Technomic®

consumer trend reports

Sample Slides

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

About Consumer Trend Reports

190+

reports, providing valuable benchmarking data dating back to 2006

30,000+

menus analyzed for ingredient-, flavor- and category-level trends

10,000+

consumer interviews annually, providing comprehensive analysis and insights

8

new studies per year, offering forward-thinking key themes, outlooks and recommendations

Methodology

Quantitative online surveys featuring tested questions designed with industry and client input

Quality controls to ensure accurate, reliable data

Nationally representative in regard to age, gender and race/ethnicity background

Integration of proprietary Technomic menu and industry data adds depth

As protein alternatives proliferate, so do ingredient preferences

Protein substitutes continue to trend on menus and expand into new categories. Protein substitutes vary widely in their ingredients, but vegetable-based descriptors lead in appeal, especially with older consumers. Natural ingredients like vegetables and beans also top the list for preferred protein substitutes and are driven by older consumers.

Age differences play a role in these preferences with younger consumers driving appeal for plant-based claims and likelihood to order tofu and soy alternatives. Addressing differences in preference will be critical for operators to implement new proteins successfully.

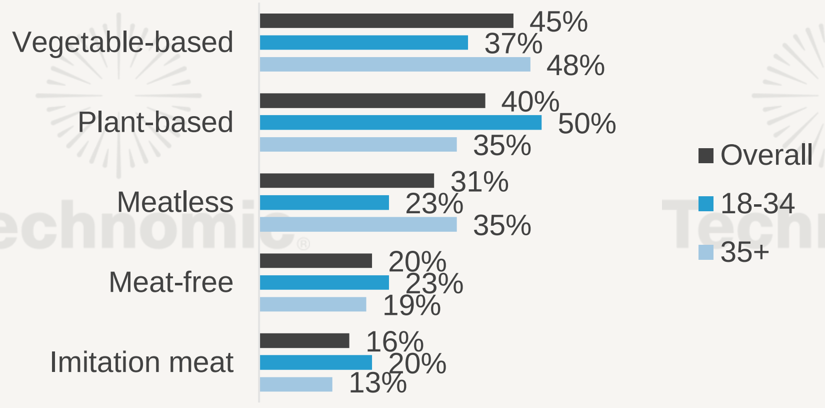
OPPORTUNITY

Identifying protein preferences by demographic can help to create menu and marketing strategies that resonate well with the core customer base. Offering multiple types of protein substitutes from vegetable-forward dishes to plant-based meat alternatives can help maximize appeal across ages.

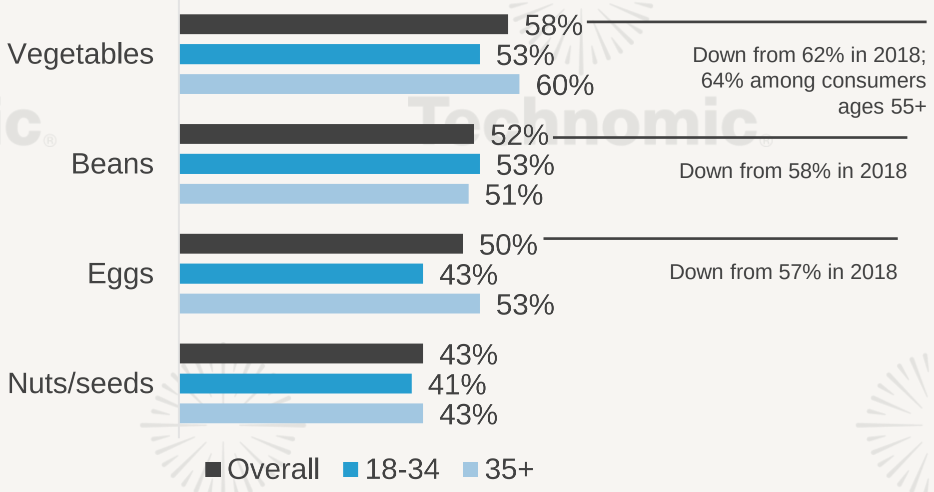
Highlighting alternatives that use vegetables or natural ingredients will have broad appeal overall and stand out to older consumers. On the other hand, soy-based items like Impossible Foods' products are preferred more among younger consumers and can be highlighted as a trending ingredient to help drive traffic.

