



Technomic

ignite

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LTO Trends to Watch

June 2024

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Introduction

Today's Agenda

Program Methodology

Top-Rated LTOs by Purchase Intent

LTO Trends With Momentum

Future Focus & Recommended Actions

For this presentation, we use the following data sources:

Technomic Ignite Menu national food trends data,
Q1 2023-Q1 2024

Technomic Ignite Menu consumer-rated LTOs
data, 1,250 LTOs tested in 2024

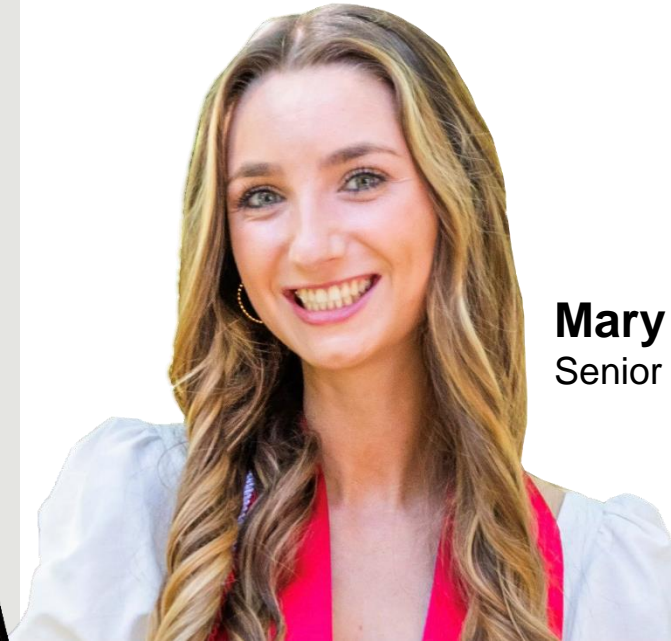
Technomic's Consumer Trend Reports

Mining of other primary data sources

Emily Ullsmith
Research Analyst

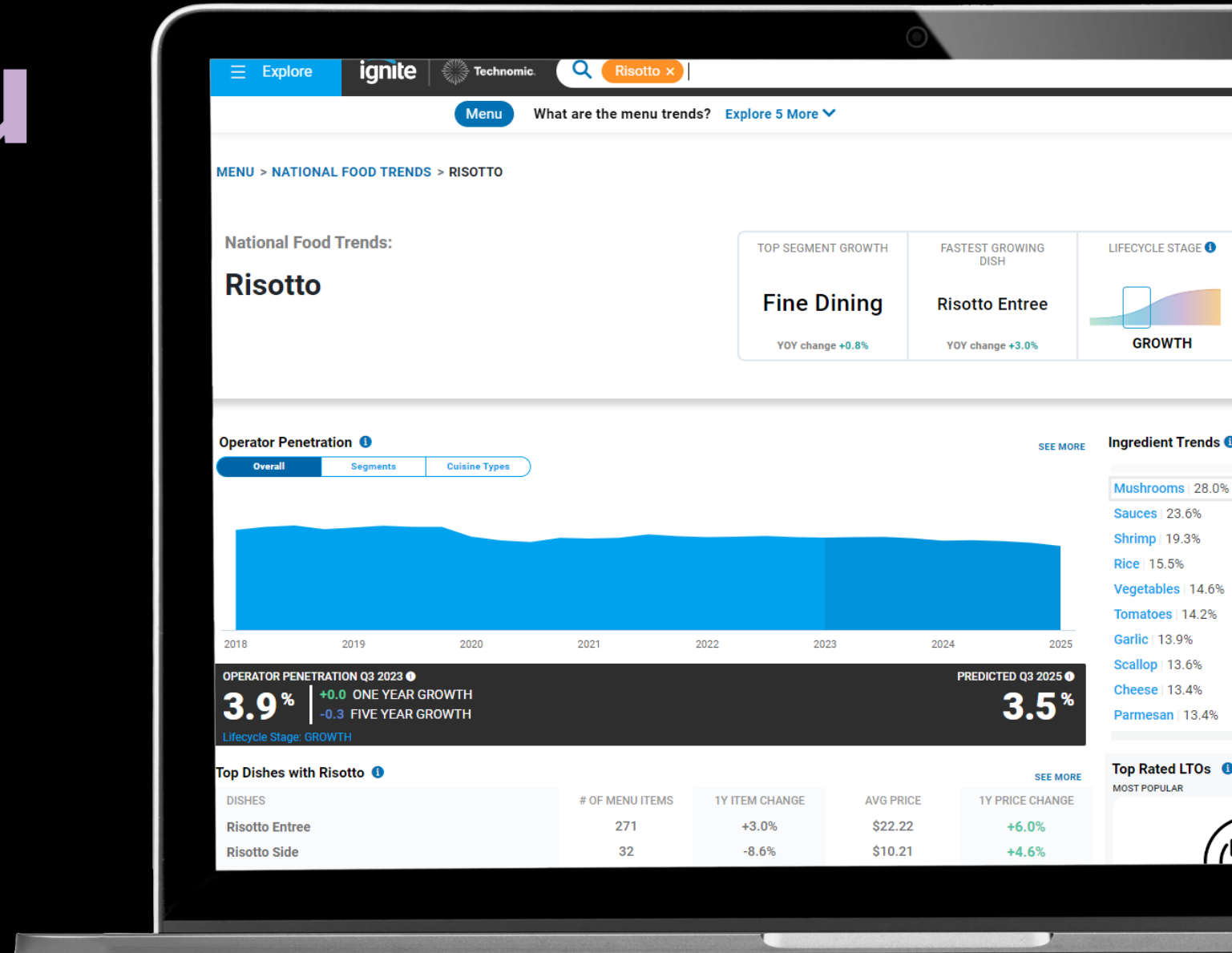


Mary Clare Metherd
Senior Research Analyst



Ignite Menu

75%
of industry sales from
35,000
food and beverage menus
14,000+
consumer-rated LTOs
from 500+ leading chains



Ignite Menu has quarterly menu updates

**Large
National Chains**

to

**Small Chains/
Independents**



**Various
Segments**

BUSINESS & INDUSTRY
COLLEGE & UNIVERSITY
LODGING
C-STORE
FOOD TRUCKS
HEALTHCARE
RETAIL
RECREATION

Ignite Menu

What's Inside?



National Food Trends

Operator menu
penetration of flavors,
dishes and ingredients

Access thousands of
publicly rated LTOs

Flavor and company
lifecycles

Menu gap analysis



Market-Level Food Trends

Regional- and market-
level menu penetration of
flavors, dishes and
ingredients



Menu Item Innovation

Real-time concept testing

Recommended
optimizations to increase
purchase intent, draw,
uniqueness and
craveability

LTO demographics, peak
launch windows and
pairing recommendations

You can slice
our data in many
ways to view the
industry at
multiple levels



SORT DATA BY:

Ingredients

Flavors

Brands

Segment

Cuisine Type

and More

