



ENDLESS POSSIBILITIES

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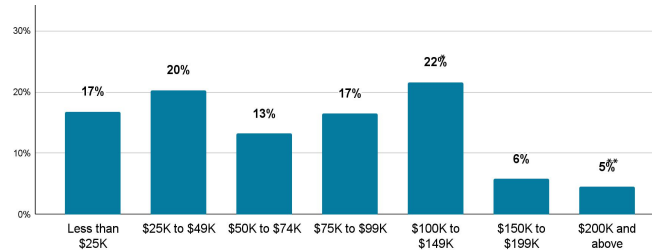
View recording and download slide deck at iddba.org. (Available in 24-48 hours)



Participant qualifications

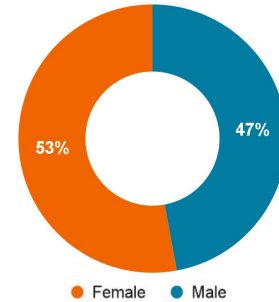
- Purchase bakery items, deli items, prepared foods, or specialty cheeses from a grocery store
- Shop at least once a month in-person at a grocery store with a deli counter and bakery

Income



*Sample slightly higher than national average (17%) **Sample lower than national average (12%)

Gender

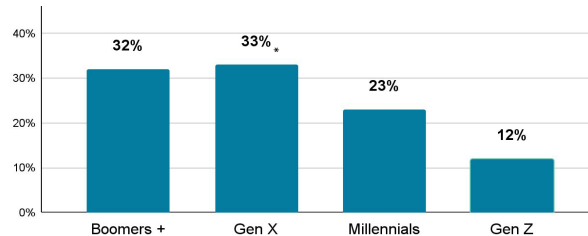


Shopping frequency

76%

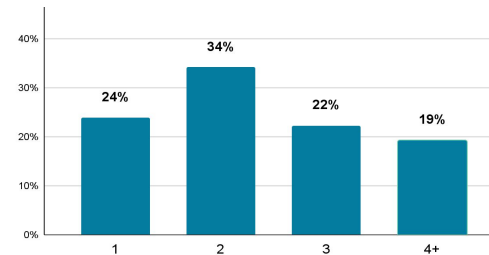
Shop at least weekly

Generation

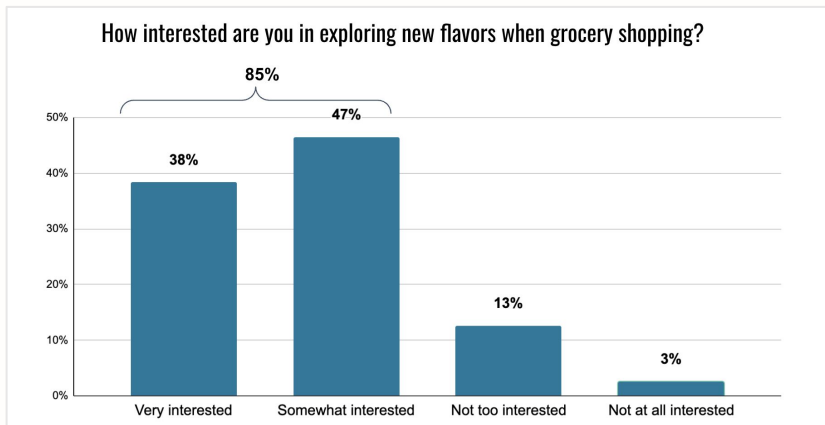


*Sample slightly higher than national average for Gen X (25%)

Household size



Quantitative data gives us the “What”



Qualitative data gives us the “Why”



2025 TRENDS



ENDLESS POSSIBILITIES

How can seasonal, limited-edition, or global flavors create urgency and exclusivity to hook shoppers?



UNIQUELY YOU

How does pop culture influence food choices and move products off the shelves? How can you ride the wave?



LESS IS MORE

Shoppers say they value sustainability, but how does it really show up at checkout? What tradeoffs are they willing (or not willing!) to make?

