

the **silk** initiative

2020年7月

丝翼领航指南 **Navigator™ Compass**

再来一点儿:
缤纷零食, 百味世界





序言

还有没有人记得小时候放学回家跑到橱柜拿零食的哪些时刻？

在我的世界里，通常有两种人：一种是咸味零食爱好者，另一种则钟爱甜食。我总是更喜欢咸咸的味道，比如薯片、脆饼和坚果，但我妈妈的最爱是饼干。她会从她的饼干罐里拿出巧克力曲奇，蘸着英式奶茶吃，十分放松地靠坐在沙发上，就像女王坐在王座上那样。

她绝不会想出在缇美恬饼干上撒鸡精这样的点子。在那个年代，这是对食物的亵渎。然而今天，这可能是个不错的点子，能让品牌保持竞争力。我们正见证着消费者在零食口味需求上的进化，这种进化已经远远超过了那些曾风靡中国的奇怪口味，比如说黄瓜味的乐事薯片。如今，许多品牌都在咸味与甜味的界线之间发挥创意。

本月的丝翼Navigator™ Compass中，我们探索了中国变化万千的零食口味世界。你要相信，这并不是一个非黑即白的世界。

Andrew Kuiler
创始人兼 CEO



WILLIAM BRENNER

William是一个真正的国际公民，他将品牌策略和设计独到地结合在了一起，并以此为丝翼的海外客户实现他们的品牌愿景。这一切都归功于他对品牌的洞察总是建立在消费者真正的反馈，并能以此构思出设计思路。在加入丝翼之前，William还拥有自己的设计公司。



ANDREW CAMERON

作为丝翼策略与洞察部门的副总监，Andrew 致力于帮助达成客户的研究调查与品牌策略目标。从保证准确的数据收集，到产出策略性发现，Andrew 为丝翼的客户提供最有效的策略以促进品牌发展。Andrew平时热爱旅行，也热衷于运动。如果他不在板球场上挥汗如雨，那他就是在厨房里尝试新颖的异域菜式。



JOHN PABON

在过去的十年间，John见证了中国经济的崛起及其产生的社会影响，并有幸成为全球关注中国的100种声音中的一员。他在丝翼主要负责市场推广和沟通。他以往的工作经历包括为联合国、麦肯锡、尼尔森等知名机构撰文，还为全球最大的可持续性发展商业联盟商务社会责任国际协会(BSR)担任顾问。



QI ZHANG

怀揣着对语言学的热爱，Qi在丝翼担任着品牌命名专家的角色。由于来自于出产各类出名零食的湖北省，她热爱食物且对味道十分敏感。Qi毕业于华中农业大学并获得了食品科学工程的学士学位，之后前往英国在利兹大学获得了翻译专业的硕士学位。

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甜咸之外

“我们正在经历零食的进化。”

Lyons Wat, 国际糖果及休闲食品展览会, 2019年。

新冠病毒的流行迫使全世界越来越多的人待在家的时间越来越长。在这些距离厨房只有一步之遥的日子里,我们都做了些什么?答案是,吃零食。零食巨头**家乐氏公司 (Kellogg Company)**表示“三月份的薄脆饼干销售额比上一年同比增长了近40%。”同时,百事集团也表示“乐事 (Lay's) 与菲多利 (Tostitos) 等品牌的收益达成了两位数的大幅提升,分别增长了32%和42%。”咸味和甜味零食都处于增长中,有趣的是,那些“对你有益”的健康零食也不落后。

中国的情况如何?多年以来,中国消费者一直在货架上看到一些大家觉得奇奇怪怪的零食。从鱿鱼味的薯片到辛辣的川味士力架,似乎每个公司都费尽心思要脱颖而出。然而,现在我们已经看到了零食口味创新的新浪潮与品牌产品研发的策略性转变。除了静观哪些产品会笑到最后,我们还有很多事情可以做,来确保我们的产品是消费者愿意花钱购买的东西。

但是,品牌如何才能跟上消费者变化万千的需求呢?在本期丝翼Navigator™ Compass中,我们深入探究了那些中国消费者在零食中寻找的古怪而又奇妙的口味。

为了得到这些发现,我们分析了丝翼专有的数据智能平台丝翼 Navigator™所分享的动态数据。该平台反映了来自全国各地消费者对10个主要食品与饮料品类的反响,以实时掌握消费驱动因素和消费趋势。除此之外,我们还利用了自身对中国消费者行为的深入了解、定性的专家访谈,以及在口味研究、零食新品研发、品牌塑造和包装设计方面的大量工作经验,对中国零食消费进行了深入的总结。

丝翼Navigator™ 情感热图技术简介

我们的分析还使用了Hotspex的情感热图技术。Hotspex情感热图综合呈现了消费者对品牌或产品在情感属性方面所产生的特定联想。该图具有8个不同的“区域”,每个区域代表不同的关键性情感属性,可帮助市场人员及其合作伙伴确定与品牌关联的情感空间。

我们可以将每个区域分为三个部分:核心、中部和外部。当情感联想从热图的中部移到外部时,联想也从正面转换为负面。

核心: 这个部分代表了每个成功品牌都应在消费者心中引起的关键联想:有趣、成功、称职、可靠、脚踏实地、随和、讨人喜欢、酷。

中部: 核心以外是中部,中部的情感属性更需要联系上下文理解,这个部分的产品联想往往更容易发展成为品牌潜在的差异因素。在这里,品牌联想应与品牌价值相匹配。例如,在“有趣”区域的中部包含热情、创意、运动与直率这样的词语。

外部: 热图的外圈包含了负面情感的联想。这些联想的影响力是正面联想的三倍,也是品牌健康问题的关键指标。例如,“有趣”区域的外部包含诸如自命不凡、危险和粗鲁等词语。

所有的情感属性联想都是环环相扣的。例如,感到“有趣”可能会触发“充满激情”的联想,但是过多的“有趣”则可能会导致“自命不凡”的情感关联。

如果您对情感热图有其他疑问,欢迎您随时联系丝翼进行咨询。

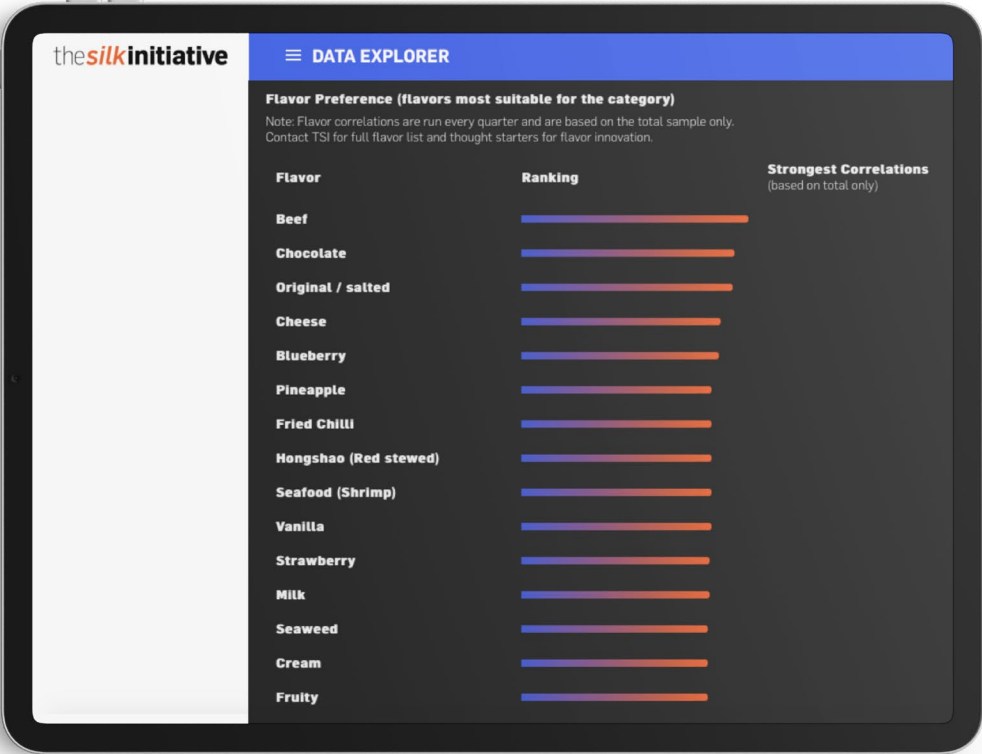
甜咸之最

在并不遥远的过去，咸和甜被认为是两个水火不容的口味。不过，最近我们看到越来越多的零食品牌在新产品的研发中将这两种口味一同结合。

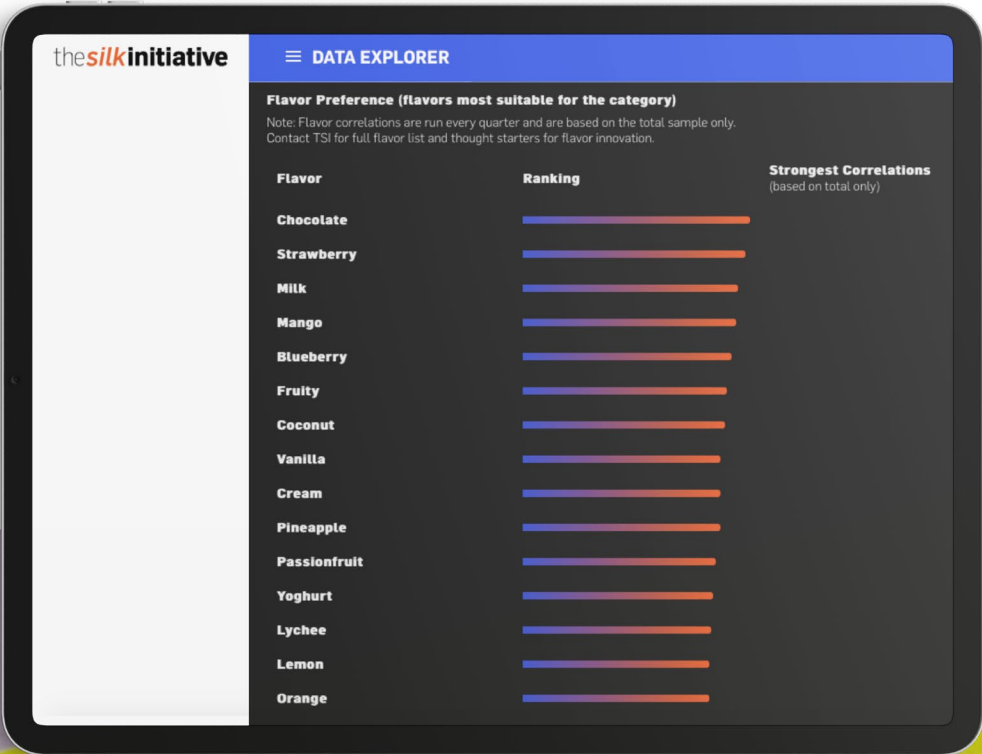
但是，这并不能说明你马上就可以开始将不同口味混合在一起。根据丝翼Navigator™的数据显示，口味的组合必须以某种合理的方式出现，才能推动消费者的购买。我们查看了咸味零食与甜味零食两个品类中的口味偏好数据，发现：带有甜味的咸味零食比带有咸味的甜

