WHAT ENCOURAGES CONSUMERS TO TRIAL NEW FLAVOURS?

FDIN
London: April 2017
What encourages new flavour trial ..........

..... what prompts the trial of a new flavour

..... Impact of street food on savoury flavour trends

..... emerging sweet flavour trends
Supermarket environment impact varies greatly with age

Factors prompting trial of a new flavour, 2015

Base: 1,489 internet users aged 16+ who have eaten or would be interested in trying emerging ethnic foods at home
Source: Lightspeed GMI/Mintel
BUT many still more open to new flavours when dining out……..

40% of older millennials (27-36)

45% of ABs

would like to see a wider variety of global cuisines when dining out
Indications from Europe suggest Social Media to be more influential over time

Impact of social media on new flavour trial by age, (2016)

- Poland: 18% (16-24) vs 13% (All)
- Spain: 28% (16-24) vs 14% (All)
- Italy: 20% (16-24) vs 11% (All)
- Germany: 21% (16-24) vs 9% (All)
- France: 16% (16-24) vs 7% (All)

Similar levels to trial of new flavour in restaurants

Base: 1,000 internet users aged 16+
Source: Lightspeed GMI/Mintel
Social media more likely to drive interest in highly visual foods

Purple Vegetables  Charcoal Foods  Rainbow Coffee

Sushi donuts  Matcha Mylkbar “smurf smoothie bowls”
Unfamiliarity the main barrier for new foods at home

Barriers to eating world cuisines at home, UK by generation, November 2016

- Don’t know how to cook/prepare
- Not sure about taste
- Prefer to try new cuisines in restaurants
- Takes too long

- Baby Boomers
- Generation X
- Millennials

Base: 1,837 internet users aged 16+ who have not eaten at least 1 type of world cuisine at home in the last 3 months source: Lightspeed / Mintel
Younger consumers seek street food inspiration in foodservice

Interest in trying street-food inspired dishes in restaurants /takeaways, UK by generation, 2016

- Millennials (younger) (17-26): 64%
- Millennials (older) (27-36): 59%
- Generation X (37-51): 47%
- Baby Boomers (52-70): 39%

Base: 2,000 internet users aged 16+ Source: Lightspeed / Mintel
Street foods trial drives home food trends

Trying new world cuisine from street vendor prompted me to cook at home, UK by generation, 2016

Younger consumers are both more likely to seek street food trends in restaurants

AND

Once tried in foodservice, to seek to replicate at home

Source: Lightspeed / Mintel

Base: 1,884 internet users aged 16+ who have eaten world cuisines in the last 3 months or are interested in trying
Meal and meal centres at forefront of retail street food adoption

Flavours and themes cover a broad selection of emerging Asian and Mexican “street” foods: Thai, Korean, Malay/Indonesian, Mexican, Vietnamese & Japanese themes are the most frequently used. Familiar partner foods often used to lessen risk of the unfamiliar (Pulled pork/Indonesian; Taco/Korean)

Source: Mintel GNPD
Emerging Asian / Latin American themes popular in many UK categories

- **Waitrose Seriously Creamy Malaysian Coconut & Lime Ice Cream**
- **M&S Thai Coconut Chicken Penang Flavoured Potato Crisps**
- **Lord Poppington’s Mexican Style Chilli & Lime Popcorn**
- **Tesco Finest Madagascan Vanilla Yogurt with Alphonso Mango, Pineapple & Japanese Yuzu Compote**
- **Encona Taste Explorers Korean BBQ Marinade**
- **Asda Good & Counted Snacking Flavours of Asia Lentil Chips**

*Source: Mintel GNPD*
Emerging Asian / Latin American a theme for sauces and seasonings

- Tean's Gourmet Malaysian Traditional Chicken Curry Paste
- Kumar's Curries & Bumbu's Redang Spice Paste
- Nem Viet Vietnamese Spring Rolls Kit
- Santa Maria Extra Fine Selection Peruvian Chilli & Lime Seasoning
- Waitrose Cooks' Ingredients Pibil Paste
- Schwartz Grill Mates Brazilian BBQ Smokey & Zesty Marinade Mix

Source: Mintel GNPD
Ethnic flavours also reflecting desire for lighter eating

Urban millennials blending interest in “street” food – with desire to eat lighter, more plant based foods: rise in Lighter, broth style street foods – Ramen, Miso, Pho

Source: Mintel GNPD
Majority of UK consumers check for sugar levels

Consumer concerns over sugar

The high proportion of people who check on-pack nutritional details further indicates the level of concerns over sugar. This is likely to discourage sales of products high in sugar, whether from added sugar or from naturally-occurring sugars. However, that a no/low/reduced sugar label is a draw for many people suggests that emphasising their health credentials here should benefit manufacturers.