LIVE, LAUGH, LUXURY



Can indulgence drive loyalty by connecting with consumers who crave self-care and culinary experiences?

CHOP CHOP

What does convenience shopping look like today—and how can you make the most of it?



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Innovation and surprises: what shoppers crave

The appetite for innovative flavors is strong for baked goods & cheese

- **85% of grocery shoppers** are interested in exploring new flavors
- **Bakery leads** in flavor experimentation, especially for unique or seasonal flavors
- **Demographic differences:** men, younger generations, and higher-income shoppers are more adventurous when it comes to trying new flavors
- **Deli shoppers** lean toward classic flavors the whole house can agree on

What makes a flavor worth trying?

- **Winning flavors build off the familiar:** Mashups that put a twist on a familiar flavor (especially sweet + savory) are most appealing
- **Losing flavors are overpowering:** even though 1 in 4 prefer “bold” flavors, they complained about flavors that were imbalance or had clashing profiles
- **Price is the #1 barrier:** especially for older or lower-spend shoppers

Flavor is an emotional experience

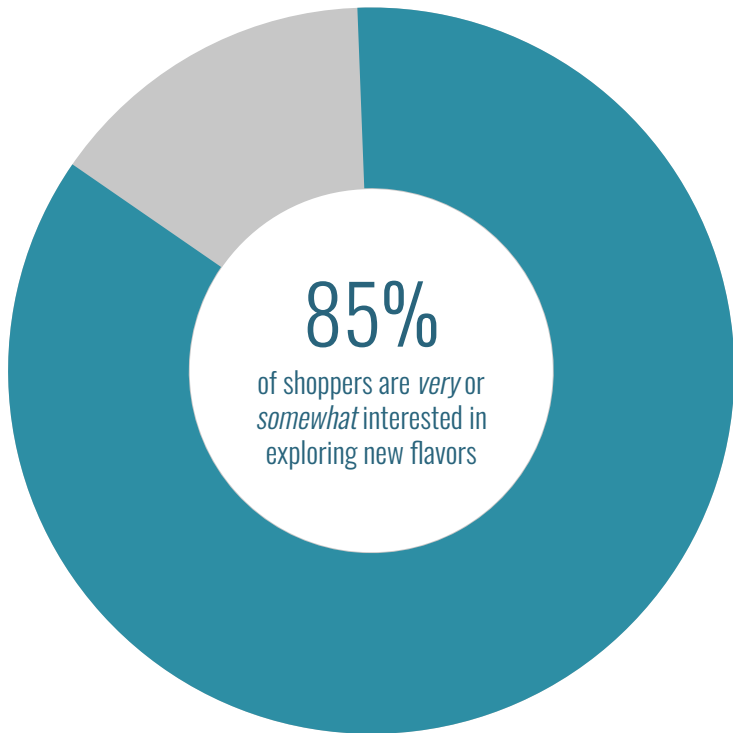
- **Flavor isn't just taste—it's emotional.** Shoppers most often described their discovery of new flavors as sources of *joy*, *comfort*, *relief*, and *adventure*.
- **Global flavors** are preferred by fewer shoppers (only 16%), but the emotional connection is powerful, often tied to heritage, identity, and a sense of adventure and discovery.



The appetite for innovative flavors in dairy, deli & bakery



Grocery shoppers are hungry for new flavors



”

I get excited by trying something new. It makes me feel good, like I'm indulging.

