



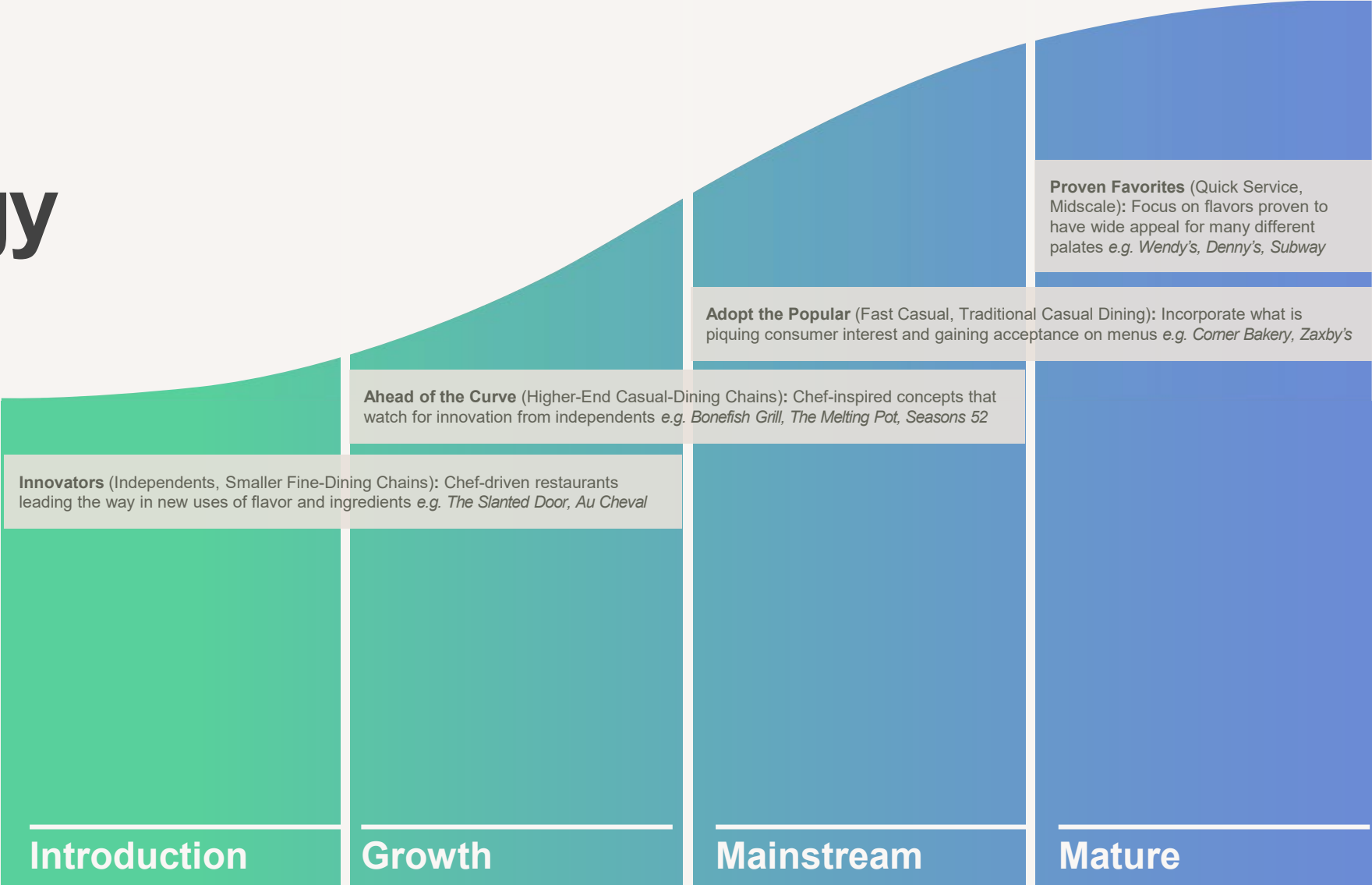
Technomic®

Lifecycle

U.S. Q2 2020

Methodology

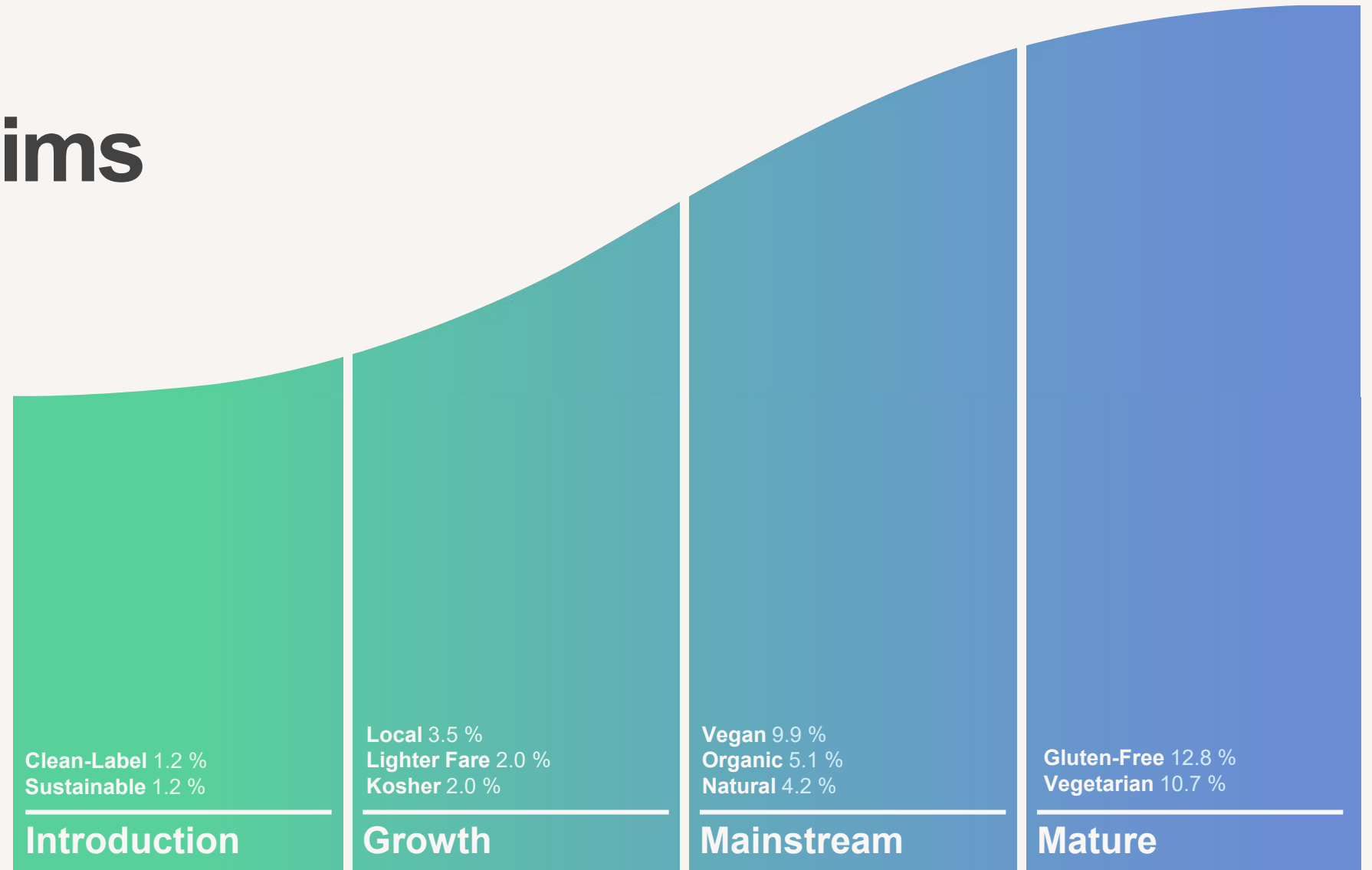
Segments tend to adopt flavors from the preceding stage.



Healthy Claims Lifecycle

What am I looking at?

Percentage of operators in each specific bucket pair appetizers with these healthy claims



Base: Q2 2020, COVID-19 Tracking
Source: Technomic Ignite menu data

Local

What are we seeing?