Consumer-Rated LTOs Methodology

- Monthly sample of 500 foodservice users
- 250 current LTOs in the market are tested each month, which are indexed against Technomic's database of 16,000 LTOs



Source: Technomic Ignite Menu
Image source: Shutterstock

Purchase Intent

Level of appeal

Uniqueness

Ability to differentiate

Draw

Ability to drive traffic

Craveability

Ability to drive sales

Top Rated LTOs by Purchase Intent

January-May 2024

Top 5 Appetizers and Sides

Boneless Wings and Skins Sampler

Sampler

Lunch/Dinner Appetizer

Ninety Nine Restaurant & Pub

168

Our signature hand-breaded Boneless Buffalo Wings and Classic Potato Skins

Onion Rings

Lunch/Dinner Side

Checkers

166

Thick-cut onion rings battered and fried to crispy perfection

Classic,
Back to
Basics

Shareables

Mini Mozz Sticks

Lunch/Dinner Appetizer

Friendly's

168

30 mini mozzarella cheese sticks served with rich and tasty marinara sauce



Image Source: [Friendly's website](#)

Fruit Cup

Breakfast Side

O'Charley's

165

A medley of fresh strawberries, mandarin oranges, pineapple tidbits and Craisins



Loaded Potato Skins

Lunch/Dinner Appetizer

Ruby Tuesday

167

Crisp potatoes topped with melted cheddar, bacon and scallions, served with sour cream

Image Source: [Ruby Tuesday website](#)

Source: Technomic Ignite Menu consumer-rated LTOs data

Top 5 Entrees



Prime Rib

Lunch/Dinner Entree
Houlihan's

174

Marbled prime rib, slow-roasted with herbs and spices, served with horseradish, jus and a choice of two sides

Image Source: [Houlihan's website](#)

Porterhouse

Lunch/Dinner Entree
Fogo de Chao

167

An indulgent cut that includes both a New York Strip and Filet that is cooked bone-in, and served sliced tableside, delivering a juicy and rich flavor with every bite.

