

Transportive  
flavors are the escape  
consumer need

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Our purpose is to help businesses and people grow.

Experts in what consumers want and why

**MINTEL**





# What you'll learn during today's presentation

01

## Recognize a shift in consumer discovery

Consumers are open to new flavors and ingredients, but the way they are learning about innovation is shifting.

Foodservice exposure isn't always the primary discovery source, especially as consumers are increasing their retail purchases, and cutting back on dining out during the recession.

02

## Go beyond the basics

Think bigger than big cities like Chicago and New York when considering regional flavor innovation opportunities.

Consumers are interested in hyper-local flavors and ingredients and are recognizing the nuances between various regional cuisines, though this is largely untapped by brands and operators.

03

## Make new flavors approachable

Familiar formats and cuisines go a long way in encouraging consumer trial. Regional and international flavor innovation should consider the current climate with a focus on comfort foods and value.

# ADJUSTING TO OUR “NEXT NORMAL”



# “New” is static, “next” is always looking forward

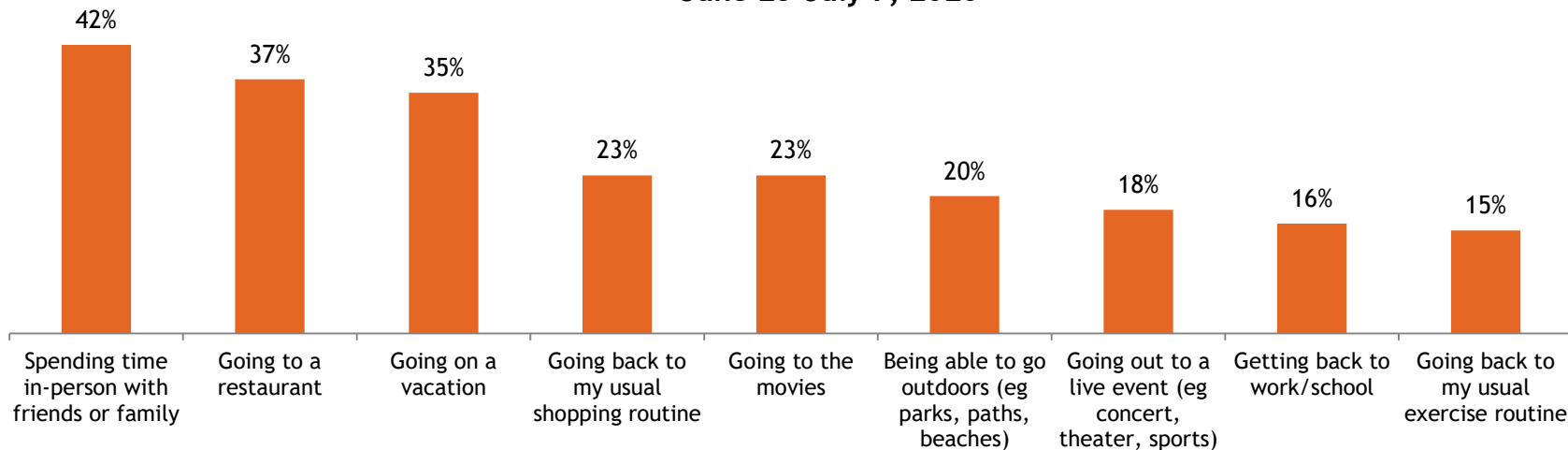
But “next” has a more complex meaning, it suggests movement forward. It means “the thing/person/situation that follows the current thing/person/situation.” And that’s what our current state of affairs is, because of COVID-19. Since the progression of the disease remains unknown, there are many more “next normals” that will challenge us until the virus is resolved.

