

SNACK ATTACK

THE LATEST ON SNACKING HABITS AND
PREFERENCES OF U.S. COLLEGE STUDENTS



BARNES & NOBLE
COLLEGE

SNACK ATTACK

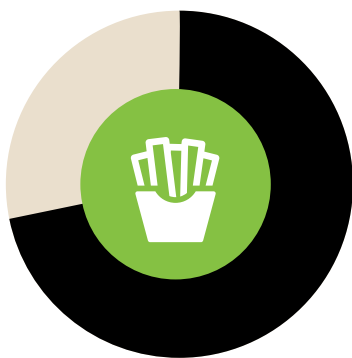
Barnes & Noble College is the one of the largest contract operators of campus bookstores in the U.S., with a national network of more than 720 stores. For our campus partners, we are more than a vendor – we are a strategic partner and collaborator. And, we are an active participant in campus life, engaging more than 5 million students, parents, alumni and fans. These relationships drive remarkable insights on students’ preferences and behaviors, which we put to work for our brand partners. They fuel creative, multi-channel marketing programs for consumer brands that create long-lasting loyalty.

College students are an increasingly important demographic. In 2015, discretionary income among college students is expected to reach \$163 billion.

Purchasing power aside, marketing to college students is essential for every brand because of their impact on trendsetting and early adoption. All across the country, we help the world’s leading brands form genuine connections with these students, and we take pride in serving the long-term goals of both brands and students alike.

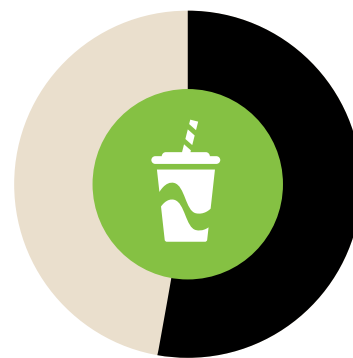
In May 2015, Barnes & Noble College fielded a survey to gain a fresh perspective on the snacking habits and preferences of college students. Close to 1,000 students on campuses nationwide participated in the survey, yielding a number of insights – both expected and unexpected.

KEY TAKEAWAYS



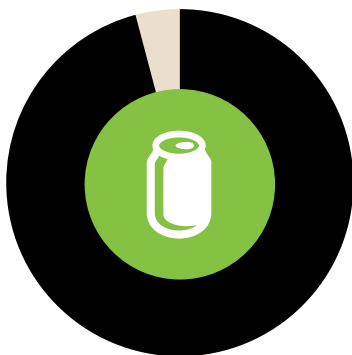
70%

Most students eat multiple snacks in a day – almost 70% eat 2 or 3



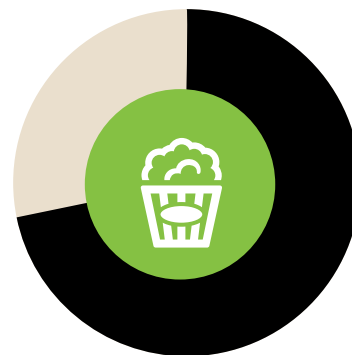
52%

Of students snack on the go



94%

94% of students are interested in free snack samples at the campus bookstore



70%

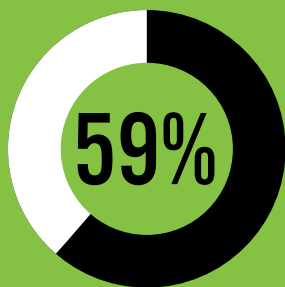
About 70% of students:

- Purchase sweet snacks on impulse
- Purchase nutritious snacks for an energy boost

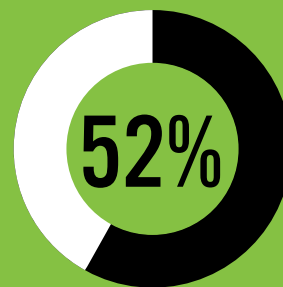
SNACKING DRIVERS

For many students, snacking isn't about the when – it's about the why. Many shared that they eat simply because they're hungry, as might be expected. However, around half indicated that their tendency to eat a snack directly correlated with what else they're doing at the time. When they're bored, 51% of students pick up a snack. On the opposite end of the spectrum, 50% said that eating snacks while they're busy studying actually helps them to concentrate. Another 46% use snacks as a meal replacement. Women are more likely than men to snack for all of these reasons – and 15% more likely to snack when bored.