”

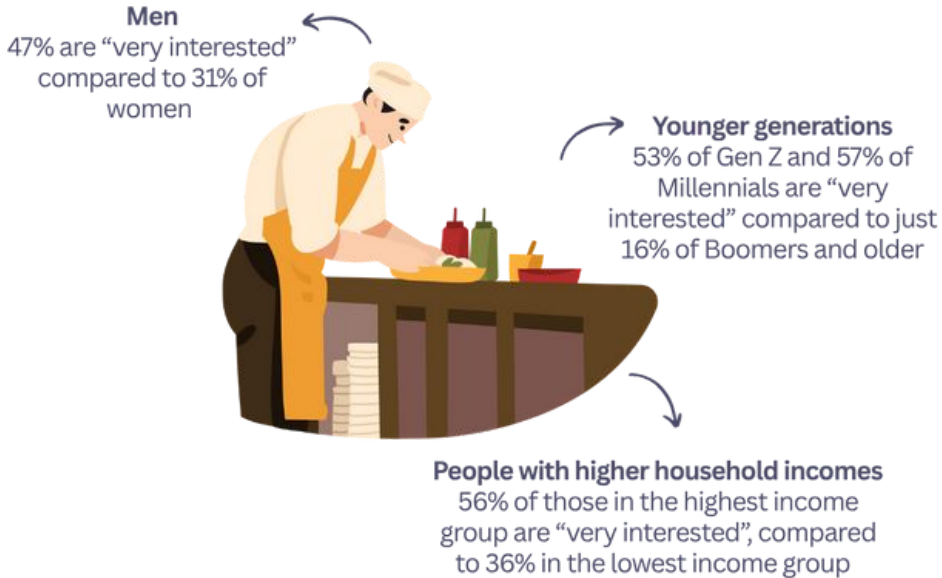
I don't ever regret trying something new, even if it's not my favorite.

”

Trying new and exciting foods keeps life interesting... [I] have fun with it!



Which demographics are most interested in trying new flavors?



How interested are you in exploring new flavors when grocery shopping?

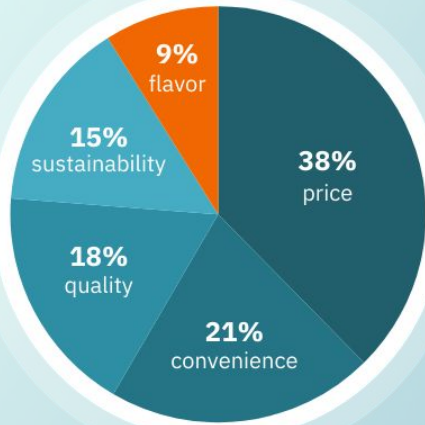
	Very Interested	Somewhat Interested	Not Too Interested	Not At All Interested
Men	47%	38%	12%	2%
Women	31%	54%	13%	3%
Gen Z	53%	42%	6%	0%
Millennials	57%	38%	6%	0%
Gen X	42%	47%	10%	1%
Boomers + older	16%	54%	23%	7%
Income				
<50k	36%	49%	13%	3%
50k-99k	35%	46%	15%	4%
100k-150k	42%	43%	15%	0%
150k or more	56%	44%	0%	0%