Marcia Mogelonsky, Mintel



# What consumers miss most suggests what brands can add to consumers' lives

US: behaviors looking forward to once current social distancing measures are relaxed,  
June 25-July 7, 2020



# Transportive flavors can take people where they can't physically go

- Provides comfort to consumers who are longing to go out or travel
- Offers a value-for-money appeal that is recession-proof
- Brands can be emboldened by consumers' already adventurous tastes
- Create experiences through flavor and aroma,
- Build connections with authentic ingredients and packaging and a connection to the local people



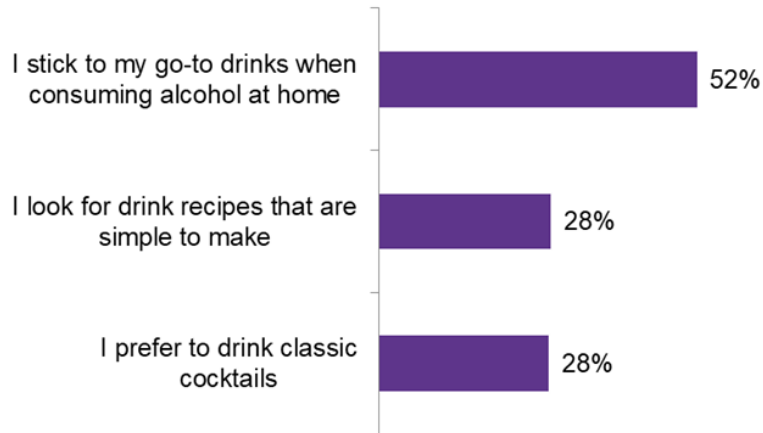


# At-home drinkers are a bit stuck in their ways

With the lion's share of alcoholic beverage occasion dramatically shifted to at home consumption, consumers are likely to be looking for some flavor and recipe inspiration.

While the depth and diversity of the market indicates that while drinkers have their go to beverages, they are moving around within those categories suggesting that variety is still appealing.

## Alcoholic beverage attitudes and behaviors May 2020



Base: 1,389 internet users aged 22+ who have consumed alcohol in the past three months

Source: Lightspeed/Mintel

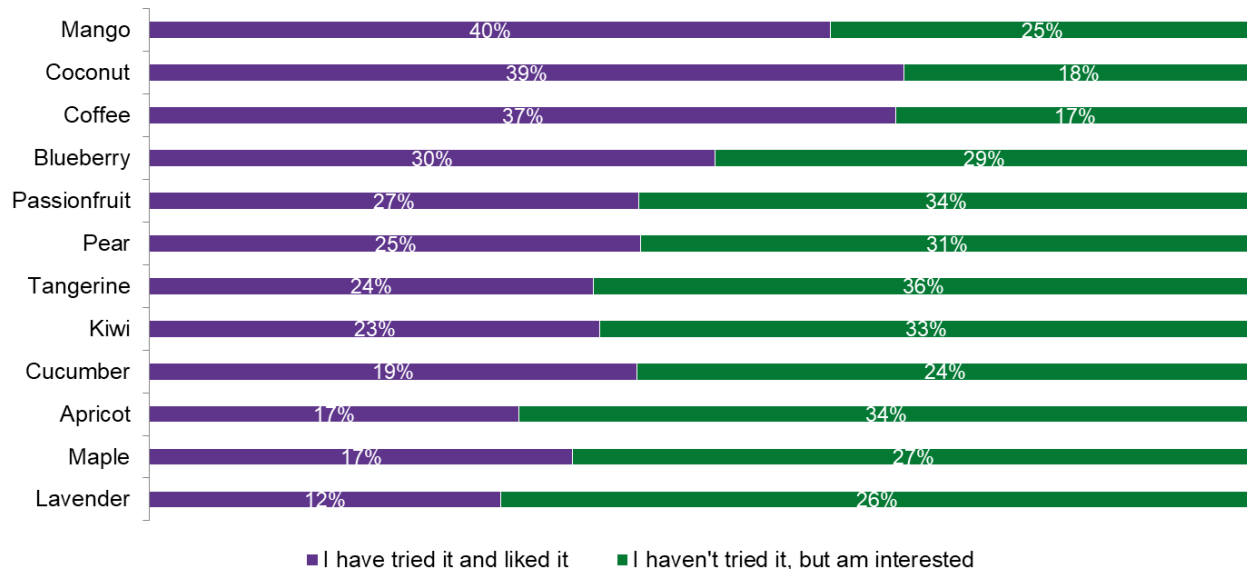


# Channel the on premise experience, at home

Innovation can also help to fill the void with packaged options that allow for flavor and product exploration wherever the setting.

