

TRACKING SNACKING: CONSUMER FLAVOR PREFERENCES

TREND REPORT BITE



Whether to satisfy hunger or explore fun flavors and textures, snacking occasions are important to the North American lifestyle. **In fact, 64% of Canadian and 73% of U.S. consumers claim to eat savory snacks 2-3 times a week or more.** Our proprietary survey asked consumers about their preferences for a variety of snack profiles. A major finding is that there is friction between sticking with familiar favorites while also wanting to explore new or limited-edition flavors. Read on to uncover flavors appropriate for pleasing both tastes.

PROFILES OF INTEREST:

1. Classic Snack Flavor Favorites
2. Regional & Global BBQ
3. Sweet Flavor Combinations
4. Comfort Food Flavors

*We surveyed 1,000 North American consumers (500 in the U.S. and 500 in Canada) in Oct 2023 to understand attitudes towards savory snacks and flavor preferences. Target Group: 50% males, 50% females, additional 'diverse' gender options without quota count; Equal size for age groups 18 to 75 years old.

Agree or Strongly Agree

I prefer classic
flavors when buying
savory snacks

62%

I love to discover
new savory
snack flavors

62%

**North American consumers
claim to prefer the classics just
as much as they claim to love
discovering new flavors.**

Canada + US average

Classic Snack Flavor Favorites

Across North America, classic snacking flavors are very much loved. 53% of survey participants claimed to want more of these types of flavor. BBQ is the top preferred classic snack flavor in both countries (check out the next panel for more details). Salt & vinegar is more preferred in Canada, while hot & spicy is more preferred in the U.S. Consider twists on these familiar favorites with gourmet, bold or spicy iterations as modern updates.



IDEAS FOR TWISTS ON CLASSIC SNACK FLAVORS

Sour Cream & Onion: Cucumber Yogurt Garlic (Tzatziki); Sour Cream & Caramelized Shallot

Salt & Vinegar: Cider Vinegar & Sea Salt; Malt Vinegar, Salt & Dill

Cheddar: Cheesy Quesadilla; Grilled Cheddar & Tomato; White Cheddar & Black Pepper

Ranch: Peppered Bacon Ranch; Southwestern Ranch; Peppercorn Ranch

PRODUCTS OF NOTE



CROUSTILLES YUM YUM SHALLOT AND APPLE CIDER VINAIGRETTE FLAVOURED WAVY CHIPS are inspired by family traditions. | Canada



FREDERIK'S BY MEIJER SWEET CHILI & SOUR CREAM FLAVORED CRINKLE KETTLE POTATO CHIPS are described as offering a bold crunch warmed with a balance of spicy and savory flavors. | U.S.

Regional & Global BBQ

BBQ flavors for snacks go beyond the classic American sauces with Teriyaki as a top preferred profile in both countries. There are many opportunities for developing a desirable BBQ profile for your brand since BBQ encompasses a variety of tastes: an open fire cooking method, a regional style of meat preparation or a sauce. Explore the nuances of different smoke types like applewood or flavorful sauces like spicy Texas BBQ and Alabama White. To appeal to younger consumers, consider Global styles like Korean BBQ and Brazilian BBQ.

Top 5 Preferred BBQ Flavors By Country

CANADA: 1. Teriyaki, 2. Texas BBQ, 3. Buffalo BBQ, 4. Maple BBQ, 5. Chipotle BBQ, 5. Korean BBQ (tie)

U.S.: 1. Honey BBQ, 2. Teriyaki, 3. Texas BBQ, 4. Memphis BBQ, 5. Brown Sugar Bourbon BBQ



PRODUCTS OF NOTE



MOKU HAWAIIAN TERIYAKI MUSHROOM JERKY is described as a "traditional Hawaiian teriyaki-flavored mushroom jerky brightened with a light tropical flavor." | U.S.

42% of consumers responded that they likely or definitely would buy this product.



TIN STAR BBQ ROADTRIP POTATO CHIPS include three profiles: Smoke Shack (Traditional Southern Style), Barbacoa (Spicy Chipotle with a Sweet Kick), and Santa Maria (Tri-tip inspired BBQ with black pepper and garlic). | U.S.

Sweet Flavor Combinations

In the snacking realm, sweetness is being balanced with other flavors—salty, sour, smoky and spicy for a complexity that’s satiating and often unexpected. 45% of survey participants claimed to want more of these types of sweet combinations. Simply ‘Sweet + Salty’ and ‘Sweet & Sour’ are among the top preferred profiles. Explore different types of salt or salty flavors like bacon. For a more sophisticated take on sweet and sour, try citrus fruits and varietal vinegars.



IDEAS FOR SWEET+ COMBINATIONS

Salty: Sweet & Salty, Salted Caramel, Maple Bacon, Honey Sea Salt, Kettle-Style, Salted Brown Sugar

Sour: Sweet & Sour BBQ, Orange Chicken, Pineapple & Sour Cherry, Apricot Chamoy, Sweet Apple & Vinegar

Spicy: Sweet & Spicy, Thai Sweet Chili, Mango Habanero, Coconut Curry, Date & Black Pepper, Mandarin Ginger, Wasabi White Chocolate

PRODUCTS OF NOTE



SWEET CHILI BAKED SUPERGRAIN & SEAWEED PUFFS are described as the perfect blend of umami from super grain sorghum and seaweed puffs is dusted with sweet chili seasoning for just the right balance of sweet and a little heat | U.S.



