# BURGERS

a SNAP! keynote

explore consumer attitudes and behaviors toward burgers

understand what motivates consumers to eat more burgers

contrast generational affinities for burger builds and ingredients

compare need states between at home and foodservice

discover opportunities to ease operator pain points

examine the burger menu landscape and what's trending

**Consumers LOVE Burgers.** In fact, they are one of the most loved foods around (ranking #8 out of nearly four-thousand foods and beverages according to Datassential's *FLAVOR*). Burgers are also frequently consumed – more than three quarters of consumers eat a burger both at home *as well as* at a restaurant at least once per month. Numerous burger trends like plant-based as well as upscale cheese, condiment, and meat additions have garnered much consumer interest. Although classic, traditional burger builds remain as appealing as ever. Discover how operators are approaching these trends and so much more. **Take a large bite and savor all the rich burger data you could ever need.**

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# BURGERS: a SNAP! keynote

## Topics covered

**examine consumer burger consumption and preferences**

- view just how often and where consumers eat burgers
- learn which ingredients appeal to which consumers by generation
- dive into when consumers eat burgers and what role these handhelds play

**find motivators for eating more burgers – at or away from home**

- get a read on what consumers like and dislike when considering a burger
- contrast which ingredient attributes consumers will pay a premium for
- look at which specific burger ingredients consumers see as most important
- compare the most-liked buns, proteins, cheeses, toppings, sides, and more

**identify operator challenges and burger menuing approach**

- assess how operator burger sales have faired during a pandemic year
- find out how operators perceive the role of burgers in their businesses
- understand the challenges and barriers operators face menuing burgers
- follow purchasing habits when it comes to ordering individual ingredients

**explore the latest menu trends and consumer ratings**

- see how plant-based burgers have taken burgers by storm and learn just which consumers these meat-alternatives appeal to
- track burger menu penetration by foodservice segment over time
- study the fastest-growing burger varieties and flavors on menus

## From the report

- OPERATORS

**87%** allow patrons to customize their burgers to some extent

**66%** sell the most burgers during lunchtime

**58%** change their burger offerings at least once per year

- CONSUMERS

**79%** eat burgers away from home at least once per month

**71%** find bacon as a burger topping appealing

**33%** are interested in trying plant-based burgers

1,500 consumers demographically balanced to the general population

316 restaurant, retail, and on-site operators

report

x-tab tool

webinar

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# BURGERS

## THE TAKEAWAYS

# 1. US consumers eat A LOT of burgers.

It's no surprise: burgers are one of the most loved foods. According to Datassential FLAVOR, burgers rank 8th out of nearly 4,000 food and beverages in terms of consumer affinity, placing it in the ranks of other legendary stalwarts like ice cream and pizza.

Burgers are also consumed very frequently. More than three quarters of consumers eat a burger at home as well as at a foodservice establishment at least once per month. In addition, 68% of consumers eat a burger from a quick-service restaurant at least once per month, their favorite venue overall for consuming these items. 28% of consumers also report an increase in their burger consumption over the last year, beating out the 21% who claim to have decreased their burger intake (the rest of consumers claim they're still eating the same amount of burgers).

