

## Lifecycle

U.S. Q2 2020

## Methodology

Segments tend to adopt flavors from the preceding stage.

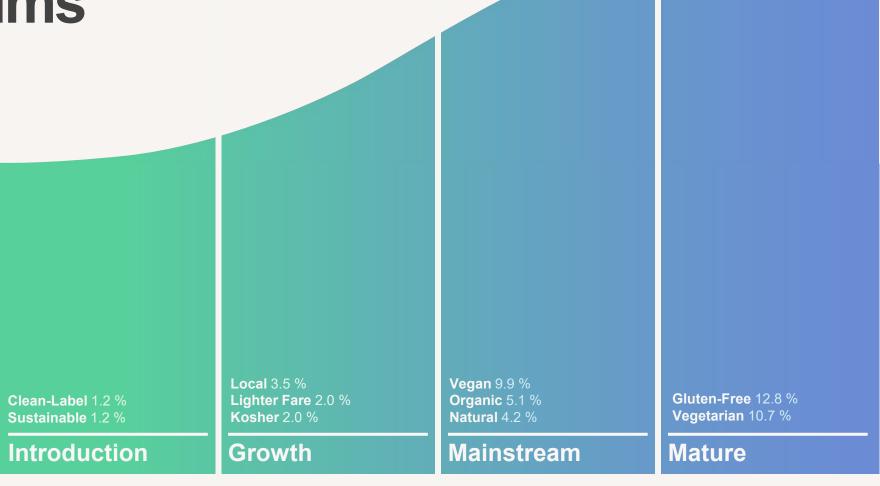
Adopt the Popular (Fast Casual, Traditional Casual Dining): Incorporate what is piquing consumer interest and gaining acceptance on menus e.g. Comer Bakery, Zaxby's Ahead of the Curve (Higher-End Casual-Dining Chains): Chef-inspired concepts that watch for innovation from independents e.g. Bonefish Grill, The Melting Pot, Seasons 52 Innovators (Independents, Smaller Fine-Dining Chains): Chef-driven restaurants leading the way in new uses of flavor and ingredients e.g. The Slanted Door, Au Cheval Mainstream Introduction Growth **Mature** 

Proven Favorites (Quick Service, Midscale): Focus on flavors proven to have wide appeal for many different palates e.g. Wendy's, Denny's, Subway

# 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



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 Diet 1.0 %
Introduction

Lighter Fare 4.9 %
Free-Range 4.9 %
Sustainable 4.4 %
Clean-Label 3.5 %
Kosher 3.0 %
Low-Calorie 2.5 %
Nondairy 2.0 %
Dairy-Free 2.0 %
Grade A 1.5 %
Antibiotic-Free 1.5 %

Mainstream

**Vegan** 19.7 %

Healthy 5.4 %

Fat-Free 4.5 %

**Low-Fat** 4.3 %

Grass-Fed 4.9 %

Cage-Free 4.2 %

**Organic** 15.5 % **Local** 7.2 %

Gluten-Free 26.5 % Vegetarian 23.3 % Natural 14.9 %

Mature

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

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Growth

### 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



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



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

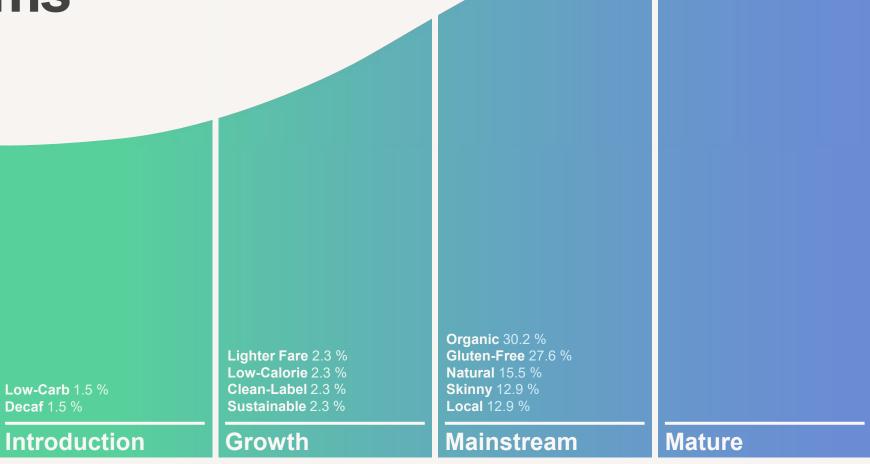


https://eu2prddennyscdnstr.blob.core.windows.net/cms/menu/product/drinks-smoothies\_thumbnaillarge\_2017-04-14-16-31-45.jpg

# 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



Photo Source: https://www.brewbound.com/news/ironhill-brewery-releases-riveting-hard-seltzer/