While consumers have the most positive experience with tropical flavors, interest is salient with trending flavors that consumers may expect to find on cocktail menus like cucumber, maple and lavender.

EXPERIENCE OR INTEREST IN TIER TWO FLAVORS, MAY 2020



*"How would you describe your experience with, and interest in, the following flavors when it comes to alcoholic beverages?"*

Base: 1,389 internet users aged 22+ who have consumed alcohol in the past three months

SOURCE: LIGHTSPEED/MINTEL



# Experiences, value and nostalgia are driving consumer behavior

77%

of US consumers agree experiences are more important to them than material possessions

62%

of US consumers have a budget that they try to stick to as much as possible

72%

of US consumers enjoy things that remind them of their past (eg childhood)

Base: 1,000 internet consumers age 18+

Source: Lightspeed/Mintel



# Time travel: General Mills brings back nostalgic '80s flavors

General Mills, the fan-favorite cereal maker, is kicking it old school, with Cocoa Puffs delivering more chocolatey taste, Cookie Crisp bringing more chocolate chip cookie taste, Trix reviving its classic six fruity shapes and Golden Grahams taking us back to its retro recipe - honey is back!

*-General Mills Press Release*





# Diners seek comfort, now more than ever

Comfort foods, seasonal flavors and local items appeal to diners.

59%

of US diners say comfort foods (eg macaroni and cheese, fried chicken) appeal to them on restaurant menus

47%

of US diners say seasonal flavors appeal to them on restaurant menus

34%

of US diners say locally sourced ingredients appeal to them on restaurant menus

Base: 1,897 internet users aged 18+ who order food from restaurants

Source: Lightspeed/Mintel





# Consumers are interested in flavor trial

Flavor experimentation and trial is heavily reliant on familiar cuisines and formats.

56%

of US consumers say they sometimes try new flavors; 23% say they go out of their way to try new flavors

49%

of US snackers like to experiment with new flavors in snacks

29%

of US consumers would try a new flavor or ingredient if it's used in a cuisine they enjoy

*Base: 2,000 internet users aged 18+; 1,606 internet users aged 18+ who consumed select snacks in the past three months; 1,876 internet users aged 18+ who have dined out in the past three months*

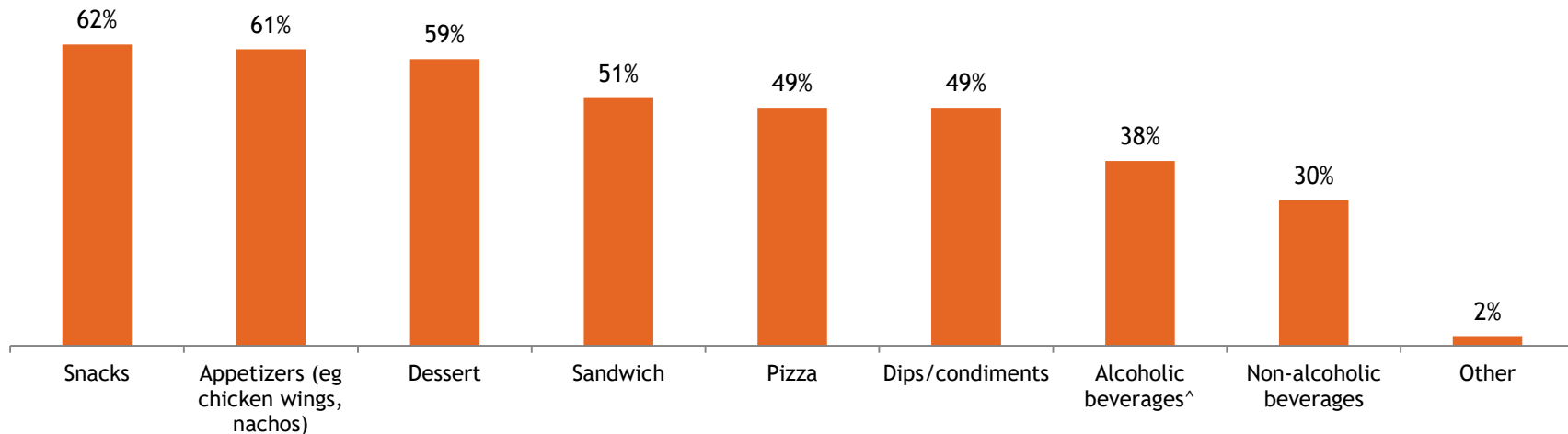
*Source: Lightspeed/Mintel*



# Bridge the unfamiliar and the familiar

Consumers are most likely to try new flavors in familiar formats.

