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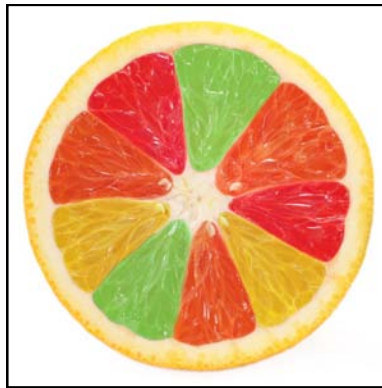
**MARKET ANALYSIS REPORT | SEPTEMBER 2011**

# Global Consumer Trends

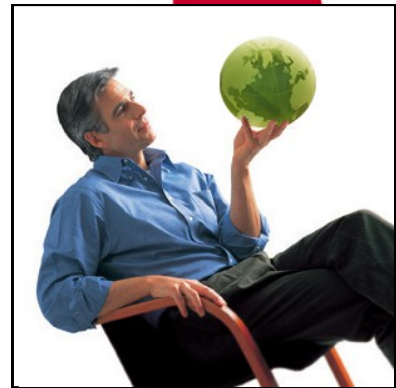
## Sensory Food Experiences



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▶ **THE SENSORY TREND: AN OVERVIEW**

Contemporary consumers can be easily bored when it comes to consumption. Increasing affluence, international connectedness, demanding schedules, and the presence of social media that allow for instant exposure to innovation and ideas, have contributed to a generation of consumers that are constantly in search of something more. Food and beverage products are no exception to this ongoing quest for the “next best thing.” Discerning consumers are looking to be inspired, surprised, and even shocked by food products, as they try to form some sort of emotional connection with the goods they consume, seeking more than standard nutritional sustenance or enjoyable taste. In other words, shoppers are demanding deeper sensory pleasures from products and services, and this is greatly affecting both how purchase decisions are made, and how successful brand loyalties are formed.

According to Datamonitor (2007; 2008), the sensory trend underpins today’s consumers’ desire for experimental pleasure and sensation from products. Consumers are placing significant value on the hedonistic benefits of foods, and are looking for particular attributes that engage all their senses, and inspire a deeper relationship with the product (Topping, 2007). To an increasing degree, an appetite for discovery, originality and variety has become a cornerstone feature of consumer behaviour. Bold ethnic spices, sweet and salty combinations, and unusual flavour integrations are some of the more commonplace characteristics of this trend. However, today’s consumers, especially younger generations, are already accustomed to certain foods and product attributes that were considered novel or unique not long ago. Due to the “global village” and increasingly food-savvy consumers, once-unfamiliar cuisines and flavour profiles have become standard elements of day-to-day diets. This broadened exposure has resulted in consumers who are always waiting to be impressed; something novel and unique is harder to come by, especially when amplified by sensory-driven demands.

This trend is also challenging because sensory perception is largely affected by personal preferences which, in turn, are a result of many factors, from the sociological, to the uniquely individual. For example, genetics, age, early experiences with food, culture, traditions and customs, the environment in which the food is consumed, and physiological reactions, will all affect a consumer’s sensory experience (Schmidt and Benson, 2009). Not every consumer will react to the same product in the same way - responses can range from delight to indifference - which only further emphasizes the fine line between something creative and edgy, and something uninspired and unappealing. Manufacturers have to provide consumers with innovative options and new twists on favourite brands in order to succeed in this sensory-driven culture (Datamonitor, 2008).

This report will outline key drivers of the sensory trend, and discuss the multi-faceted ways in which it is being enacted, with examples of products, foodservice, and retailing initiatives, to assist Canadian industry in engaging an ever-discriminating global consumer market.

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## ▶ THE FIVE SENSES



Flavour is often considered the most important factor when it comes to making food choices, and is often thought to be interchangeable with the term taste. However, taste refers to the actual sensation of a product on your tongue, while flavour relies more on perception, and actually represents a combination of the senses (Encyclopedia of Food and Culture, 2010b; Barham, 2010). All five senses are used during the eating process, with each sense contributing different physiological and, at times, emotional reactions to the food being consumed, affecting consumers' ultimate sensory experience. Although all of the senses assume important individual roles during food consumption, the process is largely interactive and it is the combination and engagement of all the senses that makes for the most gratifying experience. Consumers are continually seeking the best or most novel products available to them, and by offering products that stimulate all the senses, consumers get the chance to experience their food with the most pleasure.

### **Touch**

In the context of food, the sense of touch is primarily referred to as "mouthfeel," and plays an important role in the textural perception and enjoyment of food (Barham, 2010). Texture is a deciding factor in determining the pleasure derived from food and has a strong effect on the way consumers perceive flavour; for instance, a crisp apple is more enjoyable than a mushy one. However, consumers are increasingly looking to try foods that evoke new and unfamiliar mouthfeel, such as the "Szechuan button," a small yellow flower bud that is said to produce a tingling sensation in the mouth similar to that experienced when touching a 9-volt battery to the tongue. This "button" is being added to many garnishes and sauces in the foodservice industry in the United States (Martens, 2009a). Products that evoke unexpected heating or cooling sensations in the mouth are becoming increasingly popular as they offer consumers the chance to experiment with different mouthfeel, and experience the importance that touch plays in the eating process (Datamonitor, 2009).

