

42.6M monthly | 91% reach

**Yahoo!** is an important part of Healthy Food Searchers' online time, as they are spending an average of nearly

**~4 hours per month**

And they are spending at least  
**23 minutes per day** (on average)



# Y! Healthy Food Searchers love several Yahoo sites and are influencers where it counts in their personal lives!

Nearly half (47%) of Y! Healthy Food Searchers agree they *always* encourage others to lead healthy lifestyles...

...57% of them also agree they *always* seek new ways to lead healthy lifestyles



And they are **INFLUENCERS!**

- ✓ 1 in 3 frequently advise others on health/dieting/exercise
- ✓ Nearly half (44%) frequently advise others on restaurants/bars



# Insights Summary

78% of Yahoo! users are trying to snack healthier.

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For healthy snacks consumers, *feeling good* is more important than *looking good*. 84% exercise regularly because “how they feel is important.”

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Taste is still king when it comes to choosing healthy snacks. 53% consider taste the first or second most important attribute when deciding on a healthy snack.

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The internet is one of the top overall sources used in finding healthy snacks information; search engines, lifestyle websites, and recipe sites are the top online sources.

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1 in 4 say internet ads about healthy snacks are influential in their healthy snacks choices. Interestingly, when it comes to sponsored content 56% say it makes them feel more positive toward the sponsoring brand.

# Implications

Lots of consumers want to snack healthier Food manufacturers have a great opportunity to reach this consumer group through current product messaging OR new product creation.

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There is a deeper emotion in choosing to be healthy than just looking good. Advertisers can tap into this emotional state to connect with healthy snacks consumers.

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Taste/satisfaction is still a barrier for healthy snack consumption. One third believe that healthy snacks don't taste as good as regular snacks. Messaging around good taste in addition to specific ingredient benefits can be effective.

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Since the internet is an important source of info for healthy snacks, maintain a strong online presence for your brand. Sponsored search could also be powerful here. Yahoo! is well positioned to reach this audience through an array of lifestyle content and programs.

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Sponsoring personally and contextually relevant content can strengthen your display campaign. Coupons and messaging around savings and value can help to capture consumers' attention, as 64% are more likely to pay attention to an online if accompanied by an e-coupon or discount.



# Thank you!

Find more great Yahoo! Research on our advertiser blog:

<http://advertising.yahoo.com/industry-knowledge/>



**Tom Silveri**, Sr. Analyst Strategic Insights

[tsilveri@yahoo-inc.com](mailto:tsilveri@yahoo-inc.com)



**Sarah Elliott**, Manager Strategic Insights

[selliott@yahoo-inc.com](mailto:selliott@yahoo-inc.com)



## › **Appendix**

# Dieting/Exercise Fun Facts

**59% agree they only push themselves a little during a workout.** And Women are more likely to agree versus Men.

**31% of Women are working out LESS than they were 5 years ago.** And the same percentage of young adults (18-34) are working out more!

**78% would choose to gain 10 pounds of extra weight over \$10K of debt** and over half would choose 50 pounds over getting in this much debt...