Local callouts in salads

RECOMMENDED ACTION:

Provide “Get To Know” spotlights about local farms, butcher shops or other local producers to put a face, name and description to the items on the menu

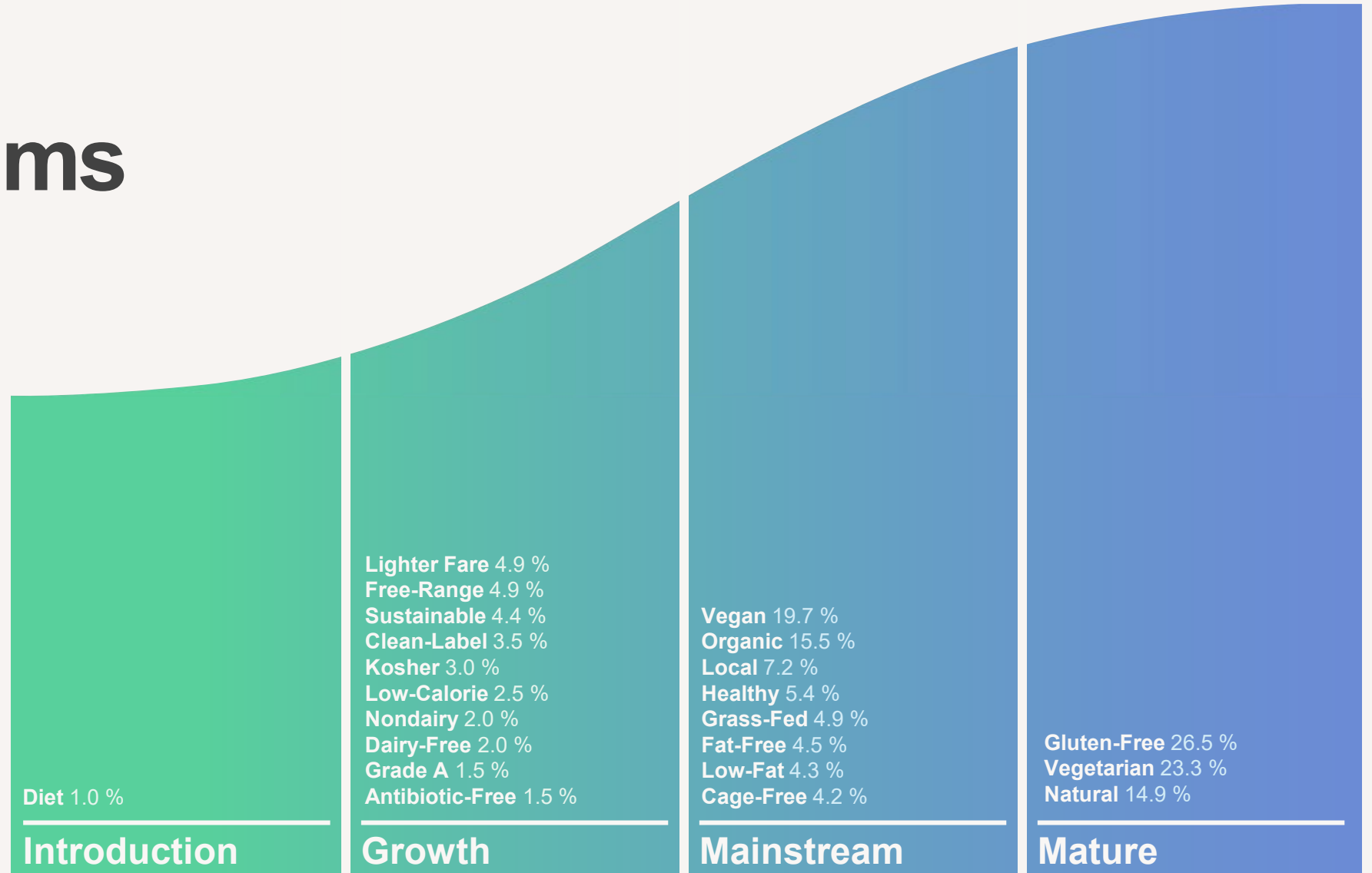


Truluck's
Salad with local goat cheese
Photo Source: Truluck's Facebook page

Healthy claims lifecycle

What am I looking at?

Percentage of operators in each specific bucket pair entrees with these healthy claims



Base: Q2 2020, COVID-19 Tracking
Source: Technomic Ignite menu data

Sustainable

What are we seeing?

Sustainable callouts in meats and seafood, including salmon, chicken and steak

RECOMMENDED ACTION:

Provide extra details on how your sustainable meats and seafood will maintain ecological balance