US: "What types of food or drinks would you be most likely to try a new flavor in?", Aug 2020



Base: 2,000 internet users aged 18+; ^1903 internet users aged 21+

Source: Lightspeed/Mintel

# Go-to flavors work well as a base for flavor innovation

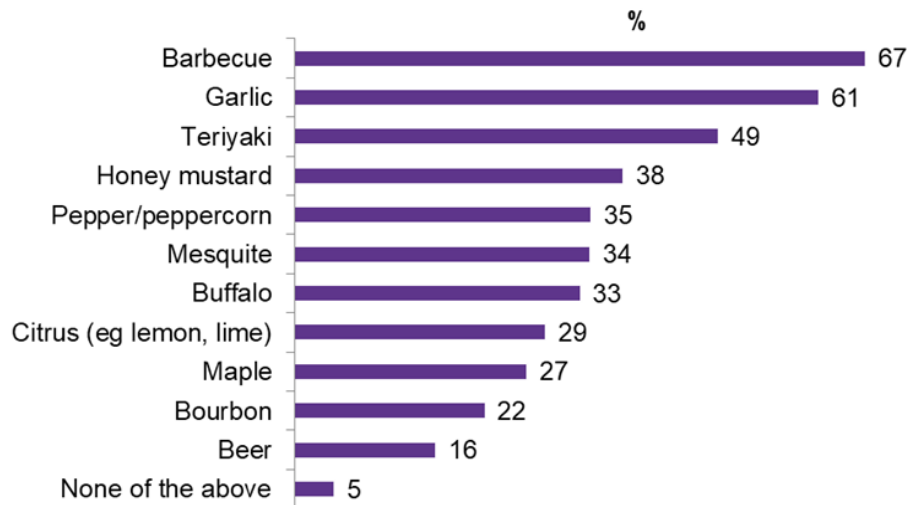
US consumers love the classics, not only because many are routine pantry staples and are familiar but also likely based on value added product availability.

**Innovation that merges classics with new complimentary flavors can feel new while remaining approachable to the conservative consumer.**

While consumers lean into the familiar, and may be more inclined to do so as a result of the events of 2020, consumers were already seeking ways to explore and will likely continue to do so, but perhaps a little more conservatively.

## Current Protein Flavors

March 2020



*"Which of the following flavors do you currently eat when it comes to proteins (eg meat, meat alternatives)? Please select all that apply."*

*Base: 1,985 internet users aged 18+ who have consumed proteins in the past three months*