# Salty Snacks are remaining somewhat steady in general, but are growing in popularity among Hispanics & Asians

**Yahoo! Reaches 103MM Salty Snack consumers each month (that's 92% of this segment)**

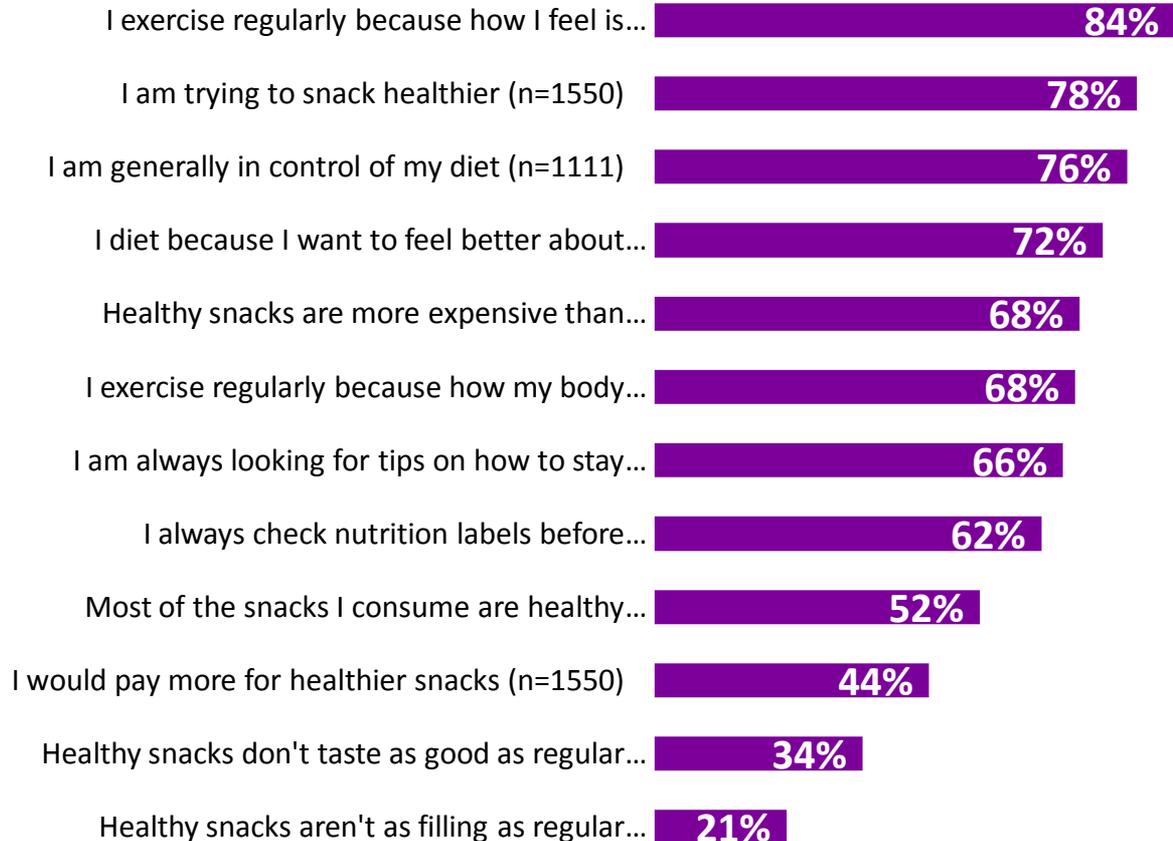
**Salty Snacks growth rate fell from 7% to 3% in 2010. Re-gaining slightly to 5% in 2011, but not projected to grow much in the next few years...**

**However, Hispanics & especially Asians are buying more salty snacks on a monthly basis.**



# Agreement Statements - Living and eating

Agreement with statements about living and eating (% top 2 box on a five point scale)



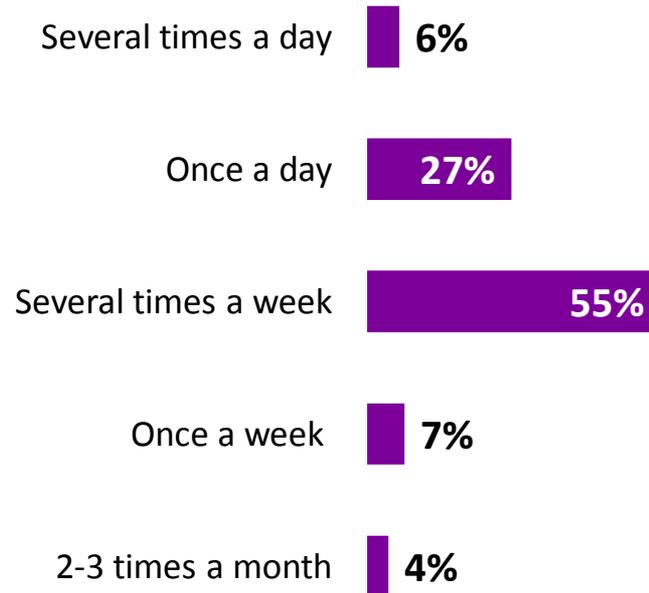
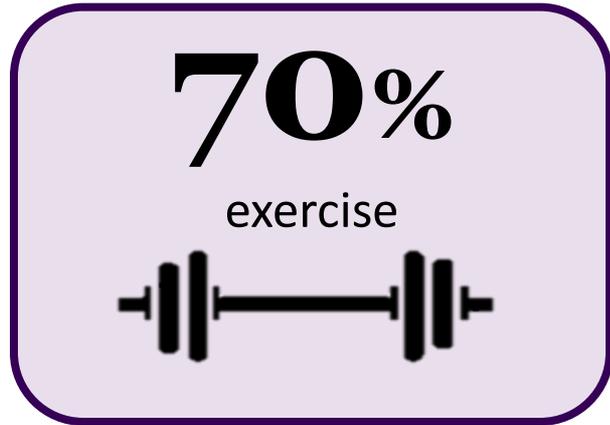
Unweighted base: All respondents

Q10. When it comes to healthy living and eating, please tell us how much you agree or disagree with each of the statements below.



