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Industry Insights

A roundup of noteworthy foodservice findings
for the week of Nov. 1, 2021



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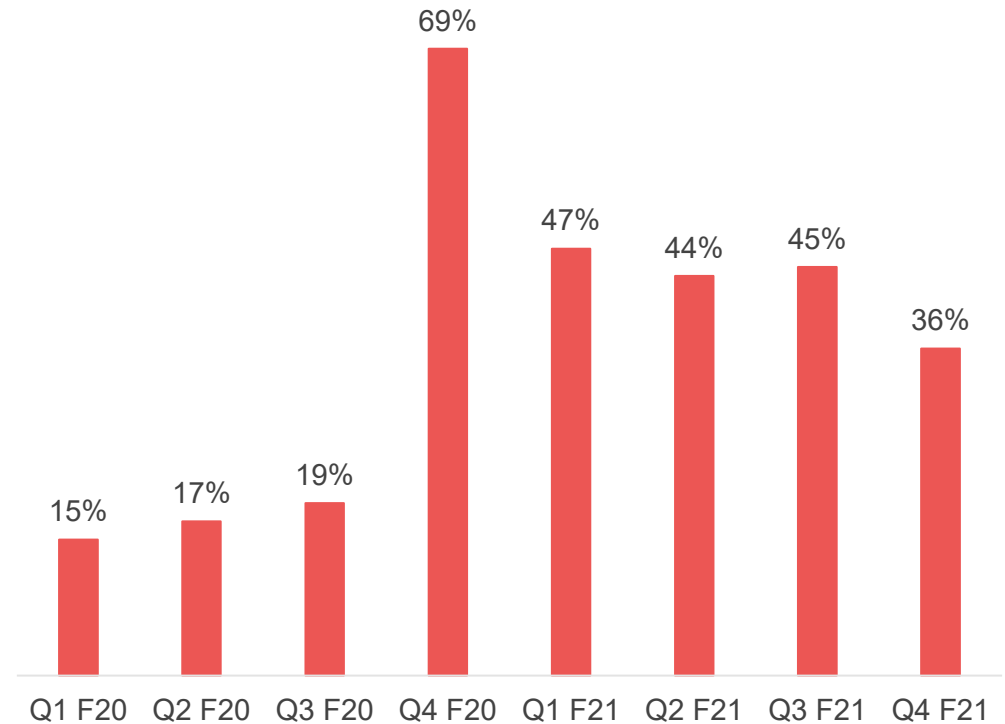
Virtual Brands Drive Growth for Brinker

Virtual brands continue to boost sales for Brinker International, the parent company of Chili's Grill & Bar and Maggiano's Little Italy, as the group prioritizes a shift to off-premise models. Last year, the group launched the popular virtual brand, It's Just Wings, operating out of space in existing Brinker kitchens.

It's Just Wings is currently available from more than 1,100 Brinker kitchens across the U.S. In its first year, the brand did more than \$170 million in systemwide sales. It also launched an Italian concept, Maggiano's Italian Classics, in August 2021.

Overall, Brinker saw \$876.4 million in total revenues in the first quarter of fiscal 2022 ending Oct. 13, up 18% from the same period the year prior. In the fourth quarter of fiscal 2021, off-premise sales accounted for 36% of Brinker's total sales.

BRINKER OFF-PREMISE SALES SHARE
% OF TOTAL SALES



Key Takeaways From Q3 2021 Menus

Technomic recently released Q3 2021 Ignite Menu data. Here are some key takeaways:

Drops

Supply shortages and operational issues have forced operators to streamline menus, not just from pre-pandemic to today (-10%) but also from the most recent quarter (-2%).

College and university and recreation menus saw some of the most significant drops. Among ingredients on the decline, shellfish items were prominent, due to lack of availability.

Adds

Hard sparkling water and soda (+167%)

continue to spike not only in items, but price (+9%), due in part to larger cans and the availability of six- and 12-packs.

Consumers looking for the convenience of bundled pricing will be happy to see growth in categories such as salad value meals (+116%), breakfast value meals (+65%) and sandwich value meals (+55%).

Imitation meat bowls (+50%), mixed protein bowls (+45%) and specialty bowls (+55%) hit on a major trend throughout the past year: portable eats.

Add-ons and sides growth, including drink add-ons (+50%) and kids protein sides (+70%), points to a trend in customization as food costs rise.

MENU DATA

Fastest-Growing Dishes and Adult Beverages	Year-Over-Year Change
Hard Sparkling Water/Soda	167%
Kids Bread Side	167%
Salad Value Meals	117%
Kids Protein Side	70%
Breakfast Value Meals	65%
Loaded Mashed Potatoes	58%
Tempranillo	58%
Specialty Bowl	56%
Sandwich Value Meals	55%
Drink Add-On	50%
Imitation Meat Bowl	50%
Pancakes Side	45%
Mixed Protein Bowl	45%
Ceviche Appetizer	44%

Quarter	Total Menu Items	Quarter-Over-Quarter Change
Q1 2020	122,016	-1%
Q2 2020	124,938	2%
Q3 2020	117,019	6%
Q4 2020	108,158	-8%
Q1 2021	110,531	2%
Q2 2021	112,844	2%
Q3 2021	110,482	-2%

-10%
Overall Menu Item Change
(Pre-Pandemic to Today)

Base: Top 500 and emerging chains
Source: Technomic Ignite Menu, Q1 2020-Q3 2021

Dessert Consumption on the Rise

Dessert consumption has risen sharply over the past two years. Currently, 38% of consumers are eating dessert more than once a week, up from 24% in 2019.* The pandemic has led many to seek out comfort foods, and the dessert category has benefited as a result. Restaurants may have room to increase check averages by promoting or adding dessert options.

