“Restaurant operators don’t need to reinvent the wheel if they want to stay on trend. Focusing on how restaurants can differentiate themselves from in-home cooking through authentic ethnic flavors, fresh herb combinations, and unique sauce pairings can garner more interest in a restaurant, especially when all of these factors have a positive impact on a consumer’s dining out experience.”

– Katrina Fajardo, Foodservice Analyst

This report looks at the following areas:

- Consumers are becoming more comfortable in their home kitchens
- Targeting the right audience for new flavors and seasonings
- How to garner curiosity for new flavors at restaurants versus at retail

Foodservice operators, chefs, and manufacturers are continually hoping to beat their competitors (e.g. cooking at home, grocery stores, convenience stores, etc.) to the punch in regard to the newest flavors and dishes that will interest American consumers. This is especially important in a competitive environment where consumers are still cautious about spending on foods eaten outside the home.

The main market trends that are affecting this race for innovation are the changing face of American demographics, consumers growing comfortable within their own kitchens, interest in regional ethnic cuisine, and the “foodies” movement cultivating a group of customers who are seeking more than nourishment when dining out; now, they seek a one-of-a-kind experience.
Table of Contents

Scope and Themes

What you need to know
Definition
Data sources
Mintel Menu Insights
Consumer survey data
Abbreviations and terms
Abbreviations

Executive Summary

Market drivers
The consumer
Ubiquitous flavors are still in demand
  Figure 1: Interest in ethnic cuisine types at restaurants, April 2014
  Figure 2: Interest in ethnic cuisine types at restaurants, trended, April 2014 versus 2012
Spicy can bring life to menus
  Figure 3: Interest in spices and ingredients at restaurants, April 2014
Word-of-mouth leads consumers to new flavor discoveries this year
  Figure 4: How consumers find out about new flavors and ingredients, April 2014
A large number of consumers are willing to try new flavors
  Figure 5: Drivers for menu items with new and unique flavors, sauces, and seasonings, April 2014

What we think

Issues and Insights

Consumers are becoming more comfortable in their home kitchens
The issues
The implications
Targeting the right audience for new flavors and seasonings
The issues
The implications
How to garner curiosity for new flavors at restaurants versus at retail
The issues
The implications

Trend Applications

Trend: Experience is All
Trend: Greenfluencers
Trend: Extend My Brand

Market Drivers

BUY THIS REPORT NOW
Key points

Immigration and a growing non-White population are spurring flavor interest

Millennials are a consuming powerhouse

The internet has allowed for free-flowing flavor information

The foodie movement

Innovations and Innovators

Marketing to spicy lovers

Stunt foods give consumers the thrill of new tastes and flavors

Food preparation is creating a new avenue for flavors and spices

Variety is created via new dips and sauces

Marketing Strategies

If you can’t beat ‘em, join ‘em on the internet

Pinterest

Facebook and other social media outlets

Mening authentic, international flavors and foods

Major restaurants

Regional, authentic flavor concepts

Seasonal menus utilize fresh, “ripe right now” ingredients

Restaurants move into retail to capture more share of stomach

Figure 6: Share of total sauces and seasonings, YTD 2014, US

Ethnic Flavors and Seasonings/Spices by US Divisions

Lesser known Asian/African flavors are in demand throughout the US, coinciding with the ethnic population in each division

Figure 7: Index of Asian/African cuisines by US divisions, April 2014

Figure 8: Top 15 menu item cuisine types on restaurant menus, by incidence, Q1 2011-Q1 2014

Figure 9: Index of Asian/African cuisines by US divisions, continued, April 2014

South American and Mexican cuisine is in demand throughout the entire nation

Consumers in the Midwest and Southern divisions are still seeking Southern (US), Cajun/Creole, and Tex-Mex flavors

Figure 10: Index of North/South American cuisines by US divisions, April 2014

Figure 11: Index of North/South American cuisines by US divisions, continued, April 2014

Peppers are spicing up the Midwest and West

Figure 12: Spicy flavors as an ingredient on restaurant menus, by incidence, Q1 2011-Q1 2014

Figure 13: Top 10 chili pepper flavor ingredients on restaurant menus, by incidence, Q1 2011-Q1 2014

Figure 14: Index of peppers/chilies/spices by US divisions, April 2014

Figure 15: Index of peppers/chilies/spices by US divisions, April 2014

Trended Data – Interest in Ethnic Flavors and Cuisines

Europe

Figure 16: Interest in ethnic cuisine types at restaurants, April 2014 versus April 2012

Asia and Africa
Figure 17: Interest in ethnic cuisine types at restaurants, April 2014 versus April 2012

Americas

Figure 18: Interest in ethnic cuisine types at restaurants, April 2014 versus April 2012

