

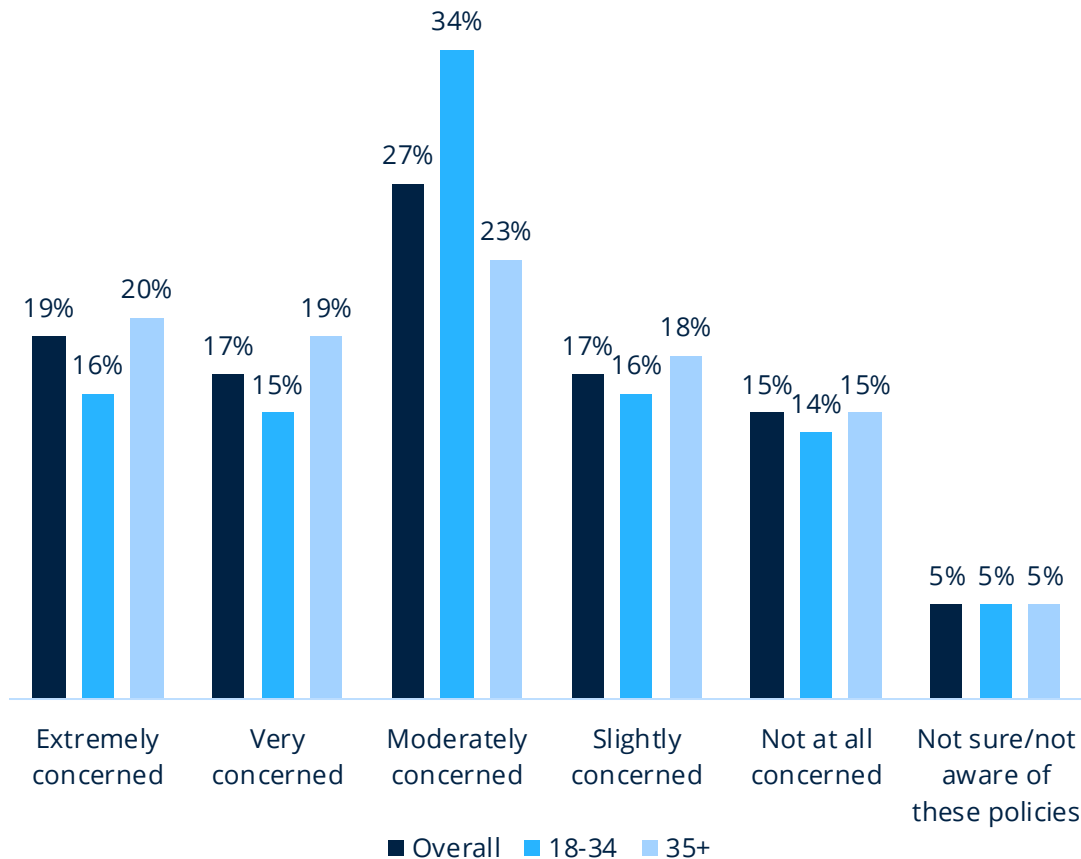
**consumer
trend reports**

Sample Slides

This is a collection of slides from various
Technomic Consumer Trend Reports

This report is authorized for use solely by the parties noted in the written contract. No part of the publication may be reprinted, redistributed or put into an electronic or information retrieval system without the prior permission of Technomic, Inc.

LEVEL OF CONCERN ABOUT TARIFFS ON GLOBAL FOODS/INGREDIENTS
SERVED AT RESTAURANTS*



*Base: 1,502 consumers who purchase global foods

*Q: Rate your level of concern regarding tariffs on global foods/ingredients served at restaurants.

