Technomic

consumer trend reports

Sample Slides

This is a collection of slides from Technomic Consumer Trend Reports uncovering consumer data and expert analysis

New habits formed during COVID-19 will shift future consumption

Amid steady beef and pork consumption, unique opportunities exist to drive sales through value, health perceptions, flavors and more

Keep An Eye On

Beef and pork consumption remains high and steady from 2018, which bodes well for operators as consumers continue to rely heavily on these proteins. Still, staying relevant amid the pandemic will require operators to engage in multiple avenues to drive patronage. Strategies include menu flexibility across dayparts, specialized steak experiences, enhanced positioning around health claims and more.

What's Now?

Plant-Based Advancements

Vegan and vegetarian meat options are revealing new innovations.

Optimizing New Cuts

Lesser-known beef and pork cuts are carving out a wider niche.

Today's Sustainability Push

Restaurant chains are prioritizing sustainability and eco-friendly practices.

What's Next?

Steak and Wine Pairings

Steak and wine pairings are being flaunted in the center of the plate.

Meat Replacing Seafood?

We are seeing greater cross-utilization as meat replaces seafood on some menus.

Meat Moves Behind the Bar

Specialty offerings behind the bar are featuring unique meat applications.

KEY THEMES

High and steady beef and pork consumption shows long-term potential

Messaging around value will help combat declines during the pandemic

At-home habits will likely have a lasting impact on consumer preferences

Shifting dayparts point to opportunities beyond dinner

Consumers will seek out the upscale, experiential elements of steak occasions

Shifting health perceptions may create new opportunities for beef and pork

Traditional meats will leverage their craveability and value to compete with plant-based alternatives

Operators will highlight more global seasonings or spices in beef and pork dishes

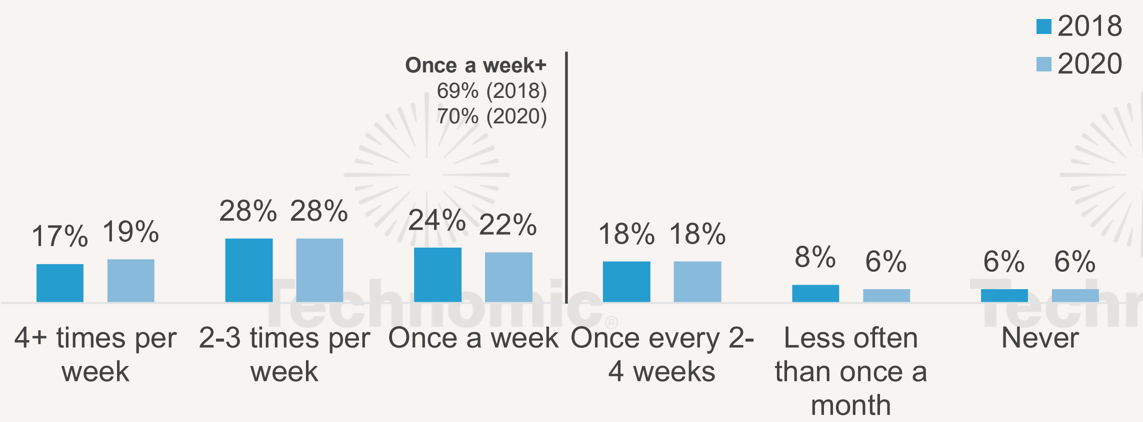
High and steady beef and pork consumption shows long-term potential

Overall, weekly beef consumption is high and stable, up 1% compared to 2018. Similarly, weekly pork consumption has held steady from 2018 data, indicating that consumption of these two proteins has remained in consumer routines even during disrupted patterns due to COVID-19. These are popular and widely available proteins across retail and restaurant segments, and it appears consumers are relying consistently on beef and pork to feature in their meals.