"Perception of hardness, elasticity, viscosity, brittleness, etc., is made possible by the action of the sense of touch"

*Source: Barham, 2010*

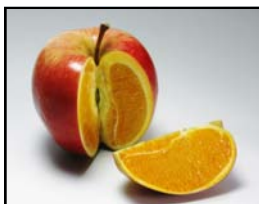
### **Sight**

The appearance of a product plays a very important role when selecting food, as a consumer's first interaction with their food is usually visual, and heavily influences how their enjoyment of that food is perceived (Encyclopedia of Food and Culture, 2010b). Colour is extremely important (approximately 80% of visual information relies on colour), and can affect the perceived flavour of a product (Datamonitor, 2008; Kilcast, 2005). For example, in a workshop tasting conducted by Chef Francisco Migoya of the Culinary Institute of America, attendees were given three apricot macarons (a French confectionery, not to be confused with macaroons) with identical flavouring and texture, but varied colours. When asked to taste each macaron and comment on their flavours, attendees noted that the lighter macarons were less intense in flavour and found the flavour hard to identify. They also noted that the whiter macarons seemed creamier, while some participants thought that each macaron had entirely different flavours, proving the important role sight plays in the perception of food (Menu R&D, 2010).

### **Visual Incongruity**



Visual incongruity is used by avant-garde chefs to play with their consumers' sensory cues. This phenomenon refers to when the appearance of a food or beverage product doesn't correspond with the expected taste profiles or the actual dining experience. There are generally two types of visual incongruity: visual novelty and hidden novelty.



Visual novelty occurs when the food doesn't look like something one would eat, but when actually consumed, offers an enjoyable taste experience. Edible "dirt," a trend appearing within haute cuisine, would be an example of visual novelty. Used as a base or accent for the other components of the meal, diners can be served varying combinations of charred or dried ingredients made to resemble the consistency of soil, ash or sand, that are sometimes "planted" with raw vegetables, greens, or edible flowers.

Hidden novelty occurs when the food looks like one thing, but upon consumption, reveals its true characteristics and tastes like something else. For example, a sweet chocolate truffle made to resemble an earthy mushroom.

**Sources:** Kaufman, 2010; Menu R&D, 2010 **Images:** Shutterstock



## Taste

Taste is continually ranked as the most important factor when making food and beverage selections, illustrated by the popularity of in-store taste-testing used to garner consumer attention (Schmidt, and Benson 2009). This sense can be broken down into five basic tastes: sour, sweet, salty, bitter and the recently discovered “umami,” which describes the savoury glutamate taste found in protein-rich foods and monosodium glutamate (MSG). Unlike the other senses, which can be influenced by exposure, reinforcement and other external factors, the preferences for the basic tastes are relatively constant and ingrained since birth, a fact that is thought to be the result of biological survival instincts (Encyclopedia of Food and Culture, 2010b).

## Scent

With the wide array of products available to them, consumers are increasingly likely to make choices based on an emotional connection to a product, for instance, buying a product that reminds them of their childhood (Datamonitor, 2007). Scent is an important aspect of food, as 75% of all emotions are generated by smell, and the association between scent and memory is stronger than with any other sense (Martin Lindstrom, quoted in Datamonitor, 2007). Because the connection between emotions and memories is so strongly connected to certain scents, consumers are able to form lasting bonds with products based on smell. In addition, smell can also play a large role in the perception of flavour, as can be demonstrated by the change in flavour that occurs when scent is eliminated (by plugging the nose or having a stuffy nose due to a cold) (Barham, 2010). Much like visual appearance, scent can also give consumers indications of what to expect from the food in terms of flavour, and is more helpful than any other sense when it comes to the identification of food (Encyclopedia of Food and Culture, 2010b).



### Scented Billboards



In December 2006, a “Got Milk?” campaign in the United States sought to engage consumer’s senses, and appeal to their childhood nostalgia using Arcade Marketing’s MagniScent technology. MagniScent labels are generally invisible additions to an image or product packaging, that release a constant stream of scent for up to six months. Labels emitting the scent of chocolate chip cookies were used in combination with “Got Milk?” imaging to tantalize consumers’ senses with the ever-desirable cookies-and-milk combination. The ads were used in bus shelters throughout San Francisco.

**Source:** Datamonitor, 2008 **Image:** Shutterstock. \*Not an actual billboard\*

## Sound

Though the role that sound plays during the eating process may not be as obvious as that of the other senses, it is no less important. The texture of a food is largely influenced by the sound it makes as it is consumed, and has a definite impact on the perceived flavour of that food (Datamonitor, 2007). If a food *sounds* crunchier as it is eaten, for example, it will *feel* crunchier in the mouth as well.



Heston Blumenthal, acclaimed chef of The Fat Duck, a molecular gastronomy restaurant in the United Kingdom, has conducted many experiments to explore the relationship between sound and one’s overall perception of food. In one example, Blumenthal wore headphones that played crunching noises while he chewed gum. Despite the fact that he knew was chewing something soft and pliable, Blumenthal found the way that he was chewing changed as though he were eating something hard and crunchy - he refrained from closing his mouth completely or with too much force for fear that he would damage his teeth. From his experiments, Blumenthal concluded that “sound can alter our appreciation of food just as powerfully as the look, taste, smell and texture of it.” His findings also led to the creation of the “Sound of the Sea” dish, in which restaurant customers listen to an iPod playing the sounds of crashing waves while eating their seafood-based meal, to enhance the overall sensory experience (The Fat Duck, 2011).



## ► SOCIOLOGICAL DRIVERS



Consumer lifestyles are changing as a result of various socio-economic factors, thereby affecting how food products, like all consumer goods, are perceived. Sensory-driven purchasing habits are primarily motivated by consumers with growing disposable incomes and increasingly busy schedules, who are more global-minded than ever before. All of these factors contribute to the sensory trend in varying ways, and will be explored in more detail below.

### *Increasing Affluence*

As incomes rise, so do expectations of consumer products. Post-materialist societies, in which developed lifestyles have pushed individuals beyond consumption as a simple fulfillment of physical needs, are causing consumers to demand much higher levels of pleasure from the goods and services they choose to purchase (Datamonitor, 2007). As with any consumer good, once a food product becomes more readily available, its actual use value becomes only part of its appeal - its aesthetic and symbolic properties also become deciding purchase factors (Shah, 2010). Food then, is perceived less as a necessity, and more as a manufactured commodity that affluent consumers seek out for the potential enjoyment it offers, or as a marker of identity and status.