Flavor makes up 9-10% of grocery buying decisions

DAIRY

Relative Importance on Purchase Decisions



DELI

Relative Importance on Purchase Decisions



BAKERY

Relative Importance on Purchase Decisions

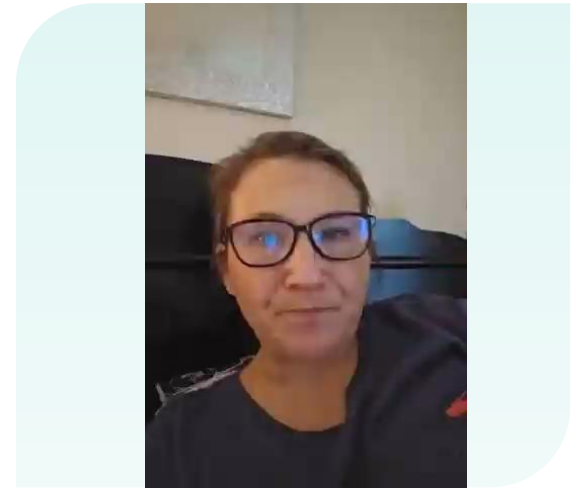
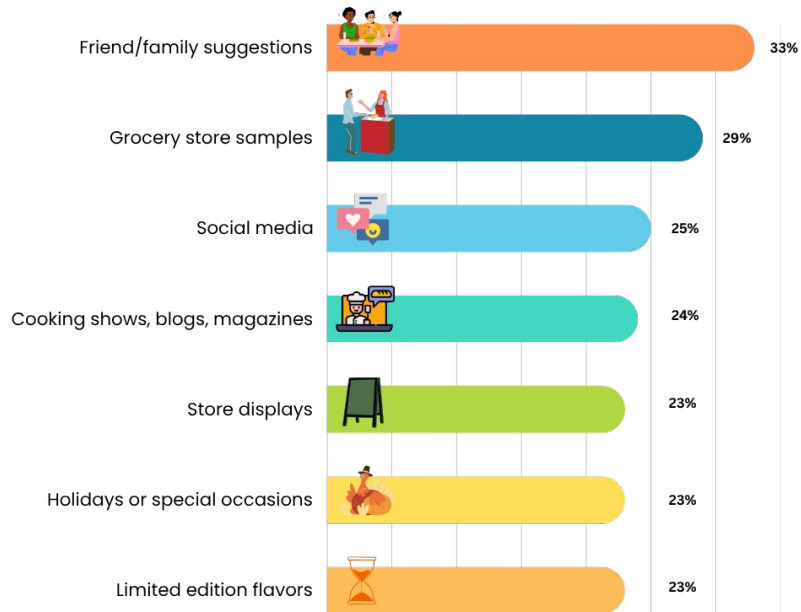


Relative Preference for Classic vs. Unique Flavors

Part-worth utility from conjoint analysis



What most often motivates you to try a new flavor? (select up to 3)



Someone talked me into trying this. It was so unique, and it was good. I was so surprised!

77



Generational trends: what motivates you to try a new flavor?



**Gen Z and Millennials
are motivated by
social media**



**Millennial and Gen X
are motivated by
suggestions from
friends and family**

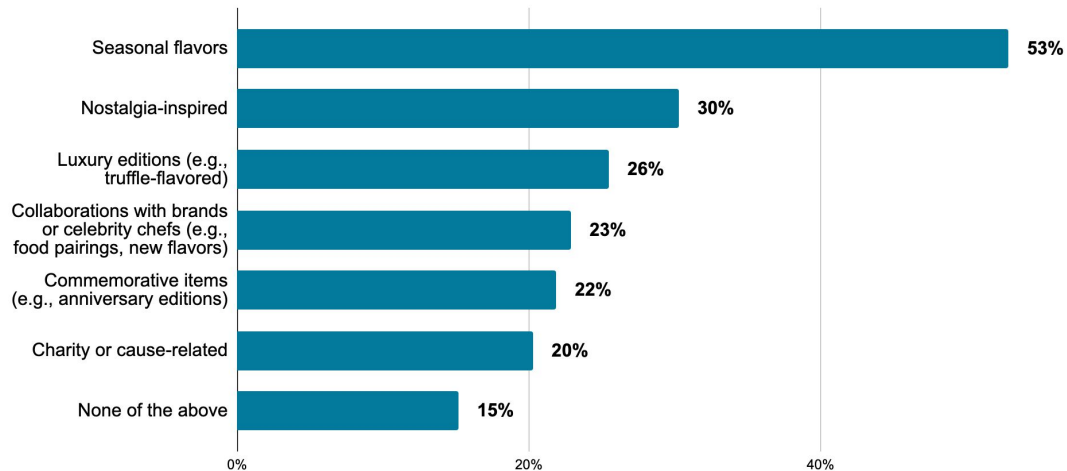


**Gen X, Boomers, and older
are motivated by
grocery store samples**



Over half are likely to buy seasonal flavors

What limited-edition food products are you most likely to purchase?
(select up to 3)