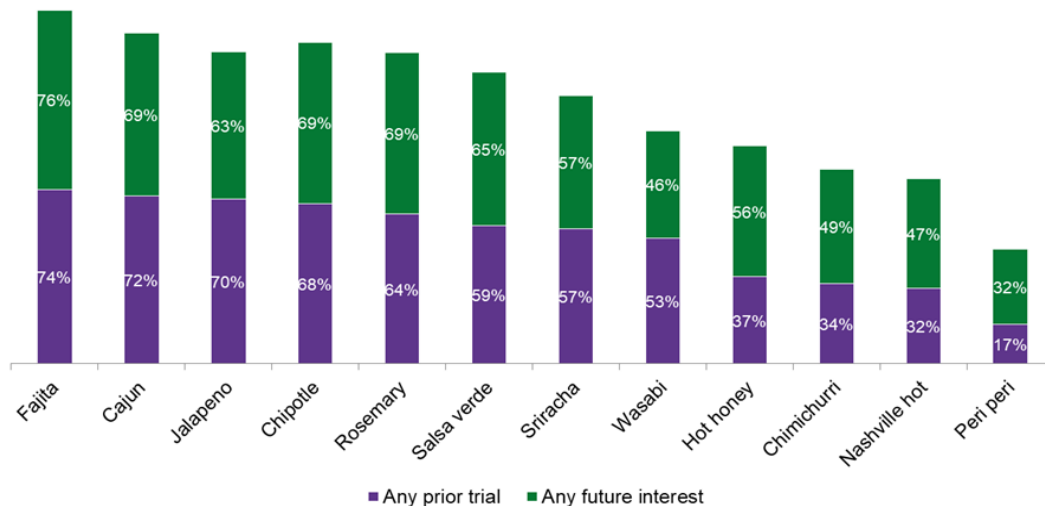
*Source: Lightspeed/Mintel*

# What's next? Move hot and spicy flavors beyond the basics

Although trial and awareness of secondary flavors may fall short of flavors like Cajun, chipotle and jalapeno, this new crop of flavors that deliver heat in varying degrees with some flavor complexity show promise.

Flavors like salsa verde, sriracha, hot honey, chimichurri, Nashville hot and peri-peri have stronger interest in *future* trial than prior trial.

Experience and Interest in Flavors  
March 2020



"How would you describe your experience with and interest in the following flavors when it comes to proteins (eg meat, meat alternatives)?" – NET Any trial/Interest

Base: 1,985 internet users aged 18+ who have consumed proteins in the past three months

Source: Lightspeed/Mintel



# Millennials are interested in regionally inspired "Nashville hot"

Millennials are more likely than other generations to have tried Nashville hot across a range of categories.

DIPS/SAUCES

31%

of US Millennial sauce/dip consumers have tried "Nashville hot" and liked it; 21% would like to try it

SNACKS

29%

of US Millennial snackers have tried "Nashville hot" and liked it; 26% would like to try it

PROTEINS

34%

of US Millennial protein consumers have tried "Nashville hot" and liked it; 24% would like to try it

*Base: 1,820 internet users aged 18+ who have used dips and sauces in the past three months; 1,921 internet users aged 18+ who have consumed snacks in the past three months; 1,985 internet users aged 18+ who have consumed proteins in the past three months*

*Source: Lightspeed/Mintel*



## But other generations show interest in trial

Regional flavors like Nashville hot have cross-generational appeal. But just seven food products launched in the past three years contain this flavor.

DIPS/SAUCES

25%

of US Gen Z sauce/dip consumers would like to try "Nashville hot" dips/sauces

SNACKS

32%

of US Gen X snackers would like to try "Nashville hot" snacks

PROTEINS

24%

of US Baby Boomer protein consumers would like to try "Nashville hot" proteins

*Base: 1,820 internet users aged 18+ who have used dips and sauces in the past three months; 1,921 internet users aged 18+ who have consumed snacks in the past three months; 1,985 internet users aged 18+ who have consumed proteins in the past three months*