Base: 1,032 consumers who ever eat vegetarian or vegan dishes

WHICH OF THE FOLLOWING DESCRIPTORS FOR VEGAN AND VEGETARIAN OPTIONS/SUBSTITUTES IN A DISH WOULD YOU BE MOST LIKELY TO ORDER AT LEAST OCCASIONALLY?



LIKELIHOOD TO ORDER PROTEIN SUBSTITUTES



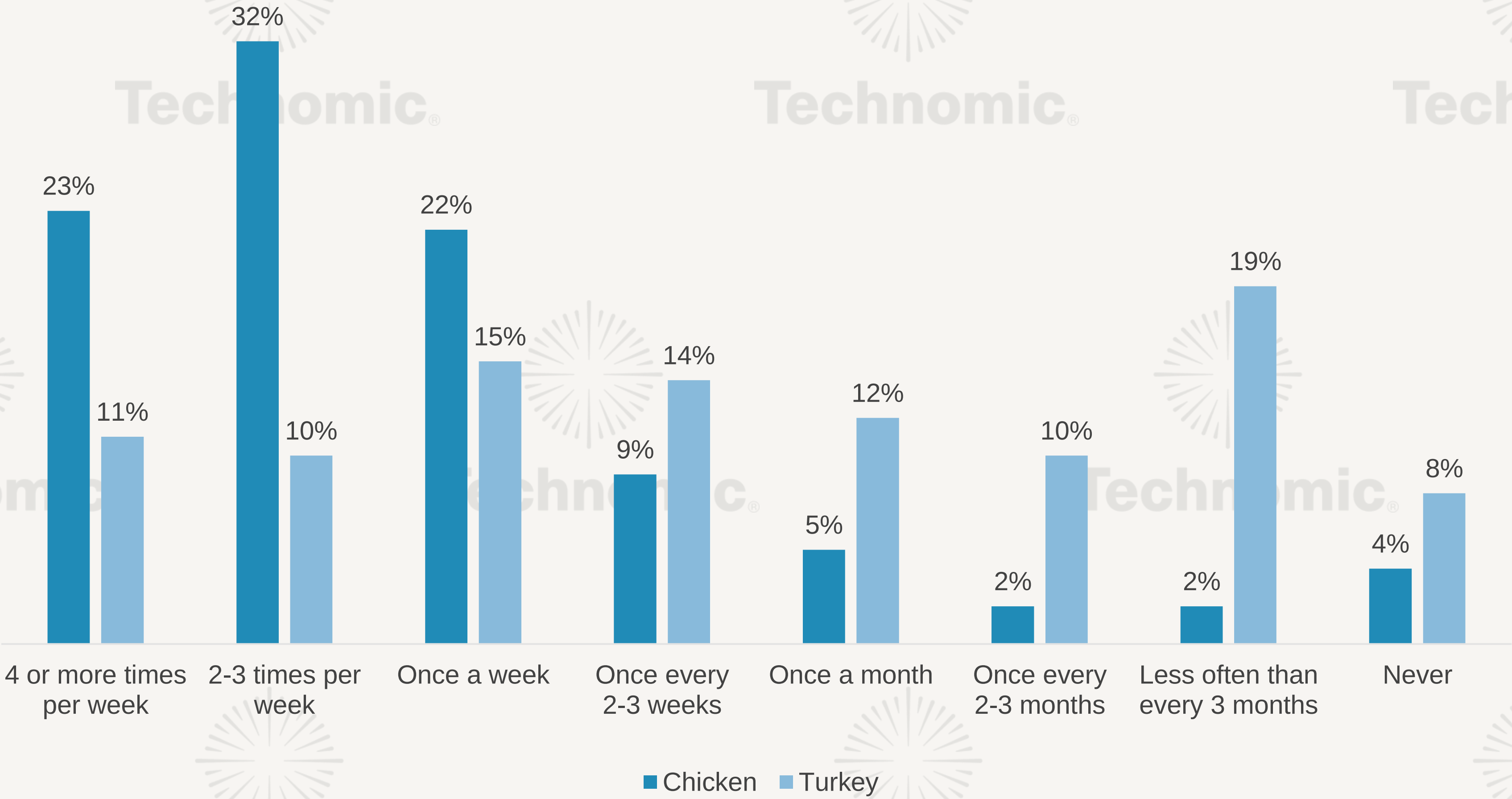
Chicken consumption far outpaces that of turkey