**3.3**

Median number of BURGERS consumed AT HOME in the past 30 days

**3.8**

Median number of BURGERS consumed AWAY FROM HOME in the past 30 days

**76%**

Of consumers eat burgers AT HOME at least once per month

**79%**

Of consumers eat burgers AWAY FROM HOME at least once per month

**A8: [Among those who ate a burger in the past month] How many times within the PAST 30 DAYS have you had a burger?**

**A9: In general, how often would you say you eat burgers?**

**68%**

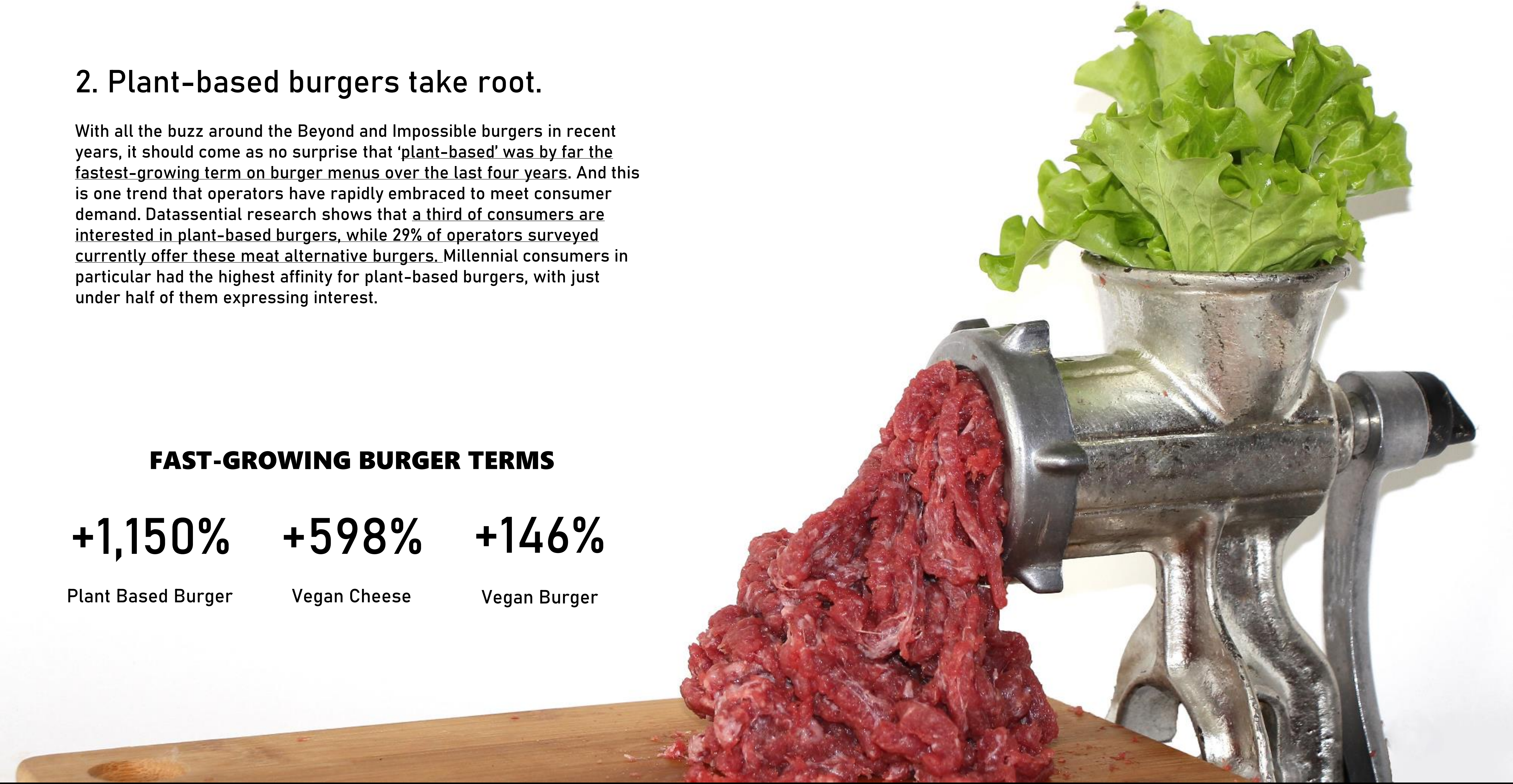
Of consumers order a burger from a QSR at least once per month

# 2. Plant-based burgers take root.

With all the buzz around the Beyond and Impossible burgers in recent years, it should come as no surprise that 'plant-based' was by far the fastest-growing term on burger menus over the last four years. And this is one trend that operators have rapidly embraced to meet consumer demand. Datassential research shows that a third of consumers are interested in plant-based burgers, while 29% of operators surveyed currently offer these meat alternative burgers. Millennial consumers in particular had the highest affinity for plant-based burgers, with just under half of them expressing interest.