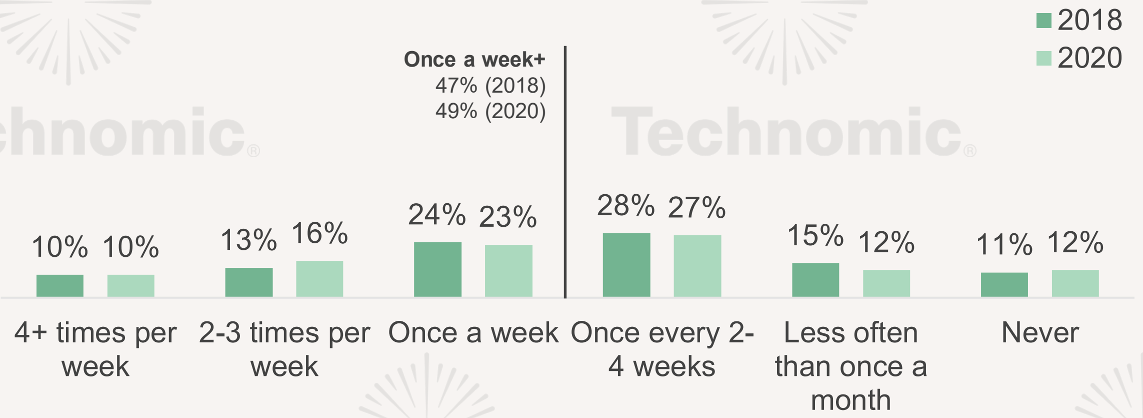
Opportunity

Consumer routines will likely continue to be in flux for the better part of 2021 as initial vaccine distribution stalls amidst recurring spikes in COVID-19 rates. Given the current situation, operators may want to highlight beef and pork offerings as simple, reliable solutions for pandemic-weary consumers. In addition to keeping a focus on crowd favorites like indulgent burgers and barbecue pork dishes, this means investing in long-term initiatives such as tech-driven ordering amenities. With the pandemic accelerating consumer usage of technology, expect online, mobile and off-premise platforms to build loyalty among new users and maintain relevance even after the COVID-19 era.

OVERALL BEEF CONSUMPTION FREQUENCY*



OVERALL PORK CONSUMPTION FREQUENCY*

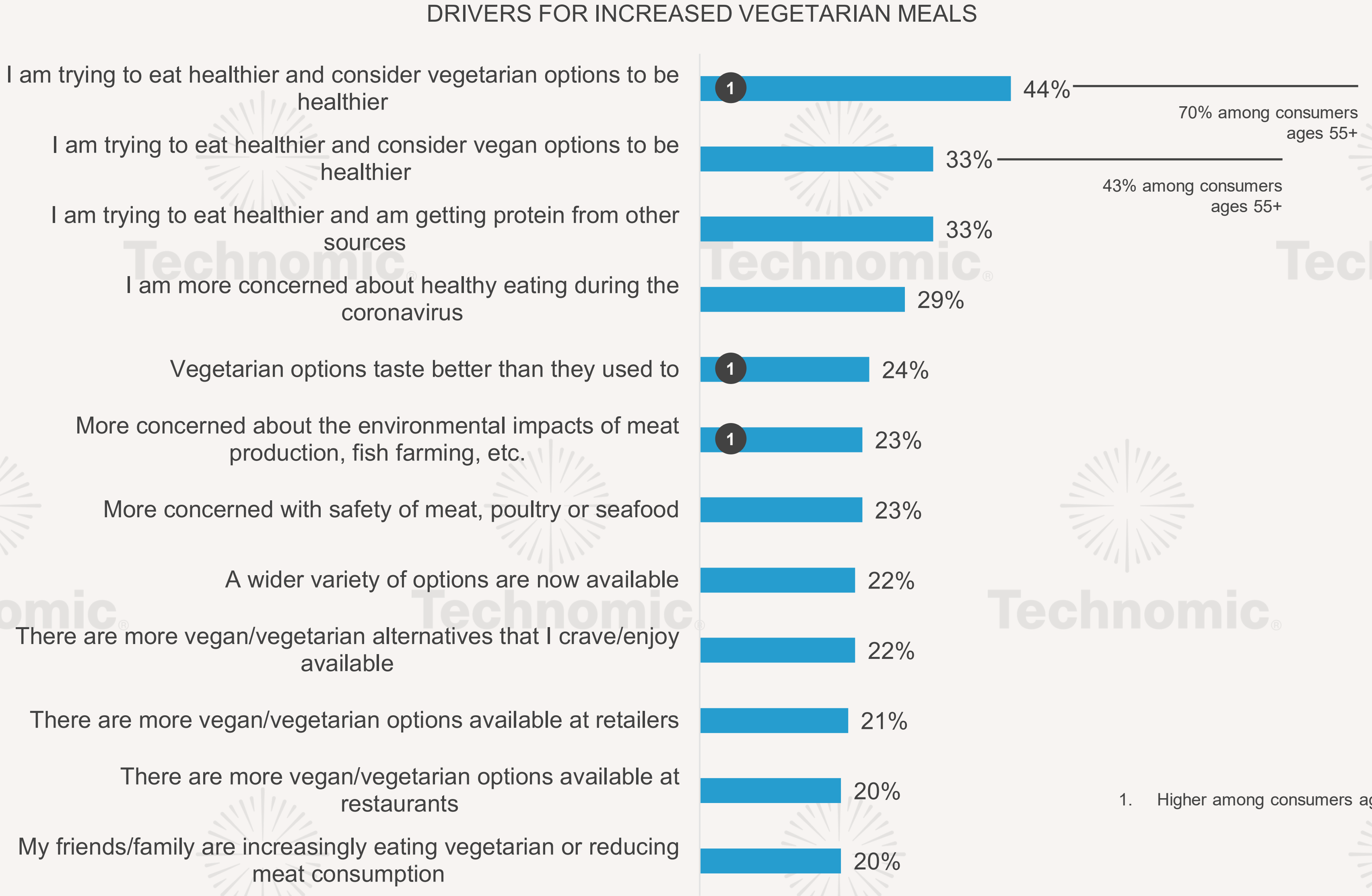


*Base: 4,253 consumers ages 18+; includes terminates

Health is the main driver in increased consumption of vegan and vegetarian meals

The desire to eat healthier is a greater driver among older consumers, especially consumers ages 55 and older, who view vegetarian and vegan options as healthier.