As a result, consumers are growing increasingly bored with what Datamonitor terms the mundane, “me-too” products (2007). Mass-produced, widely available, lowest-common-denominator products are losing share in an over-saturated market, as consumers use their extra income to seek more personalized items that reflect their own unique needs. (Datamonitor, 2007). Consumers seek to engage with all the sensory properties the food has to offer: its appearance, aroma, taste and sound, as well as the broader psychological sensations the product implies or evokes in their mind, such as imaginative, exotic, comforting or adventurous. However, as this becomes more of a minimum expectation, the sensory experience the food product offers has to be intensified. Consumers are looking for products that stimulate their senses in ways beyond the traditional or expected, and are willing to spend their extra dollars in this pursuit.

### *Demanding Schedules*

Increasing affluence has not come without its consequences, and when compounded by many other factors, consumers are finding themselves with more and more demands on their time. Active attempts are being made to secure a work-life balance, as consumers seek ways to escape the pressures of modern life and find pleasure in their day-to-day activities. Greater priority is being given to appreciating the most routine of experiences (such as cooking dinner at home), and consumers are striving to integrate even fleeting moments of indulgence into their schedules (Datamonitor, 2007).

In terms of food products, such efforts to find a balance between home and work life have resulted in two interesting trends that, although seemingly contradictory, are both sensory-oriented. On the one hand, as consumers are seeking to make the most of the time they have, they want to make their experiences with food more engaging, turning it into something more than just “eating.” Consumers are looking for dramatic and multi-faceted sensory experiences, driving the purchase of exotic, diverse and otherwise “outside the box” food products.



Source: Shutterstock

For example, consumers in the United Kingdom can indulge in Tesco’s Italian Lasagna Sandwich, combining the comforts of lasagna and the convenience of a sandwich into one product. American consumers can prepare their dishes using Easy Tasty Magic Stardust Savoury Sprinkles, in such flavours as bitter chocolate, burnt orange and chili pepper; or Persian rose, beet, pink peppercorn, and sumac, both with edible gold and silver dust. Rather than its traditional savoury flavours, consumers in Europe and North America can experiment with a sweet olive oil sauce by Olicatessen alongside their salad and cheese dishes. Finally, Filipino consumers can round out their meals with Nestlé’s sweet and savoury Double Cheese Ice Cream, a cheese-flavoured ice cream with real cheese pieces. As evidenced by the emergence of such irregular products into the market, consumers are looking to assimilate new and exciting experiences into their daily lives, and are using these adventures in food as a means to do so, whether they’re eating out, or cooking at home (Datamonitor, 2007; 2011).



### **Demanding Schedules (continued...)**

On the other hand, many consumers are opting for the appeal of food products that are comfortable and familiar, as a means of relief from a frenzied and fast-paced lifestyle. Using food as an accolade to the “good old days” has become evident, as consumers seek out more traditional meals and flavour profiles (Datamonitor, 2007). This nostalgia for simpler times is particularly important to the sensory trend, as consumers are turning to foods like macaroni and cheese, meatloaf, or apple pie for the deeper sensations they inspire. Comfort foods<sup>1</sup> are exactly that, because of the emotional connection one feels in re-experiencing their scent, smell and taste. The sensory properties of such foods allow them to become much more than a meal, and transport consumers to a significant memory, place in time, or even a more general sentiment of pleasure and ease. Furthermore, in a market dominated by processed and packaged goods offering various health-oriented benefits (think low-carb, fat-free, reduced-sodium, and so on), comfort foods are generally associated with home cooking, offering instead a sensory-rich, dietary indulgence for consumers.

### **The “Global Village”**

The world is more connected than ever before. Consumers have access to the world as their shopping mall, easily acquiring a myriad of internationally-sourced products with the simple click of a mouse, gaining entry into foreign markets and retailers from the comfort of their own homes.

International connectedness has resulted in the diversification of food and foodservice options, through an intermingling and adaptation of cultural cuisines from around the world. Changing population dynamics have already expanded the availability of ethnic foods, making such products a regular feature of mass-market retailers, rather than being limited to small-scale specialty shops. The food and flavour preferences of migrant groups, once considered foreign commodities, are becoming further ingrained within the countries they have migrated to, shifting how national populations eat on a day-to-day basis (Datamonitor, 2007).



“ ‘Let’s go out for Thai’ is as common in many American cities as ‘I’m craving Mexican.’ And the menu in that Thai restaurant may well offer a side of French fries”  
*(Source: The Food Channel, 2010)*

For example, in the United Kingdom, studies have found that even pre-school children are showing equal preference for more ethnic style dishes (curry, for example) and traditional favourites, having been exposed to a broad landscape of food options from a very young age. In Canada and the United States, oriental dishes beyond the Americanized “Chinese buffet,” are being eaten on a regular basis. Consumers are also enthusiastically utilizing spices from around the world to enhance the flavour profile of their homemade dishes: spice consumption in the U.S. has grown almost three times as fast as the population over the last few decades (Hsu, 2010; Datamonitor, 2007). This diversified consumer palate has not only resulted in the increased commonality of foreign cuisine, but also in homemade meals

and menu offerings that cross international boundaries, all on the same plate. The Food Channel’s Top Ten (American) Food Trends for 2010, further attested to this: trend number four outlined the “redefinition of ethnic,” in which traditional thinking has given way to seemingly irregular, but increasingly popular food options and culinary combinations that reflect globalized influences.