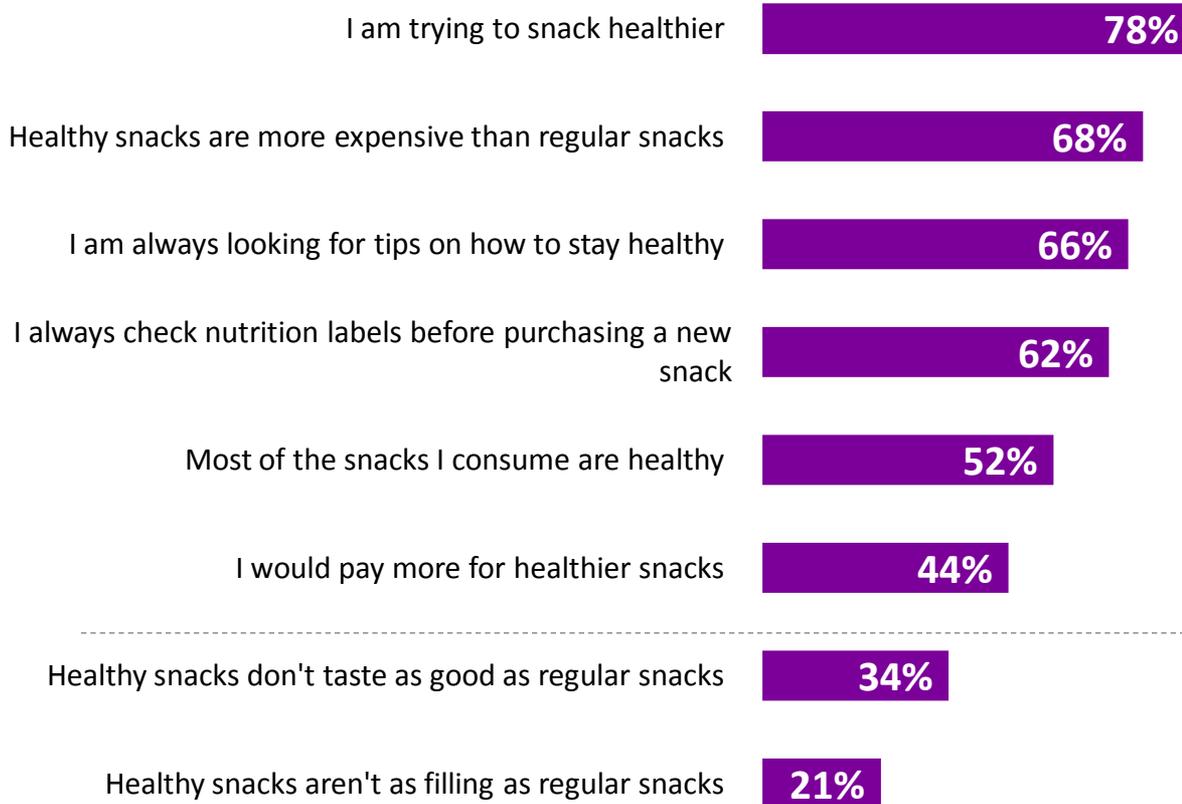
# High incidence of exercising – More than half exercise several times a week

Incidence and Frequency of Exercising



# Consumers are attuned to what they eat and committed to living a healthier lifestyle

Agreement with statements about living and eating (% top 2 box on a five point scale)