This suggests that highlighting the increased healthfulness of vegetarian and vegan dishes would be an effective way to increase consumption among older consumers, a population that currently consumes vegetarian and vegan meals at a lower rate.



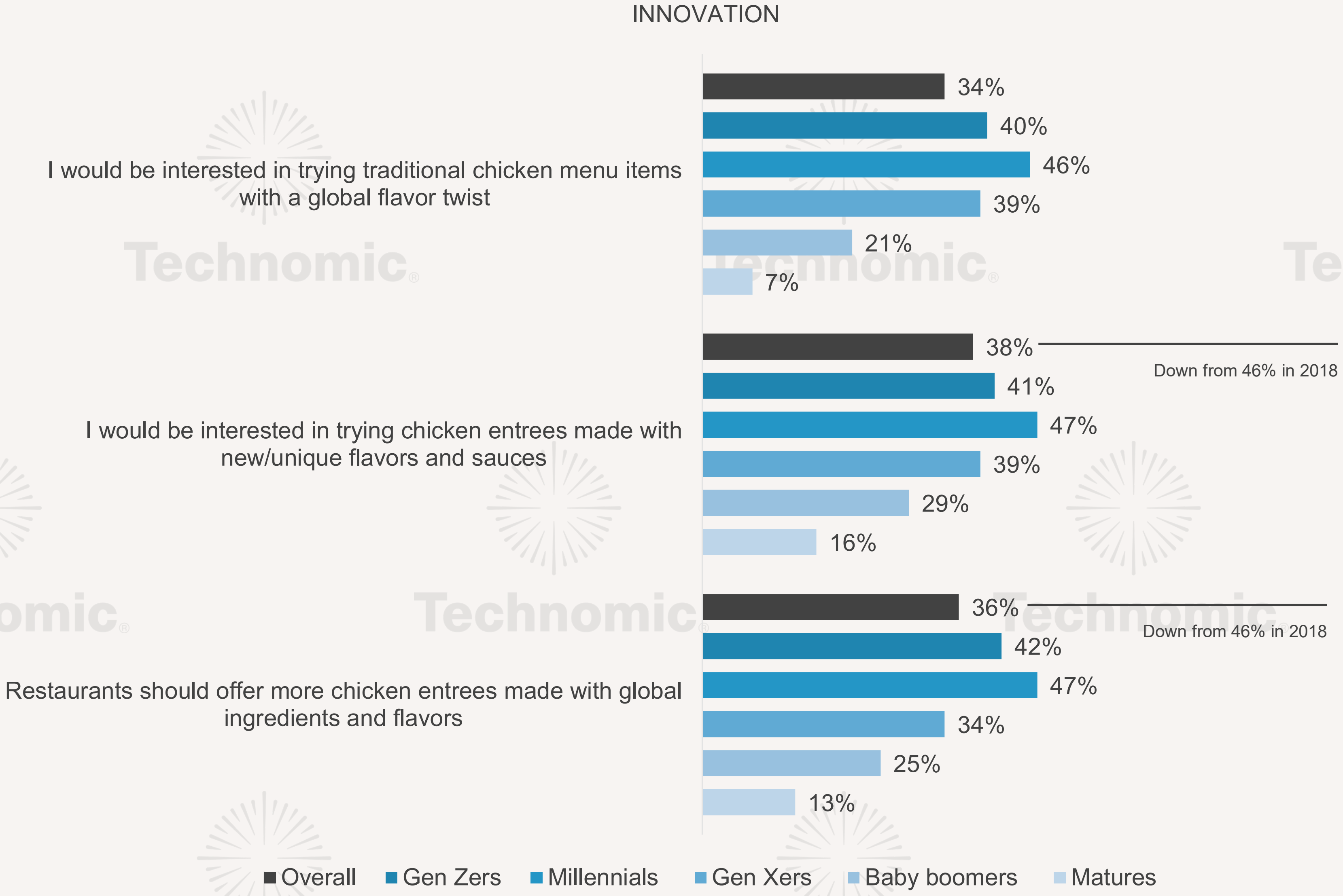
1. Higher among consumers ages 35+

Base: 283 consumers who are eating more vegetarian/vegan dishes
Q: Why are you eating more meals with vegetarian (including vegan) options/substitutes? Select all that apply.