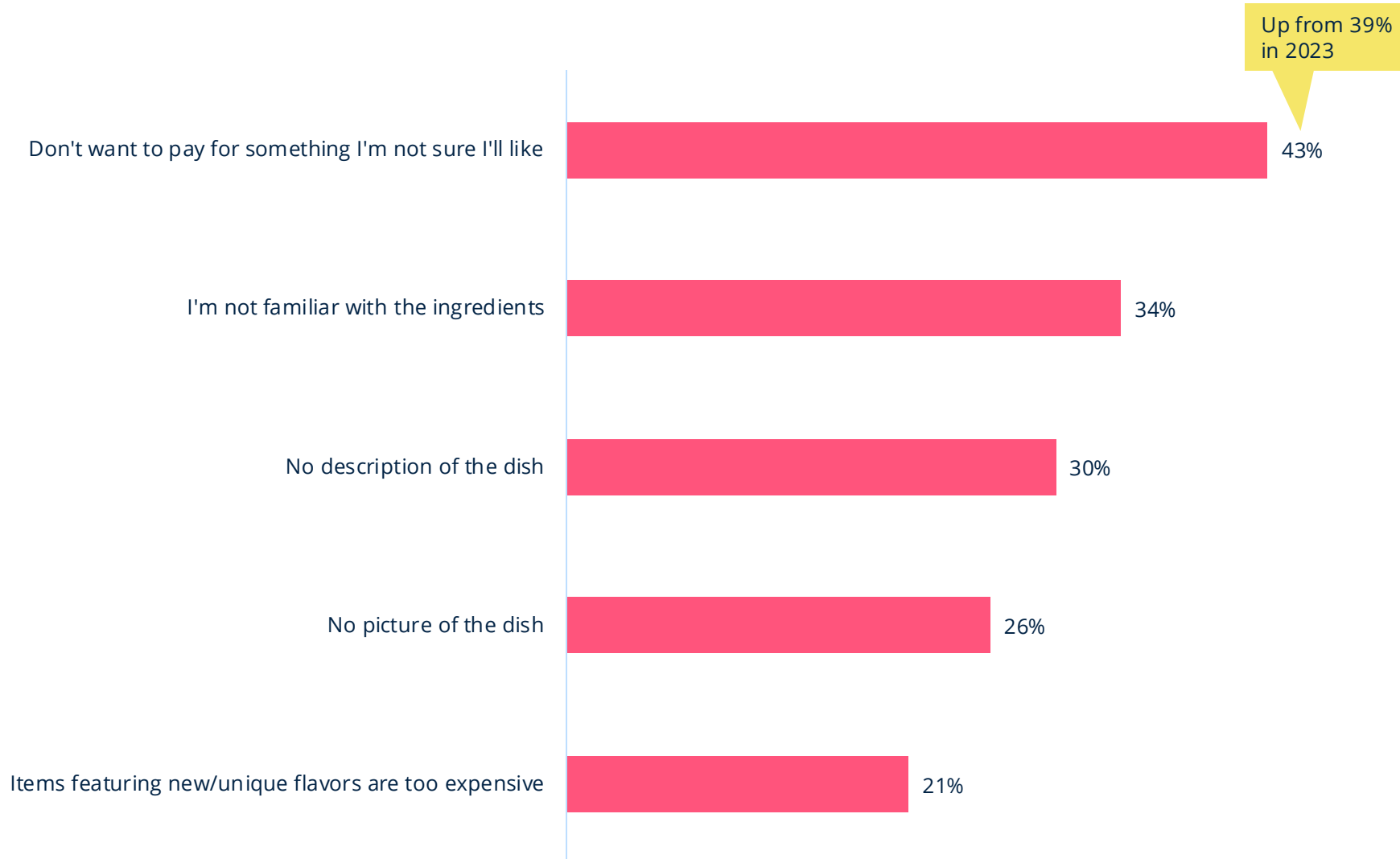
**Base: 1,058 consumers who purchase global foods

**Q: Indicate how much you agree or disagree with the following statements regarding global foods and flavors. Please use a scale of 1-5, where 1=disagree completely and 5=agree completely.

Source: Technomic 2025 Global Fare on U.S. Menus Consumer Trend Report

66% of consumers agree it's important that ingredients are **authentic rather than substituted with more commonly available ingredients****

LEADING DETERRENTS TO TRYING NEW FLAVORS*



32% of consumers **try new flavors to treat themselves**, down 5 percentage points from 2023**

Base: 1,501 consumers who order food from restaurants

*Q: For what reasons are you hesitant to order items featuring new or unique flavors at restaurants or other foodservice locations? Select all that apply.

**Q: On the occasions when you choose to order new or unique foods and flavors, why do you order these items instead of traditional foods? Select all that apply.

