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# Industry Insights

A roundup of noteworthy Canadian foodservice findings for the week of March 7, 2022



# What do consumers want?



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## 2022 TOPICS

Snacking  
Pizza

Sandwich  
Delivery & Takeout

Beverage  
Dessert

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# Wendy's Canada Enters Breakfast Daypart

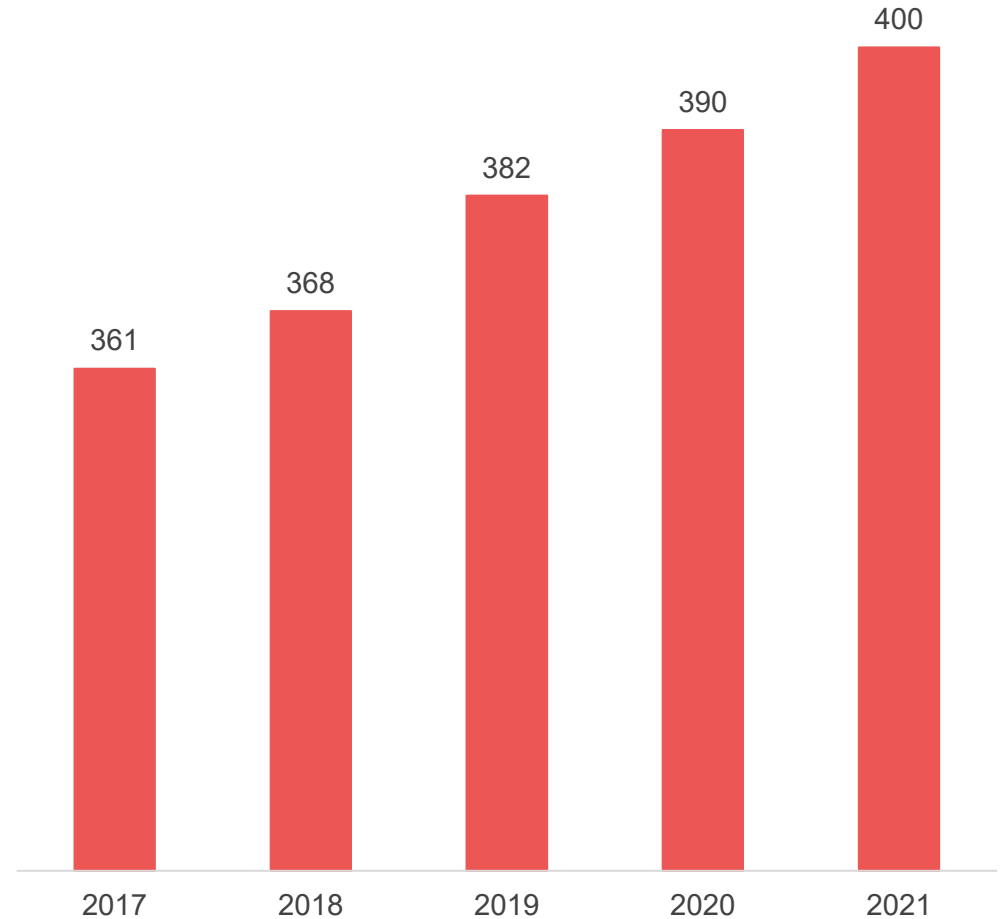
Two years after debuting its breakfast offerings in the United States, Wendy's announced breakfast will soon be available at all locations across Canada. The brand plans to start serving breakfast this spring, with the full menu being revealed within the coming weeks.

The brand initially rolled out its breakfast offerings in the United States in early 2020. The menu currently consists of new takes on Wendy's classics, such as the Breakfast Baconator, as well as more traditional breakfast sandwiches. It also recently unveiled the Hot Honey Chicken

Biscuit, its first new breakfast item since the menu was initially announced. In a recent earnings report, the breakfast daypart accounted for nearly 8% of the burger chain's total sales in the U.S.

Wendy's has been consistently growing its footprint in Canada, opening its 400<sup>th</sup> location in the country last November. In 2021, its international same-store sales grew by nearly 21%.

WENDY'S CANADA  
YEAR-END LOCATION COUNT



# Fastest-Growing Items on Canadian Menus

The list of fastest-growing items on Canadian menus over the past year sheds a light on industry trends.

## What's New in Adult Beverages

Burgundy wines topped the fastest-growing list, being served at both fine-dining restaurants and contemporary CDRs. Hard seltzer also continues its growth on menus as consumers seek out lighter alternatives to beer.