Substantial demand for chicken innovation exists, though it declined from 2018

A greater focus on familiar comfort foods during the pandemic likely plays a role in this decrease. Demand for innovation will likely grow once the pandemic subsides.

Innovation can particularly help appeal to younger and middle-aged consumers, so reserving time to try new recipes and touting new offerings may help drive traffic. Rolling out new seasonal options or LTOs can help drive repeat traffic.



Base: Approx. 600 who eat chicken
Q: Thinking about chicken either as an entree or an entree ingredient, please indicate your agreement with the following statements on a scale of 1-6. Top two box shown.
*Note: In 2020, "ethnic" was replaced by "global"

Growing preparations for chicken speak to innovation in flavor as well as format

Offering more baked chicken or highlighting this method more may help to increase orders. While top chicken preparation methods generally align with consumer preferences, baked does not rank among the top five methods even though it is the third-leading option among consumers.

The top chicken preparation methods are similar across segments, with the exception of barbecue which ranks higher at LSRs.

LIMITED-SERVICE RESTAURANTS

Top preparation styles (operator incidence)	
Grilled	67.0%
Crisp	51.6%
Breaded	45.7%
Barbecue	41.5%
Roasted	33.0%
Fastest-growing preparation styles	
Herbed	+14.8%

CHAIN EXAMPLE
Dig Inn introduced a new Chicken and Cauli Parm featuring herb chicken and roasted cauliflower, baked with tomato sauce and Jasper Hill cheese, served with a kale Caesar side salad.