This desire for multicultural cuisine is exacerbated by the growing rate at which consumers are travelling. Driven by a thirst for adventure and facilitated by rising incomes, consumers are exploring even the farthest and most remote corners of the world, bringing culinary inspiration home. They are seeking distinct and authentic cuisines that are not only the product of another country or culture, but of a specific region or community. Complex exotic tastes allow consumers to indulge in the bold sensory properties that are generally associated with ethnic cuisine and experimental eating, but also prove reminiscent of their travels, rekindling the pleasurable sensation of a holiday (Datamonitor, 2007; Topping, 2007). As a result, consumers are working to integrate the tastes of their traveling adventures into their everyday lives, making meal time both a larger sensorial experience, and a sort of cultural encounter.



“Data from the U.S. Department of Agriculture shows big gains in Americans’ spice consumption since the 1970s, including 600% more chilli pepper, 300% more cumin, and a whopping 1,600% more ginger.”

*(Source: Hsu, 2010. Image: Shutterstock)*

<sup>1</sup>For more information on comfort foods, please consult the forthcoming AAFC report entitled: [Global Consumer Trends: Comfort Foods.](#)

## ▶ OTHER DRIVERS



Other interdependent drivers are also affecting how the sensory trend is characterized. Self-indulgent consumption, a culture of premiumization, and the desire for authentic and experimental properties from commodity goods, are further driving the consumer quest for sensory-oriented food products.

### **Hedonistic Consumption**



Source: Shutterstock

Hedonistic, or “me-centric” consumption involves a very strong focus on the personalized emotive benefits or deeper sensory stimulation of a food product, and is increasingly a yardstick against which purchase decisions are made. Product value is becoming more and more entwined with the emotional benefits it can offer to consumers, and “need” is now defined by pleasure and experiential enjoyment (Datamonitor, 2007).

This trend is evidenced by the growing demand for traditionally indulgent flavours such as caramel, tapioca, toffee and gourmet chocolate, that are even appearing in carbonated drinks as a sign of added luxury. Particular cooking styles that suggest a sense of heightened product quality, such as slow-cooked or vintage, are also representative of this hedonistic culture as they too symbolize luxury and indulgence.

Many marketing efforts have adopted a more colloquial or casual style to target these self-indulging consumers, offering them more than just a product or brand, and a kind of personal relationship. Brands with such names as “Cat’s Pee on a Gooseberry Bush” (wine), for example, have found success in the personable smallness they imply, as they invite consumers to participate in an inside joke, and allow them to feel a connection with the item beyond that of just product and purchaser (Datamonitor, 2007; 2008). The trend toward hedonistic consumption is perhaps best found within contemporary consumer mediations of an age old dichotomy: do you “eat to live,” or “live to eat?” (Tahnk, 2010).

### **The Healthy = Tasteless Divide**

Many consumers have become disenchanted with the health and wellness movements that are taking place around the world. In line with growing nutritional consciousness, consumers have been re-assessing their diets, and forming food purchase decisions with their ultimate health in mind. Better-for-you and otherwise health-oriented product reformulations are abundant in supply, however, many consumers regard such products with a critical eye. These items seem to convey messages suggesting that consumers should select food products based on the health benefits they offer, rather than personal preference. Such sentiments are compounded by the perception that health-oriented foods are generally lacking in taste or flavour when compared to their full-fat or full-sugar counterpart. In this way, healthy eating has become akin to eating without enjoyment - something that today’s sensory-oriented consumers are unwilling to sacrifice (Datamonitor, 2007).



Source: Shutterstock



Source: Shutterstock

Foods seem to lose their sensory appeal when they have an explicit goal of increased healthiness, as if consumers should consume the product because it’s good for them, not because they enjoy it. Feeling forced to choose between healthy and bland, or unhealthy and flavourful, many consumers are following their appetite for hedonistic pleasure. From this divide though, fresh, minimally-processed, artisanal-type foods are gaining ground as consumers appreciate their authentic taste and flavour, as well as their seemingly healthier and higher-quality properties, due to their simpler ingredients. Furthermore, food manufacturers are attempting to bridge this divide by introducing health-oriented foods with an indulgent twist, like hamburger-flavoured sunflower seeds, for example (Datamonitor, 2007; 2011).



### **Hedonistic Consumption (continued...)**

Alternatively, consumers are harnessing the breadth of the globalized palate as a means of finding health-conscious food products that don't skimp on sensory enjoyment. Consumers are looking to the cultural knowledge of others around the world as they search for food products with natural benefits in regards to living longer, fending off certain diseases or ailments, or just generally improving their quality of life. Exotic foods and flavours offer the best of both worlds and are showing up everywhere, touting the health benefits they offer, while simultaneously allowing consumers a striking or seemingly adventurous indulgence that satisfies their appetite for sensory-driven eating.

International spices are becoming common kitchen staples as consumers experiment with new taste sensations that are also healthful, and tropical fruit is gaining increasing ground in terms of consumer preference. "Superfoods" such as açai, goji berries, guava, mango, guarana and yuzu are popular flavours in a variety of products, offering consumers the health benefits of natural antioxidants, as well as sensory-rich Amazonian taste profiles (Datamonitor, 2007). Companies are also using the rising prevalence of these ethnic "superfoods" to put a healthful spin on typically unhealthy (and un-exotic) products, allowing consumers the best of both worlds. American consumers, for example, can get their chocolate fix in a guilt-free way, with a dark chocolate pudding snack that is said to be loaded with açai-derived antioxidants (Datamonitor, 2011).



