



# Hot Sauce Study

## National Perceptual Study

Express Executive Summary



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## Executive Summary

*Highlights of responses for presentation and/or group discussion*

### Usage of Hot Sauce

- More than two-thirds of all respondents use hot sauce.
- Use of hot sauce varies very little by gender.
- Among the 32% of respondents who do not use hot sauce, the most frequent reasons for not using hot sauce are dislike of the taste or inability to handle spicy foods.
- Among respondents who use hot sauce, 75% experiment with hot sauce when cooking or preparing food, and 60% use hot sauce in dips.

### Influences on Preference of Hot Sauce Brand

- Based on a summary of the top two boxes, important and very important, the majority of respondents, 98%, indicate flavor is the primary reason for choice of brand.
- 71% pay attention to specific types of hot sauce offered in restaurants.
- 86% will use the hot sauce available in a restaurant if their favorite brand is not offered.
- Just over half of respondents, 52%, have a favorite brand of hot sauce.

### Hot Sauce Brand Preference

- The most popular brand is Tabasco Sauce, preferred by 29%.
- The great majority of respondents, 80%, indicate flavor is the reason for making their brand choice a favorite.
- The largest percentage of respondents, 37%, discovered their favorite brand in the home, using it since childhood.
- The majority, 71%, would try another brand.
- On a scale of 1-10, the majority of respondents prefer a heat level of 5-7.
- Based on a summary of the top two boxes, moderately hot and extremely hot, 79% of respondents believe Tabasco Sauce to be the hottest.
- Known by 84% of respondents, Tabasco Sauce is by far the most familiar brand.
- The only other brand known by half or more of respondents is Louisiana Hot Sauce.
- Texas Pete is recognized by 31% of respondents.

### Willingness to Try Additional Hot Sauce Brands

- Based on a summary of the top two boxes, influential and highly influential, 66% of respondents indicate the greatest influence on choosing or trying a new brand is getting a free sample.

### Awareness of Advertising of Hot Sauce Brands

- The majority of respondents are not aware of advertising for hot sauce.
- Among those who do recall advertising for hot sauce, the largest percentage, 31%, recall print ads.
- The majority of respondents, 77%, indicate they are not influenced to try a brand after seeing an ad.
- Females are slightly more receptive to advertising for hot sauce.

## Top-line Responses

*The top-line responses of all survey respondents*

### Q.2 What state do you live in?

- 303 total respondents in 36 states.
- Highest representation in Florida (8%), Texas (8%), and California (7%).

### Q.3 In which of the following ranges does your age fall?

- The highest percentage are ages 45-54.
- |          |     |
|----------|-----|
| Under 18 | 3%  |
| 18-24    | 11% |
| 35-44    | 25% |
| 45-54    | 37% |
| 55-64    | 21% |
| 65 +     | 3%  |

### Q.4 Please indicate your gender.

- More than two-thirds are female.
- |        |     |
|--------|-----|
| Male   | 29% |
| Female | 71% |

### Q.5 Do you use Hot Sauce?

- More than two-thirds use hot sauce.
- |     |     |
|-----|-----|
| Yes | 68% |
| No  | 32% |

### Q.6 Please tell us the reason for not using Hot Sauce. (Then skip to Q. 24)

- The most frequent reasons for not using hot sauce are that respondents don't like the taste or cannot handle spicy foods.

### Q.7 On what type of food do you use Hot Sauce?

- The greatest percentage use hot sauce in dips.
- |              |     |
|--------------|-----|
| Burgers      | 42% |
| Dips         | 60% |
| Marinades    | 48% |
| Pizzas       | 20% |
| BBQ          | 58% |
| Drink Mixers | 17% |
| Salads       | 19% |
| Other        | 51% |

### Q.8 Other - Verbatims

- The most frequent other use of hot sauce is on eggs, chicken, and chili.

**Q.9 How important are the following when choosing a Hot Sauce?**

- Based on a summary of the top two boxes, Important and very important, the great majority of respondents, 97%, indicate flavor is the primary reason for choice of brand.

Flavor	97%
Packaging	13%
Brand Familiarity	43%
Price	56%
Convenience of use	74%
Place of origin	27%
Heat level	85%
Bragging rights	21%

**Q.10 Do you experiment with Hot Sauce when cooking or preparing food (e.g. adding it to a recipe)?**

- Three-quarters experiment with hot sauce.

Yes	75%
No	25%

**Q.11 Do you pay attention to the specific types of Hot Sauces offered in restaurants?**

- The great majority pay attention to specific types of hot sauce offered in restaurants.

Yes	71%
No	29%

**Q.12 If a restaurant does not offer your favorite brand of Hot Sauce, will you use the kind they offer?**

- The great majority of respondents will use the hot sauce available in a restaurant if their favorite brand is not also offered.

Yes	87%
No	13%

**Q.13 Do you have a preferred brand of Hot Sauce?**

- About half of respondents have a favorite brand of hot sauce.

Yes	52%
No (If no, skip to Q.21)	48%

**Q.14 Which of the following is your favorite brand?**

- The most popular brand of hot sauce is Tabasco Sauce.
 

Frank's RedHot	22%
Louisiana Hot Sauce	15%
Crystal Hot Sauce	6%
Texas Pete	10%
Tabasco Sauce	29%
Tabasco Habanero	3%
Frank's Xtra Hot	1%
Trappy's Red Devil	0%
Other (Please Specify)	14%

**Q.15 Others – verbatim summary**

- No other brand names are mentioned more than once.