味零食得到了更广泛的接受。从右边第一张图所展示的数据中可以看出，咸味零食的口味偏好中也包括了巧克力、蓝莓、菠萝和香草这些典型的甜味。

而另一方面，右边第二张图表显示了消费者希望甜味零食能够保持传统的甜味，无论是巧克力、香草、柠檬还是橙子口味。



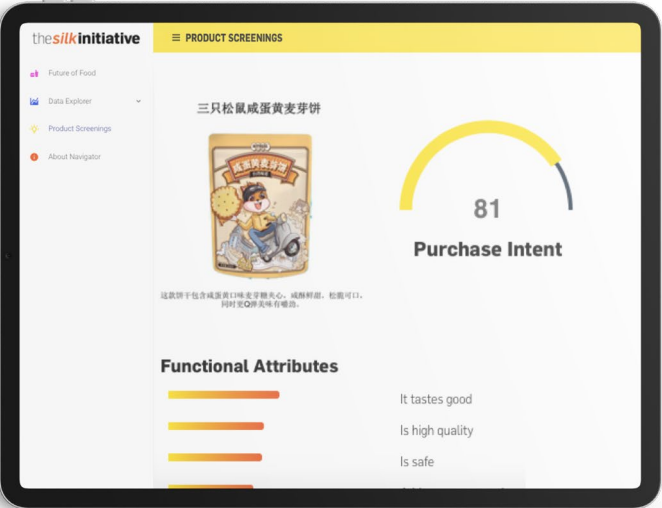
咸味零食口味偏好



甜味零食口味偏好



甜咸之最



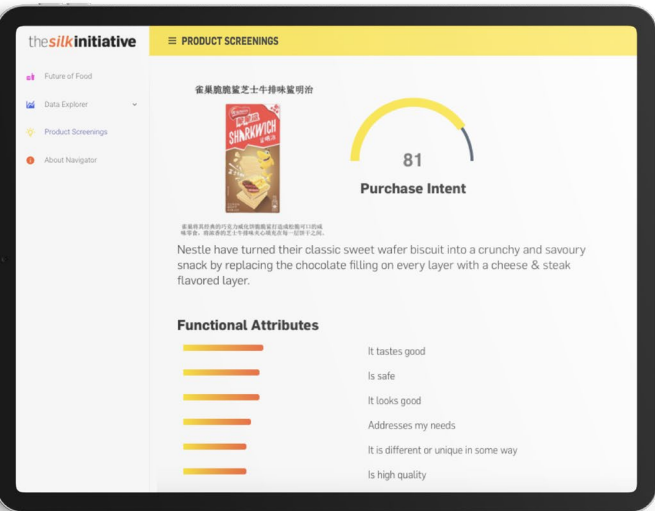
例子1:
三只松鼠咸蛋黄麦芽饼

这款饼干包含了咸蛋黄的咸味和麦芽糖的甜味, 不仅获得了消费者较高的购买意愿 (81%), 更是被认为 “味道好”, 这一点是排名第一的功能特点。

例子2:
雀巢脆脆鲨芝士牛排味鲨明治

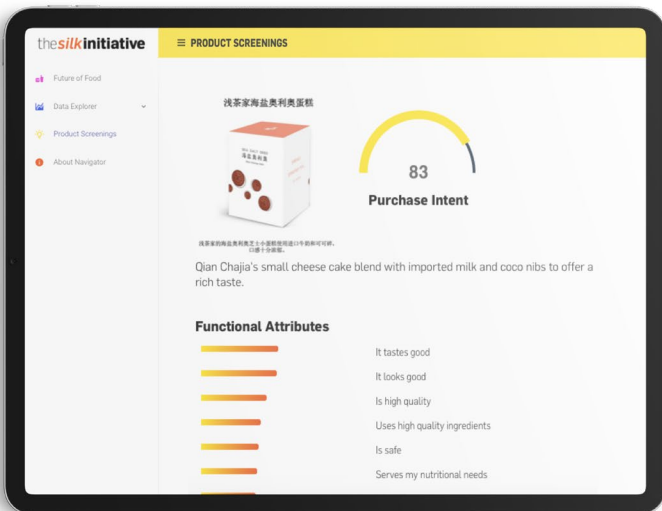
雀巢把甜味威化饼的巧克力夹心换成了芝士牛排味的, 这让经典的甜味威化饼变成了酥脆咸香的新零食。

消费者认同了这款产品的口味 (认为它 “味道好”), 并给予了 81% 的购买意愿。

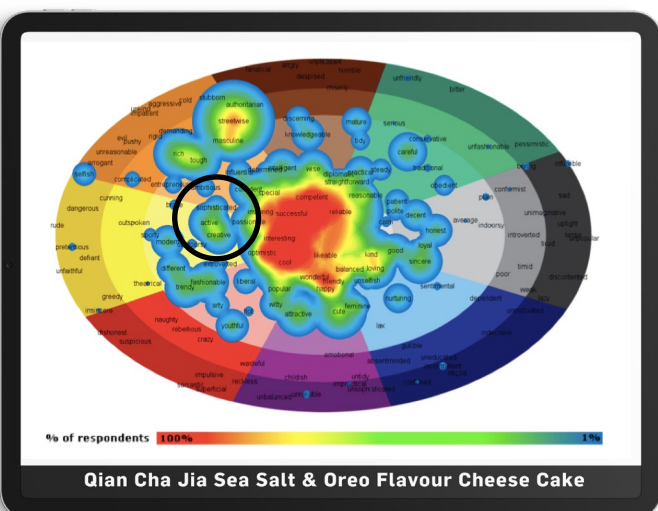
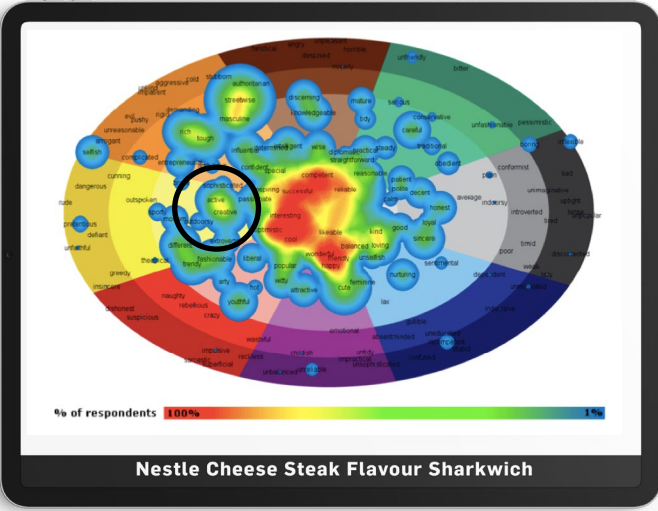
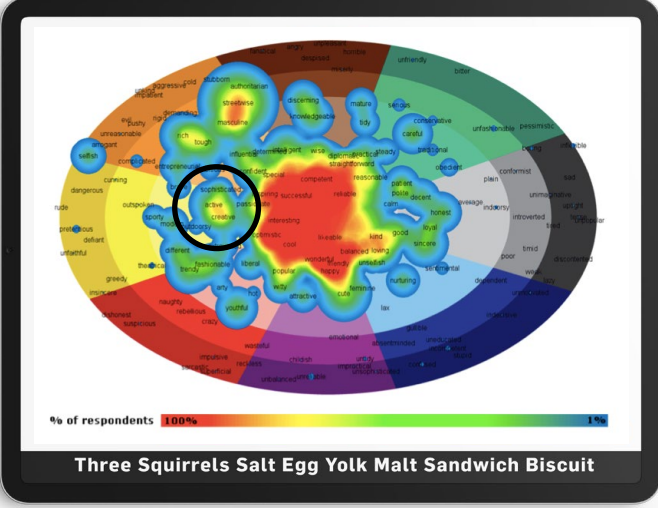


