



Technomic[®]

Industry Insights

A roundup of noteworthy foodservice findings
for the week of Oct. 19, 2020

Restaurant Visits Trending Flat

Consumers are slowly returning to foodservice, but average past-week claimed restaurant visits trend flat in recent weeks.

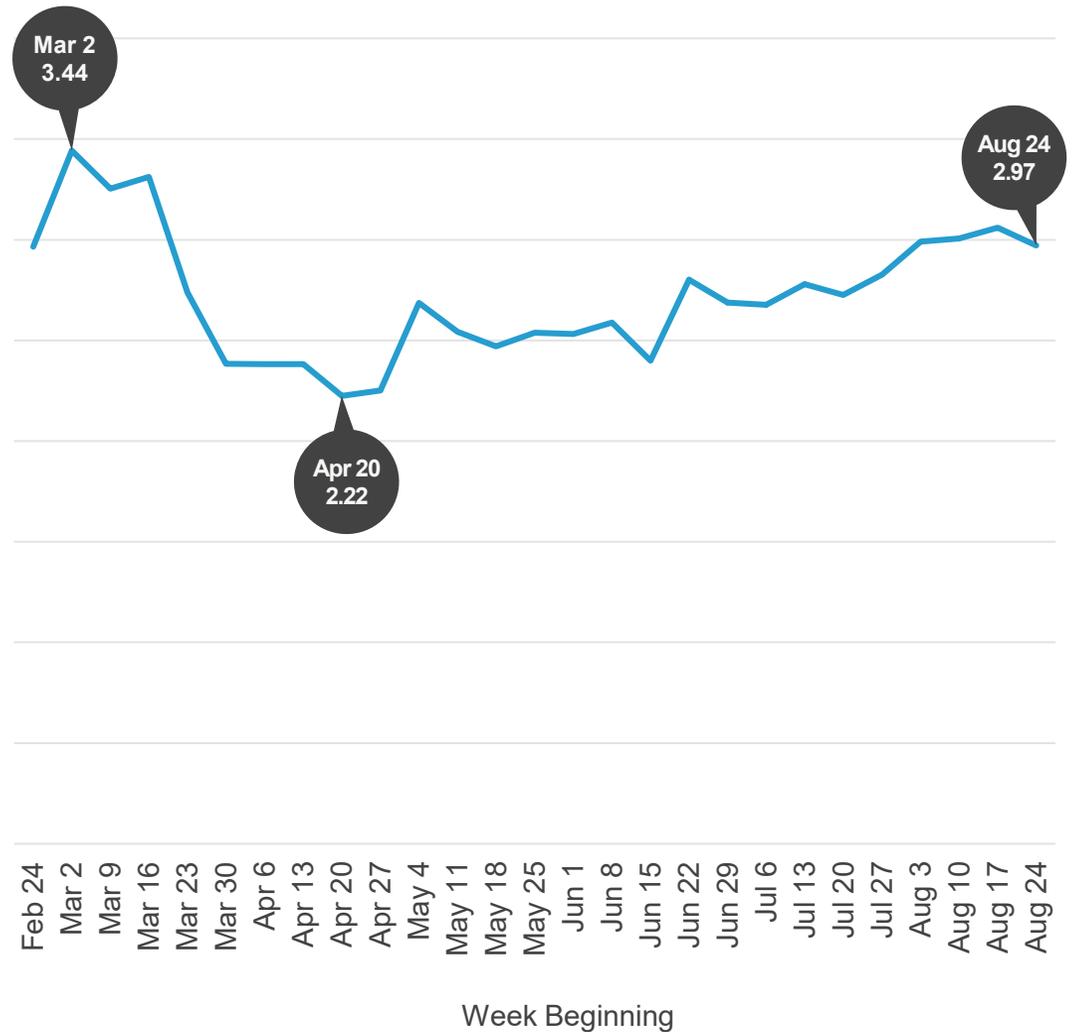
After bottoming out in April, average past-week, consumer-claimed visits gradually trended positive between May and August but have remained relatively flat since then. Consumers are now averaging about three restaurant visits per week.

Presently, the average number of visits per week is down about 14% from the 2020 peak of 3.44 visits per week.

Consumer visit behavior is mirroring the key economic indicators that we track in the Economic Impact Navigator program, such as the unemployment rate and consumer spending, which are leveling out after positive surges in May following April lows.