GIANT EAGLE MARKET DISTRICT CINNAMON & BROWN SUGAR PRETZEL PIECES are described as sweet cinnamon and brown sugar on top of salty pretzel pieces combine to create the newest favorite snack | U.S.

62% of consumers responded that they likely or definitely would buy this product.

Comfort Food Flavors

The act of nibbling on a snack is comforting; therefore, it is no surprise 44% of survey participants claimed to want more comfort food flavors for snacks. Pizza was selected as the top comfort food flavor in both the Canada and the US. Since comfort foods vary by lived experience, identify beloved regional or comforts among your consumer targets. For example, poutine, an iconic Canadian dish or fries, cheese curd and gravy, was selected as a top flavor among Canadian consumers.

Top 5 Preferred Comfort Food Flavors By Country

CANADA: 1. Pizza 2. Poutine, 3. Chicken Wings, 4. Garlic Bread, 4. Fried Chicken, (tie) 5. Cheeseburger

U.S.: 1. Pizza, 2. Bacon Cheeseburger, 2. Taco, (tie) 3. Mac & Cheese, 4. Nachos, 4. Chicken Wings



PRODUCTS OF NOTE



POPCHIPS FULLY LOADED BACON, CHEDDAR, SOUR CREAM & CHIVE FLAVORED POPPED POTATO SNACK is a powerful tot that has transformed into a small but mighty bite | U.S.



TARGET FAVORITE DAY PIZZA PARTY SNACK MIX includes pizza-flavored breadsticks, seasoned corn nuggets, cheese-flavored corn sticks and seasoned crackers. | U.S.

43% of consumers responded that they likely or definitely would buy this product.

THE TAKEAWAYS

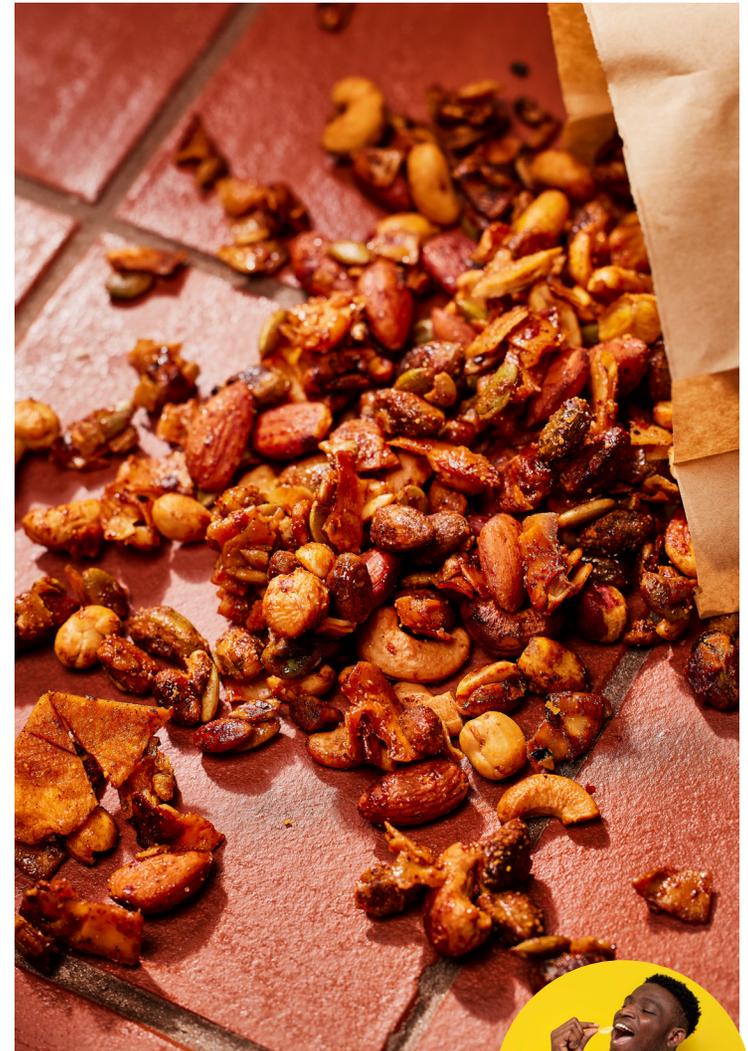
Flavor is the most important factor that consumers pay importance to when buying savory snacks. Faced with an abundance of choices, consumers enjoy the classics, but are also open to try something new. There is much interest in regional and global BBQ flavors, comfort food inspired flavors and sweet flavor combinations. Since there is pleasure in the approachable, consider subtle twists to these beloved profiles. However, if your brand is targeting a more adventurous consumer, look beyond the classics at global dishes or BBQ styles, artisan profiles or even up-and-coming condiments for your next flavor innovation. More emerging profiles delight the 53% of North American consumers that claim to love to be surprised by a flavor when eating savory snacks.

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