例子3:
浅茶家海盐奥利奥蛋糕

海盐和奥利奥相得益彰, 不仅让这款蛋糕获得了 “味道好” 的评价, 更达到了83%的购买意愿。



接着, 我们又对这三款产品的情感热图进行了分析。不难发现, 消费者对产品的创新性印象深刻。这一点可以从圆圈中心左边的黄色暖块中看出。

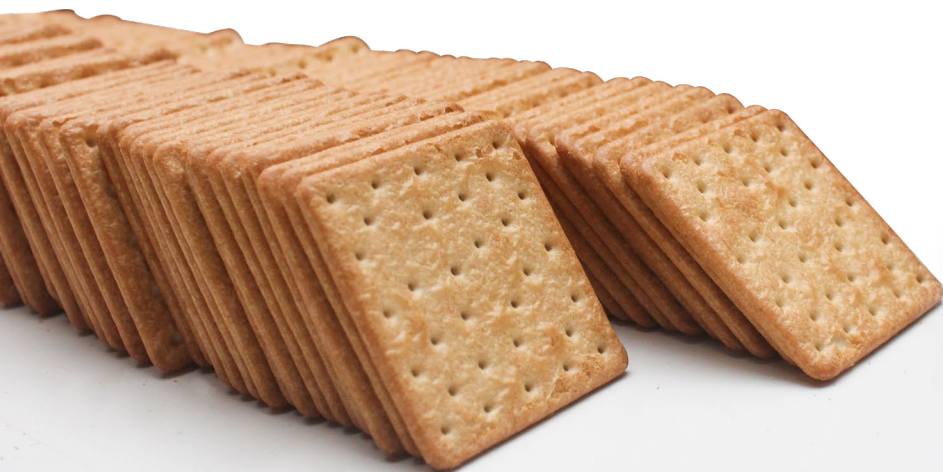
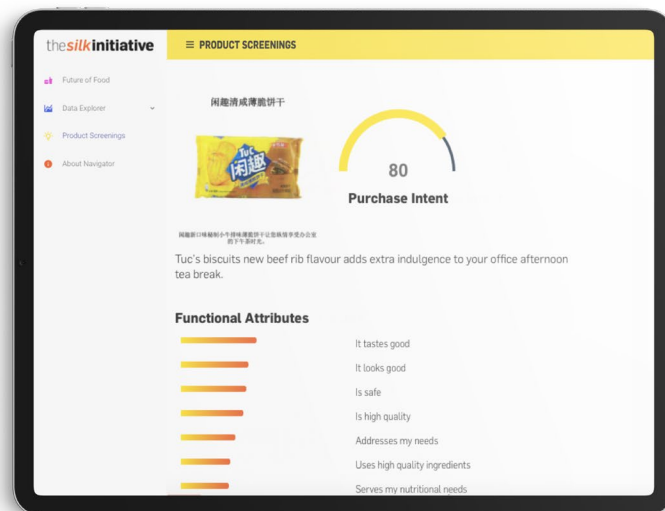


来自菜式的灵感

零食品类的新品研发也在从其他地方汲取灵感。消费者不再满足于香葱、烧烤或树莓等简单的口味，我们看到市场上涌现出更加复杂的零食口味，让人不禁联想到各类精美菜式。

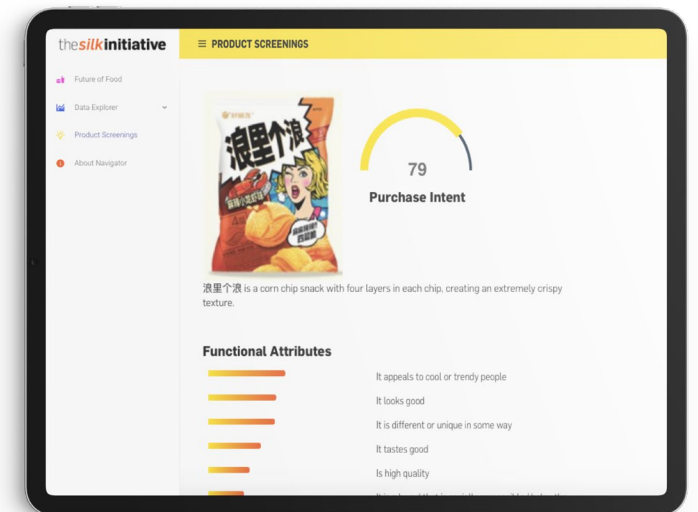
例子1: 闲趣清咸薄脆饼干(秘制小牛排味)

在选择像薄脆饼干这样的基础零食时，大多数人都会选择不易出错的黄油口味。闲趣推出的小牛排口味薄脆饼干，则为这一零食品类增加了更多的可能。很显然，这个独特口味的灵感来源于我们常见的菜式，但比起烤肉味又更进一步。从功能角度来看，消费者对这个口味和包装的视觉效果都很买账，因而给出了80%的购买意愿，这对于一款零食产品来说是相当高的。

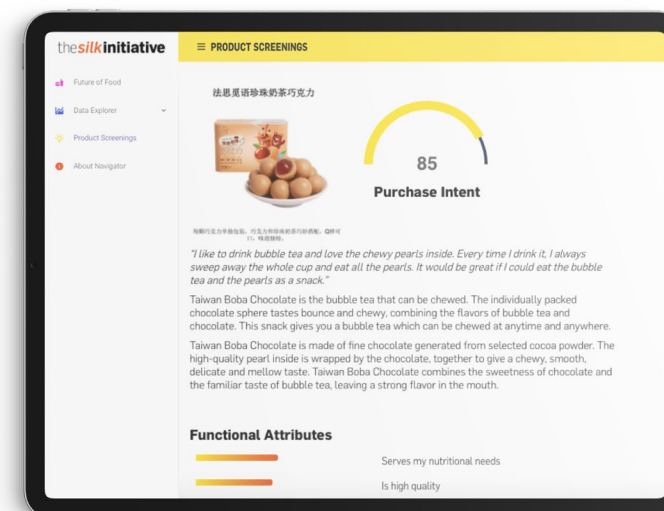


例子2: 香辣小龙虾(好丽友, 乐事, 尚米滋SunRice)

香辣小龙虾可能是时下中国人心目中最火热的一道菜之一。而零食公司抓住了这一热点，在午餐到晚餐的空档用零食提供小龙虾的香辣爽感。而消费者将这一口味定义为时尚潮流人士的最爱，坐实了产品的流行地位。



将这个口味充分发挥的品牌之一是来自澳大利亚的尚米滋 (SunRice)。丝翼与尚米滋 (SunRice) 合作开发了这款新产品。通过运用在食品口味开发方面的广泛经验，我们准确地定位了中国消费者喜爱的零食口味。我们还使用了SPRINT (创新冲刺) 方法来进行产品研发的创新，在整个过程中吸引消费者与客户的深入参与。



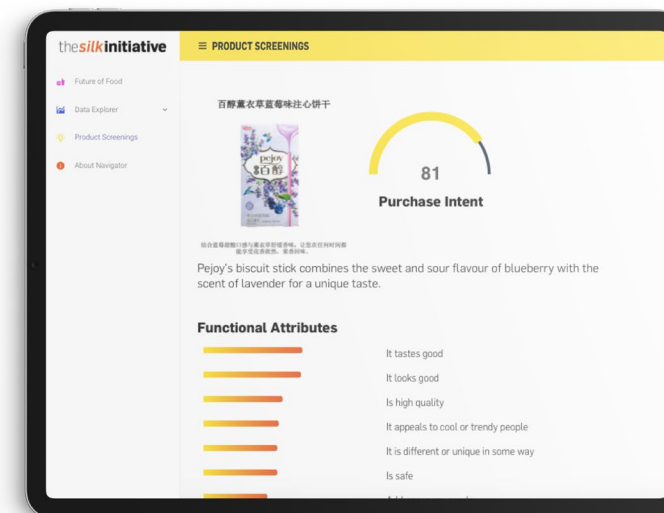
例子3: 法思觅语珍珠奶茶巧克力

许多中国年轻人对珍珠奶茶都有着别样的热忱，他们喜爱浓郁的奶香和Q弹有嚼劲的珍珠。而法思觅语结合了珍珠奶茶的这两个特点，用奶茶味的巧克力包裹Q弹的珍珠核心，打造出可以嚼的珍珠奶茶巧克力。这样的组合成功地获得了消费者的喜爱，并达成了85%的购买意愿。



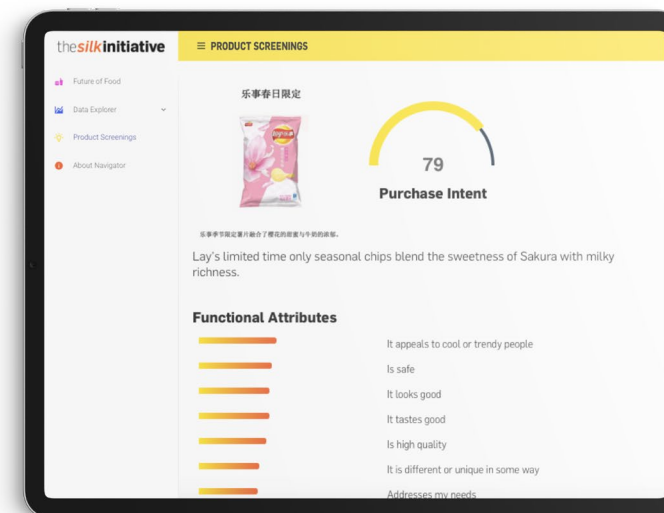
花之能量

你是否好奇花尝起来是什么味道？越来越多的零食品牌把花的味道和香气融进了他们的产品里。在甜味与咸味零食中，玫瑰、薰衣草、樱花、茉莉花与其他的花香都曾被用到。通常，这些“花香浓郁”的零食往往有着极具美学价值的精美包装。



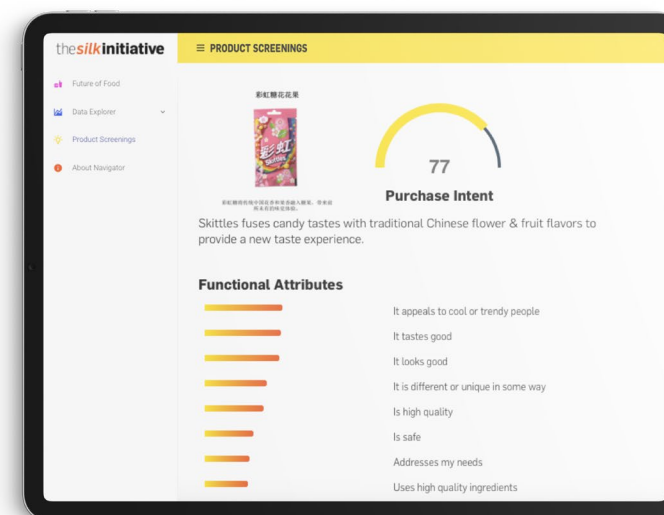
例子1: 百醇薰衣草蓝莓味注心饼干

由著名的百奇注心饼干出品，百醇的注心饼干结合了好几个既特别又吸引人的口味。这款饼干将蓝莓的口味与薰衣草的香气结合，打造出芳香微苦的口感。从功能角度出发，这款产品不仅让消费者觉得好吃，更让他们获得了赏心悦目的体验，这样的组合让产品的购买意愿直升到81%。