Note: Consumer surveys fielded weekly with a national representative sample of 500 consumers
Base: Among consumers who ordered food and beverage from foodservice locations in the past week
Q: Please indicate how many visits you made to each in the past week (or last seven days) for each daypart
Source: Technomic Economic Impact Navigator Program

AVERAGE NUMBER OF RESTAURANT VISITS
IN THE PAST WEEK



Bloomin' Brands Joins the Virtual Brand Battle

Bloomin' Brands, the parent of Outback Steakhouse and Carrabba's Italian Grill, recently announced the expansion of its virtual brand, Tender Shack, into 12 new markets following a successful test in the Tampa Bay, Fla., area.

Tender Shack offers chicken sandwiches for delivery via DoorDash, the third-party provider used by Bloomin' Brands. All Tender Shack menu items are prepared in the kitchens of Outback and Carrabba's restaurants.

Bloomin' Brands joins a growing list of large chain operators that have been experimenting with new virtual concepts to boost off-premise sales. Bloomin's competitors Brinker International and Dine Brands Global have launched chicken-focused virtual brands as well.

Sources: Technomic Ignite company news

NOTABLE VIRTUAL BRANDS

Virtual Brand	Operator	Concept Positioning
Tender Shack	Bloomin' Brands	Chicken sandwiches
Just Wings	Brinker International	Chicken wings
Neighborhood Wings by Applebee's	Dine Brands Global	Chicken wings
Pasqually's Pizza & Wings	Chuck E. Cheese	Pizza & chicken wings
The Wing Experience & The Burger Experience	Smokey Bones	Chicken wings and burgers
Rotisserie Roast	Boston Market	Modern takes on classic Boston Market menu items
Bad Motha Clucka	Dog Haus	Chicken sandwiches and wings
Bad-Ass Breakfast Burritos	Dog Haus	Morning and late-night burritos
Freiburger	Dog Haus	Burgers and fries
Plant B	Dog Haus	Plant-based burgers and sausages

IGNITE MENU

Buzzy Global Ingredients Traverse from Food to Drink

Since travel restrictions from the pandemic are keeping people at home, they're looking for a mode of safe exploration. One way we're seeing this is through globally spun drinks.

Many of the hottest, most buzzworthy ingredients trending over the last five years are global in origin and have made their way onto mainstream food menus. But now, we're seeing many of these ingredients find momentum on the beverage side of the menu.

Operators are highlighting Asian shishito peppers, soy sauce, saffron,

kosho, fish sauce, gochujang and seaweed in nonalcohol and adult beverages, while Mexican guacamole-inspired drinks and North African harissa infusions have also been noted.

Source: Technomic Ignite menu data

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ON THE MENU

Harissa Explains it All

blended rums, apricot and **harissa** cordial and craft sour mix
(Committee Ouzeri + Bar in Boston)

Shishito Margarita

shishito pepper-infused tequila and fresh lime (Boqueria in Chicago)

Le Smoke

mezcal, elderflower, passionfruit, lime and **yuzu kosho** (Bon Temps in Los Angeles)