*Source: Lightspeed/Mintel*

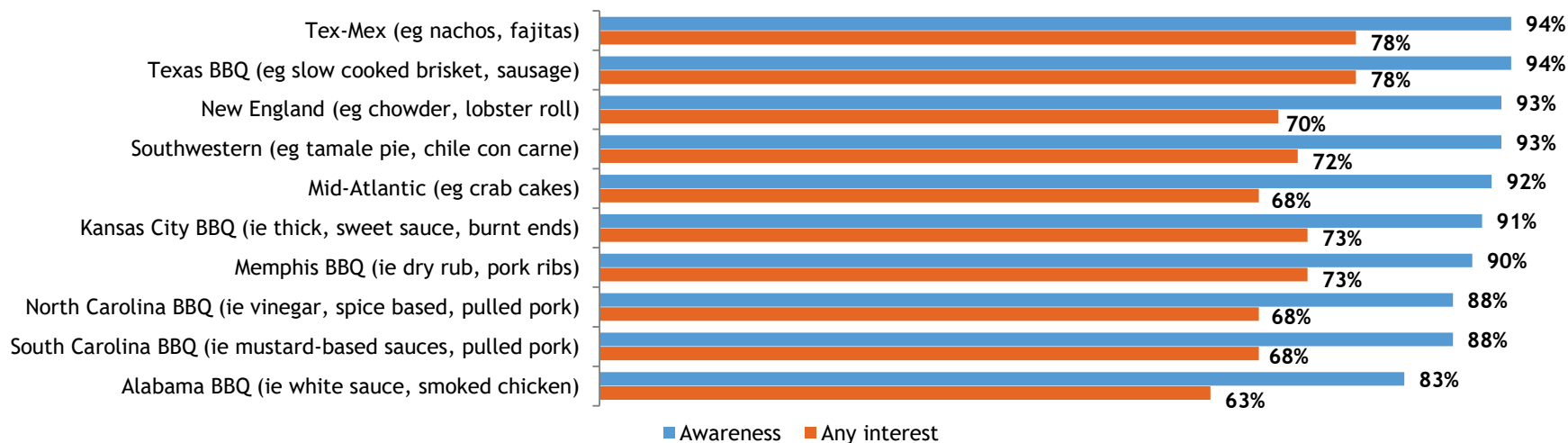




# Traveling Through Taste Buds

Consumers already show awareness and interest in various US regional cuisines:  
87% of consumers show interest in any type of regional BBQ.

**US: experience with, and interest in, the American cuisines, Aug 2020**



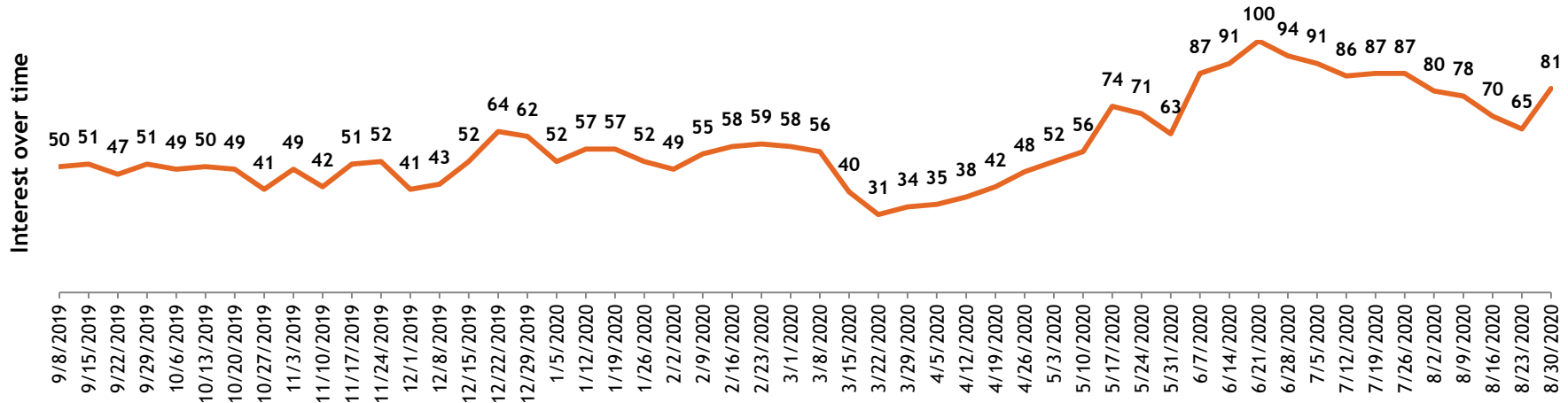
Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel

# Road trip searches are on the rise

Americans began researching road trips during the early months of the COVID-19 pandemic, and searches peaked in mid-late June 2020.

US: Google searches for “road trip,” Sep 8, 2019-Aug 30, 2020





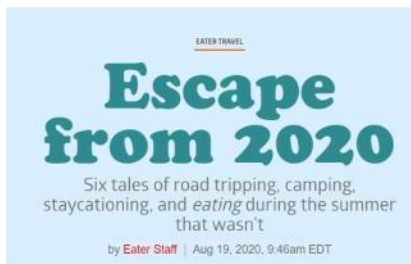
# Road trips have emerged as a way to travel within our circumstances

COVID-19 restrictions highlight new travel opportunities.



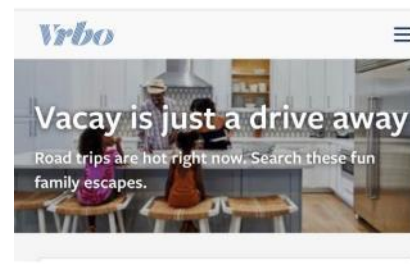
Thrillist

Thrillist released a guide to road trips, saying that while summer may not have turned out how we expected it to be, "we can still satisfy our urge for IRL exploration from the safety of our cars."