例子2: 乐事樱花薯片

这款季节性产品是对樱花花期的庆祝。乐事樱花薯片结合了浓郁的牛奶味和樱花香，是传统咸味零食在咸甜模糊的界线上对偏甜口味的创新。也正因为这样，消费者对这款产品表现出了一些困惑和犹豫。从产品功能属性的得分中不难看出，尽管消费者认为产品不仅安全好看，更能获得时尚潮流人士的喜爱，但他们对产品保持“味道好”的信心有了明显的降低。

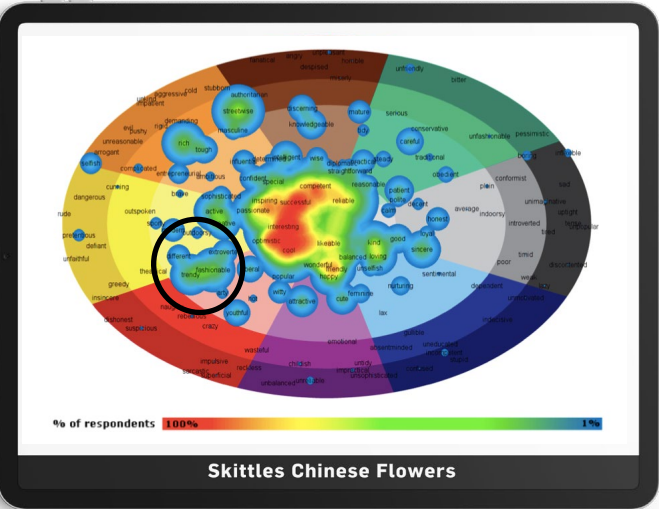
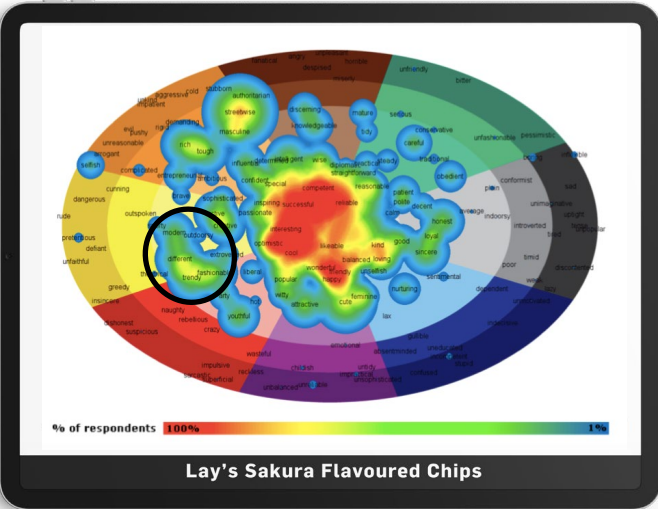
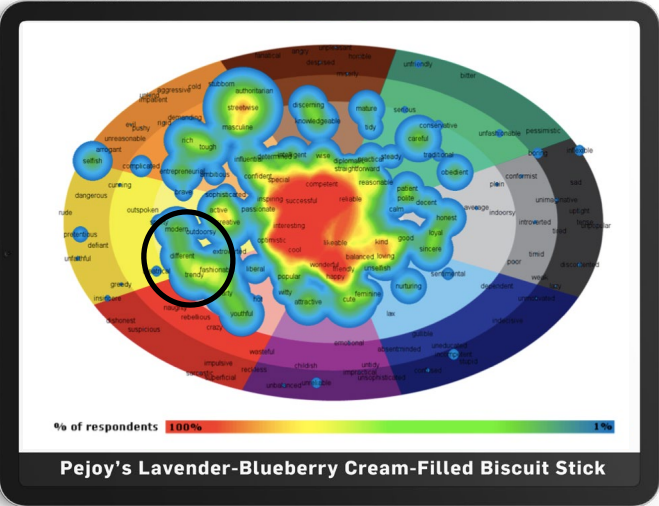


例子3: 彩虹糖花果

这款中国花果彩虹糖结合了不同的口味，让缤纷的味道在唇齿之间迸发。它们不仅有玫瑰与茉莉的花香，更包含了荔枝、桃子、西柚、葡萄和百香果的口味。这样的创新让五彩缤纷的产品本身呈现出巨大的活力，并在包装的设计上给人以愉悦的美学体验。而从功能的角度出发，消费者觉得这款产品好吃又好看，是能被时尚潮流人士所喜爱的零食产品。

花之能量

通过使用Hotspex的情感热图，我们发现消费者对这三款产品的时尚感与潮流感极其认同，这样的认同感来源于包装的设计感与花香风味的季节性。而在这张情感热图的左象限，你还可以清楚地看到消费者将产品与艺术感和与众不同紧密地联系在了一起。



结语

融合咸与甜，从独特菜式汲取灵感，以及给零食一抹新颖的花香——随着这些因素的持续发展，品牌如今可以做些什么来保障将来呢？

- 首先，创新时要保持开放的心态。中国消费者，尤其是年轻一代，对新口味总是充满好奇心与探知欲。只要你的融合或者口味不过分偏离常规，你的创新就能至少收获热烈的讨论。
- 其次，口味是消费者购买的重要原因。有了社交媒体后，消费者早在拿起一包零食前就已经决定了要不要买。这里给我们的启示是，我们要牢牢吸引住那一批喜欢最早尝试新鲜事物的消费者，他们会为你的产品做宣传，进而帮助或阻碍产品在中国市场的成功。
- 最后，在对新的口味保持开放心态的同时，也要记得保证你的产品不要过于偏离自己的大本营。消费者对口味已经有了许多预设的联想。糖应该是甜的，薯片应该是咸的，火锅应该是热腾腾的。从临近的品类借用往往能增加成功的可能性，比如巧克力借用蛋糕的口味，冰淇淋借用奶茶的口味。然而，过分突破消费者的预设，就会增加许多风险。

除了这些改变之外，我们也看到了零食品类的转变。如今，消费者追求更健康的零食替代品，购买产品时也更懂行了。所以，吸引眼球是远远不够的。不论是出于功能需求还是情感需求，消费者都希望将自己的血汗钱花在美味并且安全、营养、优质的产品上。

“零食在过去几年一直处于增长的状态——现在这已经是一个价值890亿美元的产业了，但根据我们观察和我的看法，健康相关的趋势仍会继续增长……比如说藜麦巧克力棒、胶原蛋白饼干、康普茶麦片、益生菌芝士和混合了蔬菜的冰淇淋……研发人员也在寻找植物食材代替糖和钠离子来增添风味，比如洋甘菊、薰衣草、玫瑰和接骨木花都是我们常常看到的很流行的植物食材。”

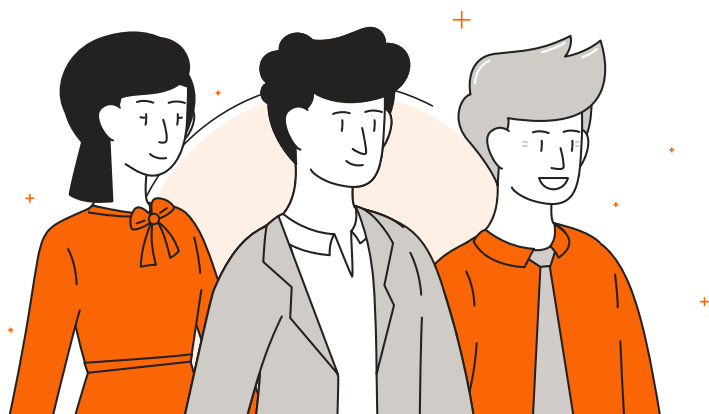
Michelle Buffardi

数字编辑部副总裁，Food Network

丝翼运用消费者洞察、品牌策略以及创意实践助力全球的食品及饮料品牌达至成功的未来。我们的业务范围包含创造并验证以消费者洞察为导向的品牌策略,进而帮助客户实现未来的愿景。

丝翼是全球少数将洞察、策略和创意相结合为食品饮料品牌提供咨询服务的公司。我们的合作对象的业务覆盖研究发展、市场营销以及消费者调研。在上海总部,我们将研究工具和服务结合起来帮助全球的客户,提供巧妙的决策、出色的建议、放眼未来的思维方式以及切实可行的品牌资产。

我们通过三种不同的方式来帮助客户进行探索、创新以及衡量他们的市场机遇。



发现 无论是短期的品牌诊断还是更为全面的品牌定位理解,我们都会以综合性视角审视品牌的产品类别、消费群体和竞争对手,进而对品牌所面临的机遇和风险进行全面评估,让您作为品牌主理人有详尽的了解和应对能力。

创新 通过专有的创意开发和视觉设计方案,我们让品牌、产品、包装和营销沟通平台更为鲜活,为您的企业提供贴合文化、切合实际的解决方案,帮助您的品牌得到市场关注,不仅在当下,更是在未来。

衡量 我们严格的品牌验证技术帮助客户衡量其品牌战略的未来投资回报,确保您有信心、激情和动力将企业的市场潜力发挥到最大极限。



此外,我们的专利工具 **Navigator™** 是业内第一个动态数据智能平台,它可以收集和分析各种数据,将中国食品和饮料的格局真正可视化。Navigator™在中国8大城市中探索了10个食品和饮料品类,以实时掌握消费驱动因素和消费趋势。Navigator™旨在帮助企业在中国食品饮料市场做出更明智的决策,尤其是创新方面。

在分析和确定消费者的消费趋势时，丝翼坚信定量数据的重要性。虽然定性研究能够提供独特的发现，但其数据也受到了一定的限制。然而，数字是说明问题的关键。因此，我们创建了丝翼Navigator™——这是业内第一个也是唯一一个动态数据智能平台。它可以收集和分析各种数据，将中国食品和饮料的格局真正可视化。Navigator™ 在中国8大城市中探索了10个食品和饮料品类，这些城市都是食品和饮料公司寻求商业增长的重要基地。