However, a large number of these purchases occur at retail stores and many consumers report a decrease in restaurant dessert purchases. Consumers don't necessarily see this changing over the next three months,

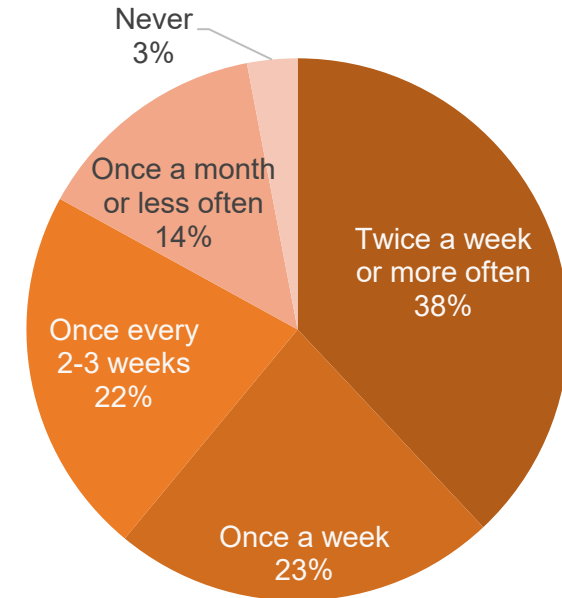
as at-home consumption is expected to remain high.

Creative, signature desserts that consumers can't easily buy from retail may help sway diners, as 33% of consumers sometimes visit a restaurant because of a specific dessert it offers.**

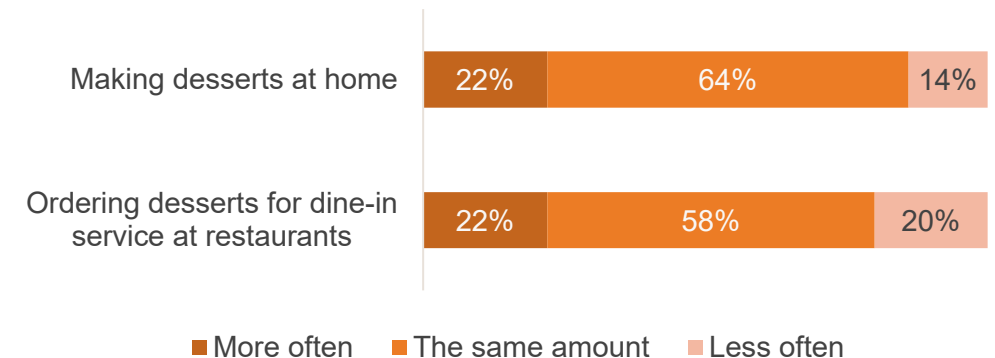
To appeal to off-premise diners, operators should look to include more desserts on third-party delivery sites and promote popular portable options such as brownies, cookies and doughnuts.

*Base: 1,545 consumers who ever order food from restaurants; Includes terminate data
 **Base: 909 consumers who ever eat dessert
 ***Base: 1,500 consumers who ever eat dessert
 Source: Technomic Ignite Consumer featuring the 2021 Dessert Consumer Trend Report

"I EAT DESSERTS AFTER A MEAL..."*



ANTICIPATED CHANGE IN BEHAVIOR THREE MONTHS FROM NOW***



Wariness of Dining Rooms Persists in Many Places

Nearly two years into the global pandemic and people in many parts of the world are still quite wary of dining rooms, per Technomic's recent consumer survey across 25 countries as part of its [Global Foodservice Navigator](#) program.

To be sure, diners in some places are certainly returning to sit-down services as local recovery scenarios take shape. In many markets though, that's a nonstarter for now and likely many months to come.

Globally, nearly half of all consumers (49%) say they won't be comfortable eating in a restaurant for at least the

next three months, and nearly a fifth (19%) push that to six months or more.

South Korea, the Philippines and Chile are the three markets where consumers are most hesitant to revisit dining rooms, with 42%, 32% and 31% of those polled, respectively, saying they're doing off-premise only for at least half a year. That's a long time.

For these countries and many others, low enthusiasm for dine in will likely continue to fuel operators' investments into off-premise channels and services such as click-and-collect and curbside handoff.

As noted, dine-in is certainly returning

to some normalcy in parts of the world. Countries with some of the highest percentages of consumers who already feel comfortable dining in or expect to in the coming weeks include the UAE, the U.K., the U.S. and France.

China and Russia also sat at the top of that list when the survey was conducted in August and September, but [recent developments](#) will no doubt tamp that down significantly.

Base: 8,704 global consumers in 25 countries

Q: When do you think you will feel comfortable dining in indoors again? Select one.

Source: Technomic Global Foodservice Navigator Program

Image Source: Shutterstock



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