Notable examples

Fall/Winter Cheese

Cranberry goat cheese
Port or mulled-wine cheese

Spring/Summer Cheese

Lemon zest ricotta
Herbed chevre
Strawberry-basil mascarpone

Fall/Winter Deli

Butternut squash mac & cheese
Turkey with cranberry
Root veggies or harvest bowls

Spring/Summer Deli

Caprese pasta salad
Lemon-herb chicken
Watermelon & feta salad

Fall/Winter Bakery

Apple cider donuts
Gingerbread pastries
Pumpkin bread

Spring/Summer Bakery

Lemon poppyseed muffins
Strawberry shortcake
Lavender honey scones



Generational Trends



**Gen Z are likely to
purchase
luxury-edition flavors**



**Millennials are likely
to purchase
nostalgia-inspired flavors**

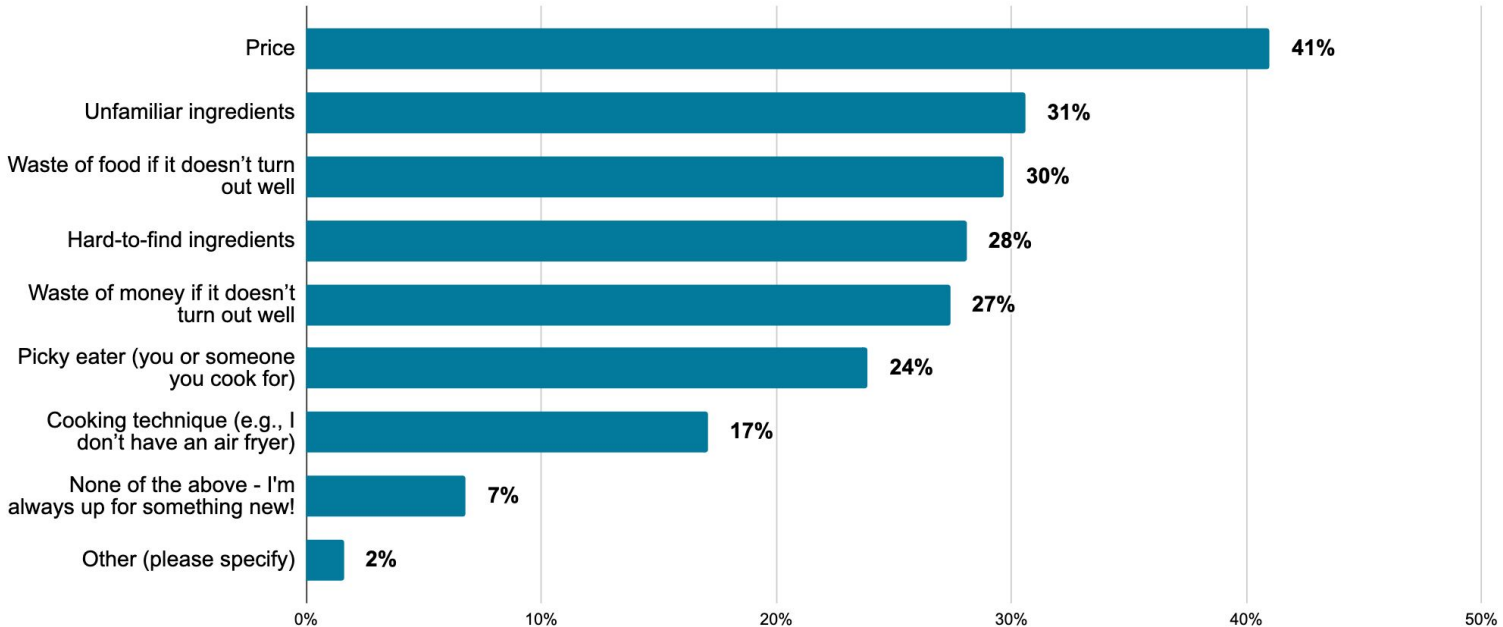


**Boomers and Older are
likely to purchase
seasonal flavors**



Price is the biggest deterrent to trying new foods

What discourages you from trying a new food or flavor? (select all that apply)



What discourages different demographics more?