每个月的丝翼 Navigator™ Compass 都是从丝翼 Navigator™ 的趋势研究、定量分析、文献探索以及对行业领导者的深入访谈中总结得来。此外，丝翼Navigator™ Compass 内容中体现的行业洞察，还充分利用了丝翼在语言学、符号学、文化、消费品、食品和饮料以及健康方面的专业知识。

丝翼 Navigator™ Compass 是丝翼对整个地区消费者消费趋势探索的一部分。通过这份研究报告，丝翼向国内外品牌分享了中国的食品和饮料、消费成品、快消品与健康行业取得成功所需要了解的最新内容。

此报告由William Brenner, Andrew Cameron, John Pabon 和Qi Zhang撰写。丝翼中国团队的成员提供了相关内容。作者同时希望感谢公司以外的受访者与其他同事提供的反馈。任何遗留在此报告中的错误由作者负责。如您有任何反馈或疑问，请直接致邮John Pabon john@thesilkinitiative.com。

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丝翼会不时发布特别的研究报告，以促进对各个商业领域更广泛的了解。然而，丝翼对这项工作的付出不反映其对任何品牌、公司或组织的认可、支持或代表。本报告中表达的观点仅代表作者的个人观点，与丝翼当前或过去的客户无关。特别报告包含初步研究、分析、发现和建议四个部分。报告内容旨在激发当下的讨论与重要的反馈，并促进围绕商业成功展开的新兴主题的持续辩论。

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丝翼 TSI Navigator™ Compass:

再来一点儿：缤纷零食，百味世界

2020年7月

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JULY 2020

The TSI Navigator™ Compass

Gimme, Gimme More:

The Expanding World of Snacking Flavours





FOREWORD

Who else remembers coming home from school and rustling through the kitchen cupboard for a snack?

In my world, you were either one of two types: a savoury-food lover or someone with a sweet tooth. I'd always gravitate towards the more salty flavours like chips, crisps, and nuts. My mom, though, loved her tin of biscuits. She'd pull out the chocolatey cookie, dunk it into her milky tea, and sit back like the queen on a throne.

Never in a million years would she have thought of covering her Tim Tams with chicken salt. Back then it would have been sacrilege. Today, though, the idea might be a good one to stay competitive. That's because we're seeing an evolution in what consumers want from their snacking flavours. This goes way beyond the odd tastes once prevalent in Chinese stores, like cucumber-flavoured Lay's. Now, companies are playing with the intersection of savoury and sweet in very interesting ways.

In this month's TSI Navigator™ Compass, we explore the evolving world of snacking flavours in China. Believe me when I tell you, it's not so black-and-white anymore.

Andrew Kuiler
Founder & CEO

TSI CONTRIBUTORS



WILLIAM BRENNER

A true global citizen, William brings a unique combination of strategy and design to the table, working alongside TSI's global client portfolio to realise their brand visions. This is supported by a focus on human-centred design thinking, meaning the insights he provides are always backed by what consumers actually want. Prior to TSI, he founded design agency DesignWB.



ANDREW CAMERON

As a Associate Director, Andrew ensures TSI's clients meet their research and brand strategy objectives. From ensuring accurate data collection to producing strategic stories, he works with clients to identify the most effective strategies to propel their brands forward. An avid traveller and an enthusiastic sportsman, when he's not on the cricket field Andrew is in the kitchen experimenting with new and exotic recipes.



JOHN PABON

Over the past decade, John has examined the societal impacts of China's economic rise and has been honoured as one of the world's top 100 voices on modern China. He also leads TSI's marketing and communications. His previous work includes posts with the United Nations, McKinsey, A.C. Nielsen, and as a consultant with BSR, the world's largest sustainability-focused business network.



QI ZHANG

Born and raised in Hubei Province, a place famous for a wide range of snacks, she has sensitive taste buds and a love for food. With a background in linguistics, Qi is also TSI's resident naming expert. Qi graduated from Huazhong Agricultural University with a bachelor's degree in Food Science and Engineering and has a master's degree in Applied Translation from the University of Leeds.

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IT'S NOT JUST SWEET AND SAVOURY ANYMORE

“We’re in the middle of a snacking evolution.”

Lyons Watt, Sweets & Snacks Expo, 2019

All around the world, the coronavirus pandemic has forced more and more people to spend more and more time at home. With all that time close to the kitchen, what are we doing? Snacking. Major snacking behemoths like the **Kellogg Company** saw, “cracker sales jump nearly 40% in March over the prior year.” Meanwhile, Pepsi “...tracked strong double-digit growth of brands, including Lay’s and Tostitos, up 32% and 42%, respectively.” Savoury and sweet snacks are all equally on the rise. Interestingly, so too are healthier “good-for-you” snacks.

But, what about in China. For years, consumers have been given what some might consider strange snacking options on the shelf. From octopus-flavoured potato chips to hot-and-spicy Sichuan Snicker’s Bars, it seemed every company was clamouring to stand out in any way they could. Now, though, we are seeing a clear evolution in snacking flavour profiles and how companies are approaching new product

development. Instead of a “see what sticks” attitude, there are more guardrails in terms of what consumers are willing to pay for. What is it going to take for brands to stay up-to-date with what consumers want, though? In this edition of the TSI Navigator™ Compass, we explore the flavours – weird, wacky, and wonderful – Chinese consumers are looking for in their snacks.

To arrive at these findings we employed our proprietary data intelligence platform, TSI Navigator™, which looks at 10 major F&B categories from consumers all across China to understand drivers and trends in real-time. Additionally, we capitalised on our in-depth understanding of Chinese consumer behaviour, qualitative expert interviews, as well as extensive work in flavour profiling, snacking, new product development, branding, and packaging design.

NOTE ON TSI NAVIGATOR™ HEATMAP TECHNOLOGY

Our analysis includes use of Hotsplex heatmap technology. The Hotsplex heatmap is a comprehensive collection of associations on the specific emotional attributes a brand or product expresses. With its 8 different “zones,” each representing a different key emotional attribute, the map helps marketers and their partners determine their brand’s right emotional space.

One can divide each zone into three sections: core, middle and outside. As associations move from the middle of the heatmap to the outside, they change from positive to negative.

Core section: This represents the key associations every successful brand should elicit among consumers: interesting, successful, competent, reliable, down-to-earth, easy-going, likeable, and cool.

Middle section: Moving out from the core section, the middle section is more contextual and indicative of potential brand differentiators. This is where associations should be matched up with brand values. For instance, the middle section of the “interesting” zone contains words like passionate, creative, sporty, and outspoken.

Outside section: The outside ring of the heatmap contains negative associations. These are, on average, three times as impactful as positive ones and a leading indicator of brand health issues. For instance, the outside section of the “interesting” zone contains words like pretentious, dangerous, and rude.

These associations are all linked. For instance, feeling “interested” can lead to feeling “passionate,” but too much of this can lead to feeling “pretentious.”

If you have any other questions on the heatmaps, please feel free to contact TSI.

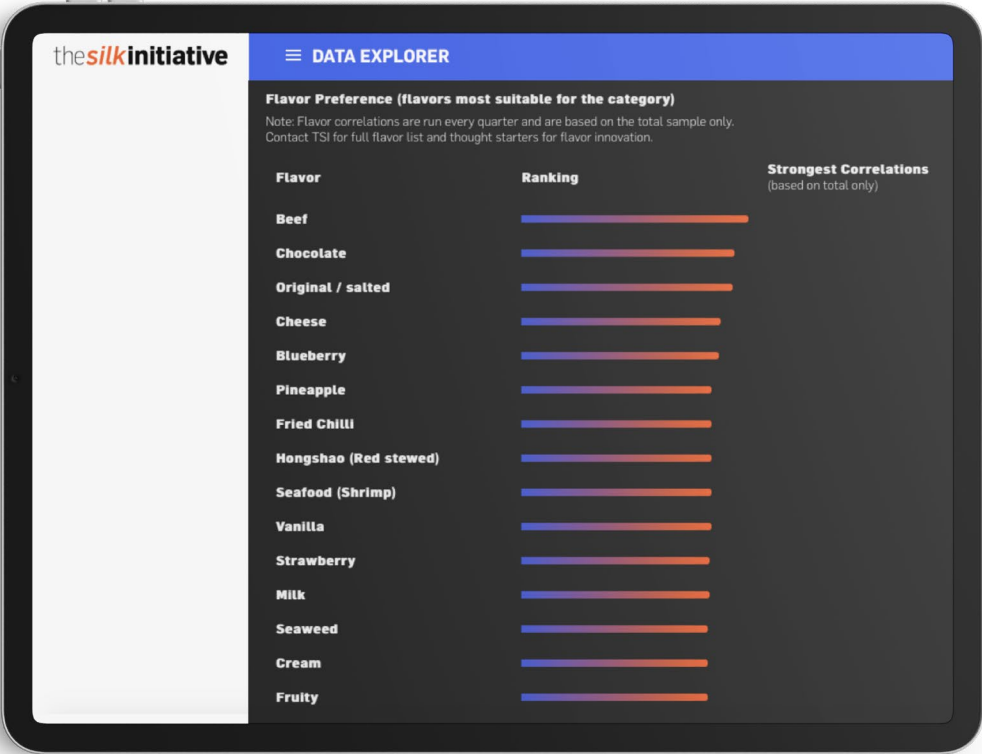
THE BEST OF BOTH WORLDS

In the not-too-distant past, salty and sweet were considered two very different realms of flavour. Recently, though, we've been seeing more snacks combining the two flavour profiles in their new product development.