In fact, consumers eat chicken more often than all other proteins measured (including beef, pork and seafood) and vegetarian fare. This is due to chicken's affordability and versatility. On the other hand, turkey is consumed least often of all proteins.

Weekly chicken consumption is higher among consumers ages 35 and up as well as white consumers compared to their counterparts. Weekly turkey consumption is highest among men and millennials.

A separate Technomic survey shows that weekly consumption of both proteins has been fairly consistent throughout each quarter of 2020.

OVERALL CONSUMPTION FREQUENCY BY PROTEIN
ONCE A WEEK+: CHICKEN (78%) AND TURKEY (36%)



Base: 4,253 consumers; includes terminates
Q: How often do you typically consume the following foods, either at home or at a restaurant or other foodservice establishment (e.g., prepared-foods areas of grocery or other retail stores, etc.)?

Consumers expect increased usage of channels often avoided during the pandemic, supporting the idea of pent-up demand for away-from-home experiences

Still, a majority of consumers expect to continue using ghost restaurants and meal kits at least as often as they are now, showing how many consumers are planning to stick with habits developed during the pandemic.

Base: Varies by foodservice channel
Q: Looking ahead, how often do you anticipate ordering food and/or beverage from the following foodservice channels once the pandemic has subsided and all coronavirus-related restrictions are lifted?

Global flavors

We've seen the influence of Mexican and Italian cuisines on burgers, but the future of globally inspired burgers points to the inclusion of ingredients such as kimchi, gochujang, Sriracha and hoisin. Like many other menu categories, Asian food and flavor infusions are making noticeable inroads.

Look for increased focus on pan-Asian flavors for burgers. Korean, Thai and Japanese cuisines will provide early avenues to global flavor exploration.

EXAMPLES

Kimchi Burger—sunny-side up egg, hoisin ketchup, sesame-Sriracha mayo and housemade kimchi slaw (Knockabout Burgers in Denver)