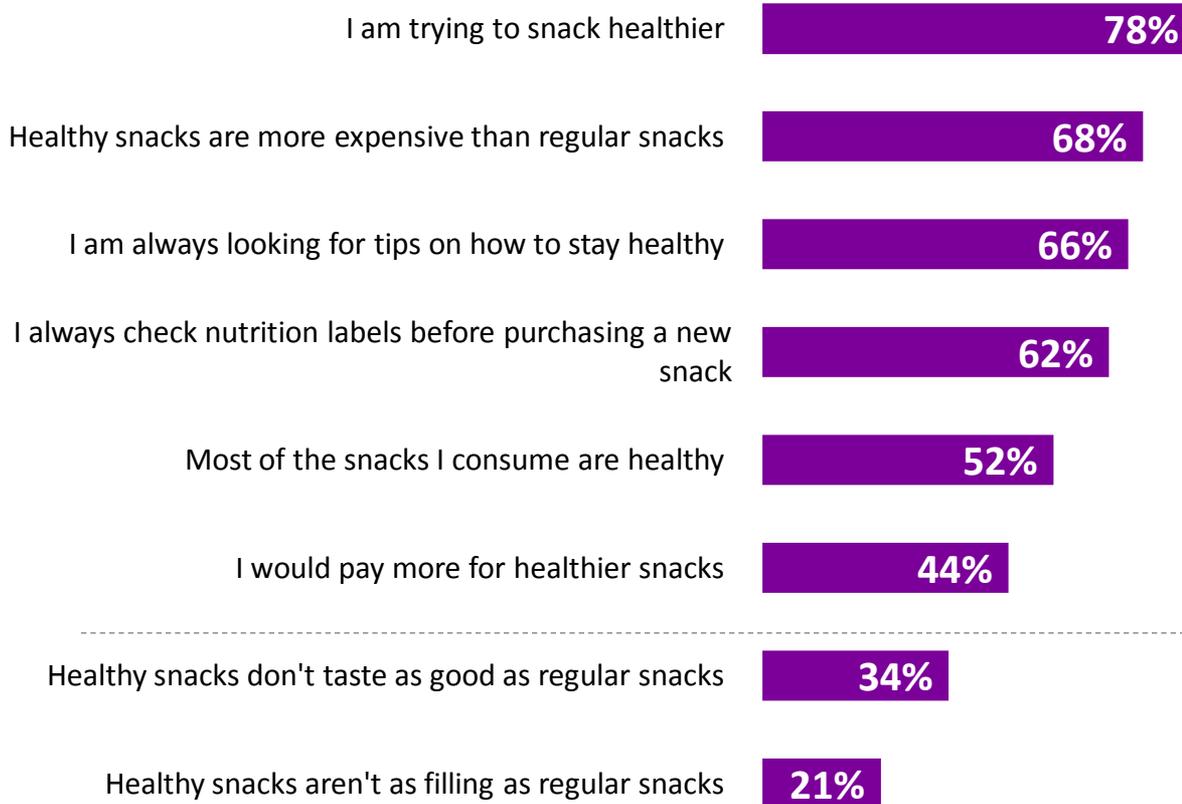
Women are more likely than men to try and snack healthier (83% vs. 73%), to look for tips on how to stay healthy (70% vs. 61%), to check nutrition labels (68% vs. 57%), and report that most snacks they consume are healthy (56% vs. 48%).

Conversely, men are more inclined than females to believe that healthy snacks don't taste as good as regular snacks (37% vs. 30% respectively) and that healthy snacks aren't as filling (24% vs. 18% respectively).



# Consumers are attuned to what they eat and committed to living a healthier lifestyle

Agreement with statements about living and eating (% top 2 box on a five point scale)