## Spicy Ingredients Heat Up

Nashville hot claimed the spot as the second fastest-growing item on menus, most often appearing as a sauce on chicken sandwiches. The regional

sauce gets its spice from cayenne pepper. Hot pepper serrano is also increasing on menus, appearing in a variety of dishes including pizza, pasta and tacos.

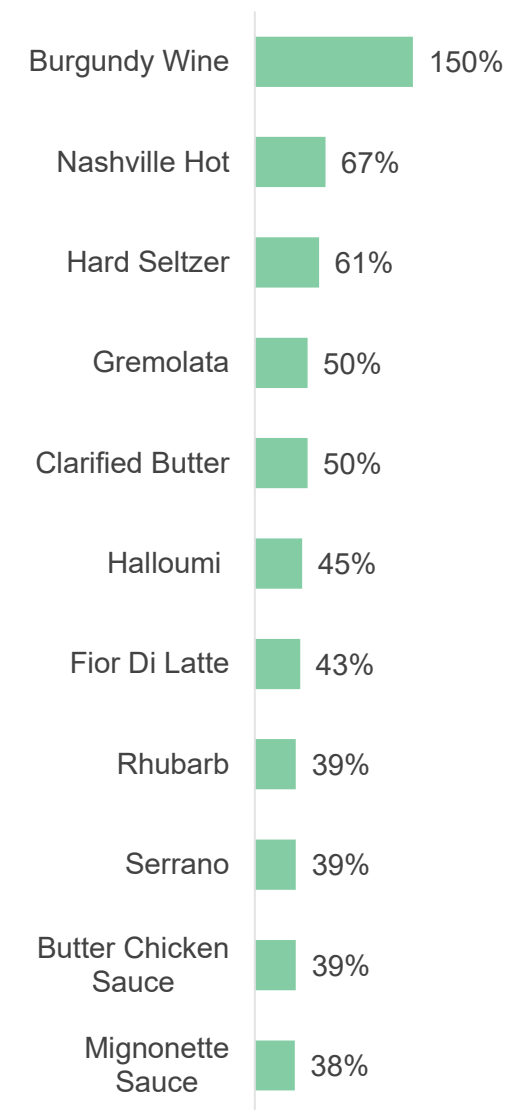
## Differing Dairy

Clarified butter—butterfat with milk solids and water removed—is rising on menus as a companion to shellfish. Cyprus' squeaky cheese, halloumi, is also seeing an increase, perhaps in conjunction with the growth of Turkish flavours (+17% year over year) on limited-service menus.

## Sauces Go Global

Indian butter chicken sauce is appearing more frequently on menus, perhaps as a result of increasing consumer gravitation toward global foods and flavours. The sauce, as the name implies, most often appears on chicken, but is starting to pop up on plant-based options such as cauliflower and chickpeas. French mignonette sauce, typically made with shallots, cracked pepper and vinegar and served with oysters, is also showing growth on menus.

FASTEST-GROWING ITEMS YEAR OVER YEAR



Base: 39,469 menu items across 501 operators  
Source: Technomic Ignite Menu, Q4 2020-Q4 2021

# Shifts in Consumer Breakfast Priorities

Convenient drive-thrus, mobile payment and order-ahead options are increasingly critical for attracting breakfast patrons.

On weekends, consumers most prioritize a convenient location when visiting restaurants for breakfast. During the week, convenience takes on more facets, such as the convenience of the drive-thru, the speed of its service and a restaurant's positioning on the route to work/school.

During the pandemic, the convenience of a restaurant's drive-thru became especially important on both weekdays (up from 20% in 2019) and weekends