Source: Technomic 2025 Flavor Consumer Trend Report

Recommended Actions

Combat the shift toward home cooking with targeted value initiatives. For family-style venues, **promote complex dishes that are difficult and time-intensive to make at home, beyond classic breakfast items.** Address heightened price-sensitivity in traditional casual-dining settings through **improved value perception** via menu design that highlights quality, portions and value-driven combinations. Leverage existing **loyalty program** strength in upscale casual-dining restaurants to discourage customer switching.

Develop tailored solutions for each FSR category's unique price challenges. Focus on **value-driven positioning** and **cost-effective options** for family-style establishments competing directly with home meals. Offer **budget-friendly to premium options** for traditional casual-dining venues to counter inflation perceptions. Design **premium products** for upscale casual-dining restaurants that enhance experience while justifying prices.

Pizza Users

Super Heavy Users

Eat pizza at least 2 times a week

DEMOGRAPHIC SKEWS: 18-34, male, millennial and Gen Z, \$100K-\$150K+ household income

Heavy Users

Eat pizza once a week

DEMOGRAPHIC SKEWS: Northeast and Midwest, millennial and Gen X, \$35K-\$75K household income

Moderate Users

Eat pizza every 2-3 weeks

DEMOGRAPHIC SKEWS: female, Gen Z and baby boomer

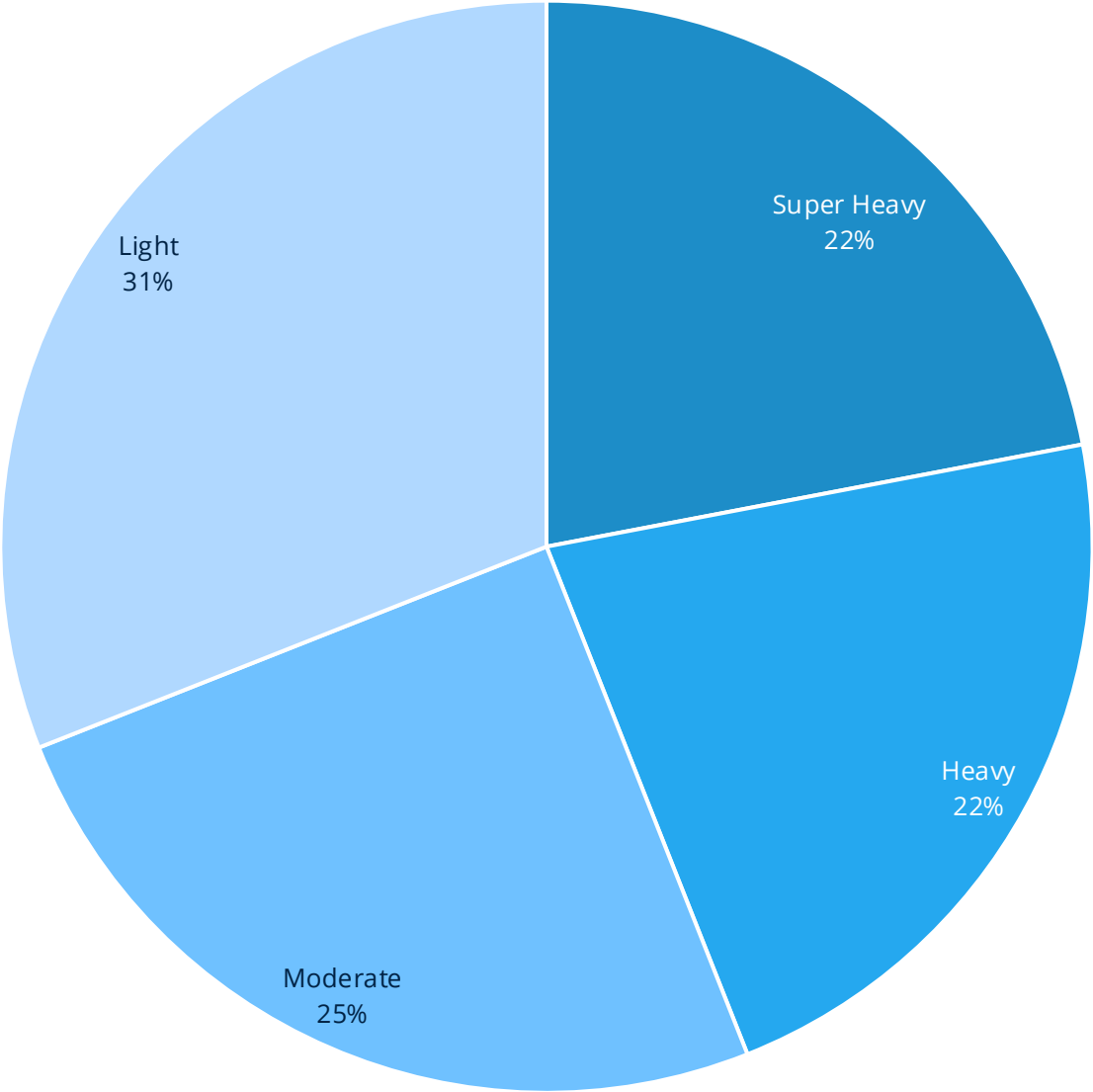
Light Users

Eat pizza once every 1-3 months

DEMOGRAPHIC SKEWS: 65+, female, mature, West, <\$25K household income

Base: 1,501 consumers who ever eat pizza
Q: How often do you typically consume pizza, either at home or at a restaurant or other foodservice location? Foodservice locations serve ready-to-eat or ready-to-heat food. This includes work or college/university cafeterias, food stands or kiosks and prepared foods sections of grocery, convenience or other retail stores.
Source: Technomic 2025 Pizza Consumer Trend Report

PIZZA USER GROUPS



Protein quality and portion size define sandwich value, not price alone