Interest in Spices and Ingredients

Dried and fresh herbs
Spicy peppers/chiles/spices
Baking spices and aromatics/seasonings

Figure 19: Interest in spices and ingredients at restaurants, April 2014

Trended Data – Discovery of New Flavors and Ingredients

The landscape of flavor discovery has changed in just two years
The internet and hands-on experiences are important for today's cook

Figure 20: How consumers find out about new flavors and ingredients, April 2014

Trended Data – Attitudes toward Flavorings

Figure 21: Consumer attitudes toward spices, flavors, and ethnic cuisines, April 2014

Drivers to Try New Menu Items with New Flavors

Unique flavors will drive menu item trials among consumers

Americans are driven by spicy foods and authentic fare

Figure 22: Drivers for menu items with new and unique flavors, sauces, and seasonings, April 2014

Consumer Data – Overview

Men are bold, women are unique (in terms of flavor interest)
Millennials and Hispanics will drive the new flavor trends in foodservice
As a whole, experience is always the most influential drive in foodservice

Consumer Data – By Gender

Key points
Men use restaurants more frequently, but women are more adventurous when dining out
Spicy and branding is a bigger draw for men at restaurants, as they are more likely to be bored with restaurant offerings
Women use a plethora of mediums to learn about new flavors and foods
Women seek unique and healthier flavor offerings at restaurants, especially if it is harder to replicate at home

Figure 23: Usage of restaurants, by segment – Mean, by gender, April 2014

Figure 24: Consumer attitudes toward spices, flavors, and ethnic cuisines – Any agree, by gender, April 2014

Figure 25: Interest in spices and ingredients at restaurants – Peppers/Chiles/Spices, by gender, April 2014

Figure 26: How consumers find out about new flavors and ingredients, by gender, April 2014

Figure 27: Drivers for menu items with new and unique flavors, sauces, and seasonings, by gender, April 2014

Consumer Data – By Generation

Key points
iGeneration/Young Millennials’ diversity leads to unique ethnic requests; social media is key for discovering new flavors and seasonings
Older Millennials are the adventurous eaters, with interests in spicy and worldly flavors, while utilizing the internet and cooking classes
Baby Boomers may not be as adventurous as younger generations, but seek more seasonings, unique combinations, and authentic foods

Figure 28: Interest in ethnic cuisine types at restaurants – Europe, by generations, April 2014
Figure 29: Interest in ethnic cuisine types at restaurants – Asia and Africa, by generations, April 2014
Figure 30: Interest in ethnic cuisine types at restaurants – Americas, by generations, April 2014
Figure 31: How consumers find out about new flavors and ingredients, by generations, April 2014
Figure 32: Drivers for menu items with new and unique flavors, sauces, and seasonings, by generations, April 2014

Consumer Data – By Income

Key points

Higher-income households are heavier users of foodservice

Traveling and authenticity is key for $100K+ consumers

Figure 33: Usage of restaurants, by segment – Mean, by household income, April 2014
Figure 34: How consumers find out about new flavors and ingredients, by household income, April 2014

Consumer Data – By Race

Key points

White consumers are interested in worldly, ethnic cuisines

Black consumers would like to see more ethnic flavors that are tied to their roots on restaurant menus

Other race consumers gravitate toward spicy, multicultural, and unique cuisines due to their experimentation at home

Figure 35: Interest in ethnic cuisine types at restaurants – Europe, by race/Hispanic origin, April 2014
Figure 36: Interest in ethnic cuisine types at restaurants – Asia and Africa, by race/Hispanic origin, April 2014
Figure 37: Interest in ethnic cuisine types at restaurants – Americas, by race/Hispanic origin, April 2014
Figure 38: Consumer attitudes toward spices, flavors, and ethnic cuisines – Any agree, by race/Hispanic origin, April 2014
Figure 39: Drivers for menu items with new and unique flavors, sauces, and seasonings, by race/Hispanic origin, April 2014

Consumer Data – By Hispanic Origin

Key points

Hispanics will need to be enticed by branded spices and sauces, as well as spicy foods and unique preparations at restaurants