**Meat-Heavy
Fare**

**Customizable
Sides**

T-Bone Steak and Eggs

Breakfast Entree
Shari's Cafe and Pies

171

Satisfy your hunger with our tender and juicy 16-ounce T-bone steak, served with two farm-fresh eggs and a choice of two breakfast sides

Bone-In Ribeye

Lunch/Dinner Entree
Cheddar's Scratch Kitchen

167

This juicy and flavorful 16-ounce USDA Choice rib-eye is fire-grilled and topped with our housemade garlic butter, served with two sides

Steak consumption is on the rise

with more consumers reporting that they **eat steak at least three times a week** compared to 2021 and 2018*

16oz Bone-In NY Strip

Lunch/Dinner Entree
Smokey Bones

165

Sink your teeth into our 16-ounce bone-in New York strip steak, seasoned and grilled to your liking, served with a choice of two regular sides. Make it surf-and-turf and add some shrimp

Image Source: [Smokey Bones website](#)



Source: Technomic Ignite Menu consumer-rated LTOs data

*Base: 2,653 consumers ages 18+

*Source: Technomic 2023 Beef & Pork Consumer Trend Report

Top 5 Desserts

Ghirardelli Chocolate Chunk Brownie

Lunch/Dinner Dessert
Buffalo Wild Wings

158

A rich, chocolate fudge brownie topped with Ghirardelli chocolate chunks

Brand
Callouts

Chocolate Brownie Explosion Sundae

Lunch/Dinner Dessert
Ruby Tuesday

144

Rich chocolate brownies layered with vanilla bean ice cream, with a generous drizzle of caramel and chocolate sauces

Image Source: [Ruby Tuesday website](#)



Molten Lava Cookie

Lunch/Dinner Dessert
Crumbl

153

A scrumptious dark-chocolate cookie oozing with hot fudge and sprinkled with powdered sugar



Image Source: [Crumbl Instagram](#)

“Rich
Chocolate”

Chocolate Lava Cake

Lunch/Dinner Dessert
Bonfish Grill

151

Rich chocolate cake with a molten center, served warm, topped with fresh berries and housemade whipped cream

Turtle Cheesecake

Lunch/Dinner Dessert
Smokey Bones

151

New York style cheesecake with a graham cracker crust topped with candied pecans, chocolate and caramel sauce, garnished with whipped cream.

Source: Technomic Ignite Menu consumer-rated LTOs data

Top five purchase intent indexes

Top 5 Beverages



Fresh Watermelon Margarita

Lunch/Dinner Adult Beverage

Uncle Julio's

151

Muddled watermelon, freshly squeezed lime juice and 100% agave Lunazul tequila and St-Germain

Image Source: [Uncle Julio's website](https://www.unclejulios.com/)

Ghirardelli Hot Chocolate

Breakfast Nonalcohol Beverage

Krispy Kreme

154

Ghirardelli cocoa blended with steamed milk and topped with whipped cream and a chocolate drizzle

Tropical Fruit

Tropical Sunrise

Breakfast Nonalcohol Beverage

First Watch

150

Mango, pineapple, strawberry and lime

Perfect Pineapple Margarita

Lunch/Dinner Adult Beverage

Benihana

150

Don Julio Blanco tequila mixed with yuzu, fresh lime and pineapple juice, finished with a fresh lime and pineapple slice

Twists on Classics

Frozen Mango Lemonade

Lunch/Dinner Nonalcohol Beverage

Popeyes

148

A rich, tropical fruit flavor that balances the tart and sweet lemonade

Image Source: [Popeyes Facebook](https://www.popeyes.com/)



Source: Technomic Ignite Menu consumer-rated LTOs data

LTO Trends With Momentum

Five trends over five months

Stuffed Entrees

Lobster and Cheddar Bay Stuffed Shrimp—roasted Maine tail with shrimp topped with a brioche, Cheddar Bay Biscuit, bacon and mushroom stuffing (*Red Lobster*)

Stuffed Avocado—an avocado filled with chicken, cheese and green chiles (*Chuy's*)



Source: Technomic Ignite Menu featuring consumer-rated LTOs data
Note: Some item descriptions were shortened for length

Image Source: Shutterstock

Stuffed Entrees

Top Ingredients	% of Menu Items
Cheese	36.8%
Chicken	17.2%
Onion	14.2%
Tomatoes	13.2%
Potato	13.0%
Rice	12.5%
Vegetables	11.8%

The top ingredient in stuffed entrees is cheese, with **36.8%** of entrees highlighting it

Specifically, stuffed pastas are the leading stuffed entree type

Appetizer Samplers

Boneless Wings and Skins Sampler—hand-breaded boneless Buffalo wings and potato skins (*Ninety Nine Restaurant & Pub*)

Fan Favs With Mozzarella Sticks—mozzarella sticks, curly fries and tiny tacos with marinara, avocado lime and ranch dip cups (*Jack in the Box*)



Source: Technomic Ignite Menu featuring consumer-rated LTOs data
Note: Some item descriptions were shortened for length
Image Source: Shutterstock

Appetizer Samplers

27.3% of operators menu some form of a sampler, with fine dining being the top segment at 50.4%*

56% of consumers stated they would like to see operators apply more sampler options to appetizers or small plates at restaurants** (60% within those ages 35+)

48% of consumers are more likely to order appetizer sampler platters if they can choose which appetizers go in it**