Source: Shutterstock



Source: Shutterstock

### **Trading Up / Premiumization**

Dubbed as one of the most powerful and durable economic phenomena of our times (Silverstein, 2008), the trend toward premiumization<sup>2</sup> plays a significant role in the consumer quest for sensory pleasure from food products. This trend may have faltered during the recent economic recession, but it never completely disappeared as consumers became even more discerning of where and when to indulge. Although some would associate such a trend with simple materialism or brand-centric consumerism, it is quite the opposite. Consumers' advanced knowledge of marketable commodities, as well as their substantial experience in the world of consumption, has resulted in savvy and increasingly critical shoppers. Trading up is indicative of consumers' attempts to strategically navigate the vast landscape of food products at their disposal, while allowing themselves the ever-important everyday indulgences (Datamonitor, 2007; 2008; Silverstein, 2008). By choosing premium variations within the product categories that mean the most to them, consumers are both granting themselves the luxury of a heightened experience, and asserting their own unique food-oriented priorities.

However, in much the same way that increasing incomes have allowed consumers to move beyond mass-produced products in favour of more personalized goods, what has been termed the "democratization of luxury" has also changed the ways in which premium products are defined. An overall rise in consumer expectations and the culture of trading up have resulted in high-quality and novel products becoming accessible to those outside of high income brackets. For example, some quick service restaurants, such as the American *Burgerville* chain, are adding wine to their menu, allowing customers to experience some of the luxury of fine dining while eating their casual meal (Martens, 2009b). Premium products are no longer reserved for upwardly wealthy consumers, as more and more demand for such products has made them available at lower and lower prices, positioning them as a mainstream standard, or "everyday indulgence," rather than a luxury purchase (Datamonitor, 2007; 2008).

The consumption of food products that were once highly valued for their rarity or inaccessibility, becomes less pleasurable as they become more commonly available, pushing consumers' quest for the next best thing even further (Encyclopedia of Food and Culture, 2010a). This has only worked to amplify the sensory trend, as the premiumization of food products now rests largely on the emotional connection or sensorial properties they can offer. Consumers have a much more sophisticated palate in terms of appreciating not only the taste, but the whole "experience" of a food, and are trading up to products and brands that engage all of their senses in evocative and surprising ways, while upholding the indulgent lifestyle that they have come to expect.

<sup>2</sup>For more information on premiumization, please consult the 2009 AAFC report entitled: [Consumer Trends Report: Premium Foods and Beverages in Canada](#)





## Simplicity and Authenticity

Simplicity and authenticity are two common attributes that consumers consider when trading up their food purchases. As consumers seek alternatives to the mass commoditization of culture and marketable goods, a renewed focus on simplicity is associated with naturalness, attention to detail, healthfulness and minimal ingredients. Along a similar wavelength, the trend toward authenticity emphasizes the traditional aspects of a product; careful, and at times lengthy processing methods and product integrity have become important features of food products, mirroring consumers' desire to get away from the informational clutter and complexities of day-to-day life. Although these "back to basics" approaches may seem to run counter to the sensory trend and its emphasis on evocative and experimental food products, simplicity and authenticity are generally perceived as representative of overall better quality products, and thus, a more sensorial experience (Datamonitor, 2008).

### Simplicity

Once generally reserved for smaller companies, "simple" qualities are increasingly being found amongst the offerings of larger corporations, as new product lines are introduced, or existing products are amended accordingly. According to Mintel, in the United States, 56% of food and beverage product categories showed a decrease in the average number of ingredients per product launched between 2008 and 2009. Furthermore, the average number of ingredients in all new food and beverage products decreased by 2.4% during that same time period. On an international scale, 56% of countries showed a decrease in the average number of ingredients per new food product, between 2008 and 2009 (Lukovitz, 2010; Mintel, 2010a). Overall, messages emphasizing "simplicity" or inherent goodness are often perceived more positively by consumers than vague mentions of "good for you," or overly complex information on the product's healthful attributes (Lukovitz, 2010).

### Authenticity

Indeed, consumers are finding heightened sensory pleasure in products perceived as "simple" or "real," and marketers are taking note. But ingredients are not the only facet of this sub-trend. Authenticity in particular, also refers to the overall experience a food product represents, and this is addressed in different ways. Consumers are increasingly seeking products to re-create external experiences in their own home (Datamonitor, 2008). Restaurant-quality frozen pizza or bottled "draught" beer, for example, allow consumers to forgo the added expense of going out, without having to compromise on the authentic flavour and sensory experience these products would offer in a foodservice setting.

Consumers are also looking to form a connection that goes beyond the product itself, and are paying special attention to the narrative behind the product. Consumers want to know about the source location for ingredients, the people involved in the production process, and what that process requires, as a way to further engage with their food - they are not simply purchasers of an item, but participants in a story. For example, it is not only the flavour of a homegrown Florida orange that provides heightened enjoyment, but the very *idea* that it is a homegrown Florida orange and what that entails, affects how its flavour is perceived (Encyclopedia of Food and Culture, 2010a). This contextual awareness has led to a growing interest in "homemade" or "heritage" product lines, as well as region-specific flavour profiles: Catalan wine, not Spanish; Hunan cuisine, not Chinese (Datamonitor, 2008). Contemporary consumers are in search of the ultimate sensory experience that can only be found in "the real thing."

### "Simple" Success

"Simple" marketing can be a complex exercise. Consumers have already come to expect transparency from most food and beverage purchases; this need becomes more important when a product's marketing is based on its "simplicity." Here are some examples of U.S. products that have found success in being "simple."



#### **Pillsbury Simply...Chocolate Chip Cookies**

This refrigerated, ready-to-bake dough is free from trans fats, high fructose corn syrup, and does not contain artificial colours, flavours or preservatives. Sales reached US\$10.3 million between its launch in May 2009, and August 2010.



#### **Häagen-Dazs Five Ice Cream**

This all-natural ice cream contains only five ingredients that are listed on the front of the package. Product sales were valued at US\$21 million in its first year on the market.