**Q.16 What makes it your favorite brand?**

- The great majority of respondents indicate flavor is the reason for making their brand choice a favorite.
 

The right flavor	80%
Have been using it since childhood	31%
Have tried several other brands but this is the best	49%
Attractive Packaging	8%
Cost	28%
Availability	37%
Other (Please Specify)	3%

**Q.17 Other – verbatim summary**

- Only three respondents volunteered other reasons. These were the heat, not too hot, and uniqueness.

**Q.18 How did you discover your favorite brand?**

- The largest percentage of respondents discovered their favorite brand in the home.
 

I have been using it since childhood	37%
At a restaurant / fast food diner/ cafeteria	17%
At a picnic/ party	3%
From an advertisement	2%
From a T.V. show	0%
Referred by a friend/ family member etc	31%
Other (Please Specify)	10%

**Q.19 Other – verbatim summary**

- Eleven respondents volunteered other points of discovery. Eight of these indicate they first saw it in a store.

**Q.20 Would you try a Hot Sauce other than your favorite brand?**

- The majority of respondents are receptive to trying a new brand of hot sauce.
 

Yes, definitely would try	71%
Might try	27%
Might not try	1%
No, will never try	1%

**Q.21 Please slide the scale below to indicate your preference of heat level for Hot Sauce?**

- On a scale of 1-10, the majority of respondents prefer a heat level of 5-7.

**Q.23 Please indicate the heat level for each of the following brands of Hot Sauce.**

- Based on a summary of the top two boxes, moderately hot and extremely hot, respondents believe Tabasco Sauce is the hottest.
 

Frank's RedHot	44%
Louisiana Hot Sauce	60%
Crystal Hot Sauce	27%
Texas Pete	41%
Tabasco Sauce	79%
Tabasco Habanero	70%
Frank's Xtra Hot	45%

**Q.24 Which of the following brands of Hot Sauce are you familiar with?**

- By far, the most familiar brand among respondents is Tabasco Sauce.
 

Frank's RedHot	34%
Louisiana Hot Sauce	57%
Crystal Hot Sauce	16%
Texas Pete	31%
Tabasco Sauce	85%
Tabasco Habanero	38%
Frank's Xtra Hot	13%
Trappy's Red Devil	15%
None	8%

**Q.25 Select the level of influence the following would have on trying out a new Hot Sauce?**

- Based on a summary of the top two boxes, influential and highly influential, respondents indicate the greatest influence on brand choice is getting a free sample.
 

A celebrity chef mentioning it on a TV show	12%
Finding it in your favorite restaurant	29%
Watching an advertisement	25%
Getting a coupon/offer	38%
Word of mouth (referred by a friend or someone you know)	56%
Getting a free sample	66%
Attractive bottle/packaging	17%

**Q.26 When was the last time you came across an advertisement for Hot Sauce?**

- The majority of respondents are not aware of advertising for hot sauce.
 

Couple of days ago	7%
A few weeks back	17%
A few months back	19%
Six months back	9%
Over a year ago	18%
Never came across an ad for Hot Sauce	30%

**Q.27 Where did you find the advertisement for Hot Sauce?**

- Among those who do recall advertising for hot sauce, the largest percentage recall print ads.
 

Television	28%
Print ad (Magazine, Newspaper, etc)	32%
Flyers/Mailers	6%
Internet	4%
Radio	1%
Don't remember	28%

**Q.28 How likely were you to try the Hot Sauce as a result of the advertisement?**

- The great majority of respondents indicate they are not influenced to try a brand after seeing an ad.
 

More likely	22%
Less likely	0%
No change in my desire to try the hot sauce	77%

**Q.30 What is your marital status?**

- The majority of respondents, 59%, are married.
 

Single	18%
Married	59%
Divorced	11%
Separated	3%
Widowed	3%
Living with Partner	6%
Other	0%

**Q.31 Which of the following best represents your pre tax household income?**

- The majority of respondents have pre-tax household income between \$30,000 and \$100,000.

Under \$10,000	4%
\$10,000-\$20,000	5%
\$20,000-\$30,000	8%
\$30,000-\$40,000	14%
\$40,000-\$50,000	13%
\$50,000-\$60,000	9%
\$60,000-\$75,000	14%
\$75,000-\$100,000	13%
\$100,000-\$125,000	8%
\$125,000-\$150,000	4%
Over \$150,000	4%
Prefer not to answer	4%

**Q.32 What is the highest level of education you completed?**

- The majority of respondents have some college or received a 2-year degree.

Grade School	0%
Some High School	0%
High School completed	19%
Some Trade/Vocational School	4%
Trade/Vocational certification	6%
Some College/2 Year Degree	22%
College 4 Year Degree	19%
Some Graduate School	7%
Masters Degree	10%
Doctorate	2%

**Q.33 Which of the following best describes your ethnic background?**

- The great majority of respondents are White/Caucasian.

Asian or Pacific Islander	2%
Black/African American	4%
White/Caucasian	87%
Hispanic/Latino	3%
Native American	2%
Multi-Racial	2%
Other	0%
Prefer not to answer	0%



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**Thank you for your business.**

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