## FAST-GROWING BURGER TERMS

| +1,150% | +598% | +146% |
|---|---|---|
| Plant Based Burger | Vegan Cheese | Vegan Burger |



# 3. But don't neglect the meat.

"Plant-based" may be the largest trend currently in burgers, but consumers still love their meat. In fact, more than half claim that meat burgers are superior to their vegan and vegetarian counterparts. Upscale meat options are also one of the most-favored mega trends among consumers, with 41% expressing interest. Despite this, operator adoption of upscale meats as patties or toppings on burgers is still very low. Operators can close this gap by incorporating more upscale burger meats like brisket, pork belly, Wagyu beef, and more.

Many consumers are also interested in transparency around the varieties of beef served in burgers when dining at foodservice establishments. More than any other ingredient attribute, consumers are willing to pay more for burgers made with grass-fed beef as well as patties made with high quality breeds and grades of beef. Nearly half also claim that they would be willing to pay more for burgers that came with detailed information on the proteins used.

Additionally, bacon is one of the most favored ingredients to have on a burger. When asked which burger toppings consumers found appealing, bacon was the most loved topping, beating out other top favorites like lettuce, tomato, and onions.

Meat burgers are superior to vegetarian and/or vegan burgers


Vegetarian/vegan burgers can be just as good as meat burgers

***C3: Please select which of these statements most describes your attitudes toward burgers.***

# 4. Operators have a long runway for experimentation.

From aioli to tzatziki and even brioche to waffles, nearly anything you can think of can be used in burger construction. And consumers *are interested* in atypical burger ingredients. Mega trends like sweet flavors, whimsical carriers like waffles, and even bowls made from burger ingredients all carry substantial appeal that outweighs current operator adoption of these burger innovations.

Controlling the cost of ingredients was reported as the top challenge operators faced when menuing burgers. But still, only 13% claimed that using ingredients in their burgers that aren't used in other dishes posed a difficulty. Operators have an expanded opportunity to fit even the most unusual ingredients used in other dishes onto their burgers — and they likely would find a happy audience.

| | Consumer Interest | Operators Offering | Operator/ Consumer Gap |
|---|---|---|---|
| Burger bowls | 34% | 4% | -30% |
| Next-level cheddar | 55% | 26% | -29% |
| Upscale meats | 41% | 13% | -28% |
| Whimsical or sweet carriers | 30% | 6% | -24% |
| Sweet flavors | 30% | 7% | -23% |
| Breakfast/brunch burgers | 41% | 20% | -21% |
| Mac and cheese | 37% | 16% | -21% |

**C4: How interested are you in trying these items or burger trends?**

**Operator C1: Which trending burger items do you offer or plan to offer?**

## 5. Millennials are the likely target for experimental, creative burgers.

Across the board, Millennials index high in terms of appeal for just about every burger component possible in comparison to their other generational counterparts (even younger Gen Z consumers). This goes the same for both traditional and atypical burger ingredients.

In terms of mega trend interest, people in Gen Z aligned more closely with Gen Xers than with their closer counterparts in age, leaving Millennials seemingly alone in their significant interest for emerging burger flavors and formats.

Here are some fun, noteworthy mentions of burger ingredients that index well with Millennial consumers, demonstrating that a substantial amount of consumers in this generation are very open to burger innovation. These are ones they find appealing at a statistically higher rate in comparison to all other age demographics – beets (34%), hummus (34%), pesto (40%), pico de gallo (44%), waffle buns (44%), gruyere cheese (44%), and teriyaki sauce (45%),

# 6. Still, nothing beats the classics.

While interest in unique and atypical burger offerings far outpaces availability in foodservice, ingredients traditionally associated with burgers still hold the widest appeal among consumers overall.