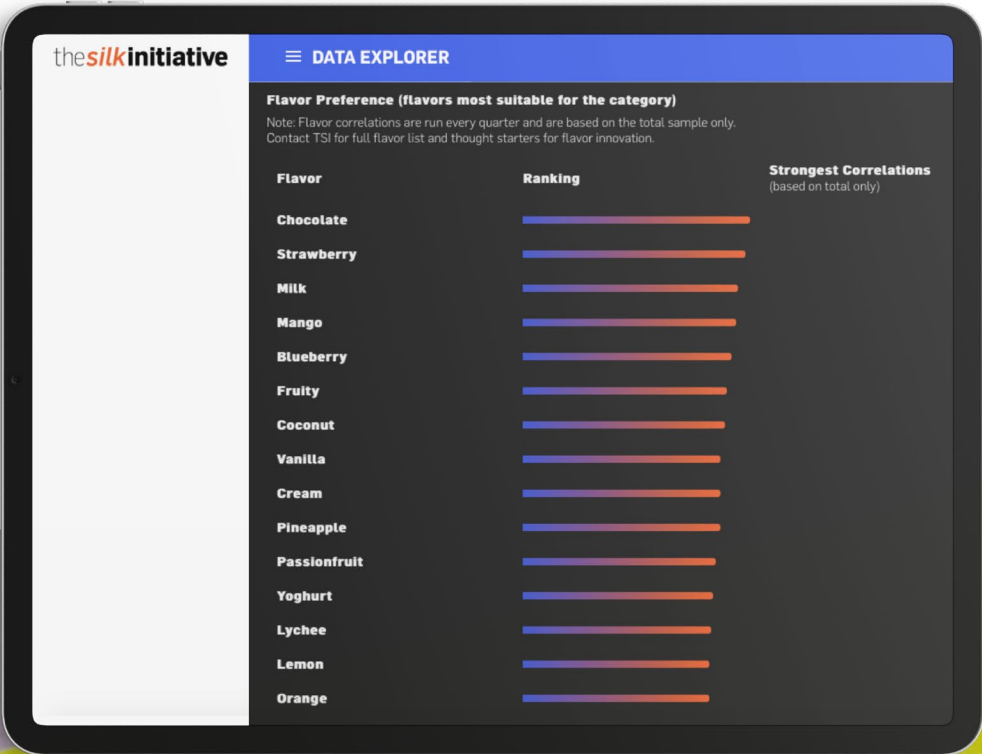
But, this isn't carte blanche for you to go out and start mixing profiles together. According to data from TSI Navigator™, the flavour combinations have to run a certain way to drive consumer conversion. We looked at data around flavour preferences under both savoury and sweet snacks. What we

found is that savoury snacks with sweet tastes are more widely accepted than sweet snacks with savoury tastes. The first chart below shows how flavour preferences for savoury snacks can include chocolate, blueberry, pineapple, and vanilla even though these are typically thought of as sweet.

On the other hand, the second chart reveals consumers expect sweet snacks to stick to traditionally sweet flavours, whether that's chocolate or vanilla, lemon or orange.



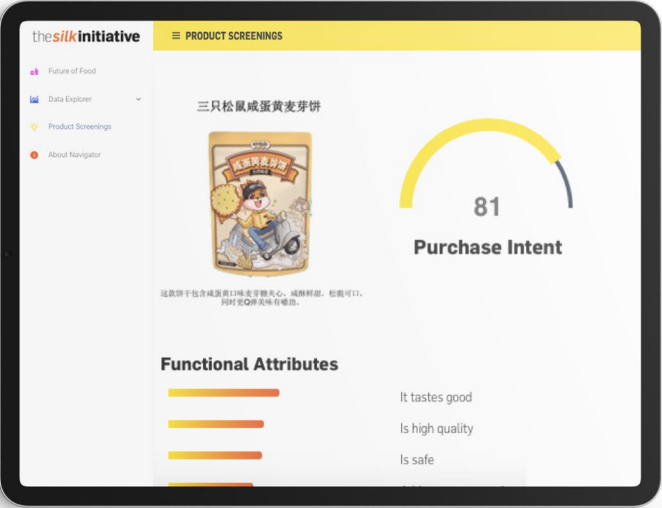
Savoury snack flavour preferences



Sweet snack flavour preferences



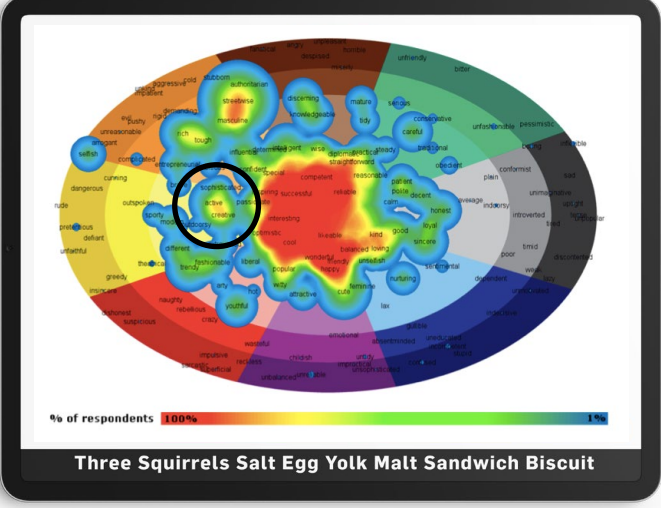
THE BEST OF BOTH WORLDS



Example #1
Three Squirrels Salt Egg Yolk Malt Sandwich Biscuit

This product combines salted egg yolk (salty) and maltose (sweet). It has received a high purchase intent (81%) and is believed to "taste good" as demonstrated by being the top functional attribute.

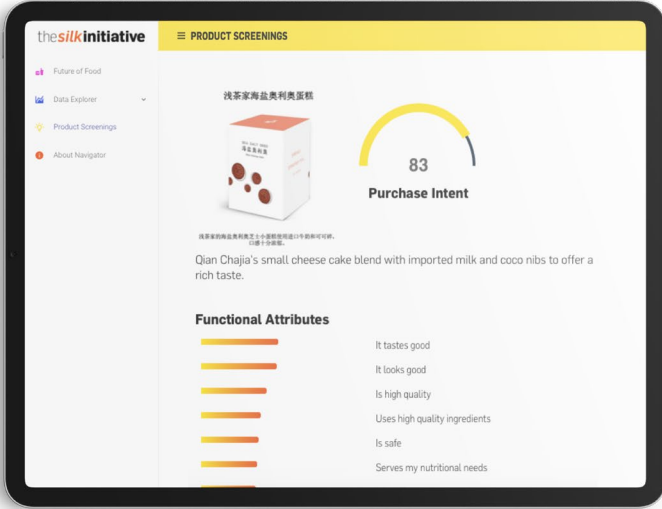
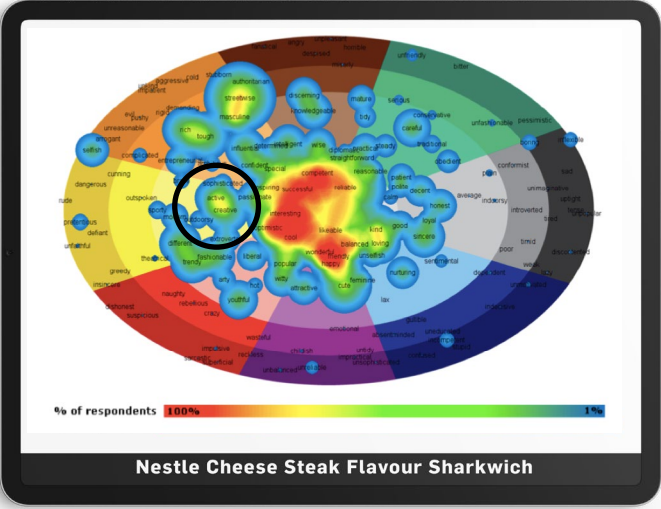
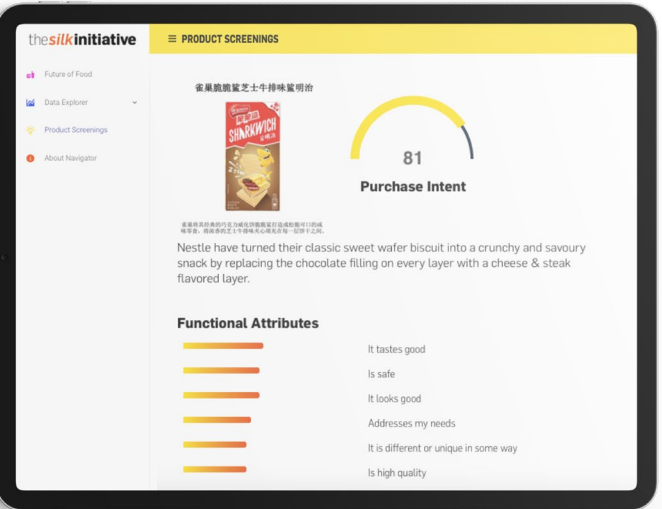
When we look at these three products through our Hotspex Heatmaps, it also becomes clear consumers view them as more creative. You can see this with the rising yellow warmth to the left of centre.



Example #2
Nestle Cheese Steak Flavour Sharkwich

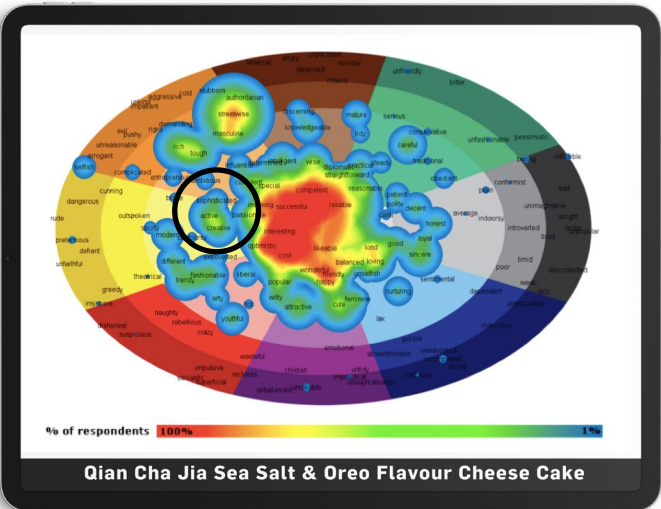
Nestle has turned their classic sweet wafer biscuit into a crunchy and savoury snack by replacing the chocolate layer with a cheese and steak flavoured layer.