Mango Jang

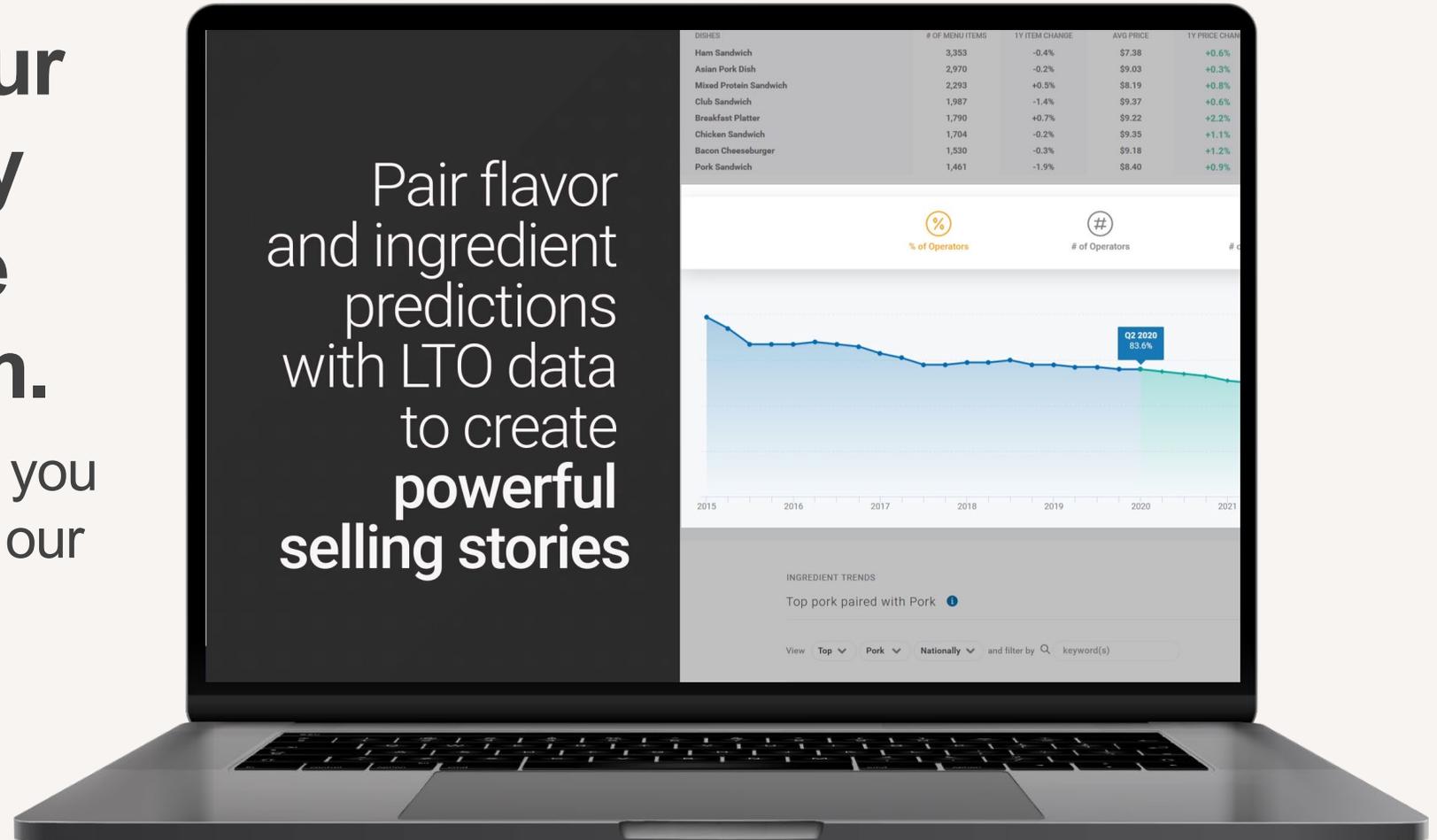
tequila, China-China, mango and **gochujang** (Oseyo in Austin, Texas)



Mango Margarita
with gochujang
Image Source:
Shutterstock

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Racing to the Drive-Thru

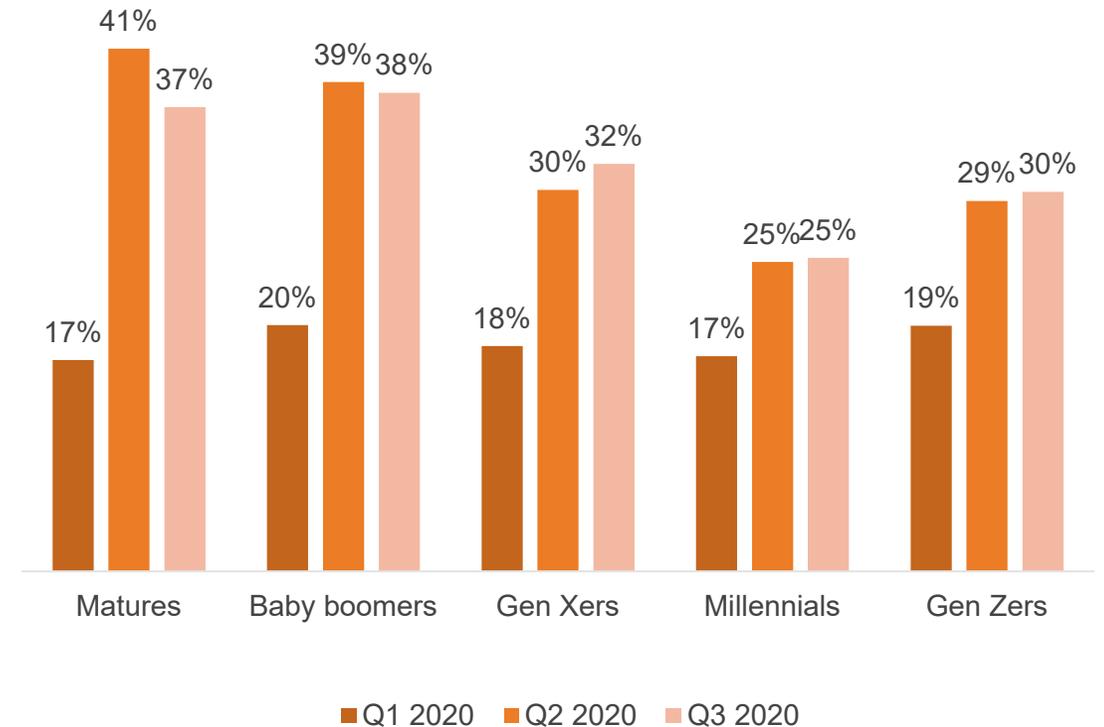
Without much warning, the COVID-19 pandemic forced immediate changes on restaurant behaviors earlier this year. Fortunately for many operators, digital ordering and restaurant delivery efforts were well underway and ramping up in previous quarters.