WHERE STUDENTS SNACK



**59% OF STUDENTS
SNACK AT HOME
OR IN THEIR DORM**



**52% INDICATED
THAT THEY
ALSO SNACK
ON THE GO**

POPULAR ON-CAMPUS SNACK SPOTS



**29%
CLASSROOMS**



**26% LIBRARY OR
STUDY AREAS**

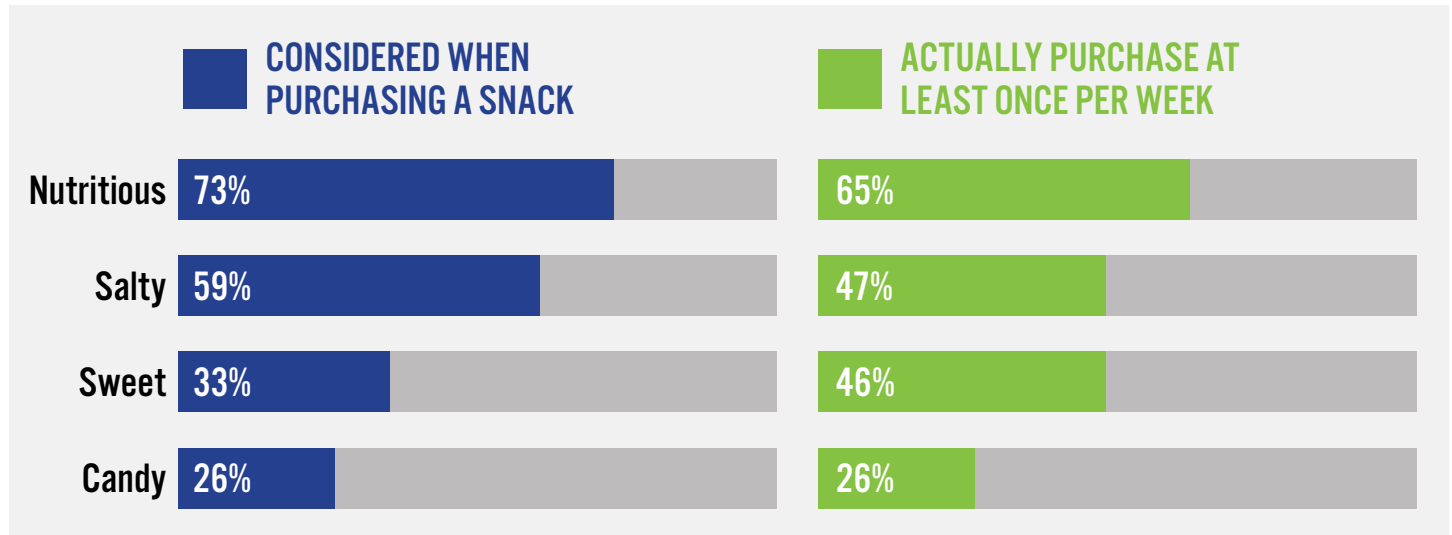


**21% OTHER
COMMON AREAS**

Given their busy schedules, it's no surprise that students are often snacking and multitasking – far from a kitchen table. When they want a snack to eat on the go, students ranked “easy to eat and clean up” (71%) as very/extremely important – almost as high as price (72%), which is typically one of the most significant factors for this age group. The majority of respondents also prioritized other convenience factors, including the ability to eat quickly (62%) and the ability to eat in one serving (55%). Exactly half deemed nutritional value an important consideration.

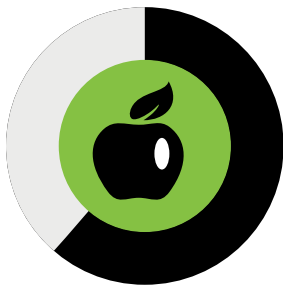
THE SNACK BREAKDOWN

Students indicated that even when they want a quick, pre-packaged snack, they're looking for healthy options. And, by and large, what they say they think about purchasing aligns with what they actually buy.