South American flavors are popular with Hispanics

Figure 40: Consumer attitudes toward spices, flavors, and ethnic cuisines – Any agree, by race/Hispanic origin, April 2014
Figure 41: Drivers for menu items with new and unique flavors, sauces, and seasonings, by race/Hispanic origin, April 2014
Figure 42: Interest in ethnic cuisine types at restaurants – Europe, by race/Hispanic origin, April 2014
Figure 43: Interest in ethnic cuisine types at restaurants – Asia and Africa, by race/Hispanic origin, April 2014
Figure 44: Interest in ethnic cuisine types at restaurants – Americas, by race/Hispanic origin, April 2014
Figure 45: Interest in spices and ingredients at restaurants – Dried herbs, by race/Hispanic origin, April 2014
Figure 46: Interest in spices and ingredients at restaurants – Peppers/Chiles/Spices, by race/Hispanic origin, April 2014
Figure 47: Interest in spices and ingredients at restaurants – Fresh herbs, by race/Hispanic origin, April 2014
Figure 48: Interest in spices and ingredients at restaurants – Baking spices, by race/Hispanic origin, April 2014
Figure 49: Interest in spices and ingredients at restaurants – Aromatics/Seasonings, by race/Hispanic origin, April 2014

Consumer Data – By Parents (Millennial/Non-Millennial and by Age of Children)

Key points

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 │ Brazil 0800 095 9094
Americas +1 (312) 943 5250  │ APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

oxygen.mintel.com © 2014 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
Millennial parents, and parents with kids aged 6-17, are more internet savvy, especially in regard to finding new flavors

Branding at grocery stores and menus is helpful for Millennial parents

Restaurant foods that aren’t up to par among parents with kids aged 6-11 has them turning to cooking at home

Figure 50: How consumers find out about new flavors and ingredients, by millennial parent, April 2014
Figure 51: How consumers find out about new flavors and ingredients, by parents with children and age, April 2014
Figure 52: Consumer attitudes toward spices, flavors, and ethnic cuisines – Any agree, by millennial, April 2014
Figure 53: Consumer attitudes toward spices, flavors, and ethnic cuisines – Any agree, by parents with children and age, April 2014
Figure 54: Drivers for menu items with new and unique flavors, sauces, and seasonings, by millennial parent, April 2014
Figure 55: Drivers for menu items with new and unique flavors, sauces, and seasonings, by parents with children and age, April 2014

Appendix – By Generation

Figure 56: Usage of restaurants, by segment – Mean, by generations, April 2014
Figure 57: Interest in spices and ingredients at restaurants – Dried herbs, by generations, April 2014
Figure 58: Interest in spices and ingredients at restaurants – Peppers/Chiles/Spices, by generations, April 2014
Figure 59: Interest in spices and ingredients at restaurants – Fresh herbs, by generations, April 2014
Figure 60: Interest in spices and ingredients at restaurants – Baking spices, by generations, April 2014
Figure 61: Interest in spices and ingredients at restaurants – Aromatics/Seasonings, by generations, April 2014
Figure 62: Consumer attitudes toward spices, flavors, and ethnic cuisines – Any agree, by generations, April 2014
Figure 63: Drivers for menu items with new and unique flavors, sauces, and seasonings, by generations, April 2014

Appendix – By Income

Figure 64: Interest in ethnic cuisine types at restaurants – Europe, by household income, April 2014
Figure 65: Interest in ethnic cuisine types at restaurants – Asia and Africa, by household income, April 2014
Figure 66: Interest in ethnic cuisine types at restaurants – Americas, by household income, April 2014

Appendix – By Parents (Millennial/Non-Millennial and by Age of Children)

Figure 67: Usage of restaurants, by segment – Mean, by millennial parent, April 2014
Figure 68: Usage of restaurants, by segment – Mean, by parents with children and age, April 2014
Figure 69: Interest in ethnic cuisine types at restaurants – Europe, by millennial parent, April 2014
Figure 70: Interest in ethnic cuisine types at restaurants – Europe, by parents with children and age, April 2014
Figure 71: Interest in ethnic cuisine types at restaurants – Europe, by millennial parent, April 2014
Figure 72: Interest in ethnic cuisine types at restaurants – Europe, by parents with children and age, April 2014
Figure 73: Interest in ethnic cuisine types at restaurants – Americas, by millennial parent, April 2014
Figure 74: Interest in ethnic cuisine types at restaurants – Americas, by parents with children and age, April 2014
Figure 75: Interest in spices and ingredients at restaurants – Dried herbs, by millennial parent, April 2014
Figure 76: Interest in spices and ingredients at restaurants – Dried herbs, by parents with children and age, April 2014
Figure 77: Interest in spices and ingredients at restaurants – Peppers/Chiles/Spices, by millennial parent, April 2014
Figure 78: Interest in spices and ingredients at restaurants – Peppers/Chiles/Spices, by parents with children and age, April 2014
Figure 79: Interest in spices and ingredients at restaurants – Fresh herbs, by millennial parent, April 2014
Figure 80: Interest in spices and ingredients at restaurants – Fresh herbs, by parents with children and age, April 2014
Figure 81: Interest in spices and ingredients at restaurants – Baking spices, by millennial parent, April 2014