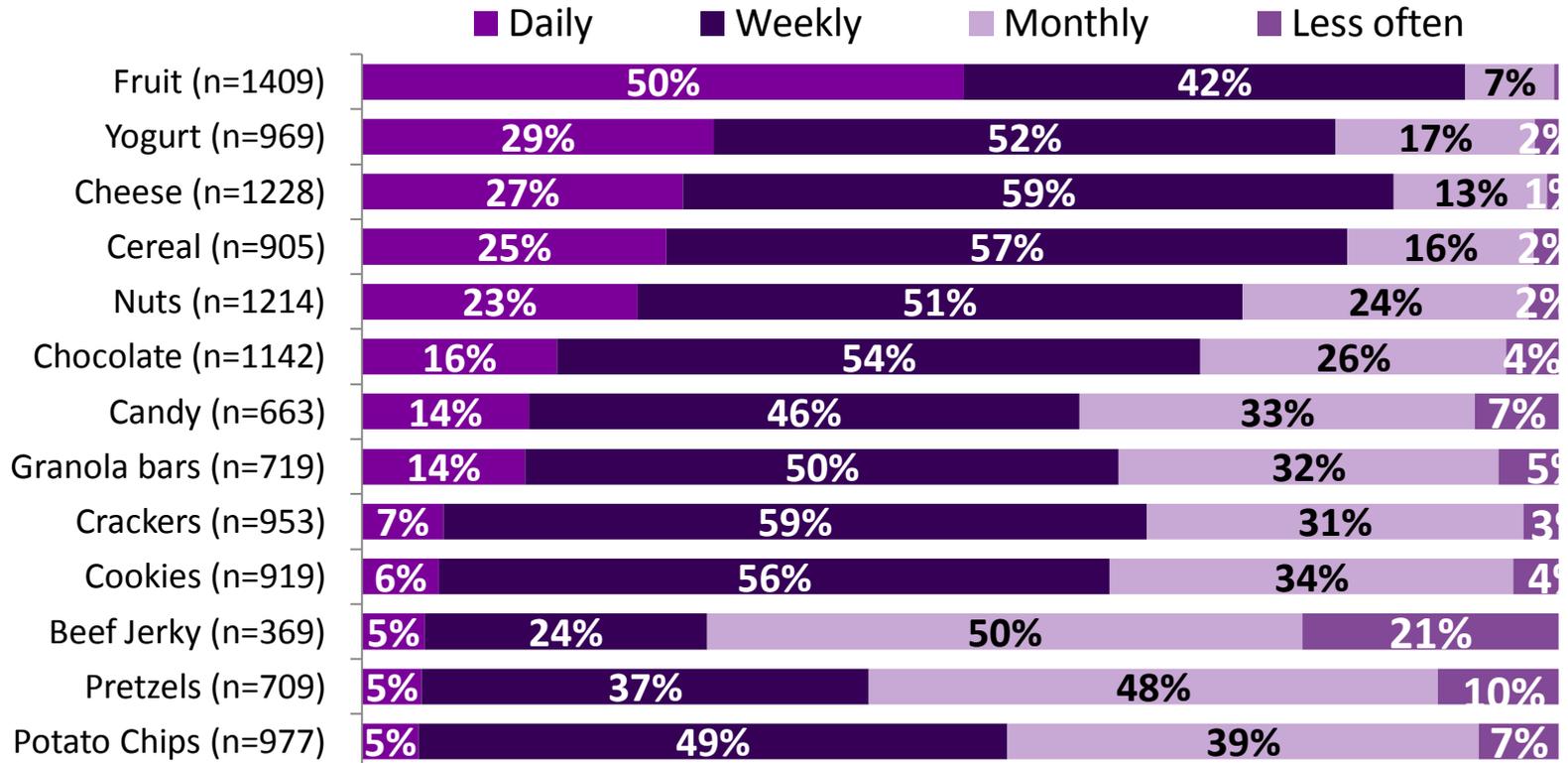
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# Fruits are consumed once a day or more often while other snacks are consumed at least weekly

How often are the following snacks eaten?