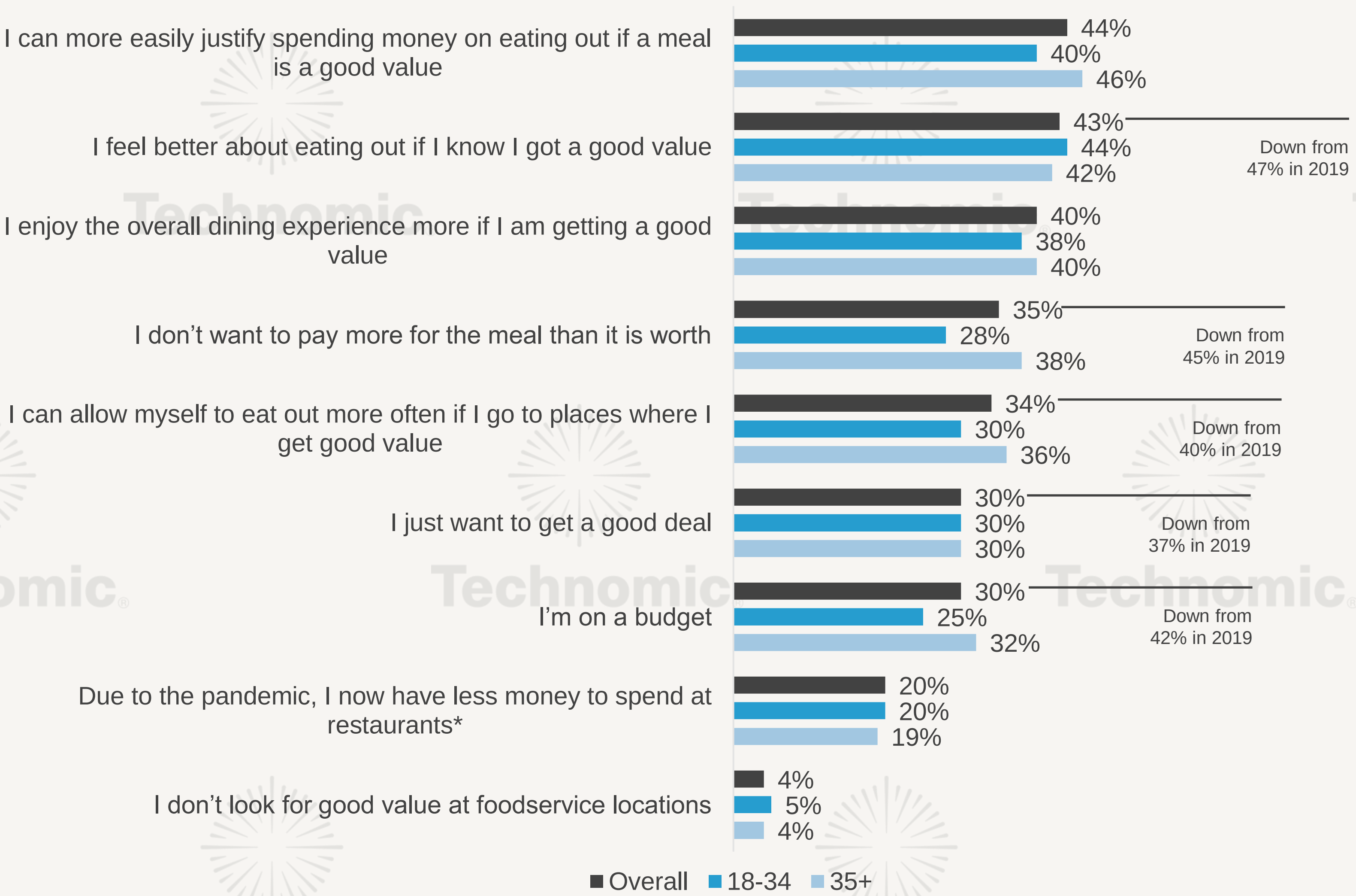
Beyond Burger—roasted shiitake mushrooms, kimchi, gochujang aioli and brioche (Clyde's Tower Oaks Lodge in Rockville, Md.)

Up next: Kimchi-topped burgers
Image Source: Shutterstock

Consumers look for value because it helps them justify and feel better about spending money on dining out

Fewer consumers feel better about dining out if they got a good value compared to 2019. COVID-19 significantly impacted the financial situation for many consumers, driving fewer to feel comfortable splurging on dining experiences, even as restrictions are lifted.

WHY DO YOU LOOK FOR GOOD VALUE AT RESTAURANTS OR OTHER FOODSERVICE LOCATIONS?