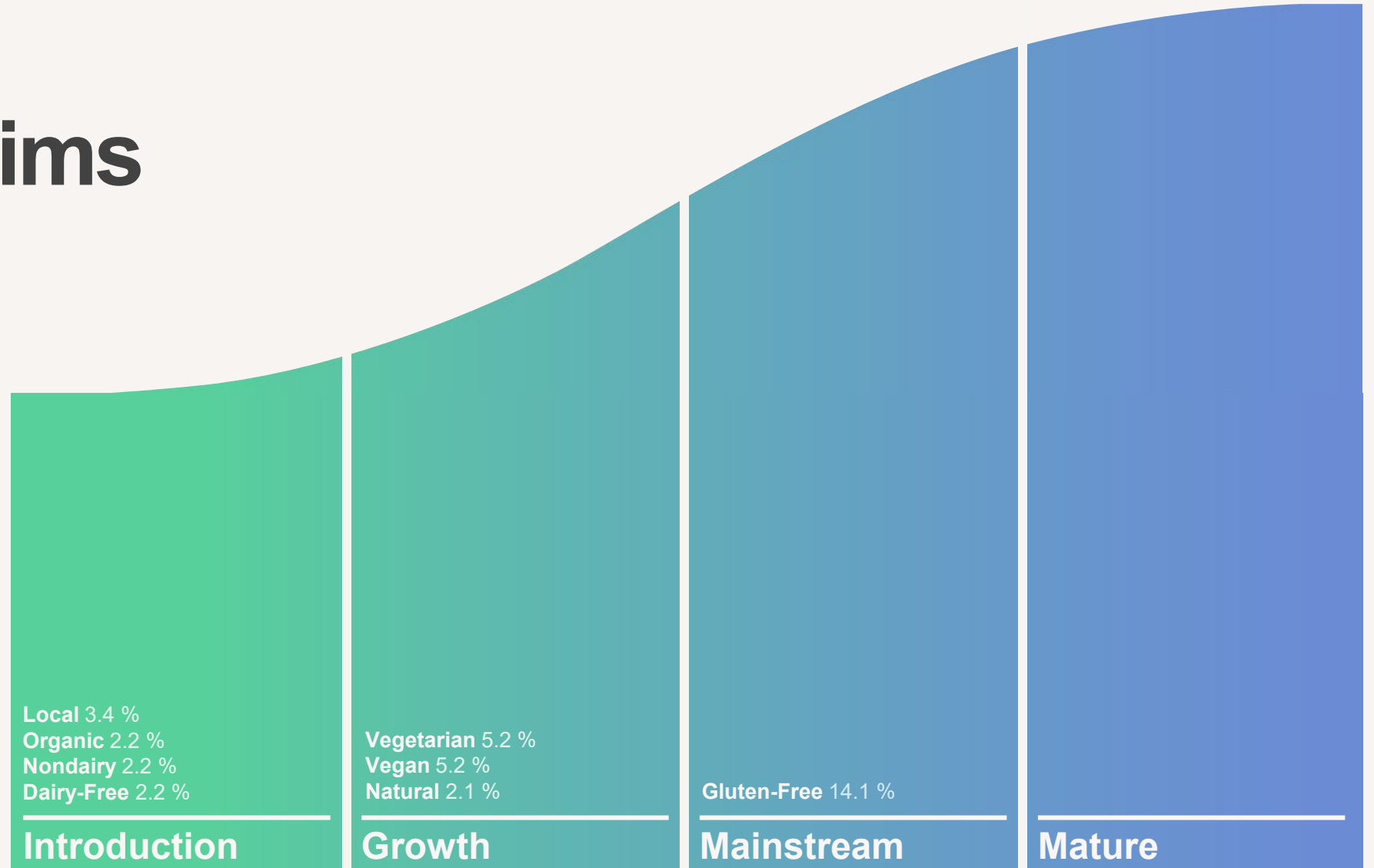
Urban Plates
Sustainably sourced
oven-baked salmon

Photo Source: Urban Plates Facebook page

Healthy Claims Lifecycle

What am I looking at?

Percentage of operators in each specific bucket pair desserts with these healthy claims



Base: Q2 2020, COVID-19 Tracking
Source: Technomic Ignite menu data

Nondairy

What are we seeing?

Nondairy callouts in ice creams, shakes, sorbets and cookies

RECOMMENDED ACTION:

If reformulating recipes isn't an option, call out dessert items that are naturally nondairy (i.e., if they were made with plant-based "dairy," such as coconut or almond) as dairy-free directly on menus