Although online ordering channels provided a business lifeline for many restaurants, those who touted drive-thru capabilities likely fared better than most. The drive-thru occasion is a familiar staple across generations, all of whom used these windows in relatively equal amounts prior to the pandemic.

As regional lockdowns eased, consumers who were looking to get out of the home for a meal—yet were not sure they were ready to dine in—likely turned to drive-thru lanes to satisfy their desire for restaurant-quality food.

Base: Approx. 16,200 consumers ages 18+ per quarter; Past 30-day, quick-service/fast-casual restaurant chain guests (excluding snack and family-casual concept types)
Q: Where did you order your food/drink from?
Source: Technomic Ignite consumer data

PERCENT WHO ORDERED USING DRIVE-THRU DURING THEIR MOST RECENT LIMITED-SERVICE CHAIN BRAND VISIT



Home Kitchens Inspire Menu Innovation

Since lockdowns hit markets worldwide this past winter and spring, chains have been recreating viral foods and drinks made famous during home quarantines.

Dalgona coffee made the biggest splash (and continues to), but several other home kitchen-inspired recipes have landed on the menus of restaurant operators. Here's a small sampling.

Burnt Cheesecake

Basque cheesecake popped up as a food trend a few years ago, but at-home baking during lockdowns rekindled the popularity of this visually interesting treat. It continues to make its way onto chain menus. Starbucks has a [Halloween variation](#) on its menu in Singapore.

Sushi Bakes

Cross a sushi roll with a casserole and this is what you might get. This trend started in home kitchens and made its way to countries in parts of Asia and beyond. It's been especially popular in the Philippines. Local chainlet Ooma recently added a [Ebi & Soft Shell Crab Tempura Aburi Bake](#) to its menu there.

Tom & Jerry No-Bake Cheesecake

[Popularized in Japan](#) in late spring, this cartoonish dessert has huge visual appeal for social sharing. It's not been observed on many chain menus yet but that might change soon. McDonald's recently added a [Jerry's Cheesecake](#) to its McCafe menu in Thailand.