- Check for sugar/sugar content on food and drink labels or ingredients lists or nutritional tables
- Actively seek out products labelled as no/low/reduced sugar

Base: 2,000 internet users aged 16+ | Source: Lightspeed/Mintel
Consumers are open to a range of sugar alternatives, with anything with a vaguely ‘natural’ association especially favoured. While there is no ‘one-size-fits-all’ option suitable for all product categories, consumer openness gives companies wide scope to experiment with different substitute ingredients to find the one best suited to their requirements.
But artificial sweeteners not the answer to sugar concerns …

Concerned about sugar in food and non-alcoholic drink products: 62%
Taking steps to limit or reduce the amount of sugar in their diet: 53%
Concerned about sugar are also concerned about artificial sweeteners: 72%

People’s health concerns over sugar are likely to have gained strength with the announcement of the sugar tax and advice to cut back from multiple health organisations. This has implications for all products containing sugar. However, high concerns over artificial sweeteners mean that manufacturers will need to look to more varied methods to achieve Government sugar reduction targets.

Base: 2,000 internet users aged 16+ | Source: Lightspeed/Mintel
Consumers seeking new foods that cut back on sugar content, rather than artificially replacing

UK adults say that...

While consumer suspicions of artificial sweeteners present a significant barrier towards reformulation, that many people are amenable towards less sweet-tasting food and drink products gives companies looking to reduce sugar the option to cut sugar without replacing it with anything, where it is possible for them to do so without affecting structure or consistency.

40% A sweet food or drink brand that changed its recipe to replace sugar with sweeteners would put them off

47% A reduced-sugar food/drink product with a less sweet taste is more appealing than one which uses sweeteners

Base: 2,000 internet users aged 10+ | Source: Lightspeed/Mintel
Changing consumer perception on sugar may impact sweet flavour trends

Need for natural
Consumers' priorities for natural products drive product formulation and provide opportunities for flavors that have familiar bases, such as **fruits, herbs, spices and flowers**.

"Permissible indulgence"
Balancing need for **indulgence** through flavours that have less sugar, calories or fat than the original products.

Flavour forecast
Global beverage trends for Watermelon, rose and cardamom could have dessert cross-over potential.
Floral flavours have potential to expand

MOST COMMONLY USED FLOWERS AS A FLAVOUR COMPONENT IN NEW FOOD AND DRINK PRODUCTS, EUROPE, 2011 - 16*

*Note: 2016 includes January to July
Source: Mintel GNPD

Interest in botanical flavours in food and drink, Europe, 2016

Base: 1,000 internet users aged 16+
Source: Lightspeed GMI/ Mintel
Botanicals, and florals start to take a leading role

Albert Ménès Provence Rose Petal Preserve (UK)

Lambertz Bio Cookies with Meadow Herbs feature spearmint, lemon balm and calendula (Germany)

Vilvi Imunia yogurt with honey and linden blossoms extract (Poland)

Source: Mintel GNPD
Spice with a medicinal punch

Casa Amella Organic Cream of Vegetable Soup (Spain)
This soup features a Provence herb infusion (rosemary, oregano, basil, thyme, lavender), and is good for digestion

HeyLife Glow & Shine Pineapple, Carrot and Turmeric Juice (Switzerland)
This lactose- and gluten-free cold pressed juice is 100% natural has not been pasteurised to preserve all nutrients

So Riso Rice Oil with Ginger (Poland)
This GMO-free oil is said to contain a high content of antioxidants

Source: Mintel GNPD
Nut and seed flavours grow

CONSUMERS WHO AGREE WITH THE FOLLOWING STATEMENTS ABOUT SEEDS, NUTS AND TRAIL MIXES, US, APRIL 2016

Source: Lightspeed GMI/Mintel

- 88%: They are a good source of protein
- 86%: They are healthier than other snacks
- 86%: They are more natural than other snacks
- 84%: They are a good source of energy
Seeds as a flavour infiltrate new categories

- **Finax Urkraft**
  Melon Seeds, Hemp, Cashew Nuts and Cinnamon Granola
  **Finland**

- **Lindt Excellence**
  Dark Chocolate with Toasted Sesame
  **Spain**

- **True Food Mango Chia Yoghurt**
  comprises yogurt with chia seeds and fruit
  **UK**
BBQ trend promotes Smoke & Oak flavours

Users who prefer smoky flavours (Q3 2016)

- France: 28%
- Germany: 29%
- Italy: 32%
- Spain: 34%
- Poland: 32%

Base: 1,000 internet users aged 16+
Source: Lightspeed GM/ Mintel
Rising use of smoky flavours can mask sugar reduction

**The Tea Room Chocolate Fusion Lapsang Souchong Smoky Tea Organic Dark salt (Germany)**

**Veganz roasted organic coconut chips with smokey flavour are made from tropical coconut rounded off with a wonderful smoky and spicy flavour (Germany)**

**NomNom Lust Super Salted Caramel Chocolate Tablet contains 72% dark chocolate and is seasoned with smoke (UK)**
Three thoughts to take away:

Balance

It can take younger consumers time to be comfortable when experimenting with flavour.
Consider providing a sense of the familiar:
  *Pairing; Heritage; Authenticity*

Discovery

Consider how consumers discover new flavours.
  *Foodservice & street food* are known sources
Don’t underestimate the power of *Sampling in-store*
i-generation & *social media*: need for highly *visual flavours*

Natural Health

Emerging sweet flavour trends combine desire for natural and less processed foods and over-laps with trends for *heritage ingredients, nuts & plants*
THANKS! GET IN TOUCH

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