Receiving a good value for the price paid is an essential sandwich purchase driver; 86% of consumers agree that it's important when deciding to buy a sandwich across all dayparts. However, less than half (48%) of consumers agree that sandwiches from most restaurants are actually a good value for their money. This sentiment is due to menu price increases and declining portion sizes, which can be attributed to inflation and today's economic uncertainty. In fact, nearly two-thirds (64%) of consumers report noticing that sandwich portion sizes have decreased at restaurants.

Consumers define good value as receiving a fair portion of high-quality ingredients for a reasonable price. When it comes to ingredient quality, meat/protein is deemed by far the most important and ultimately defines the sandwich's overall value.

Image Source: Adobe Stock
Source: Technomic 2025 Sandwich Consumer Trend Report



TYPICAL DINING BEHAVIOR

	2021	2024	Three-Year Change
Three meals a day with a few snacks between meals	37%	37%	+0 pts
Usually skip one meal per day or replace one meal per day with snacks	32%	35%	+3 pts
Usually skip two meals per day or replace two meals per day with snacks	10%	11%	+1 ppt
Three meals a day with many snacks between meals	10%	9%	-1 ppt
Three meals a day with no snacks	6%	4%	-2 pts
Usually snack instead of eating full meals	4%	4%	+0 pts

46% of overall consumers **usually skip at least one meal a day or replace it with snacks**

Base: 1,501 (2021) and 1,500 (2024) consumers who ever eat snacks
Q: Thinking about all the meals and snacks you consume in a typical week, which statement best describes your overall dining behavior?
Source: Technomic 2025 Snacking Consumer Trend Report

Global twists on classics

Restaurants are infusing beloved classic soups and salads with global flavors, creating exciting fusion cuisine. This trend caters to both adventurous eaters and those who may be more redescent to try new foods and flavors.

By blending global flavors, such as Vietnamese influence, with more classic soups and salads, like French onion soup, these dishes offer more hesitant diners an opportunity to try new flavors without completely going outside of their comfort zone.

Restaurant examples:

Ellie Bird (Falls Church, Va.)

Vietnamese French Onion Soup—braised oxtail, sourdough croutons and Gruyere

The Pig & The Lady (Honolulu)

Burmese Tea Salad—green papaya, cherry tomato, sprouts, medjool dates, crispy mung bean, shallots, garlic, preserved lemon and fermented lahpet dressing