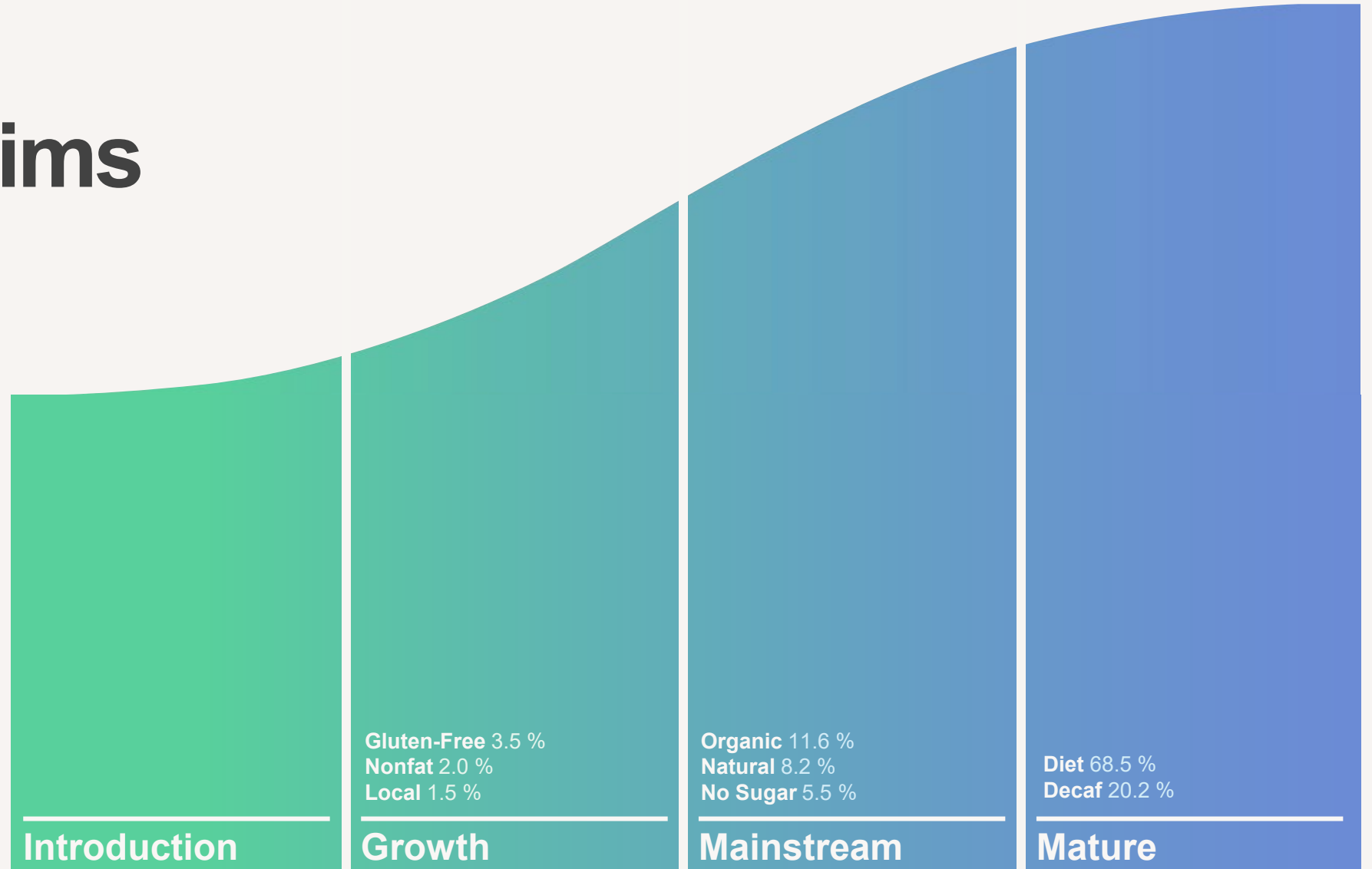


Bruster's Real Ice Cream
Nondairy ice creams made with coconut milk
Photo Source: Bruster's Real Ice Cream Facebook page

Healthy Claims Lifecycle

What am I looking at?

Percentage of operators in each specific bucket pair nonalcohol beverages with these healthy claims



Base: Q2 2020, COVID-19 Tracking
Source: Technomic Ignite menu data

Gluten-Free

What are we seeing?