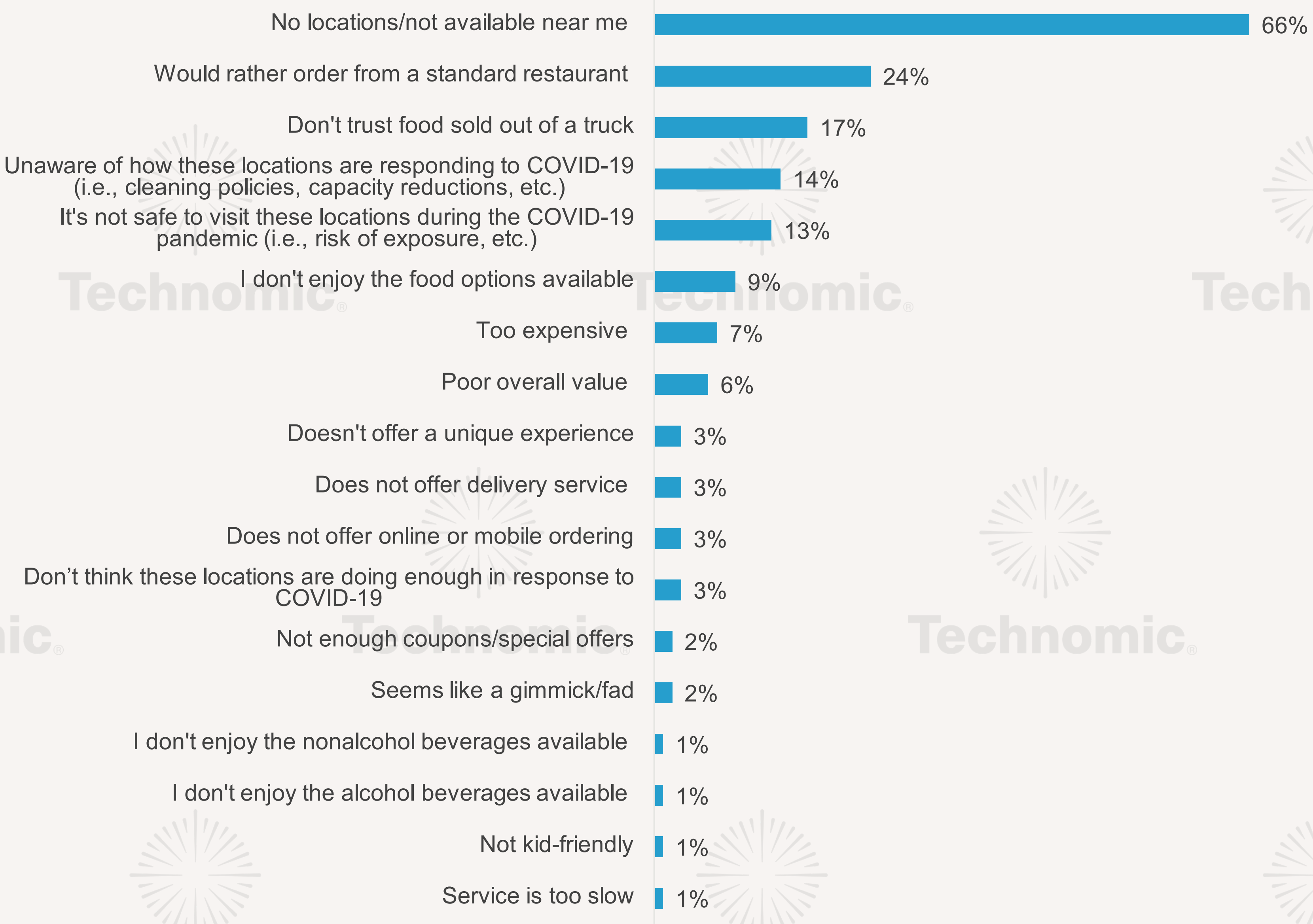
FULL-SERVICE RESTAURANTS

Top preparation styles (operator incidence)	
Grilled	33.3%
Crisp	17.1%
Breaded	14.7%
Fried	10.2%
Roasted	9.0%
Fastest-growing preparation styles	
Family style	+57.1%
Bone-in	+50.0%
Beer-battered	28.6%

Base: 227 limited-service restaurants and 216 full-service restaurants
Source: Technomic Ignite menu data, Q4 2018-Q4 2020

Proximity, which has likely been impacted by COVID-19, plays a major role in patronage

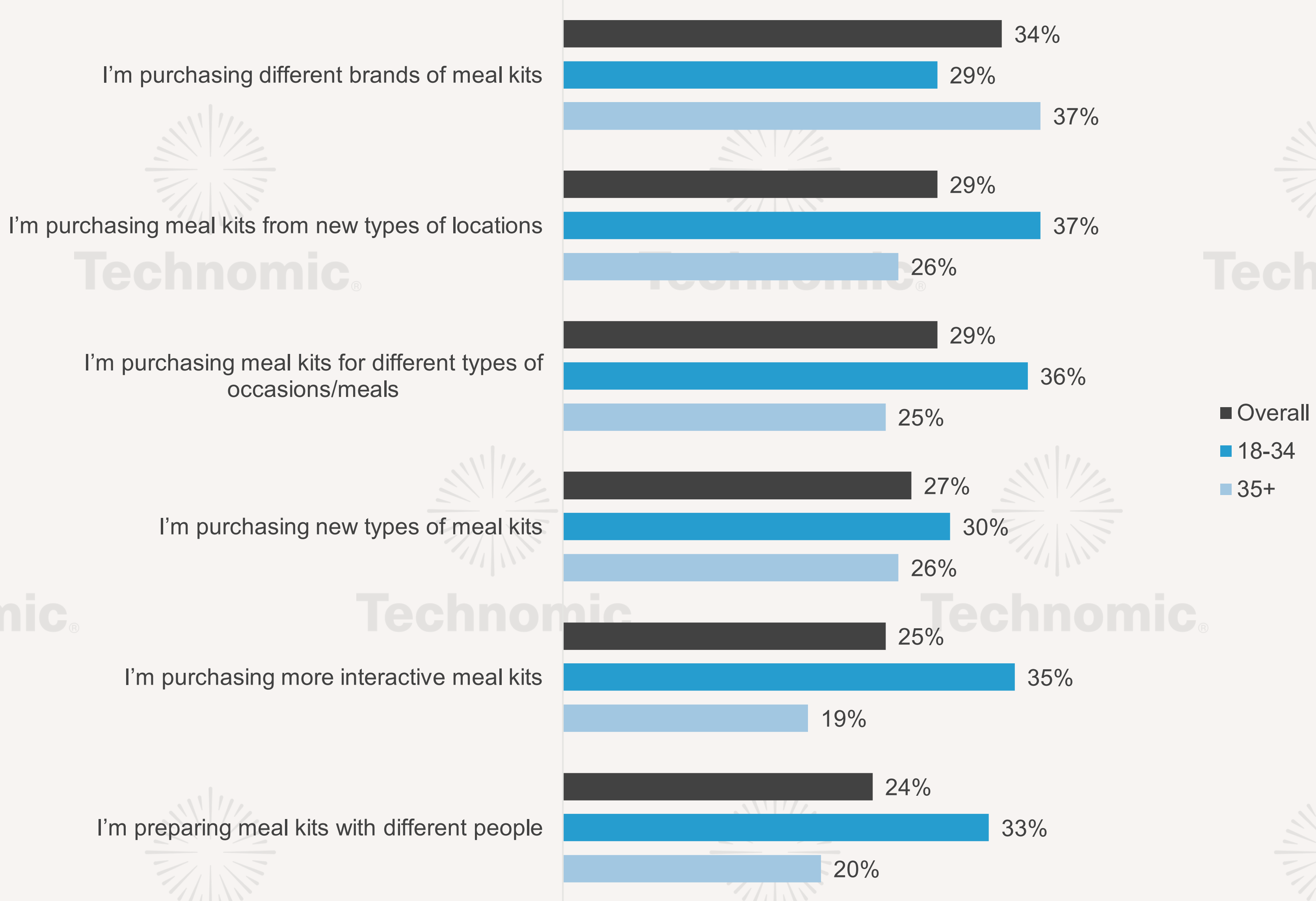
Food trucks are often located in urban settings—close to offices and businesses—which makes them an idyllic lunch or snack spot for working consumers. However, over a year into the pandemic, many Americans are still working from home and are no longer within proximity of food trucks. Consumers are now spread out, away from city centers, which gives food truck operators an opportunity to meet consumers where they are located.