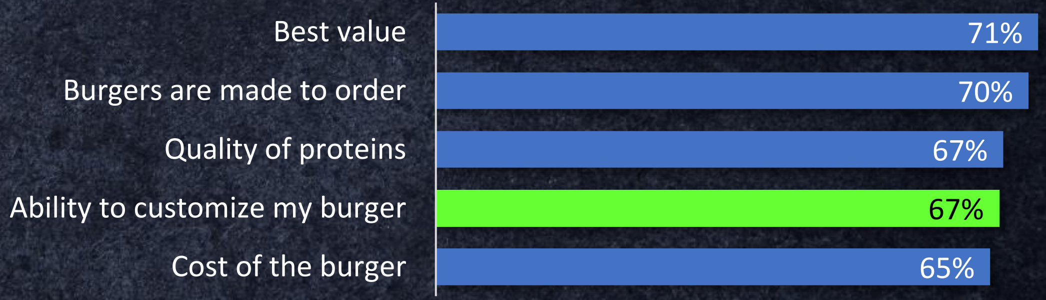
On top this, the classic pairings of French fries and soda are the most preferred sides to have alongside burgers. Consumers place the most value on great taste and a good quality of ingredients when eating burgers, so getting this formula down right regardless of what ingredients are used will please many.

# 8. Customization is key.

The ability to customize and make modifications to burgers is a trait that many value. More than one-third of consumers claim that they will pay more for a burger if they can customize it. Also, when consumers want to order a burger away from home, having the ability to customize it is among the top 5 most important characteristics they value in these handhelds.

On the operator side of things, customization is generally the rule, not the exception. Most foodservice establishments that serve burgers allow their guests to make modifications, and slightly more than half offer build-your-own burgers.

*% of consumers selecting "extremely important" or "very important."*




**B5: When you want a burger away from home at a restaurant or other eating establishment, how important are the following attributes?**

# THOUGHT STARTERS

## Burgers are the biggest blank canvas for operators and supplier partners.

The sheer breadth of burger components available to menu makers and appealing to different consumer groups presents some challenges but far more opportunities to grow sales.

Consider that people's most-loved proteins, cheeses, condiments, and toppings all fit perfectly on burgers. Yet the fastest-growing burger varieties are new plant-based and breakfast/brunch offerings. About two consumers in five say all components of a burger are equally important, and there's a fairly even split in their preferences between traditional and unique ingredients.

In response, few operators struggle to menu burgers or to hold all those possible ingredients in their inventory. But they *do* have a harder time thinking of new burgers to put them all together.

Manufacturers and distributors trying to get the next successful ingredient into their clients' hands ought to offer not only what's new, but also what pairs with ubiquitous, loved burger flavors.

## THOUGHT STARTERS

# Burgers will weather any storm

The coronavirus pandemic has had a dramatic impact on the foodservice industry, and some restaurant operators in particular claim that their burgers sales have declined during this time. Yet despite this, many operators plan on building out their burger offerings in the coming year, making additions like incorporating more ingredients for customization as well as increasing the number of burgers offered overall.

Burgers are one of the most loved foods and will always be in demand. And although foodservice in many cases experienced an unexpected pivot to more takeout-orientated orders, many consumers see burgers as great takeout food.

THOUGHT STARTERS

## Differences in the ideal burger arise between at-home and foodservice, yet we'll never cut corners on beef.

Whether decision makers are trying to merchandise beef in a retail setting for consumers' home cooking or developing the menu of a restaurant built around burgers, they should lean into the kinds of quality descriptors that emphasize how the burger protein was sourced. In away-from-home settings, grass-fed beef and high-grade heritage breeds fetch the biggest premium. Consumers are a little less willing to pay more for what they think is inherent to dining out, such as convenience, value, and customization, all of which they rate as most important aspects.

At home, people value taste above all, and carefully consider all parts of the build, including cheese, buns, and toppings. They are most willing, however, to spend more money on the protein.