Source: Technomic Global Foodservice Navigator Program

NEW

McCafe

Jerry's
Cheesecake

เจอร์รี่ ชีสเค้ก

1 ชิ้น 65.-

3 ชิ้น 180.-
จากปกติ 195 บาท

มูสชีสเค้กเคลือบด้วยไวท์ช็อกโกแลต
รสชาติหวานอมเปรี้ยวลงตัว

16 ต.ค. 63 - 12 ม.ค. 64 ภาพเพื่อการโฆษณา ราคาอาจแตกต่างกันในแต่ละสาขา

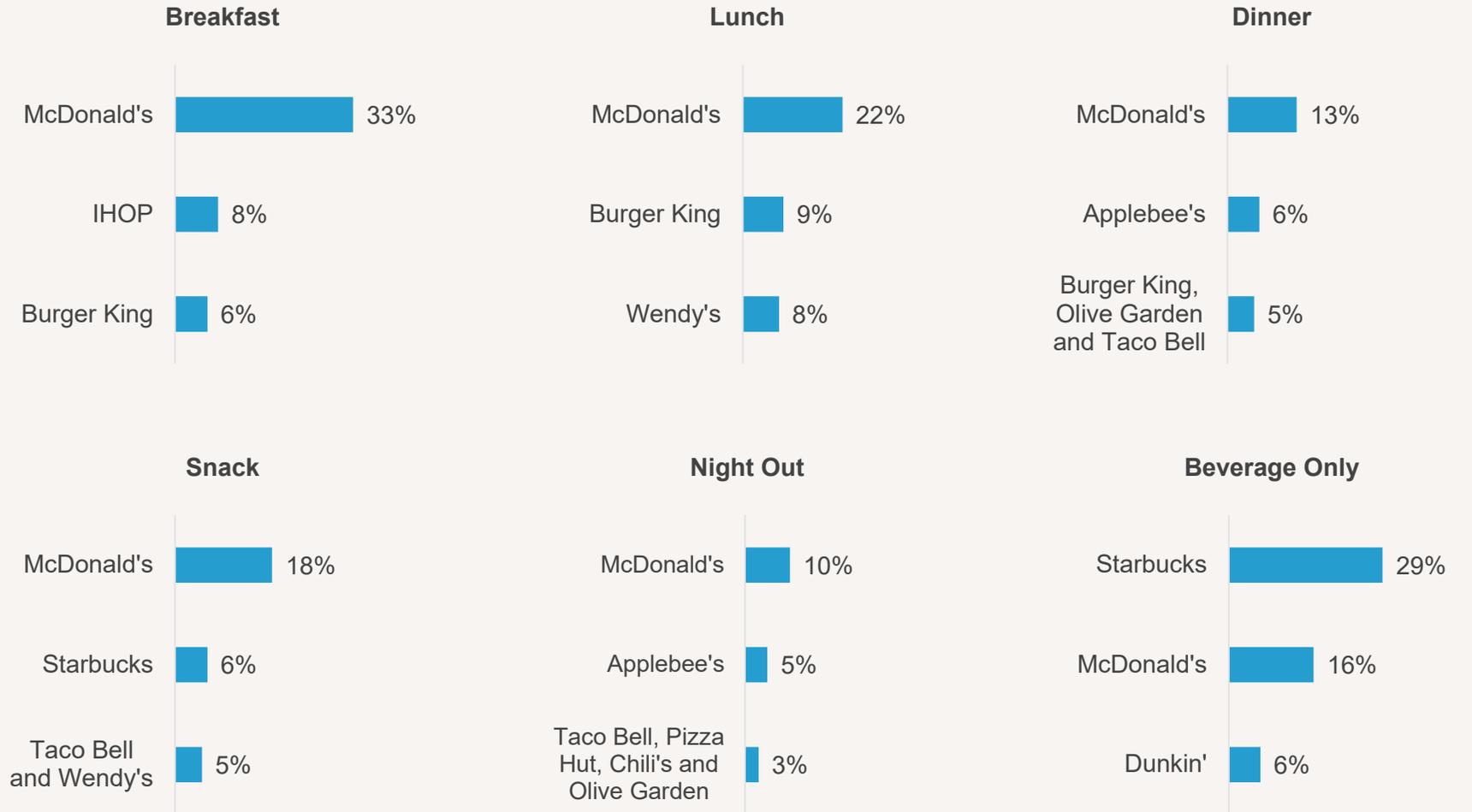
McDonald's new Jerry's Cheesecake in Thailand looks like a wedge of cheese but is made of cheesecake mousse coated in white chocolate
Image Source: ThaiPR.net

CONSUMER VISIT TRACKER

UNAIDED AWARENESS AUGUST 2020 YTD

McDonald's is top of mind among consumers for August 2020 YTD for a majority of meal types

The exception is beverage-only occasions, where Starbucks is most frequently mentioned on an unaided basis.



Source: Technomic Consumer Visit Tracker

COVID-19 DISRUPTION INDEX

COVID-19 Disruption Index is powered by [Shortest Track](#), utilizing AI, machine learning and disparate sets of data resources to quantify the potential risks that U.S. businesses face from the spread of the COVID-19 virus at the market level.

The highest index possible is 1.00, which is not good and reflects markets that are extremely disrupted. The index is updated on a weekly basis.

The COVID-19 Disruption Risk Index shares weekly updates through a business lens, rather than a health lens, and incorporates more than 20 different data signals to measure disruption and predict future impact. These signals include infection rates, deaths, state-level restrictions and social distancing

requirements, population densities and mobility, group size limitations and lifestyle risk factors contributing to spread. More information is available [HERE](#).

Change Versus Previous Week and Month

Change versus previous week/month allows users to see if the market is becoming more or less disrupted over time. Changes that are positive (+) show a move toward becoming increasingly more impacted by COVID-19 (not good). Changes that are negative (-) show a trend toward being less impacted by COVID-19 (good).

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TOP 5 MOST DISRUPTED MARKETS BY INDEX POINT CHANGE (VERSUS PREVIOUS WEEK)		COVID-19 DISRUPTION INDEX (MAX: 1.00, HIGH DISRUPTION)	PERCENT CHANGE VERSUS LAST WEEK	PERCENT CHANGE VERSUS LAST MONTH
1	Bismarck, N.D.	0.436	4.77%	19.11%
2	Sioux Falls, Iowa	0.390	4.38%	17.96%
3	Oshkosh-Neenah, Wis.	0.617	2.44%	14.34%
4	Wausau, Wis.	0.591	2.55%	14.19%
5	Billings, Mont.	0.085	20.51%	83.65%

Notes: Data updated Oct. 12, 2020

Source: [Shortest Track](#)

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

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312-876-0004
info@technomic.com
technomic.com