Base: 3,230 consumers who never order from a food truck: only consumers ages 21+ asked for alcohol
Q: You indicated that you never visit food trucks, why is that? Select all that apply.

The pandemic has ushered in significant changes to meal-kit usage, driven by increased purchases among many users

Sourcing has shifted, with older consumers being especially likely to purchase different brands and younger consumers being more likely to purchase from different locations. Overall, 18- to 34-year-olds are also driving changes seen in occasion dynamics by purchasing meal kits for different occasions and with different people, as well as opting for more interactive meal kits. Together, these trends highlight how usage hasn't simply grown during the pandemic, it has diversified across different occasions and needs.



Base: 780 consumers who purchase meal kits at least once every six months
Q: How has your usage of meal kits changed during the pandemic? Select all that apply.

COLLEGE & UNIVERSITY | FOODSERVICE RETAIL SALES EQUIVALENT

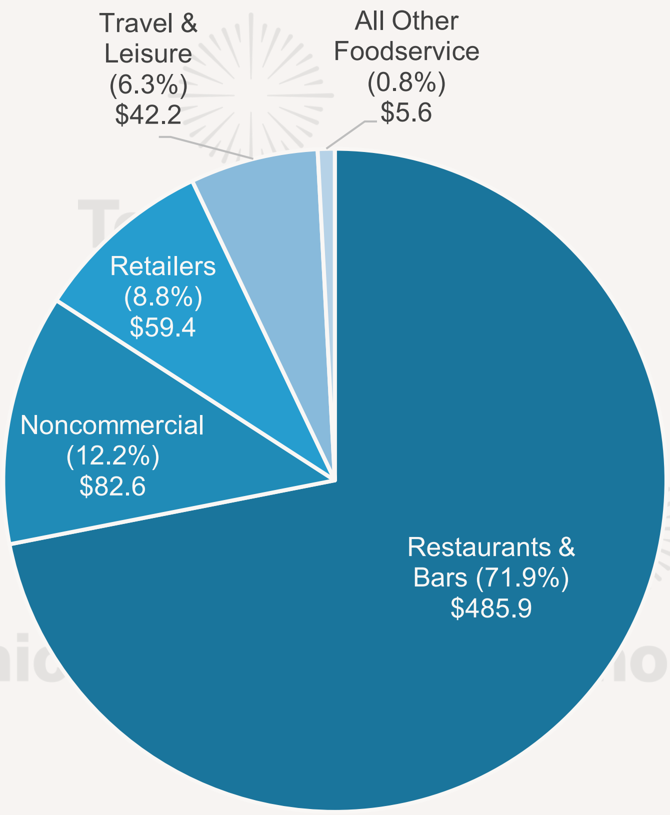
$675.7B

2020 Total Foodservice Retail Sales Equivalent

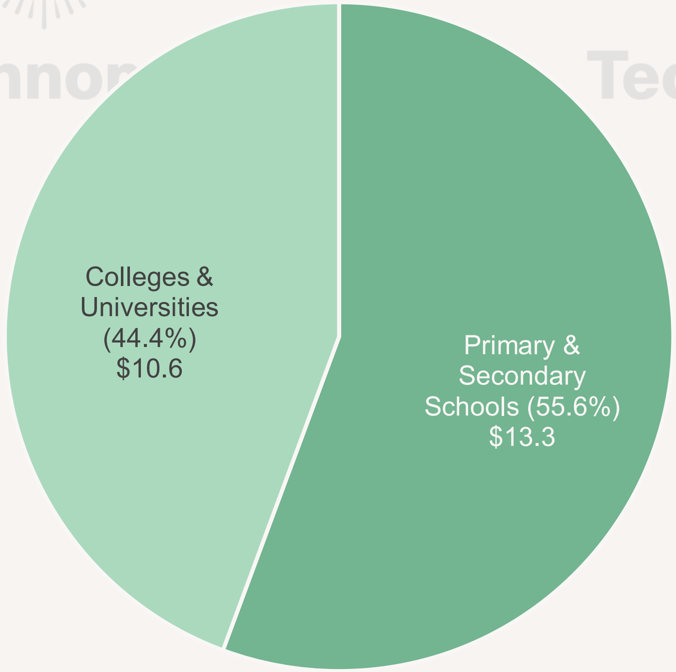
$23.9B

2020 Education Foodservice Retail Sales Equivalent

TOTAL FOODSERVICE RSE



EDUCATION FOODSERVICE RSE



Note: Retail sales equivalent includes food, nonfoods, and all beverages (alcohol & nonalcohol); Noncommercial segment includes business & industry, education, healthcare, refreshment services, military and corrections
Source: Technomic February 2021 Wallchart

Growing breakfast flavors include a nearly equal mix of sweet and savory ingredients

This points to varied menu innovation operators are exploring for breakfast, with even the Mainstream phase seeing trending ingredients such as turmeric, acai, hibiscus and passion fruit.