**Source:** Lukovitz, 2010; Mintel, 2010a

### Foraged Food and "Terroir"

As emerging trends among chefs and foodies all around the world, foraged food and *terroir* are bringing consumers back to the basics of eating. While both concepts are associated with the sourcing of wild, uncultivated plants and localized products, *terroir* emphasizes the important relationship between location and taste. That is, *terroir* refers to the effects of environmental conditions on an item's unique flavour profile, and encourages appreciation of these natural flavours. These movements allow consumers to experience a new level of authenticity, knowing that what they are eating has been sourced from their community (with even some unconventional items being instilled with culinary potential). Also, what appears on the menu completely depends on what can be harvested from the surrounding area, as well as one's ability to conceive a meal from those items. As consumers experiment with unexpected culinary sensations and engage with the stories behind the meal itself, they are said to have heightened dining experience.



**Sources:** Hu, 2010; Palling, 2010 **Image:** Shutterstock



## Experimentation and Experientialism

Consumers are becoming more experienced and open-minded when it comes to food, and are increasingly looking to try things that others have not. Experimental and experiential products capitalize on this and are becoming huge draws to the sensory-oriented consumer.

### Molecular Gastronomy

Building on the concept of 'gastronomy', which first appeared in France and can be broadly defined as "the comprehension of everything connected with the nourishment of man," molecular gastronomy brings chemistry and physics directly to the kitchen. Operating from a scientific understanding of food and different cooking processes, molecular gastronomy is largely experimental and aims to be innovative and intriguing. Unusual techniques are employed, such as using liquid nitrogen to create the "Pistachio Coulant Nitro-Truffle" at Spain's elBulli\*, previously one of the world's leading molecular gastronomy restaurants. Another restaurant famous for experimenting in the kitchen is The Fat Duck in the United Kingdom, which offers unusual menu items such as "Nitro Poached Aperitifs" and "Snail Porridge." Chefs capitalize on the idea that we use all of our senses (not just taste and smell) while eating, and experiment with different texture, flavour and sight combinations in order to enhance the overall experience of the food.



**Sources:** Barham et al, 2010; de Solier, 2010; The Fat Duck, 2011; McGee, 2011; O'Connell, 2011 **Image:** Shutterstock.

\*Despite its extreme popularity, head chef Ferran Adrià closed elBulli on July 30th, 2011. Adrià plans to re-open the restaurant as a culinary research foundation (Moskin, 2011).

### Experimentation

Experimentation refers to consumers' attraction to the undiscovered, offering strange and often shocking flavours or sensations that suggest quality, excitement and sensory gratification. Experimental products present an opportunity for adventure, as consumers try products that offer unfamiliar sensations and an uncertain outcome. In addition to the fun of experimenting with food, consumers are attracted to the very act of trying something new, as studies have shown that consumers across the globe feel that trying new things is an important factor in sustaining personal well-being (Datamonitor, 2009).

Experimentation is not limited to entirely new products. A new take on an old classic (offering new sensory experiences in the process) is also a way to attract consumers who desire innovation and novelty, but who are not yet ready to part with the comfort of their favourite products or brands. Adding innovative twists to the products consumers already trust, like a new ingredient or flavour, ensures that both their desires for comfort and excitement are met. For example, Lindt Excellence Chilli combines dark chocolate with an exotic spice of chilli flavour, offering consumers a new and exciting taste experience while maintaining the familiarity of the Lindt brand (Datamonitor, 2008).

### Different Sides of Sensory: Hellmann's versus Miracle Whip (Authentic versus Experimental)

Most products will not be able to satisfy *all* the varying sub-trends that are driving consumers' quest for sensory pleasure, and will thus choose one particular aspect through which to tout their product's sensory appeal. Marketing campaigns, such as those of Hellmann's Mayonnaise (Unilever) and Miracle Whip (Kraft Foods), focus on the broader experiential characteristics associated with the sub-trend their product can be positioned under. Such advertisements, driven by the sensory trend, are asking consumers to not only choose between two products, but between lifestyles.



#### Hellmann's REAL Mayonnaise

Unilever has chosen to promote the authentic aspects of its Hellmann's Mayonnaise product, asking consumers to "join the real food movement," or declaring that "it's time for real." Hellmann's also offers consumers insight into the simplicity of the product's make-up, and even further, the origin of the ingredients themselves. Promotional text assures that "we've removed the ingredients you can't pronounce," and that Hellmann's authenticity comes from its straightforward use of "free run eggs from free run hens, vinegar and oils with omega 3." The product's website also promotes the concept of eating "real food" more broadly, and provides recipes for "real sandwiches" that are both mom and kid-friendly, as well as a search tool to help consumers find local food markets in their community.



#### Miracle Whip Dressing

Kraft Foods has chosen to market their Miracle Whip product as having a more exciting flavour profile than traditional mayonnaise products, seeking to attract consumers looking for more experimental or adventurous sensory properties. The product's taglines, "it's the zip" or, "a sandwich just isn't a sandwich without the tangy zip of Miracle Whip!" insist that its unique flavour is essential to enjoyment. Television ads for the product encourage consumers to renounce the status quo, and enjoy the more exciting lifestyle Miracle Whip inspires: "Don't go unnoticed. Don't blend in. Don't be ordinary, boring or bland. In other words, don't be so mayo. We are our own one-of-a-kind unique flavor. We are Miracle Whip and we will not tone it down!"

**Sources:** Edwards, 2009; Kraft Foods Canada, 2010; and Unilever Canada, 2010. **Images:** Datamonitor, 2010.



## Experimentation and Experientialism (continued...)

### Experientialism

Not only are consumers looking for something new when it comes to their food, but they are also looking for something *more*. Consumers seek products that will induce emotional benefits, turning the act of eating into an experience that stimulates all of the senses in order to provoke a more intense reaction. Products that indulge the consumer by offering excitement, adventure or fun, such as a product containing exotic flavours that remind the consumer of a favourite holiday spot, increase the emotional bond between the consumer and their food and satisfy their need for more (Datamonitor, 2009).