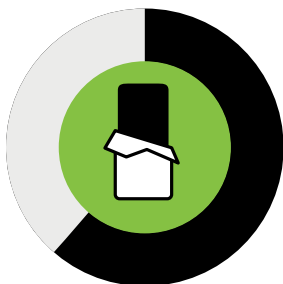


Within each snack category, students offered interesting insights into their preferences.

NUTRITIOUS SNACKS



A nutritious option proved to be the most popular snack among any category: fresh fruit. When looking for a nutritious snack, 79% of students would reach for a piece of fresh fruit. Vegetables did not fare as well, coming in at 44%. Women were more likely than men to snack on either one, ranking both fruit and vegetables more than 10% higher.



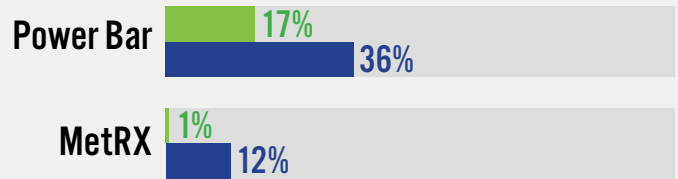
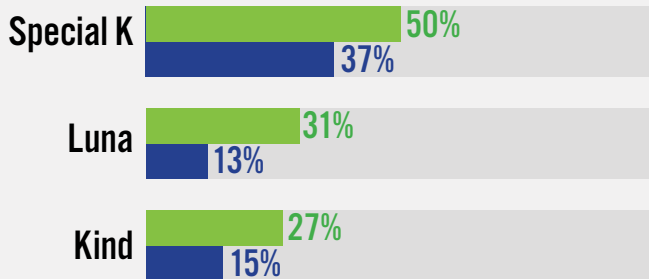
A pre-packaged nutritious option, such as a granola bar or protein bar, actually ranked second (60%). When taking a closer look at subcategories for these bars, students didn't have a clear preference among different consistencies or textures – all types ranked closely. Among pre-packaged nutritious snack brands, Nature Valley came out on top (65%), followed by Special K Bars and Clif Bar (both 44%).

THE SNACK BREAKDOWN

NUTRITIOUS BRANDS: GENDER PREFERENCE

There were distinct gender differences among brands – both for those at the top and lower-ranking brands.

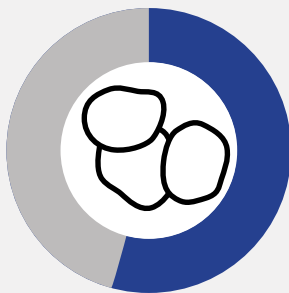
WOMEN **MEN**



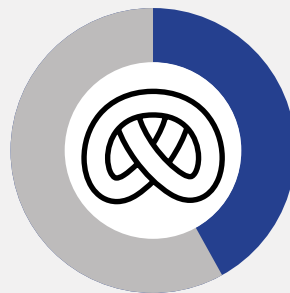
SALTY SNACKS

CHIPS REIGN SUPREME

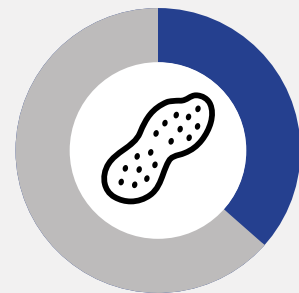
Among the salty snack options, more than half of students buy them to fulfill a snack craving (52%), followed by pretzels (45%) and bagged nuts (40%).



POTATO CHIPS
52%



PRETZELS
45%



BAGGED NUTS
40%

CHIP TIP

When eating chips, students would buy:

55% TRADITIONAL POTATO CHIPS

30% ORGANIC/NATURAL CHIPS

29% TORTILLA CHIPS

Given the overall popularity of chips, it's not surprising that the top three brands among all salty snacks are all known for their chip products: Lays (49%), Doritos (47%) and Pringles (40%). Tied for third, however, was Chex Mix (40%), which received a boost from women (10% higher than men). Among pretzel brands, Snyder's proved most popular (30%), followed closely by Rold Gold (26%).