# BURGERS

## MEGA TRENDS

# BURGER MEGA TRENDS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# BURGERS

## NEW DIRECTIONS & GROWTH

| fastest-growing burgers
| changes in consumer behavior

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## Overall, most consumers feel that all components of a burger are equally important, though many younger consumers favor individual components such as the cheese and individual toppings.

| *% of consumers selecting most important…* | Total n=1,500 | Gen Z n=158 | Millennial n=459 | Gen X N=459 | Boomer+ n=424 |
|---|---|---|---|---|---|
| They are all equally important | 39% | 25% | 28% | 40% | 55% |
| Cheese | 20% | 20% | 27% | 21% | 11% |
| Patty protein | 14% | 15% | 17% | 14% | 9% |
| Toppings | 13% | 19% | 14% | 11% | 13% |
| Condiments/sauces | 8% | 15% | 8% | 8% | 4% |
| The bun/carrier | 4% | 5% | 5% | 4% | 4% |
| Other | 2% | 2% | 1% | 2% | 3% |

**B1: What do you consider to be the most important component of a burger?**

n=1,500

# BURGERS

## CONSUMER PERSPECTIVES

| most-loved varieties
| purchase motivators
| attribute importance
| how consumers build their ideal burger

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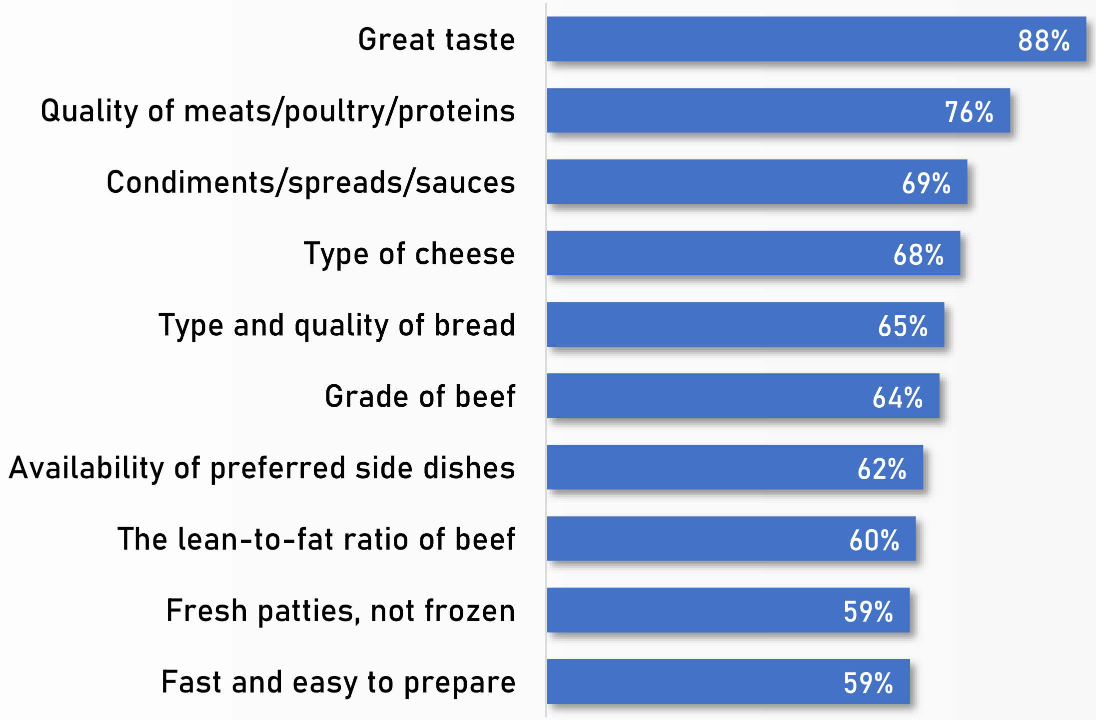
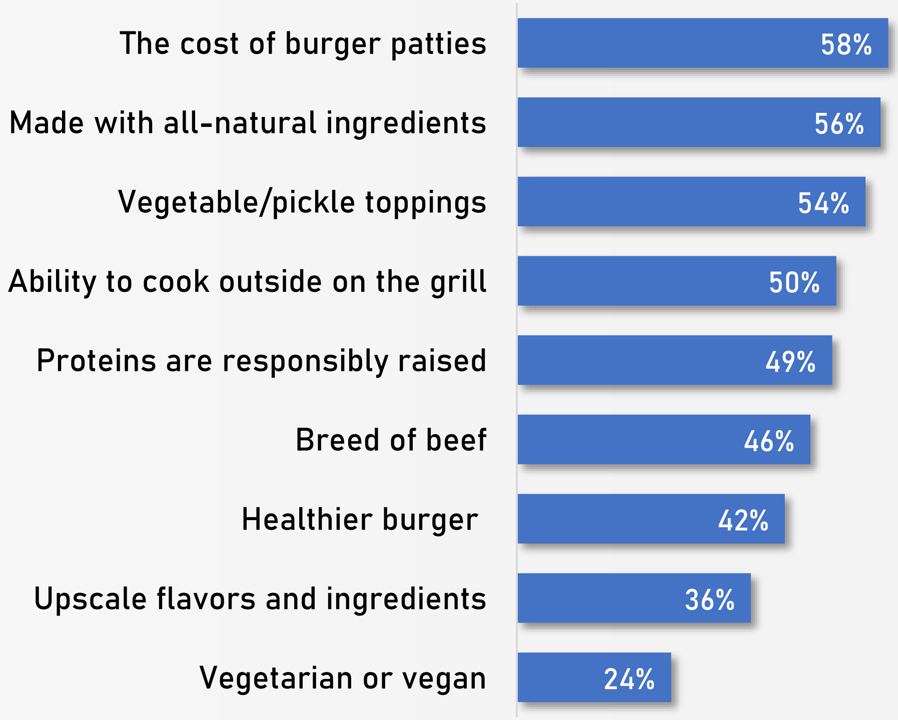
# Taste, quality, and the variety of ingredients of burgers are most important to consumers when eating at home.