This product has also received a high purchase intent (81%), with consumers viewing it as "tasting good."



Example #3
Qian Cha Jia Sea Salt & Oreo Flavour Cheese Cake

This is a blending of sea salt and Oreo flavours. The cheese cake also performs well in purchase intent (83%) and is viewed as "tasting good".



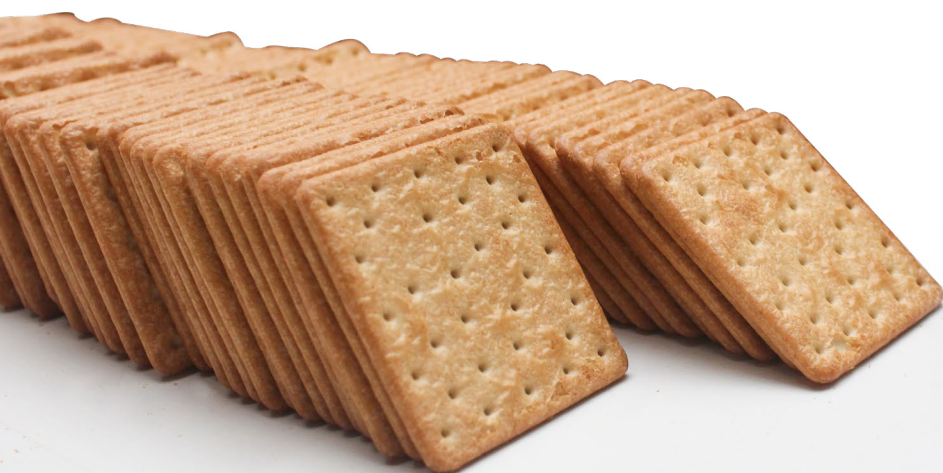
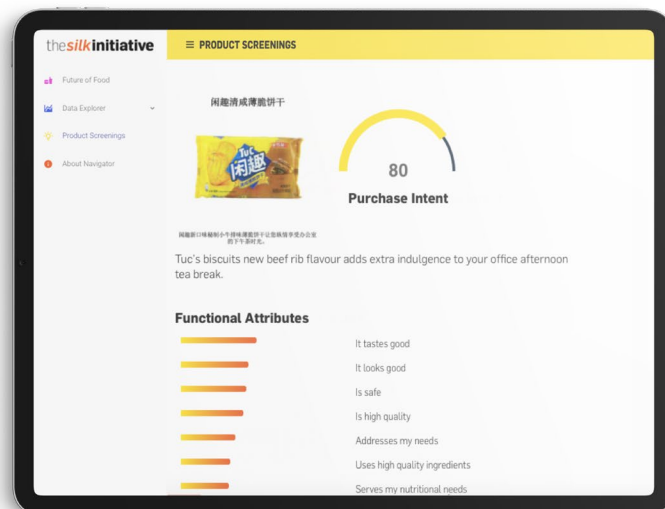
MEALTIME INSPIRATION

The snacking category is also pulling inspiration from other occasions. No longer satisfied with simple flavours like spring onion, barbecue, or raspberry, we are seeing the emergence of more sophisticated flavours reminiscent of full meals.

Example #1

TUC's Beef Rib Flavour Biscuits

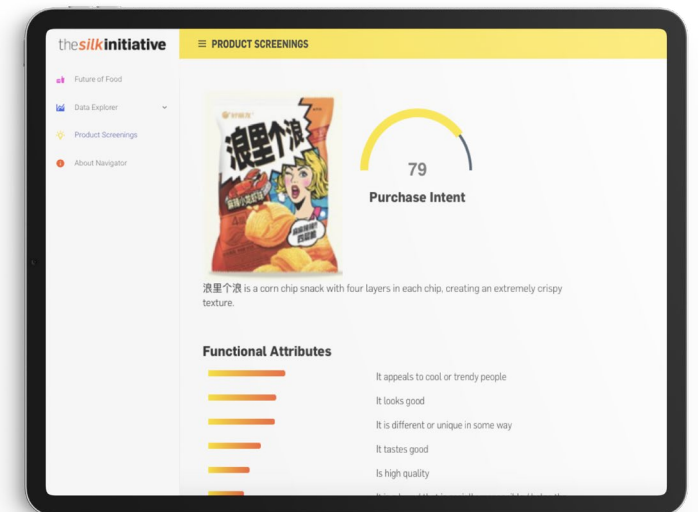
When it comes to a simple pack of crackers, most people are used to just settling for butter flavour. TUC ramped up the category with beef rib flavoured biscuits. The dinner-time inspiration is clear with this particular flavour. It also goes one step beyond just barbecue. Functionally, consumers appreciate the taste and visual appeal of the product. They give it a purchase intent score of 80%, pretty high for a snacking product.



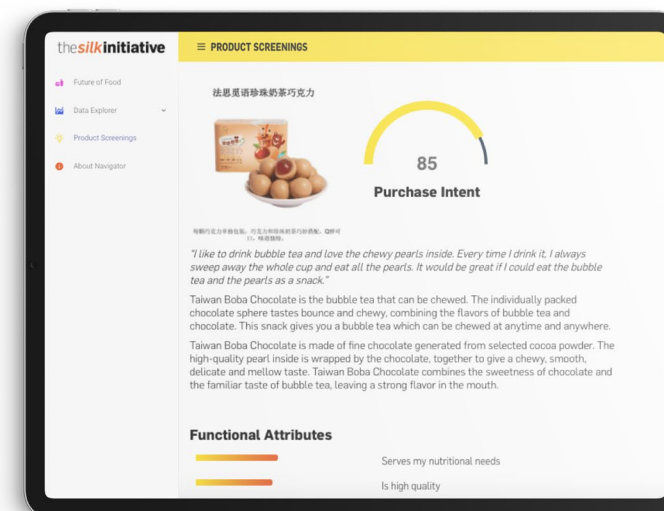
Example #2

Spicy Crayfish (Orion, Lay's, SunRice)

Spicy crayfish are probably one of the hottest (no pun intended) meals enjoyed by Chinese groups. Snacking companies have caught on to this, offering the flavour between lunch and dinner. Consumers view the flavour as something appealing to cool and trendy people, a solid mark for a popular product.



One brand capitalising on this flavour profile is Australia's SunRice Chips. TSI worked with SunRice on this new product, tapping into our extensive knowledge of flavour development to really nail the right profiles Chinese consumers would go mad for. We also used our SPRINT approach to innovation, engaging consumers and other stakeholders all along the journey.



Example #3

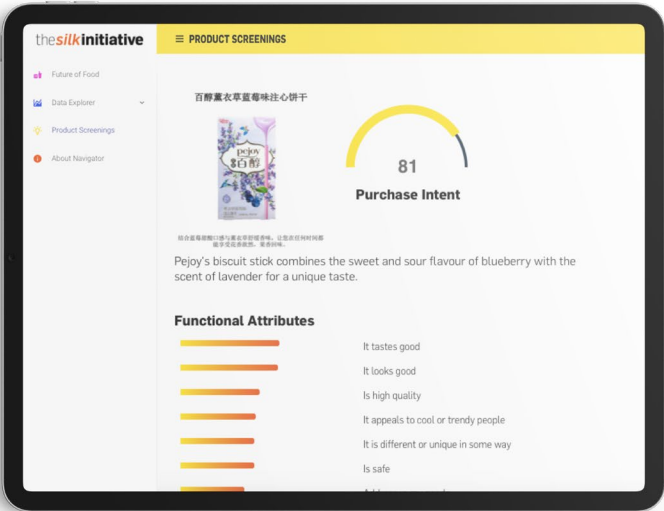
Fasimisu Taiwan Bubble Tea Chocolate

Many Chinese young people are also going crazy for bubble tea. They love its milky flavour and chewy tapioca bubbles. Fasimisu has introduced a snack that combines these two features. It has a milk tea flavour chocolate layer and chewy bubble core. The mash up seems to be working as it received a very high purchase intent score of 85%.



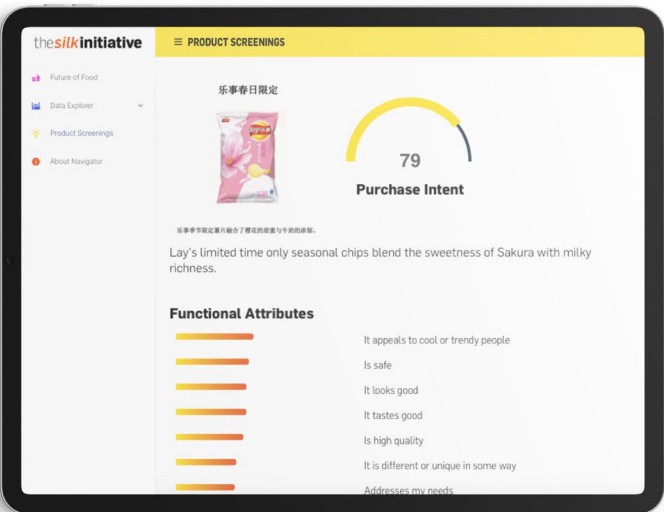
FLOWER POWER

Have you ever wondered what flowers taste like? Many snack brands are blending flower flavours and scents into their products. Rose, lavender, sakura, jasmine, and other flowery aromas are used in both sweet and salty snacks. Typically, we see the packaging around such products to be very aesthetically pleasing as well.