Introduction

- **Fennel** 8.3 %
- **Vanilla Creme** 8.3 %
- **Salted Caramel** 6.3 %
- **Assam** 6.3 %
- **Toffee** 6.3 %
- **Truffles** 6.3 %
- **Ricotta** 6.3 %
- **Pear** 4.2 %
- **Tarragon** 4.2 %
- **Buffalo** 4.2 %

Growth

- **Gruyere** 8.7 %
- **Parsley** 8.7 %
- **Chocolate Banana** 4.4 %
- **Norwegian** 4.4 %
- **Mole** 4.4 %
- **Marshmallow** 4.4 %
- **Cajun** 4.4 %
- **Vanilla Bean** 4.4 %
- **Paprika** 4.4 %
- **Blueberry Lemon** 4.4 %
- **Red Chile** 4.4 %
- **Moroccan** 4.4 %
- **Lemon Poppyseed** 4.4 %
- **Toasted Marshmallow** 4.4 %
- **Oaxacan** 4.4 %
- **Pistachio** 4.4 %

Mainstream

- **Sesame** 21.4 %
- **Earl Grey** 15.9 %
- **Basil** 13.5 %
- **Brownie** 12.7 %
- **Cinnamon Raisin** 12.7 %
- **Sea Salt** 11.9 %
- **Pesto** 11.1 %
- **Turmeric** 10.3 %
- **Sesame Seed** 10.3 %
- **Chive** 9.5 %
- **Acai Berry** 8.7 %
- **Peppermint** 8.7 %
- **Lemon Ginger** 8.7 %
- **Hibiscus** 8.7 %
- **Goat Cheese** 8.7 %
- **Caramel Macchiato** 8.7 %
- **Passion Fruit** 7.9 %

Mature

- **Coffee** 79.5 %
- **Bacon** 72.9 %
- **Orange** 70.5 %
- **Chocolate** 67.1 %
- **Strawberry** 60.1 %
- **Apple** 57.8 %
- **Blueberry** 53.9 %
- **Tomatoes** 51.6 %
- **Mexican** 50.4 %
- **Banana** 47.7 %
- **Onion** 47.7 %
- **Cheddar** 47.7 %
- **Cinnamon** 47.3 %
- **Pepper** 47.3 %
- **Vanilla** 45.4 %
- **Sweet** 39.9 %
- **French Toast** 39.2 %
- **Chocolate Chip** 37.6 %

Base: 89 C&U operators who menu breakfast
Source: Technomic Ignite menu data, Q4 2020

Flexitarian burgers address new dietary demands

Beyond strictly plant-based components, menu creativity is extending to innovative patty blends that meet the needs of the flexitarian consumer

Flexitarian diners create space in their eating habits for both plant-based and meat-centric foods. It’s a flexible sensibility that calls for an increased attention on these types of options and more menu variety. Now more chains are specifically calling out “flexitarian” for burgers as a descriptor on the menu to signal these offerings to consumers.

Behind the Trend

This trend reflects the need for operators and supplier partners to create burger offerings that fit into how health definitions keep shifting. With flexitarian diets moving into the forefront, “flex” burgers are set to proliferate on menus, especially in the emerging chain subsegment.

.

CHAIN EXAMPLE

B.Good recently debuted four new Flexitarian Burgers on its permanent menu. Options are Falafel, made with a chickpea patty; Jalapeno & Cheddar, made with a poblano-quinoa patty; Sweet Heat, made with a beet-pineapple patty; and Turkey Medley, made with a turkey-mushroom blend patty.