Those who shop primarily online are more likely than in-store shoppers to be discouraged by price

Boomers and older are more likely to be discouraged by unfamiliar ingredients, wasting food, or hard-to-find ingredients



Lowest spenders are most likely to be discouraged by price

What discourages you from trying a new food or flavor? Select all that apply:

	Price	Unfamiliar Ingredients	Waste of food	Hard-to-find ingredients	Waste of money
Mostly in-store	40%	30%	30%	26%	29%
Mostly online	50%	33%	25%	40%	15%
Gen Z	42%	25%	31%	22%	31%
Millennials	43%	29%	26%	25%	26%
Gen X	42%	28%	26%	27%	28%
Boomers + older	38%	37%	36%	34%	27%
Monthly spend					
<\$200	55%	29%	31%	29%	25%
\$200-\$399	41%	33%	32%	28%	28%
\$400-\$599	30%	28%	26%	26%	35%
\$600 or more	43%	31%	29%	31%	21%



Younger generations are driving most of the appetite for adventurous foods



I don't ever regret trying something new even if it's not my favorite. -Madison, age 28



I want to try something more unique. -Matthew, age 23

”

Trying new and exciting foods keeps life interesting. If I have to go grocery shopping and plan my meals anyway, I might as well have fun with it! Cooking the same old meals over and over again gets boring quickly.

- Hannah, age 29

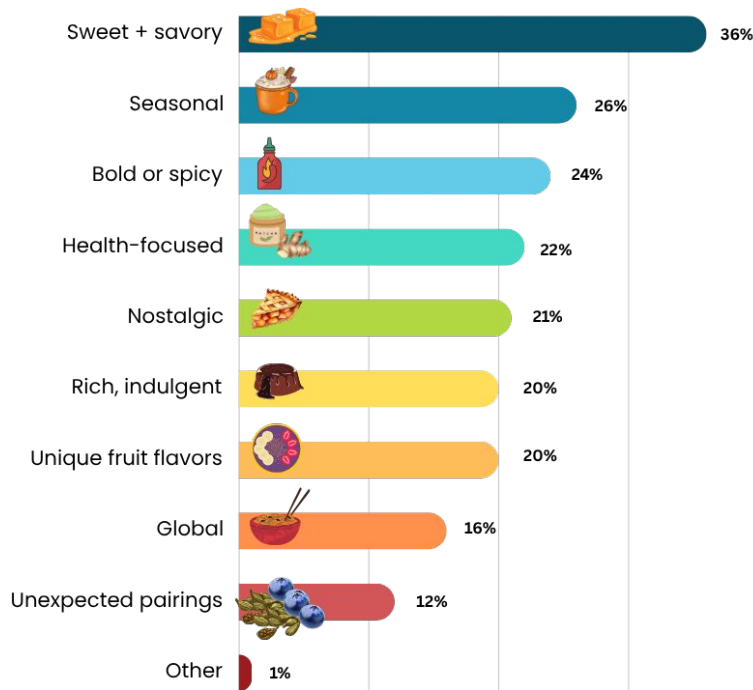


The winning and losing flavors



1 in 3 shoppers look for sweet + savory flavor combinations

When shopping for a new flavor, I most often look for... (select up to 3)



Flavor mashup for comfort + excitement



I was really pleased with the pairing of the sweetness of the cranberry and the sharpness of the cheese.



Demographic differences



Men

are more interested in trying bold flavors (32%) compared to women (17%).



Older generations

are less interested in new flavors across the board, no matter what kind of flavor.



Household income > \$150k

are more interested in trying sweet + savory combinations, seasonal items, and health-focused flavors.