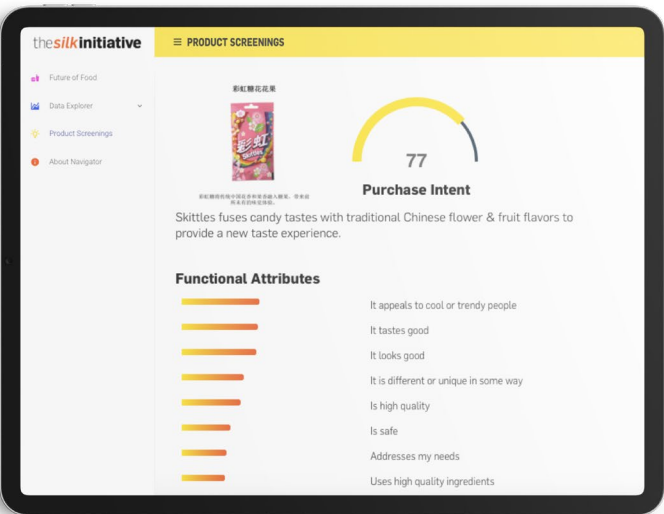
Example #1
Pejoy's Lavender-Blueberry Cream-Filled Biscuit Stick

From the makers of the infamous Pocky sticks, Pejoy brand biscuit sticks combine a few unique flavours that are attracting consumer attention. The biscuit mixes blueberry flavouring with a lavender scent for a slightly bitter, aromatic taste. Functionally, consumers feel the product both tastes good and is visually appealing. This has resulted in a high purchase intent score of 81%.



Example #2
Lay's Sakura Flavoured Chips

A limited product timed to coincide with Cherry Blossom season, Lay's Sakura-flavoured chips combine a milky taste with sakura aroma. This makes the typically salty snack edge on the sweeter side. Because of this, there is a bit of consumer confusion and hesitation. Looking at the functional scores, you can see "it tastes good" drops down on the list of attributes. Topping out the list, though, was the product "appealing to cool and trendy people," being "safe," and looking good.

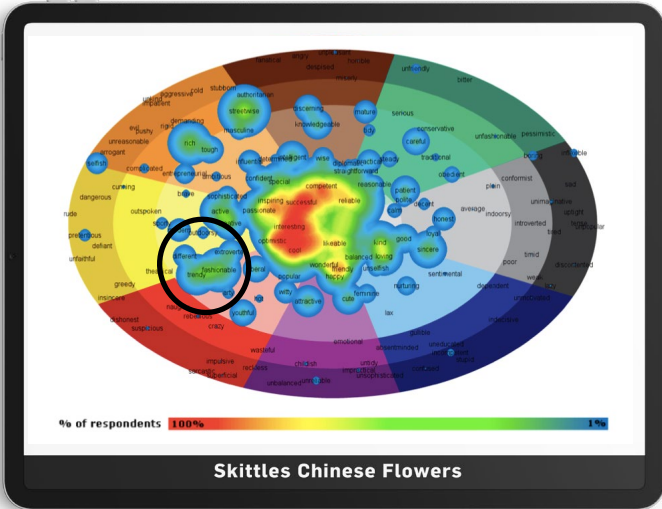
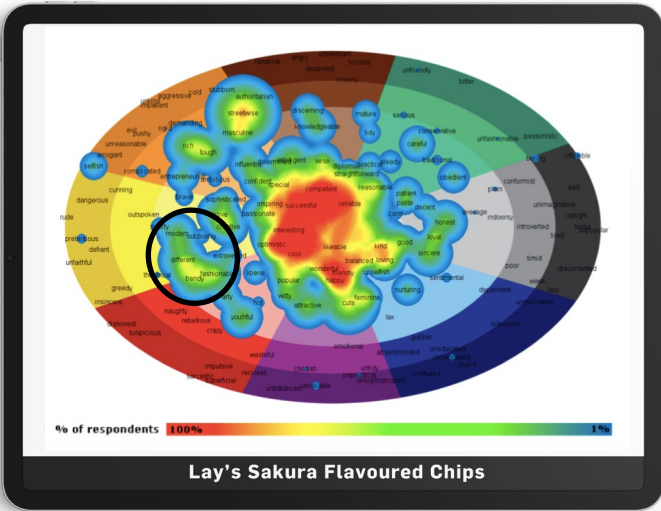
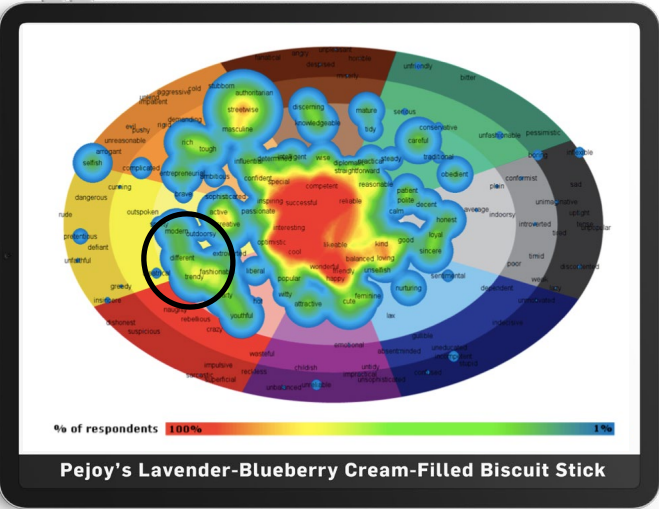


Example #3
Skittles Chinese Flowers

The Skittles Chinese Flowers product seems to bet everything on an explosion of flavour. Not only do they combine rose and jasmine aromas, but also use lychee, peach, grapefruit, grape, and passionfruit flavours. This creates vibrancy in the product colouring itself, but also an aesthetically pleasing package. Functionally, consumers view the product as "appealing to cool and trendy people," "tasty," and "good-looking."

FLOWER POWER

Using our Hotspex Heatmaps, we find that consumers view these three products as being quite fashionable and trendy. This speaks to the aesthetics of packaging, as well as seasonality of floral flavours. Looking at the bottom left quadrant of the Heatmap, you can also see associations with being arty and different.



CONCLUSION

As these parameters – mixing sweet and savoury, pulling inspiration from unique sources, and adding novel aromatics to snacks – continue to evolve, what can companies do today to prepare for tomorrow?

- First, they can keep an open mind when it comes to innovation. Chinese consumers, especially younger demographics, are curious and adventurous with new flavours. As long as you don't go too far with your new combinations or tastes, you can expect your innovations to at least drive discussion.
- Second, taste is a key component of consumer adoption. Thanks to social media, consumers are already making up their purchase decisions before even picking up a pack. That means getting early adopters hooked, and advocating your product, can make or break success in the Chinese market.
- Lastly, while we advocate keeping an open mind with new flavour profiles, you have to keep things close to home. Consumers already have pre-conceived notions of flavour associations. Candy should be sweet, chips should be savoury, and hot pot should be hot. Borrowing from adjacent categories, like chocolate borrowing flavours from cakes and ice cream from bubble tea, can amplify your results. On the other hand, breaking too far out of the frames consumers have can be a risky decision.

On top of all these changes are the shifts in the snacking category itself. Now, consumers are looking for healthier alternatives and have become savvier with their purchase decisions. It's no longer enough to stand out. Functionally and emotionally, consumers want to spend their hard-earned money on products that are going to taste good, but also provide a sense of safety, nutrition, and high quality.

“Snacking has been on the rise for the past few years – it’s grown to be an 89 billion dollar industry, but the trends we’ve seen and I think will continue to grow are around health...Things like chocolate quinoa bars, collagen cookies, kombucha granola and probiotic cheese, ice creams blended with vegetables...recipe developers are looking to botanicals to add flavor where sugar and sodium used to be—chamomile, lavender, rose and elderflower are popular botanicals we’re seeing a lot more of.”

Michelle Buffardi

VP of Digital Editorial, Food Network



ABOUT TSI

At The Silk Initiative, we use data-led foresight to future-proof ambitious consumer brands. Our business is to create and validate data-driven brand strategy solutions for our clients' future ambitions.

TSI is one of the world's few consumer goods brand consultancies sitting at the intersection of foresight, strategy, innovation, and creative development. We work with partners across research and development, marketing, consumer insights, and futures. From our base in Shanghai, we help clients around the world make smarter brand and product decisions by combining our tools and services, excellent advisory, future-focused thinking and tangible, actionable assets.

We do this through three distinct practice areas to help companies discover, innovate, and scale their market opportunities.



Discover. Whether it's short-term brand diagnostic work or comprehensive brand positioning, we take a comprehensive look at your category, consumers, and competitors to provide a complete assessment of opportunities and future risks, helping you feel informed and competent as a brand owner.

Innovate. Our proprietary innovation development and visual design approaches bring brand, product, pack, and communication platform ideas to life. This gives your business culturally inspired, relevant solutions that will get noticed in the market today and in the future.

Scale. Our rigorous brand validation techniques help our clients understand the measurable future return on investment of their brand strategies. This ensures you have the confidence, excitement, and motivation to maximise your market potential.



In addition, our proprietary tool, **Navigator™**, is the industry's first dynamic data intelligence platform that collects, analyses, and visualises the China food and beverage landscape. Navigator™ looks at 10 major F&B categories from consumers across 8 key cities in China to understand drivers and trends in real time. The tool is designed to help companies make smarter decisions in food and beverage in China, particularly when it comes to innovation.

ABOUT THE TSI NAVIGATOR™ COMPASS

TSI strongly believes in the importance of quantitative data when analysing and determining consumer trends. Qualitative insights are good, but only go so far. Numbers, however, speak volumes. That's why we created TSI Navigator™, the industry's first and only dynamic data intelligence platform that collects, analyses, and visualises the China food and beverage landscape. Navigator™ explores 10 F&B categories across 8 of the most important cities in China, cities where companies are looking to for growth.

The monthly TSI Navigator™ Compass is based on TSI Navigator™ trend analysis, quantitative analysis, literature reviews, and qualitative interviews with industry leaders. It also draws on TSI's industry expertise in flavour profiling, snacking, consumer products, food and beverage, and wellness.

This research is part of The Silk Initiative's continued examination of consumer trends throughout the region. With this report, The Silk Initiative (TSI) aims to educate foreign and domestic brands on the latest topics prevalent to business success in the food and beverage, consumer packaged goods, fast moving consumer goods, and wellness sectors.

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The TSI Navigator™ Compass:

Gimme, Gimme More: The Expanding World of Snacking Flavours

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