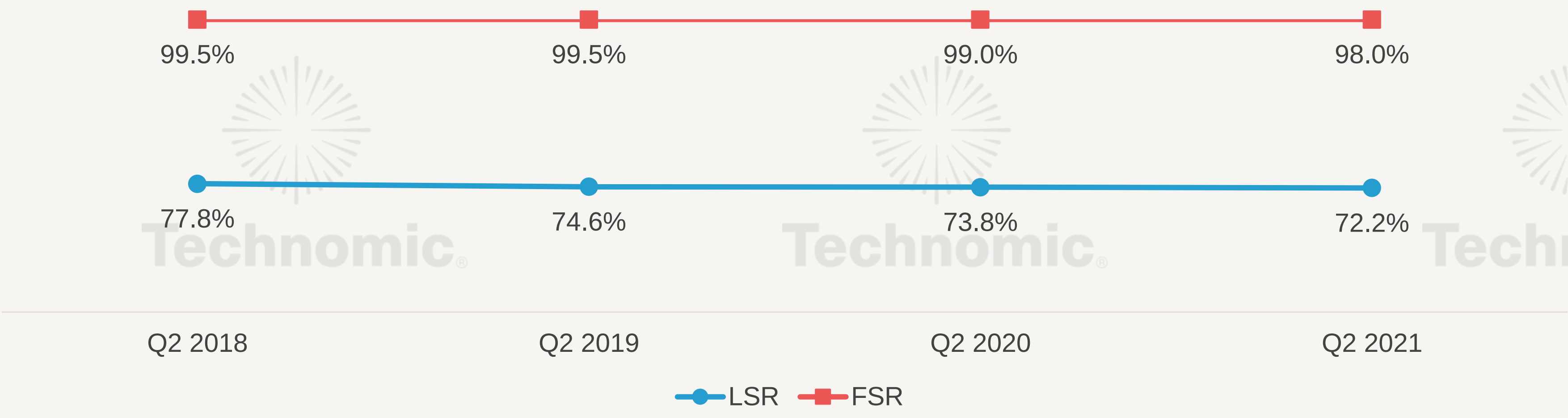
Base: 1,500 consumers ages 18+
Q: Why do you look for good value at restaurants or other foodservice locations? Select all that apply.
*Note: Response option was added this year and could explain decrease across other responses

App and small plate operator penetration is down except for small plates at LSRs

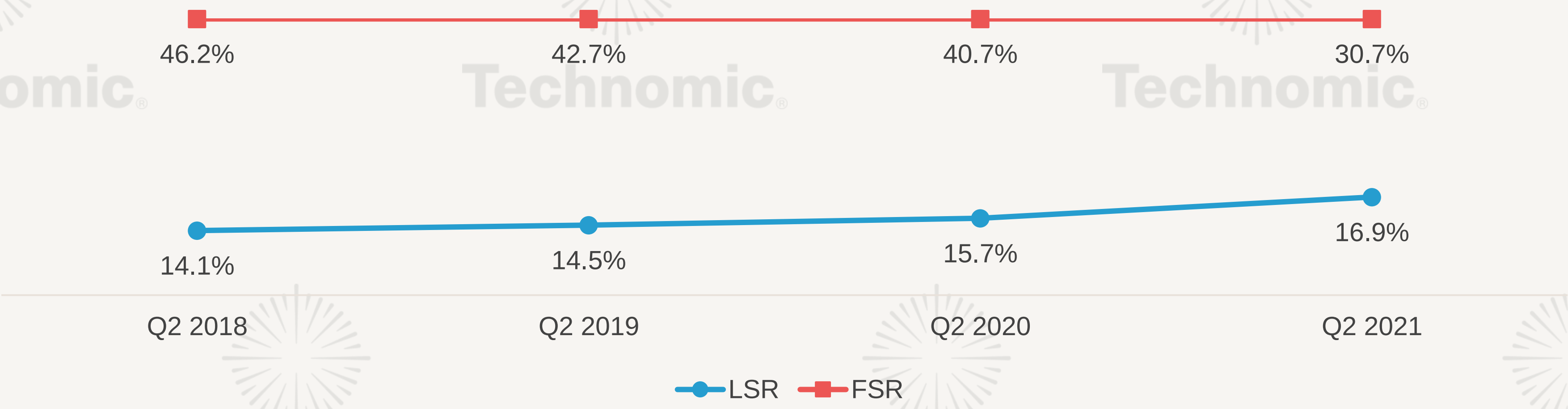
The decrease aligns with menu streamlining efforts to lower cost and make operations more efficient.