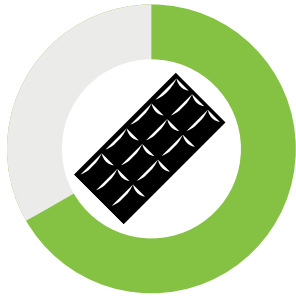
THE SNACK BREAKDOWN

SWEET SNACKS

With such a wide range of sweet snacks available to students, this survey looked at candy separately from other sweet options.

CANDY

Chocolate dominated the candy category; more than two-thirds of students said they buy it when they want candy (69%). That's about two times as many as the next candies in line: chewy candy, gum and sour candy.



Looking at specific chocolate options, Reese's Peanut Butter Cups proved to be the most popular (52%), followed by M&Ms, Kit Kat, Twix and Snickers (all 43-44%). Men demonstrated a strong affinity for both Snickers and Reese's Peanut Butter Cups, ranking them higher than their female counterparts.

In terms of breath-freshening candy, 64% of students preferred gum, compared to only 25% who prefer mints. For both gum and mints, however, close to three-fourths of students would choose a mint flavor over a fruit flavor.

OTHER SWEETS

Looking at other sweet snack options, cookies had the strongest showing, with 70% of students indicating they would buy, followed by brownies (42%) and donuts (31%). The brand options in this category varied widely. Oreos were almost three times as popular as any other brand (66%), but it's difficult to make a direct comparison to other brands. For example, Pillsbury Cinnamon Rolls (23%) and Hostess Mini-Muffins (22%), which are more cake-based, came in at the second and third spots.

TOP 10 SNACKS IN BARNES & NOBLE COLLEGE BOOKSTORES

CLIF® Bar White Chocolate Macadamia Nut

Strawberry Pop Tarts®

CLIF® Chocolate Chip Bar

Nutella® & GO!

M&M'S® Peanut (Tear & Share Size)

Planter's® Trail Mix

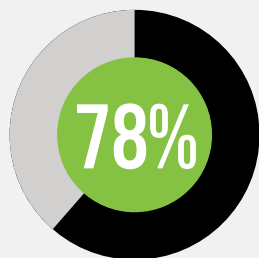
Cheez-It® Baked Snack Crackers (Original)

CLIF® Bar Chocolate Brownie

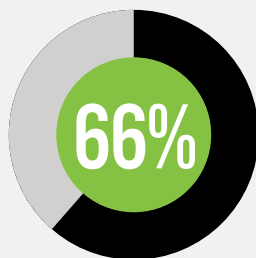
Nature Valley® Oats 'n Honey Granola Bar