Less concern is placed on cost, healthfulness, and the specific format of ingredients.

*% of consumers selecting "extremely important" or "very important."*




**B3: When you want a burger at home, how important are the following attributes?**

n=1,500

# BURGERS

## OPERATOR PERSPECTIVES

| varieties offered
| attribute importance
| operator needs

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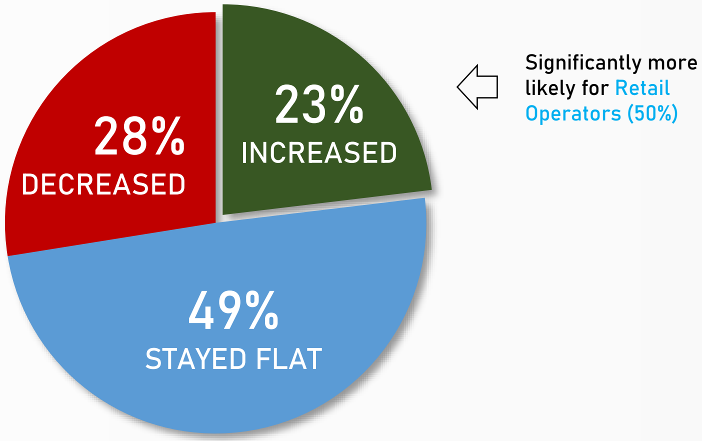
# Many operators plan on to make several changes to their burger menus in the next six months.