But LSR operator penetration of small plates has increased since 2019, which could be to meet needs for snacks or shareable items or for off-premise menus during the pandemic.

APPETIZER OPERATOR PENETRATION



SMALL PLATE OPERATOR PENETRATION

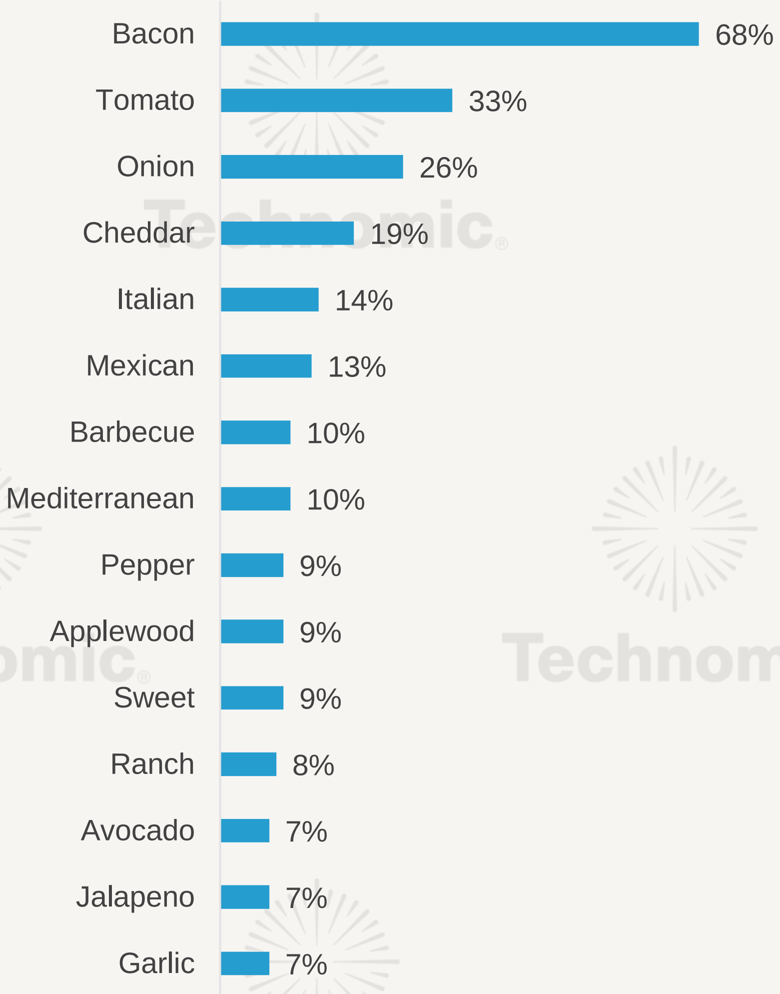


Base: Top 500 chains
Source: Technomic Ignite Menu, Q2 2019-Q2 2021

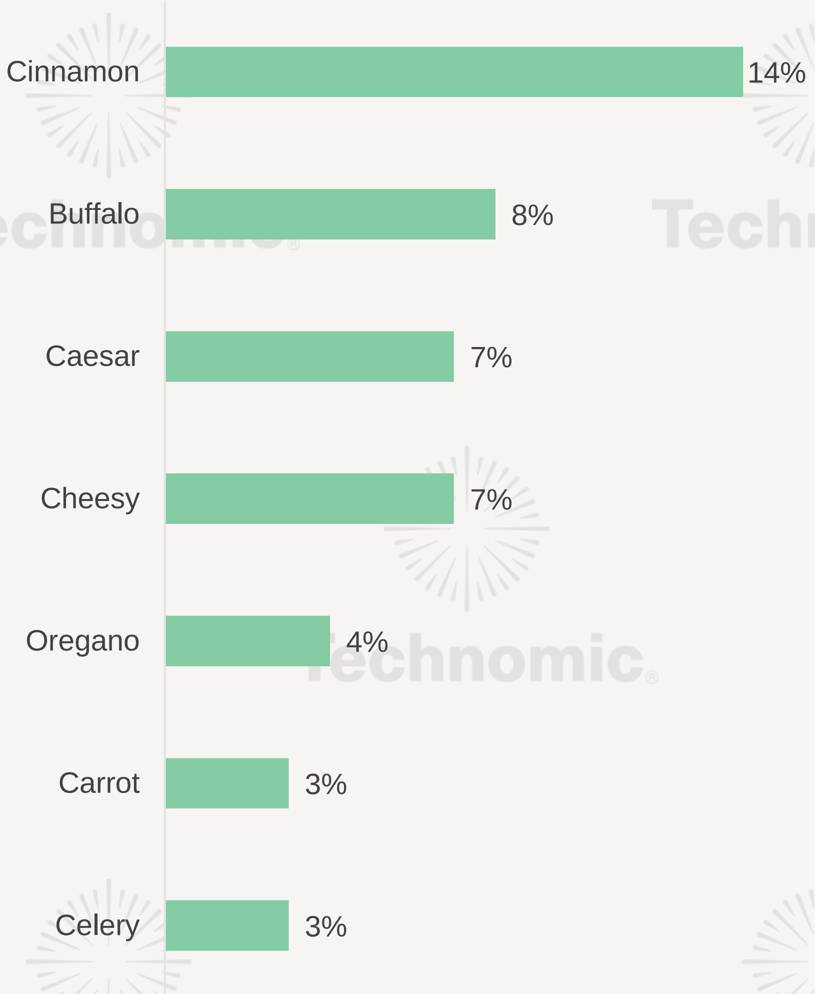
Cinnamon apples are a fast-growing topping/accompaniment for pork dishes, explaining cinnamon as a fast-growing flavor

This flavor combination is especially common at Southern and comfort food restaurants.

LEADING FLAVORS
OVERALL INCIDENCE



FASTEST-GROWING FLAVORS
CHANGE IN ITEM INCIDENCE



Base: 4,315 menu items across 382 operators
Source: Technomic Ignite Menu, Q2 2019-Q2 2021

Several entrees have seen growth on menus compared to two years ago

Sandwiches and wraps hold the top spot as the most menued item at both grocery and convenience stores, but retailers are now adding more protein-based dishes to their menus as well. Grocery stores and mass merchants are adding more pork, beef and chicken dishes, and c-stores are adding more protein/veggie bowls to their menus. Some Mexican dishes like enchiladas and tacos are also proliferating on retailer menus, but burritos have declined over the past two years.