KIT KAT® King Size

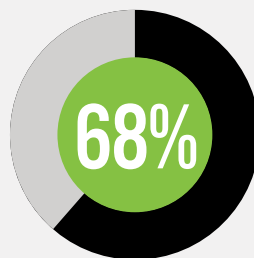
SNAPSHOT: BEVERAGE PREFERENCES



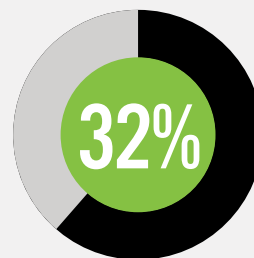
PLAIN OR FLAVORED WATER?
78% PLAIN



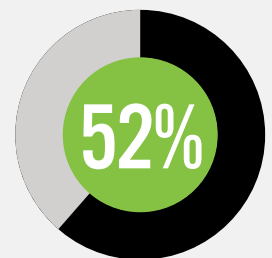
COKE OR PEPSI?
66% COKE



BOTTLED WATER OR TAP?
68% BOTTLED



NO SODA FOR YOU?
32% DON'T DRINK SODA



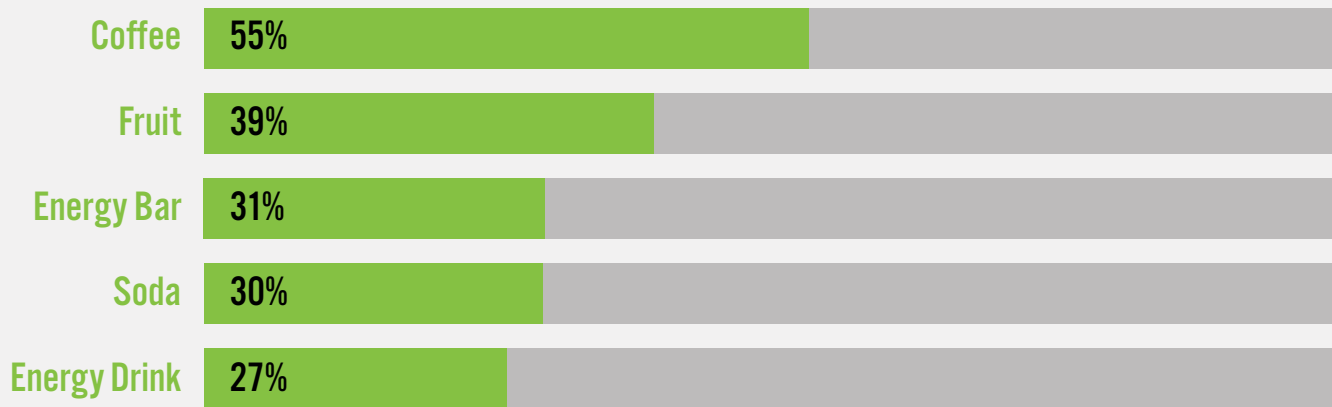
REGULAR OR DIET SODA?
52% REGULAR

MAKING THE CHOICE

From a broader standpoint, students look at nutritious snacks differently than they do sweet and salty snacks. The latter categories are much more likely to be seen as a “treat” and/or bought impulsively, especially candy (almost 70%). On the other hand, nutritious snacks are a more strategic purchase, with 71% of students indicating that they buy when they need an energy boost, and only 33% buying on impulse. Interestingly, while more than half of students (51%) indicated that they eat more candy and sweet snacks during finals and other stressful periods, only a third indicated that they eat more nutritious snacks during that time. Since finals and other stressful periods seem like natural moments to seek out an energy boost, there may be opportunities to promote nutritious snack options at these times during the semester.

TIME TO RECHARGE

In general, how do you get an energy boost?



In terms of factors influencing snack purchases, price topped the list in every category. Taking a deeper dive into the factors related to ingredients and nutrition, protein ranked at the top when considering all types of snacks (44%), followed by natural ingredients (38%) and low-calorie (33%).

These three factors proved to be most important across all categories of snacks as well, though students expressed higher expectations for nutritious snacks. Almost half of students cited natural ingredients (49%) and protein as a high priority for nutritious snacks, with low-calorie (40%) and low-fat (39%) falling next in line. These figures are more than double the percentages for the same factors in the candy and sweet snacks categories. The least important factor across all categories: gluten-free, which ranked at the bottom of each list.

MOTIVATION TO TRY AND BUY

Before being offered any incentives, more than half of students (58%) indicated that they would be most likely to purchase a healthy snack from the campus bookstore, followed by a salty snack (46%), candy (37%) and something sweet (24%). Since many students look at candy and sweet snacks as a “treat” and make impulse purchases, it’s not a surprise that about half are more likely to purchase these if on display in the checkout area (51% and 49%). However, even though nutritious snacks are less of an impulse, almost half (49%) of students also would be more likely to purchase if they see them on display. Salty snacks proved to be less of a temptation, at 37%.

SWEET SPLURGES



Campus bookstores see a 3-8x sales lift when a product is featured in a countertop display at checkout. Most popular? Premium candies.

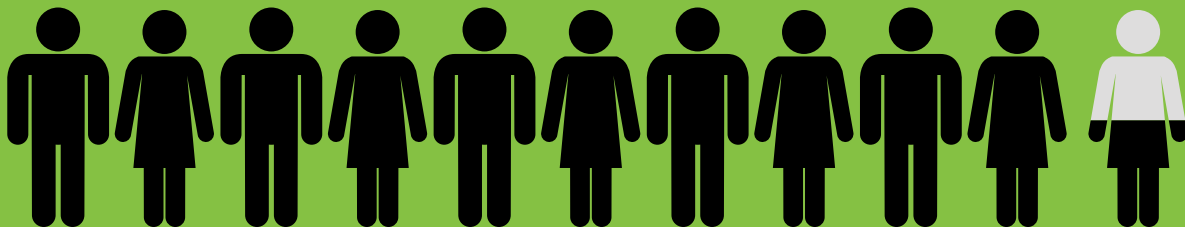
SHAKING THINGS UP

What motivates you to buy a snack you don't typically buy?