Experientialism is exceedingly popular in the foodservice industry. Consumers are more likely to experiment with new foods and environments as they actively seek to heighten the experience of going out (Topping, 2007). Although food may have the same taste in any given environment due to chemical and biological reactions, the pleasure derived from the product is influenced by cultural, environmental and psychological factors. The overall atmosphere of a foodservice outlet, for example, will have a strong impact on consumers' overall enjoyment of their meal, which together, represent the whole experience of eating. Consumer expectations are beginning to reflect this broadened concept of eating as they seek out not only the food itself but the associated experiential properties it offers (Encyclopedia of Food and Culture, 2010a).

### **Dining in the Dark**



Based on the premise that when one sense is removed, the others are heightened, dining in the dark offers consumers the opportunity to intensify the taste, scent and sound of a meal. Guests are blindfolded or led into pitch-black dining areas (or both), and are presented items off a set menu. Servers wear night vision goggles or are blind themselves, taking control away from diners and putting it into the hands of staff who are more comfortable with the setting. Some restaurants even offer guests "surprise" courses or dishes, further removing the diner from the control they are accustomed to while eating. Dining in the dark adds a new dimension to eating out, transforming the act of eating into a full-bodied sensory experience through heightened engagement with a food's aroma, texture, and mouth-feel, as well as with the overall environment where the meal takes place.

**Sources:** Hendry, 2010; Mintel, 2007; Mintz, 2010.  
**Image:** Shutterstock.

## ► CONCLUSION

The sensory trend is a broad and over-arching one that branches into several facets of consumer behaviour. Consumers are looking to be shocked, surprised and inspired by their food, as they have come to expect an expanded definition of product value that goes beyond nutritional sustenance or need. As incomes rise and globalization becomes even more pronounced, consumers are regularly being exposed to new flavours, products, tastes and experiences. In turn, this results in generations of consumers who are eager to take risks for the sake of enjoyment, adventure and discovery. Through unfamiliar and heightened sensory experiences, products will attract consumers who are willing to spend on more pleasurable and gratifying encounters with their food. By offering novelty and excitement, sensory-oriented products will keep consumers interested and coming back for more.

Consumers are also seeking out more information and emotional benefits from products and brands to make their purchases more meaningful to them. Whether it's a totally novel product or a comfort food with new twists, it is not only important to make a connection between the consumer and the product, but between the consumer and the whole *experience* that product provides. Be it a sense of nostalgia or adventure, by engaging the senses to form a deeper experiential connection, sensory-oriented products allow consumers to amplify the experience of eating.

Consumers around the globe are on an intensifying quest to find that certain something extra when it comes to their food, in order to satisfy a broadened definition of "need." The luxury, excitement and emotional gratification that comes from engaging the senses while eating, is what will continue to drive sensory-oriented purchases into the future.





## ▶ ANNEX: MARKET RESPONSE



One of the most significant challenges to successful innovation is the ability to capture consumers' imaginations (Datamonitor, 2008). This annex highlights some market responses to the sensory trend, as found amongst consumer products, as well as foodservice and retail initiatives.

### **Consumer Products**



#### **Tabasco Chocolate Wedges**

Released in October 2010, this product is a collaborative effort between The Chocolate Traveler and McIlhenny Co. These licensed dark chocolate wedges are infused with Tabasco brand hot sauce, and offer consumers the smooth creaminess of chocolate, but with a “delayed heat sensation.” The chocolates are 30 calories each, are trans-fat free and kosher certified. They are sold in a licensed tin containing eight chocolate wedges for US\$3.99.

**Source:** *Candy and Snack Today*, 2010.



#### **Stride SHIFT - Flavor Changing Gum**

Released in April 2010 by Cadbury Adams (now Kraft Foods), this gum offers consumers two flavours in a single piece, progressing from one to the other as it is chewed. It is available in two combinations: Citrus and Mint (shown), and Berry and Mint. The product is free of sugar, fat and sodium, and retails for US\$1.49

**Source:** *Mintel*, 2010.



#### **Meat Liquor (various)**

Although the combination is said to date back to at least the 16th Century, the relationship between meat and liquor is resurfacing as a consumer trend for the adventurous and experimental. Smoked Salmon Vodka (by The Alaska Distillery), Bakon Vodka (from Black Rock Spirits—shown at left), or Pechuga Mezcal (by Del Maguey), which is a fruit-flavoured spirit, distilled through a chicken breast for “smoky-barbeque complexity”, are just some examples of meat-flavoured liquor to have entered the market to a fairly successful response. Consumers are drinking Smoked Salmon martinis, and bacon-flavoured Bloody Marys, as they seek to indulge their senses with a salty and savoury cocktail, rather than something fruity or sweet.

**Sources:** *Brown*, 2010; *Thiessen*, 2010.

**Image:** *Mintel*, 2010.



#### **Pringles Fruit and Nut and Pringles Xtreme**

Available in East and Southeast Asian countries, Pringles Fruit and Nut potato crisps are available in two flavours that offer consumers a unique combination of sweet, savoury and salty: Blueberry and Hazelnut, and Lemon and Sesame.

Pringles also offers Xtreme variations (available in many western countries) that are marketed as aggressively flavourful, and “not for the faint of heart,” targeting more adventurous consumers looking for a heightened sensory experience.