What ingredients are on the rise over the last year in samplers?***

- Chicken 38%
- Shrimp 27%
- Chicken wings 23%
- Crab 15%
- Mozzarella 14%

*Source: Technomic Ignite Menu, Q1 2024

**Source: Technomic 2023 Starters, Small Plates & Sides Consumer Trend Report

***Source: Technomic Ignite Menu, Q1 2023-Q1 2024

Image source: Shutterstock

Nostalgic Inspirations at Breakfast

Banana Monkey Bread Pancakes—buttermilk batter with cinnamon sugar, chocolate chips, bananas, caramel, cinnamon butter, candied pecans and powdered sugar
(*Snooze, an A.M. Eatery*)

Pigs in a Blanket—pork sausage links, grilled and wrapped in a buttermilk pancake
(*Perkins Restaurant & Bakery*)

Source: Technomic Ignite Menu featuring consumer-rated LTOs data
Note: Some item descriptions were shortened for length
Image Source: Shutterstock



Nostalgic Inspirations at Breakfast



40% of consumers would like restaurants to offer more nostalgic items or flavor*

+112% predicted operator penetration by 2026**

Nostalgic Flavors to Watch

Rainbow Sprinkle

PB&J

S'mores

Bubblegum

Cotton Candy

Fruit Punch

Orange Creamsicle



*Source: Technomic 2023 Flavor Consumer Trend Report
**Source: Technomic Ignite Menu predicted two-year operator penetration growth
Image Source: Shutterstock

Cookie Butter Treats

Biscoff Cookie Butter Shake—vanilla shake with Biscoff Cookie Butter and Biscoff Cookie Crumbles (*Del Taco*)

Biscoff Cookie Butter Cheesecake Doughnut—doughnut with Biscoff Cookie Butter cheesecake filling, Biscoff Cookie Butter icing, Biscoff Cookie crumble and Biscoff Cookie Butter drizzle (*Krispy Kreme*)

Source: Technomic Ignite Menu featuring consumer-rated LTOs data
Note: Some item descriptions were shortened for length
Image Source: Shutterstock

Cookie Butter Treats

Cookie butter
milkshakes have seen

50%

growth on menus in the
last year**



20.8%

of consumers ordered
cookie butter iced coffees
during their most recent
restaurant visit*



*Source: Technomic Ignite Consumer, Q1 2023-Q1 2024
**Source: Technomic Ignite Menu, Q1 2023-Q1 2024
Image Source: Shutterstock

Cinnamon Crunch Coffees



Cinnamon as an ingredient
in lattes has seen

9.7% growth in the last year



Cinnamon Toast Crunch Latte—spicy-sweet cinnamon and brown sugar with espresso, topped with whipped cream and sprinkled with crunchy Cinnamon Toast Crunch pieces (*Scooter's Coffee*)

Iced Cinnamon Crunch Latte—espresso, milk and cinnamon syrup topped with whipped cream and cinnamon sugar, served over ice (*Panera Bread*)

Source: Technomic Ignite Menu, Q1 2023-Q1 2024
Note: Some item descriptions were shortened for length
Image Source: Shutterstock

Cinnamon Crunch Coffees

Fastest-Growing Nonalcohol Beverage Flavors*	Change in Incidence
Italian	35%
Caramel Macchiato	25%
Cinnamon	24%
Mediterranean	24%
Fruit punch	23%

Mentions of cinnamon crunch have increased **8.3%** on menus over the last year, including **+50%** in desserts and **+100%** in add-ons**

*Base: 4,699 menu items across 458 operators

*Source: Technomic Flavor Consumer Trend Report Q2 2021-Q2 2023

**Source: Technomic Ignite Menu, Q1 2023-Q1 2024

Future Focus & Recommended Actions

FUTURE FOCUS

Consumers prioritize variety, so customization in various forms will be increasingly important



RECOMMENDED ACTIONS

Offer customizable side options or sampler platters where consumers can pick and choose which dishes they would like to try to appeal to consumers looking to personalize their meals

Brand callouts will increasingly appeal to consumers looking for transparency and personal connection



Leverage popular brands in desserts and beverages especially as a way to elevate your LTOs

FUTURE FOCUS

Nostalgia will continue to be important, but each generation's version of nostalgia will modify over time



RECOMMENDED ACTIONS

Tap into the emotion of nostalgia through flavors reminiscent of childhood classics but keep up with each generation's nostalgic preferences

Simple menu items are resonating the most from a purchase intent perspective with consumers, but many operators are differentiating by offering twists on classics



Elevate the basics through new preparation styles, adding a new ingredient to a classic dish to add extra flare and new presentations of classics

**SAVE the
DATE!**

Upcoming Webinar Dates

LTO Spotlight & Review

Tue., Sept. 24, 2024, at 10 a.m.



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.**