Eater

Food website Eater similarly created a guide to breaking free from the monotony of quarantine told through six stories.



VRBO

The popular vacation rental website VRBO promotes road trips and staycations as safe travel options during COVID-19.

# Regional flavors have been used to shake up mature categories

In retail, regionally differentiated flavors began popping up in barbecue sauces at the beginning of the last decade and have taken off since then.

More recently, retail pizzas have begun to explore regional styles.

These products begin with something familiar and add a level of specificity to make the category feel new again.



Texas-Style BBQ Sauce



Detroit-Style Pizza

# Snacks are especially fruitful for flavor variation

38% of US consumers who have increased their salty snack consumption in the past year have done so because of a better variety of flavors available.



**Mid-Atlantic**

Chesapeake Bay Crab Spice Flavored  
Potato Chips



**Midwest**

Deep Dish Pizza Flavored  
Potato Chips



**Southern**

Nashville Style Hot Chicken Flavored  
Potato Chips

# Regional also appears in internationally inspired food and drink

Consumers can't necessarily travel far right now, but this doesn't mean they aren't also missing international flavor exploration.



Forno de Minas Frozen Baked Cheese Sticks are described as a **"traditional and regionally inspired comfort food."**



Market District Ciabatta Bread **"respects all the finest in Italian baking traditions."** It explains that ciabatta is native to the Apulia region of Italy.



Lesley Stowe Raincoat Crispotti Pineapple and Thai Basil Crackers **"are inspired by the exotic flavors of the Pacific Rim region,"** with a combination of pineapple, mango and Thai basil.



# Exotic food and drink bring numerous rewards

Consuming world cuisine can leave a deep impression. Such exotic flavours make us feel closer to new cultures, excite our daily lives and inspire new purchase patterns

A SUBSTITUTE FOR  
EXPERIENCE

78%

of Canadian adults say that internationally inspired foods are a good way to experience other cultures

TRAVEL ENCOURAGES  
EXPERIMENTATION

38%

of Italian adults say travelling encourages them to try a new flavour\* (eg getting to know new cuisines)

AFFORDABLE  
EXCITEMENT

51%

of UK respondents say world cuisine meals are an inexpensive way to inject some excitement into the day

*Base: Canada: 2,000 internet users aged 18+; Italy: 1,000 internet users aged 16+; UK: 1,775 internet users aged 16+ who have eaten world cuisines at home in the last three months*

*Source: Lightspeed/Mintel*



# Tap into quirky combinations of savory and salty flavors

The blurring of sweet and salty flavours has been evident in China and Japan over recent years, and 38% of US frozen treat consumers, particularly affluent consumers, find salty flavours appealing.

Japanese launches can provide inspiration. Akagi Nyugyo has released a popsicle that tastes like an omelette; the suggested topping is soy sauce. Fast food chain First Kitchen has launched a French fry dish topped with ice cream, chocolate sauce and sprinkles.



First Kitchen French fry dish (Japan)



Akagi Nyugyo's Garigari-kun omelette flavour (Japan)

# Celebrating ingredients and people can connect the drink to the place of origin

## Celebrating authentic local ingredients

To convey authenticity, the recipe should be as similar as possible to the one where the drink was founded. Using the same ingredients can achieve this consistency.

## Celebrating people

With 65% of US travelers liking travel activities where they can meet local people, transportive drinks can make consumers feel connected to a far-off place by describing how the people there make the drink special.



Karma Drinks credits its kola nut growers in advertising



An aerial photograph of a coastal landscape. The top half shows a sandy beach with gentle waves washing onto it. The water is a vibrant turquoise color, revealing some rocks beneath the surface. Several large, dark rocks are scattered along the shoreline. The bottom half of the image shows a winding asphalt road with white lane markings, curving through a lush green forest. The road is bordered by a low stone wall in some areas. The overall scene is bright and scenic.

## KEY TAKEAWAYS





# Key takeaways

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Foodservice exposure isn't always the primary discovery source, especially as consumers are increasing their retail purchases, and cutting back on dining out during the recession.

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# Thank you!



**Stephanie Mattucci**

Associate Director, Food Science

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