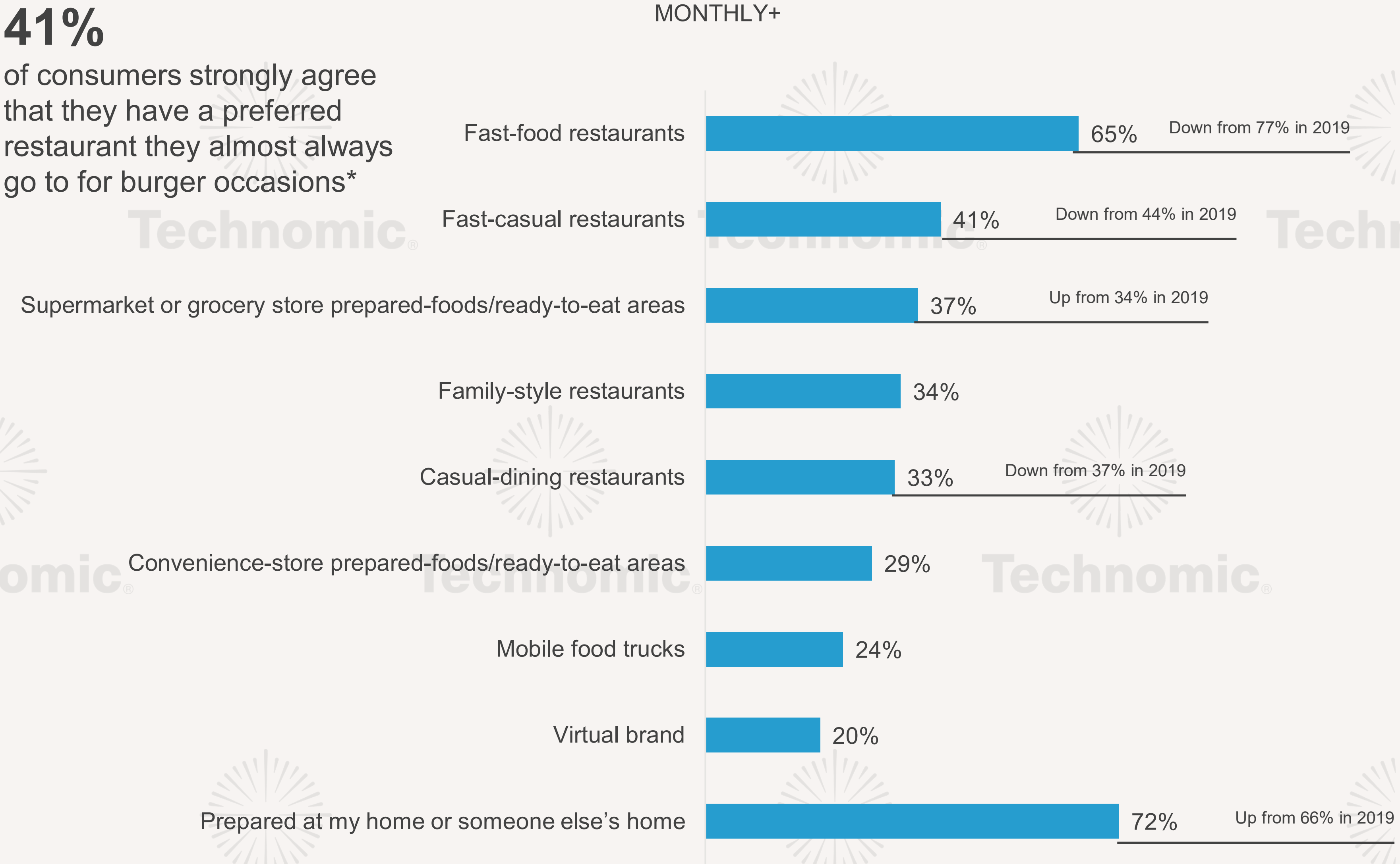
Retail and at-home burger consumption increased, while QSR consumption declined

Notably, consumers are now more likely to consume burgers at home than from fast-food restaurants at least once a month, noting a shift in the leading consumption location from 2019.

The decline in QSR purchases could be due to the high frequency of pre-pandemic purchases, as this would be the easiest segment to cut back on. Additionally, many burger chains have been emphasizing chicken sandwiches, potentially impacting burger consumption from these locations.

41%

of consumers strongly agree that they have a preferred restaurant they almost always go to for burger occasions*



Base: 1,500 consumers who eat burgers
Q: How often do you consume a burger from the following types of restaurants or places?
*Base: 919 consumers who eat burgers

consumer trend reports

150+

reports, offering valuable benchmarking data dating back to 2006

16,000+

consumer interviews annually, providing comprehensive analysis and insights

9,000+

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

12

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 with regard to age, gender and ethnicity

Integration of proprietary Technomic menu and industry data adds depth

Check out the various topics we cover!

Q1 2021
Beef & Pork
Seafood & Vegetarian
Poultry

Q2 2021
Emerging Channels
College & University Foodservice
Burger

Q3 2021
Value & Pricing
Starters, Small Plates & Sides
Dessert

Q4 2021
Flavor
Breakfast
Retail Foodservice

TENTATIVE 2022 TOPICS
Soup & Salad
Snacking
Pizza
Sandwich
Future of LSR: Fast Food & Fast Casual
Delivery & Takeout
Beverage
Healthy Eating
Future of FSR
Global Food & Beverage


Pinpoint consumer preferences
Explore Technomic’s robust library of Consumer Trend Reports to understand usage, preference and behaviors for today’s foodservice consumer.
Let’s chat
info@technomic.com | technomic.com

Technomic®

Since 1966, we have produced in-depth research focused on the foodservice industry.

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.