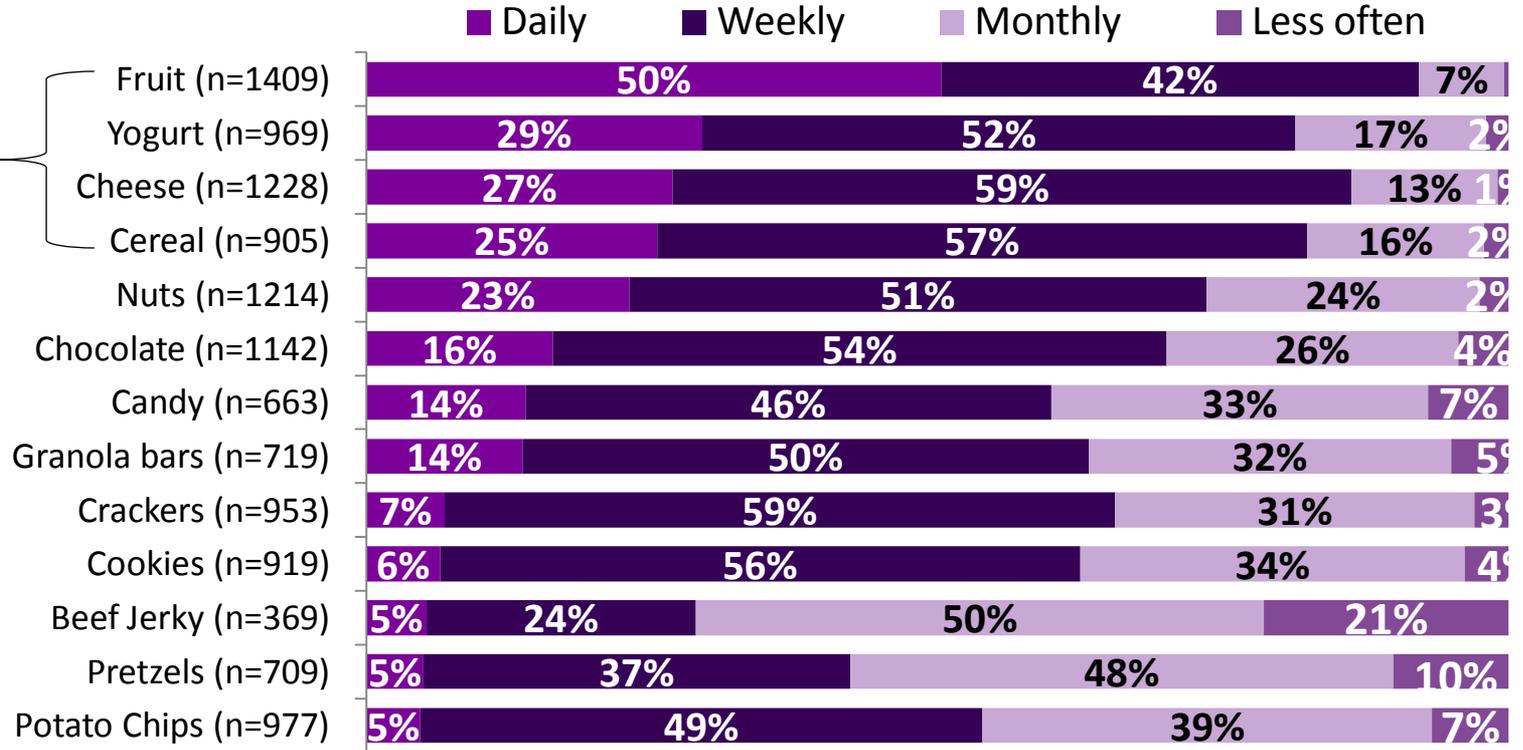
Unweighted base: Have eaten type of snack in past 3 months  
 Q3. How often do you eat the following snacks?



# Half consume fruit daily and nearly a third eat yogurt daily

Frequency of snack consumption

Interestingly, fruit, yogurt and cheese are consumed more frequently than cereal



Base: Have eaten type of snack in past 3 months  
 Q3. How often do you eat the following snacks?

# Home is where snacks are consumed most, although a sizeable number eat snacks at work too

Where are the following snacks typically eaten?

%	Home	Work	School	Commuting	Gym	Movies	Other
Cereal (n=905)	96	11	1	2	-	-	1
Cheese (n=1228)	94	25	3	4	-	1	4
Crackers (n=953)	90	30	2	7	-	-	4
Fruit (n=1409)	90	44	5	10	-	-	4
Potato Chips (n=977)	89	34	4	10	-	2	6
Cookies (n=919)	89	34	6	6	-	1	6
Chocolate (n=1142)	88	42	5	13	-	13	8
Yogurt (n=969)	87	36	3	2	-	-	2
Popcorn (n=956)	86	16	1	2	-	29	5
Corn Chips (n=601)	86	27	2	5	-	1	7
Pretzels (n=709)	83	34	4	11	-	2	6
Nuts (n=1214)	83	41	3	11	-	1	5
Candy (n=663)	79	41	5	15	-	21	7
Beef Jerky (n=369)	76	31	3	24	1	1	10
Granola bars (n=719)	73	<b>53</b>	6	21	1	1	5

Unweighted base: Have eaten type of snack in past 3 months

Q4. Where do you typically eat these snacks?