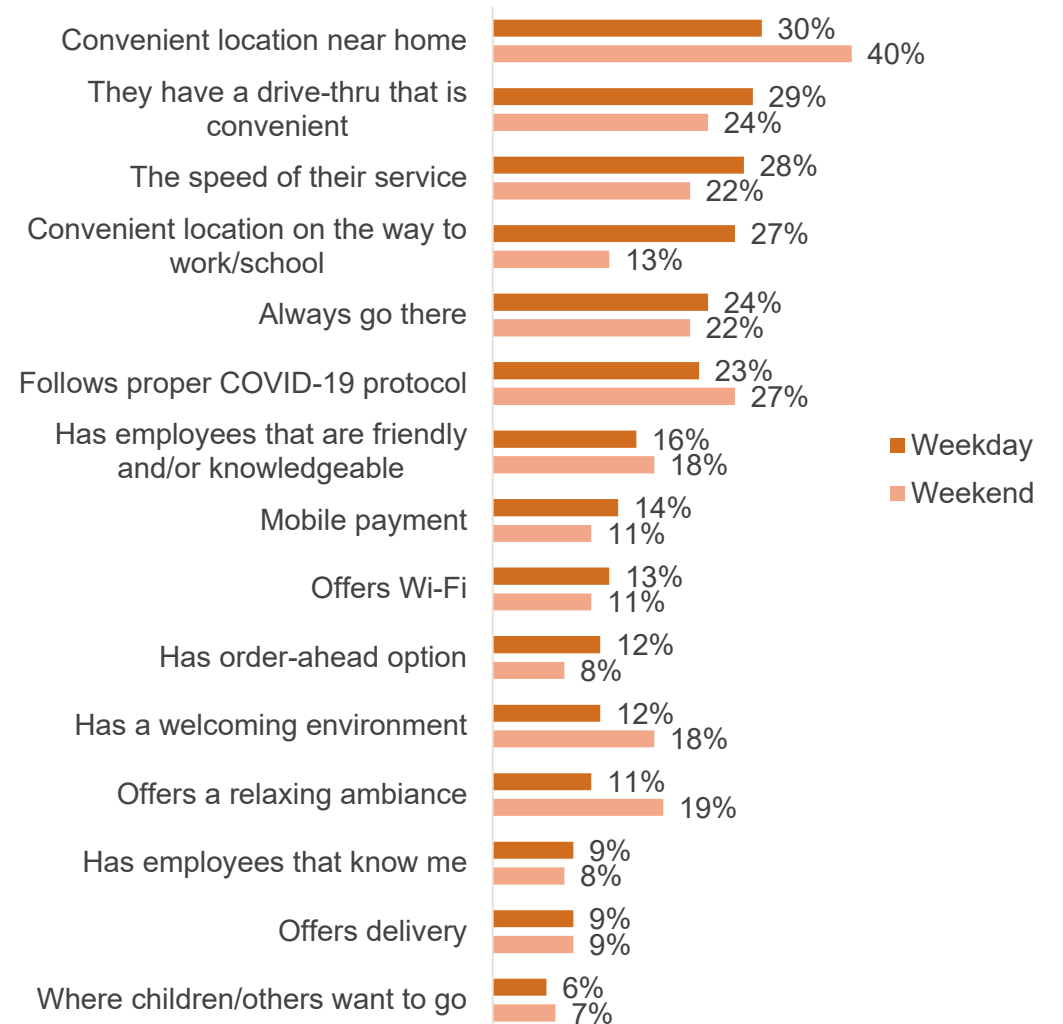
(up from 16%). The option to pay via mobile device increased by 7 percentage points for both weekparts, and interest in order-ahead options also rose.

Base: 500 consumers per weekpart

Q: Thinking about the place you purchase breakfast from most often during the week/on the weekend, what are the main reasons you do so?

Source: Technomic Ignite Consumer featuring the Technomic 2021 Canadian Breakfast Consumer Trend Report

## WHAT ATTRACTS BREAKFAST PATRONS?



# Global State of Off-Premise

One of the largest and likely most permanent impacts that the pandemic has had on the restaurant industry is the enormous shift from both operators and consumers toward off-premise channels.

To be sure, services such as delivery, click-and-collect and drive-thru were already robust and growing prior to 2020.

But like so many other trends emerging at the time—like delivery-only kitchens and virtual brands—the pandemic accelerated the growth of off-premise across all corners of the world.

Today, delivery and takeout, which

include drive-thru, carside handoff and counter collection, have grown to account for nearly two-thirds of all foodservice occasions across the 25 countries Technomic tracks in its global program.

Here are some other key stats from our recent whitepaper examining the state of off-premise, based on proprietary global sizing and ongoing consumer surveys conducted between February 2020 and August 2021.

Globally, delivery now accounts for 31% of all purchases from foodservice venues, up from 25% in February 2020. That percentage has remained mostly steady since early in the pandemic.

The size of the total off-premise market in the 25 countries tracked accounted for about US\$1.2 trillion in consumer spending at restaurants and bars in 2021—roughly 56% of total spending.

Delivery accounts for about 13% of all purchases from restaurants and bars in North America, the lowest percentage of any region tracked. Of course, it's important to note that the drive-thru is a much more established service in North America than most other markets.

Technomic has been tracking consumer ordering preferences across international markets since 2017. [Learn more about the company's global programs and capabilities.](#)

Source: Technomic Global Foodservice Navigator Program consumer surveys conducted in 25 countries in February 2020, August 2020, February 2021 and August 2021  
Image Source: Shutterstock



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We provide insights into consumer, industry and menu trends in the U.S., Canada and 23 countries around the world.

Our team of experts helps leaders in the industry make complex business decisions, set strategy and stay ahead of the curve.

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312-876-0004  
[info@technomic.com](mailto:info@technomic.com)  
[technomic.com](http://technomic.com)