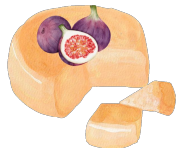
When shopping for a new flavor, I most often look for... (select up to 3)

	Sweet + Savory	Seasonal	Bold	Health-focused	Nostalgia
Men	38%	27%	32%	23%	21%
Women	34%	24%	17%	21%	21%
Gen Z	39%	28%	33%	28%	31%
Millennials	39%	29%	26%	32%	29%
Gen X	41%	26%	27%	19%	17%
Boomers + older	27%	23%	15%	17%	17%
<50k	30%	25%	21%	15%	22%
50k-99k	34%	28%	29%	21%	16%
100k-150k	45%	18%	24%	34%	28%
150k or more	41%	38%	19%	31%	16%



Best flavors for specialty cheese

In qualitative research, when people raved about cheese flavors, they talked about:



Fruit cheeses
(sweet + savory)



Herb cheeses
(health-focused “fresh” taste)



Wine cheeses
(sweet + savory, seasonal indulgence)



Sweet + sharp:
maple syrup infused
cheese was “knee-
buckling” good



Wine cheese is sweet,
but not too sweet.



But not every flavor should be paired with cheese



” *Pumpkin spice is so overdone these days. I rejected it on moral grounds.*



” *I'm a peanut butter fanatic. But the peanut butter cheese was disappointing.*



” *I like Indian food, so I wanted to try it. I honestly didn't like it. I think curry and cheese should be two separate flavors*



Remember: Deli shoppers are less adventurous with new flavors

Relative Preference for Classic vs. Unique Flavors

Part-worth utility from conjoint analysis



Favorites with a fresh or fiery spin



”

The new flavor has to be aligned with the normal flavor profiles that I like... something that I typically would enjoy, but in a different food group.



”

It was really nice to have a new experience, to find [familiar] flavors that I really love, but in a new packaging and new format.

”

*Blue cheese & buffalo was a flavor I was really **excited about because it's a classic taste** [for wings], but you don't see it often in the deli.*

”

*I'm a sucker for anything with sun dried tomato. **It's not anything new**, but I look for it at the deli counter.*

”

*I love when... **savory is paired with... citrus** [in reference to lemon-pepper flavored rotisserie chicken]*

”

*I go for **cajun** turkey whenever I can find it. I especially love it paired with **pepperjack** cheese.*

”

*The jalapeno ranch [dip] was so **spicy and zesty and fresh**.*



Worst in deli: overpowering flavors

I pass on anything that has heavy amounts of oregano because it overpowers the other flavors.

I decided to pass on dill pickle chips because it felt like the vinegar taste would be too strong.



It overpowered my tacos to the point where I couldn't even eat them.



I don't know who thought that was a great idea... They need to be fired from their job!



Bakery shoppers are most open to exploring new flavors... but are they?

Relative Preference for Classic vs. Unique Flavors

Part-worth utility from conjoint analysis



Reimagined classics



” [My bakery] had **fresh strawberry** cupcakes, which I had never had before. I’ve had... strawberry cupcakes, of course. But these were made with fresh strawberries, and they were so good. It was like a dopamine hit.



” My favorite is when danishes or similar baked goods have a **fruit and cheese combination**... like raspberry and cheese. Blueberry and cheese is probably my favorite. I even saw something with apple and cheese.



” I’m a big fan of pistachio or almond in a croissant... a **twist on a classic**.



” [My pastry] had corn and poblano pepper and cheese... It was an **interesting remix to my go-to treat**, and I liked that it could be a whole meal in itself.



Can you name the one flavor that pairs well with (almost) everything in bakery?



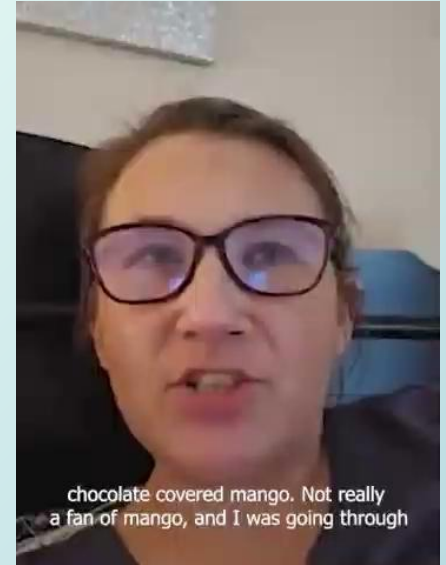
*Sweet-and-savory
baked desserts*



*Mexican hot
chocolate bread*



*Chocolate hummus
(ok, maybe this trend
extends to the deli too...)*



When flavors in the bakery failed, it was due to...