**Sources:** *Datamonitor*, 2010; *Mintel*, 2010.





## Consumer Products (continued...)



### Jones Soda (various)

Jones Soda is well known for intriguing consumers' senses with their bizarre or unique flavours of carbonated beverages. Releases for 2010 included Tofurky and Gravy (certified vegan), and Jones Jumble (unidentified mixed flavours). The latter selection prompts consumers to choose the flavour profile they would like, by choosing between the representative scenic experience that appears on the label: urban, country or seaside.

#### Other Select Flavours

**Various Limited Editions (2007):** Christmas Ham, Candy Corn, Dirt Soda (fruit flavoured), Perspiration Soda (fruit flavoured).

**Limited Edition Holiday Pack (2006 - bottom image):** Sweet Potato, Dinner Roll, Green Pea, Antacid, Turkey and Gravy.

**Limited Edition Holiday Pack (2005):** Smoked Salmon Pate, Turkey and Gravy, Broccoli Casserole, Pecan Pie, Corn on the Cob, Wild Herb Stuffing



**Sources:** Datamonitor, 2010; Mintel, 2010.

## Foodservice

### Tableside Cocktail Service



**Source:** Moore, 2010.  
**Image:** Shutterstock

As a means to both make the best use of a smaller space and appeal to the senses of diners, many restaurants are choosing to employ portable cocktail carts. These wheeled bars allow servers to bring cocktail service tableside, which grants consumers the opportunity to see their beverage of choice being prepared, acknowledging the important relationship between visual stimulation and flavour. Watching bartenders hand-craft their beverage, rather than having it delivered from an out-of-sight area, allows consumers to engage with the broader sensory properties associated with a cocktail. This emphasizes the overall experience of the beverage, beyond simply drinking the beverage itself.

“So much of the experience is the sound of the shaking drink, the look of it being poured into the glass...There's something so very visceral, and that's one of the great things about being able to do tableside service.”

- Tony Maloney, Alchemy Consulting. As quoted by Moore, 2010.

### Glorified Gluttony



While many products are emphasizing their health-oriented properties, some foodservice distributors are taking the opposite approach, marketing to consumers that are looking to satisfy their more gluttonous urges. Kentucky Fried Chicken (KFC) released the Double Down, a bunless sandwich featuring bacon and cheese surrounded by two fried chicken breasts - the most successful sandwich launch in the brand's history (pictured at left). Friendly's restaurant released an Ultimate Grilled Cheese Burger Melt, which is a burger patty between two grilled-cheese sandwiches in lieu of regular buns. Carl's Jr. then introduced a foot-long hamburger, comprising three burgers lined along a hoagie bun. Aside from the initial novelty, and the knowledge that one is partaking in sheer caloric indulgence, these products are also said to offer consumers unusual taste sensations and unfamiliar mouth-feel, appealing to their more adventurous senses.

**Sources:** Mintel, 2010b; Passikoff, 2010. **Image:** Mintel, 2010c



## Retailing

### **Branded Experiences Beyond the Product: Pepsi Refresh Grants and Starbucks Loyalty Program**

Certain brands are looking to appeal to consumers' broader senses and develop deepened brand-consumer relationships by offering an experiential or participatory component that goes beyond the product itself.



For example, Frank Cooper, chief consumer engagement officer at Pepsi, believes that “engaging consumers in meaningful experiences” is the future of marketing and is thus working to tell consumers a product story that goes beyond the traditional 30-second advertisement. Pepsi Refresh Grants, for example, allow consumers to suggest and vote on project ideas that will have a positive impact in their immediate or extended community. The projects with the most votes are then awarded a financial grant from Pepsi.



Starbucks is also offering consumers experiential opportunities through their loyalty card program. Using a pre-loaded Starbucks card, consumers are awarded stars (based on transactions), and can make their way upwards through the company's three tiers of loyalty, each with its own perks. After 5 stars, consumers are offered complimentary flavour shots or refills. “Gold” members, those with 30 or more stars, are invited to film screenings, offered concert passes, and granted exclusive opportunities to purchase luxury goods; in one instance, coffee beans from a Galapagos farm were offered. Extending consumer engagement in such ways seems to be gaining ground: in the United States, almost 20% of Starbucks transactions are made on a Starbucks card, and there are more than 1 million gold level members.

**Sources:** Greenberg, 2010;  
Jargon, 2010.

**Images:** Planet Retail, 2010;  
Mintel, 2010.

### **Experience-Oriented Grocery Stores**



**Source:** Turner, 2011

To contend with an increasingly competitive landscape, some grocery stores are expanding their services by adding bars, restaurants or cafés, or offering a variety of entertainment, such as cooking classes, wine-tastings and even live music, in order to attract shoppers. By providing these additional non-grocery niceties, grocery stores are changing the dynamic of grocery shopping, transforming it from a chore into a fun, social outing. As customers are enticed into prolonging their visit, they are treated to sights and sounds that excite and entertain, and grocery stores are capitalizing on the chance to turn customers' outings into much more interesting experiences. With a focus on the experiential aspect, these new additions to the grocery stores capture shoppers' interests and address their needs for more engaging encounters with their food. Simultaneously, these experience-oriented attractions allow retailers to highlight particular products or brands in a more hands-on way, to increase sales.

### **On-the-Shelf Televised Advertising**



**Sources:** Elliott, 2010,  
Fleenore, 2011.

Automated Media Services (AMS) has spent years developing the 3GTV Network system in order to market to consumers more directly, by putting television screens right on the shelves in retail stores. The screens play advertisements and offer customers product information, such as nutritional facts or sale pricing, to engage the consumer at the most important point in the shopping experience—the moment of decision. This new form of advertising presents an opportunity for consumers to visually connect with the products they are choosing and learn more about what they are purchasing. The company also hopes that 3GTV will enhance the shopping experience by providing shoppers with additional information about the store or reminders of community events, strengthening the relationship between shopper and retailer.

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