Breakfast sandwiches have been removed from some grocery store menus, which may be due to lower demand for the morning daypart during the pandemic. However, operators should keep in mind that this is still the most preferred breakfast dish among consumers.

Grocers/Mass Merchants

Leading

1. Sandwich/wrap (100%)
2. Chicken dish (96%)
3. Salad main dish (82%)

Growing

1. Pork dish (+14%)
2. Beef dish (+14%)
3. Chicken dish (+14%)
4. Enchiladas (+14%)

Declining

1. Breakfast sandwich (-14%)
2. Fish dish (-9%)
3. Burrito/chimichanga (-9%)
4. Value meal (-9%)

C-Stores

Leading

1. Sandwich/wrap (100%)
2. Breakfast sandwich (92%)
3. Hot dog (89%)

Growing

1. Protein/veggie bowl (+12%)
2. Breakfast starch dish* (+12%)
3. Nachos (+8%)
4. Combo plate (+8%)
5. Tacos/taquitos (+8%)

Declining

1. Burrito/chimichanga (-12%)
2. Pork dish (-8%)

Base: 22 grocers/mass merchants and 26 c-stores
Source: Technomic Ignite Menu operator incidence data, Q3 2019-Q3 2021
*Note: Includes breakfast quesadilla, biscuits and gravy, French toast and oatmeal