Gluten-free callouts in juices and smoothies

RECOMMENDED ACTION:

Place a symbol (such as a “GF” in a circle) on websites and menus that signify gluten-free items



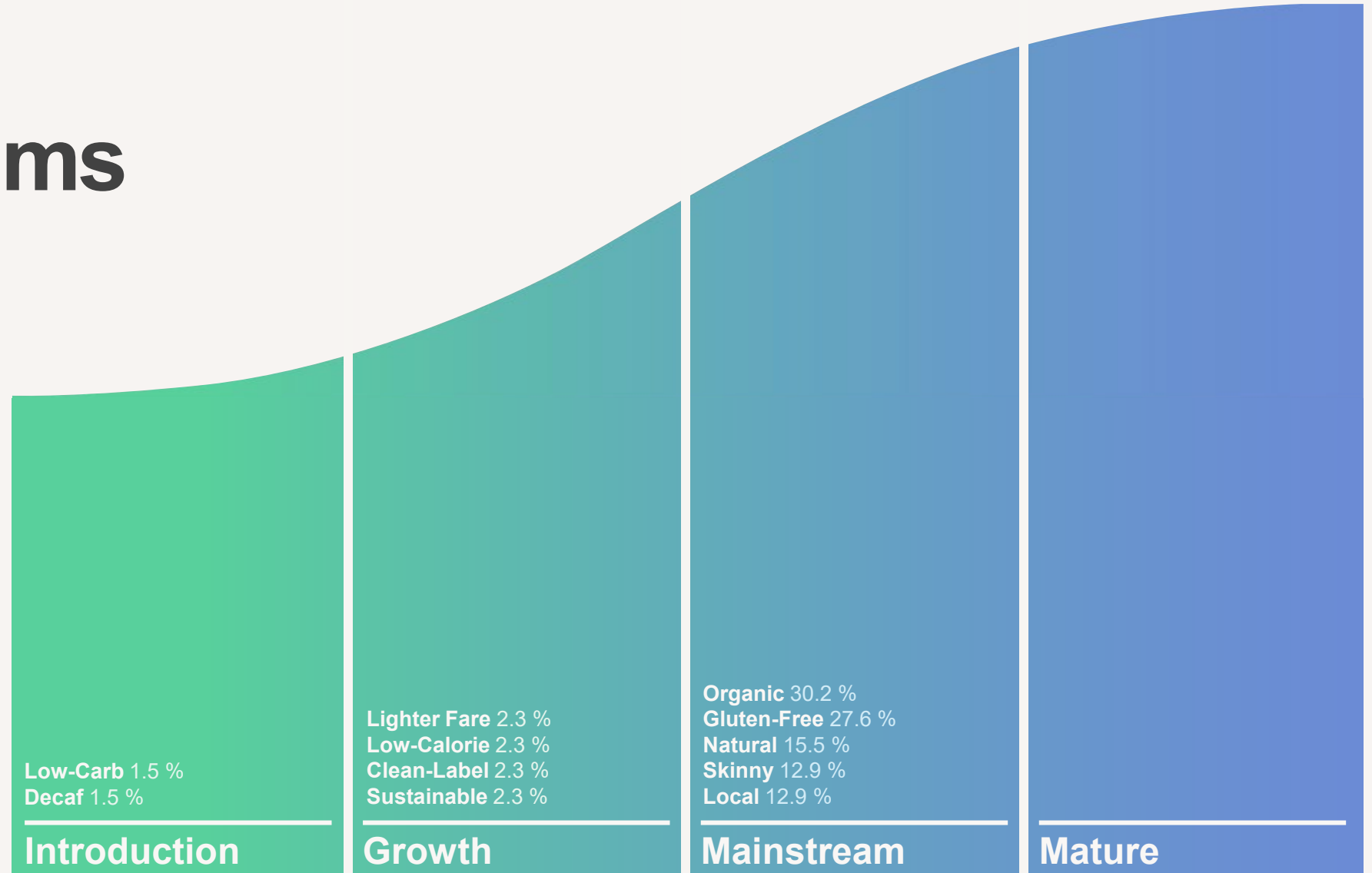
Denny's
Gluten-free smoothies
Photo Source:

https://eu2prddennyscdnstr.blob.core.windows.net/cms/menu/product/drinks-smoothies_thumbnaillarge_2017-04-14-16-31-45.jpg

Healthy claims lifecycle

What am I looking at?

Percentage of operators in each specific bucket pair adult beverages with these healthy claims



Base: Q2 2020, COVID-19 Tracking
Source: Technomic Ignite menu data

Low-Calorie

What are we seeing?

Low-calorie callouts in beer and seltzer

RECOMMENDED ACTION:

Appeal to health-conscious consumers ages 21 and older by marketing these options as guilt-free ways to imbibe while maintaining fitness or wellness goals



Iron Hill Brewery & Restaurant
Low-calorie hard seltzers

Photo Source: <https://www.brewbound.com/news/iron-hill-brewery-releases-riveting-hard-seltzer/>