# E-Coupons and discounts are attention grabbers for online ads

Agreement with statements about online advertising for healthy snacks (strongly/somewhat agree)

I'm more likely to pay attention to an online ad for a healthy snack if it is accompanied with an... **64%**

I prefer ads that focus on specific health benefits of the product (i.e. 100 cal pack, 10g protein) **55%**

I prefer seeing ads for healthy snacks on webpages that discuss healthy eating and living **52%**

I like it when online ads focus on taste **35%**

Online ads for healthy snacks are informative **33%**

I have a good idea how healthy a snack is from the advertising **33%**

I'm more likely to try a certain brand of snacks if I see an online ad for it **24%**

I'm more likely to consider purchasing a healthy snack if it is endorsed by a celebrity **7%**

18-34 year olds (59%) are more likely than 35-49 year olds (50%) and 50+ year olds (46%) to prefer seeing ads for healthy snacks on webpages that discuss healthy eating and living.

18-34 year olds (10% vs. 6% of 35-49 & 2% of 50+), males (9% vs. 4% of females) and moms (6% vs. 3% non-moms) are more likely than their counterparts to consider purchasing a snack that is endorsed by a celebrity.

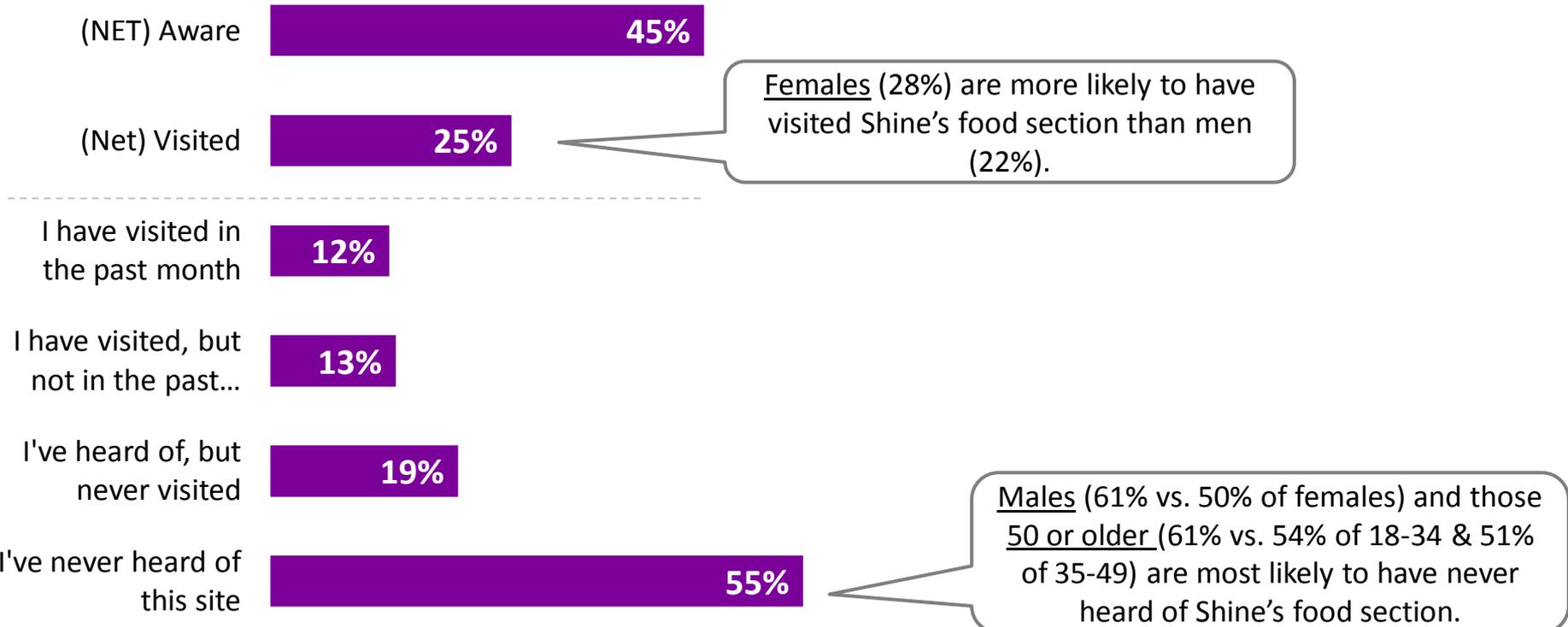
Unweighted base: All respondents, n=1550

Q15. How much do you agree or disagree with the following statements about online advertising for healthy snacks.



# Just less than half are aware of Yahoo! Shine's food section and one quarter have visited the site

Recall of hearing about or visiting Yahoo! Shine's Food section



Unweighted base: All respondents, n=1550  
Q19. Do you recall hearing about, or visiting Yahoo! Shine's Food section/column?