Free samples offered at the campus bookstore specifically generated an even better response – 94% of students showed at least some interest, and half were very or extremely interested.

94% OF STUDENTS ARE INTERESTED IN FREE SNACK SAMPLES AT THE CAMPUS BOOKSTORE



Email was the preferred method of learning about any discounts or samples at the bookstore (63%), followed by on-campus ads (50%) and in-store signage (42%). Social media again fell at the bottom of the preferred methods of communication, with Facebook at 25% and Twitter at 12%.

WHAT'S HOT IN SNACKING



Lisa Shapiro, Barnes & Noble College's Director of Café and Convenience, weighed in on key trends sweeping the industry and what's scoring big with students at campus bookstores.

From the campus bookstore perspective, where are you seeing the greatest sales increases?

Thinking about sales increases, two categories stand out: fresh food and nutrition bars. I think fresh foods are on the rise because we offer students a lot of variety – from breakfast options to mid-day snacks to dinner on the run – and there are many healthy choices. We also make a point to merchandise so that it's easy for students to make a quick decision. And, we help them save money through a Savings for Your Cravings value program and other promotions. Nutrition bars also are incredibly popular with students, which makes sense – they're very versatile, offering an inexpensive snack or meal replacement at any time of day. They're also portable and easy to eat, but they still can offer an energy boost or nutritional benefits like protein and vitamins.

What are the hottest flavors on the market right now?

Breakfast flavors are incredibly popular – and not just at breakfast time. We're seeing a rise in flavors like blueberry muffin, maple syrup and bacon for products that sell in all dayparts. It's also been interesting to watch the latest trends in fruit flavors, which get very specific – not just orange, but blood orange. Meyer lemon and granny apple. All are bolder than other fruit flavors. And, students enjoy modern takes on classic childhood treats, which we've seen in the form of flavors like birthday cake and root beer float.

What trends are you seeing in how students are snacking?

Three immediately come to mind in terms of what students are looking for in their snack experience.

Customization: students like to control the proportions of their food, including spreads and snacks you can dip. We first saw the demand as one of five exclusive retailers to launch the Nutella® & GO! products in the U.S., and now with newer options such as Reese's Spreads Snacksters.

Function: it's true that students pay attention to nutrition, and they are very interested in snack options that taste good as well as offer health benefits. We offer a number of these popular snack items, from gummies with protein or Vitamin C to snack mixes with probiotics.

Evolution: mini or snack-sized candies have been popular for a while now; they're portable, easy to eat and offer good portion control. The next wave of sweet snacks evolved straight from minis: thins. We see interest in cookie and brownie crisps as well as candy thins.

ABOUT BARNES & NOBLE COLLEGE MARKETING

Barnes & Noble College Marketing (BNCM), a division of Barnes & Noble College, is the leader in marketing to college students in the United States. With the largest social media network of its kind, a proprietary online research panel and access to more than 5 million students on campus, BNCM provides its brand partners with unprecedented reach to the college consumer and gives them a strategic advantage in successfully achieving their marketing goals and objectives. BNCM's college marketing capabilities include email marketing, social media marketing, digital media advertising, product sampling, event marketing, in-store signage, sports marketing and millennial market research.

For more information, visit bncollegemarketing.com or contact Stacey Merkin, Manager, Brand Partnerships, 908.991.2407, smerkin@bncollege.com.

BARNES & NOBLE COLLEGE MARKETING BY THE NUMBERS



5M+
college students with
\$545B
in total spending power



200M
web page views per yr
17M
new visitors per yr



1.5M
person email database
26%
average email open rate



810,000
social media followers
6,500
student panel research



1,000
in-store events per yr
57M+
in-store impressions per yr

This survey was conducted through Barnes & Noble College's Student Point of View (POV), an online research community of 6,500 diverse, forward thinking college students across the nation.

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