(1) The flavor felt out of place

”

The idea of lavender being in a baked good just doesn't sit well with me. When I think of lavender I think of it being a nice smell to have in your home, your car. I think of it being a nice smell for soaps and I don't want to eat it.

(2) Too strong / overwhelming

”

[The lemon] was too much. I couldn't even finish it.



The emotional connection with flavors



How flavor makes us feel: emotional drivers behind shoppers' choices

JOY

Joy can be found in the “perfect bite” or deep satisfaction in an unexpected flavor mashup.

“It was like a dopamine hit.”

“It was the perfect combo: sweet and savory.”

RELIEF

Indulgent flavors offer a moment of relief, an escape from stress.

“It felt like a treat I didn't know I needed.”



ADVENTURE

New flavor combinations spark a sense of risk and reward, giving people the thrill of discovery in an everyday setting.

“I'd never had that before.”

COMFORT

Flavors can evoke nostalgic memories and feelings. Familiar flavors with a twist feel exciting and comforting at the same time.

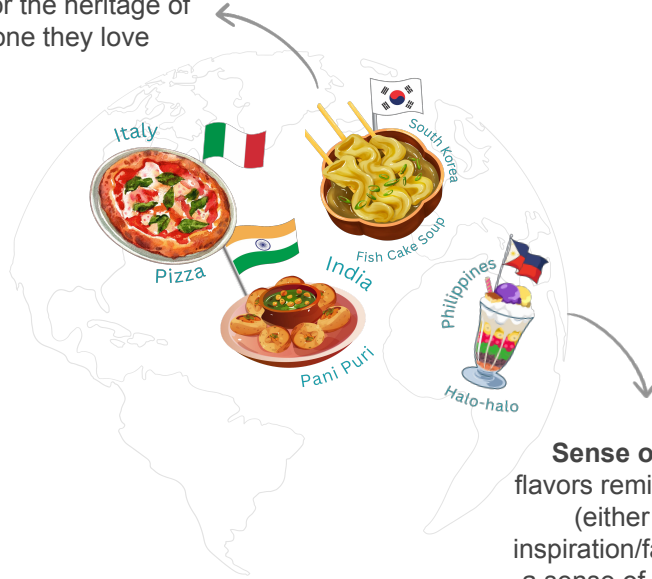
“Like something I remember... but better.”

“It was a fun take on something familiar.”



Global flavors evoke memories, celebrate identity, and bring a sense of adventure

Sentimental: global flavors help consumers feel connected to their own heritage or the heritage of someone they love



Sense of adventure: global flavors remind consumers of travel (either past memories or inspiration/fantasy). Shoppers feel a sense of adventure, inspiration, and/or excitement



”

Anytime I can have desserts from my heritage, I'm super happy about that.



Global flavors evoke feelings of travel, adventure, and inspiration



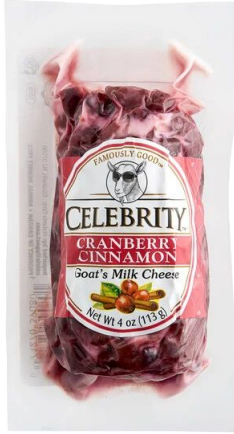
Global flavors evoke feelings of travel and adventure...



And shoppers go out of their way to reconnect with that feeling.



Flavor innovation is not just about taste—it's also memory, emotion, and connection



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Learning to make pizza in Italy



Naan air fryer pizzas at home!