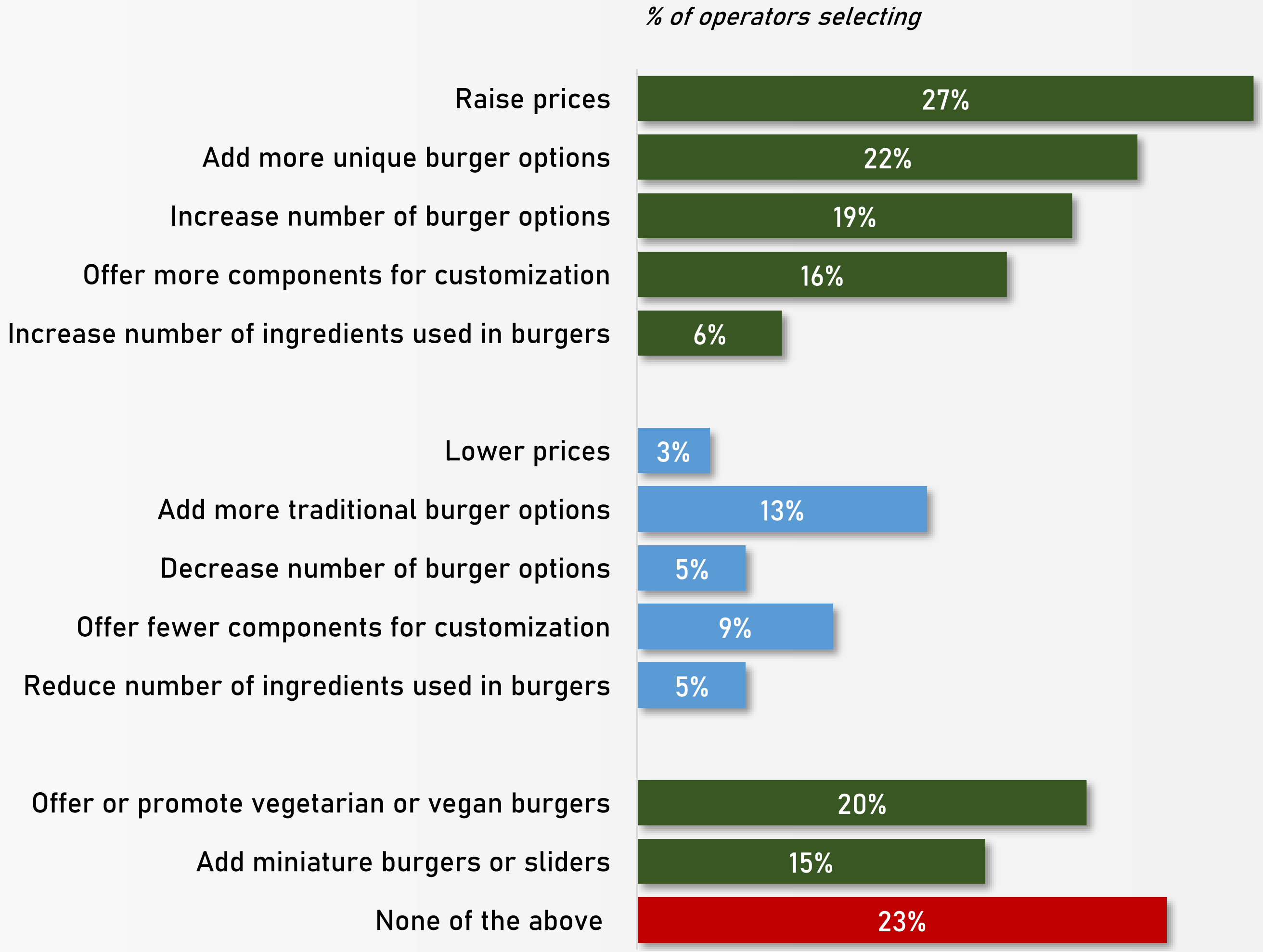
Slightly more operators reported a decrease in burger sales rather than an increase over the last year, though half of all retail operators saw their burger sales increase.