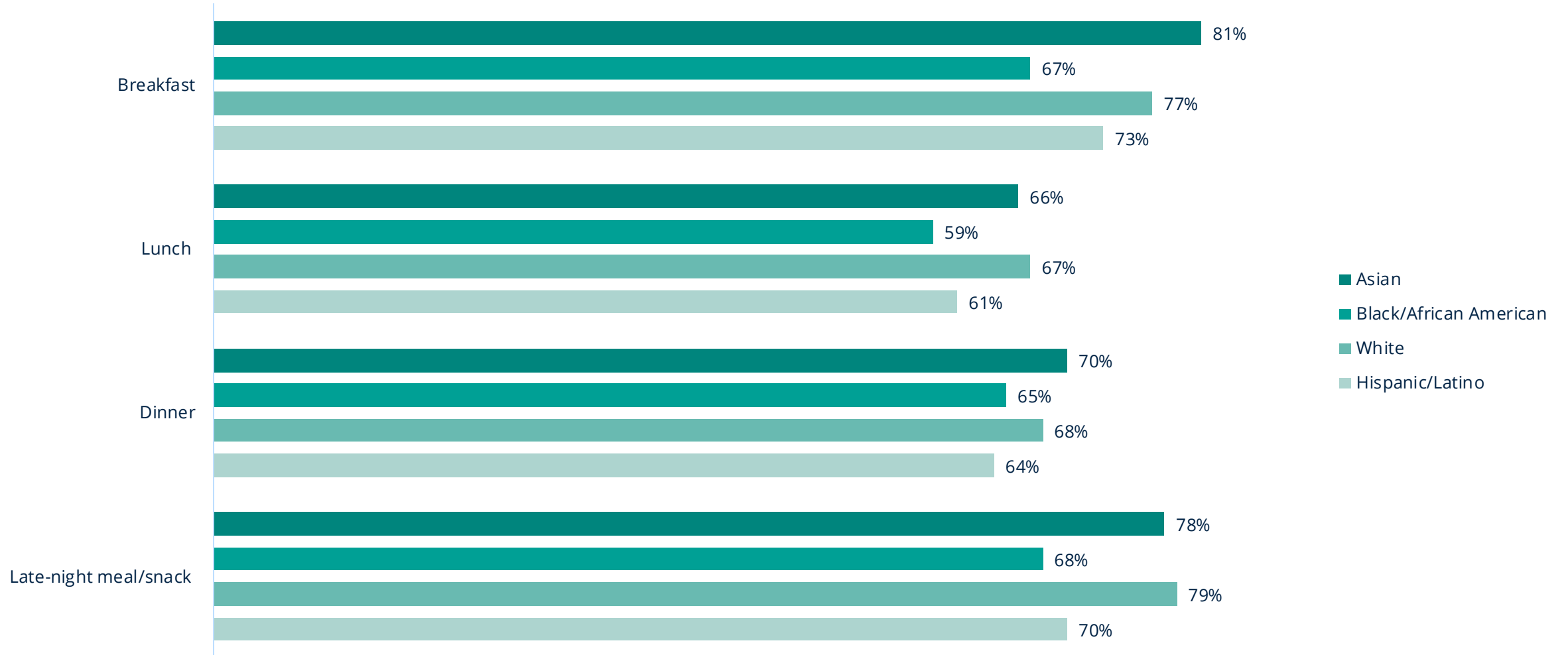
The Wolf on Broadway (Milwaukee)

Gado Gado Cobb Salad—Lone Duck Farm greens, egg, corn, cucumber, radish, herbs, toasted coconut, rice cracker and peanut dressing



Image Source: Shutterstock
Source: Technomic 2025 Soup & Salad Consumer Trend Report

% OF MEALS PREPARED AT HOME



Base: 2,001 consumers

Q: What percentage of the following meals do you purchase at a restaurant or other foodservice location (e.g., retail store prepared-foods area, street vendor, etc.) and what percentage are prepared at home? Total for each row must equal 100%.

Source: Technomic 2025 Multicultural Consumer Trend Report

What do consumers want?

Understand what consumers want now and in the future with Consumer Trend Reports, as well as corresponding webinars, datasets and infographics

[Explore consumer insights](#)

2026 TOPICS

Emerging Channels (February)
Value & Pricing (March)
Retail Foodservice (April)
Future of LSR (June)
Generational Differences (July)
Delivery & Takeout (September)
Dessert (October)
Burger (December)

2025 TOPICS

Soup & Salad (February)
Snacking (March)
Pizza (May)
Sandwich (June)
Multicultural Consumers (July)
Flavor (August)
Future of FSR (October)
Global Fare on U.S. Menus (December)