## Operators' Change in Burger Sales




**Operator A10: How have your burger sales changed over the past year?**

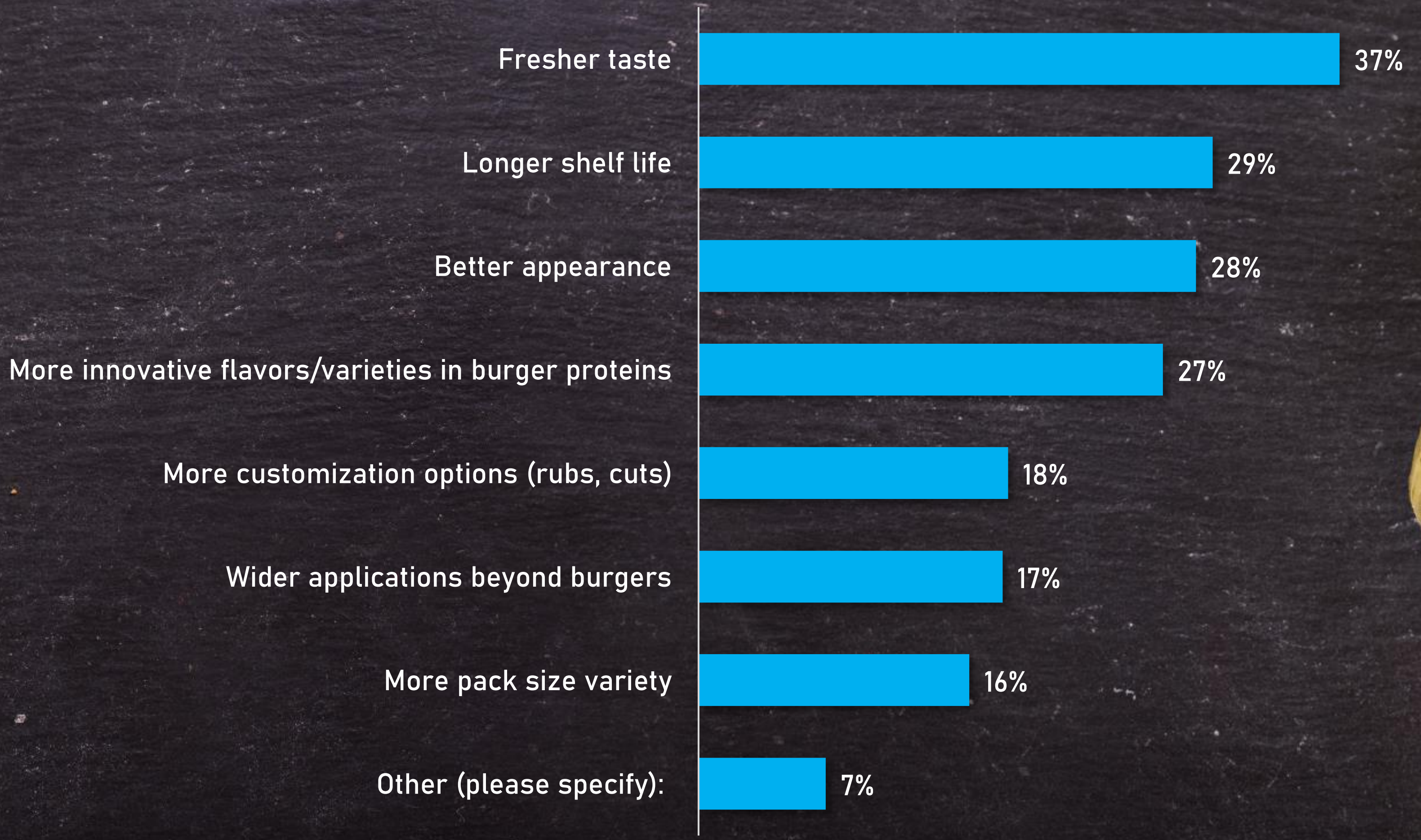
## Planned Changes to Burger Offerings




**Operator A13: Which of the following changes, if any, do you plan to make to your burger offerings within the next six months?**

## OPERATOR NEEDS

# Menu makers want to thread the needle with proteins, prizing a longer shelf life that might come from frozen product, but also fresher taste, which would not.




**Operator B2: Which of the following improvements to burger proteins would address your burger "pain points"?**

n=316

# BURGERS

## MENU DEEP DIVE

| top and trending burger components
| Menu Adoption Cycles
| menu penetration across the industry

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## Plant-based burgers have experienced triple-digit menu growth over the past four years, becoming one of the most prevalent varieties on menus.

Breakfast burgers likewise have seen double-digit menu growth in the past year and four years, although operator adoption is still relatively low.

### BURGERS

ranked by menu penetration

| | QSR | FAST CASUAL | MIDSCALE | CASUAL | FINE DINE | ALL | 1-YEAR GROWTH | 4-YEAR GROWTH |
|---|---|---|---|---|---|---|---|---|
| Cheeseburger | 62.1% | 45.5% | 60.5% | 50.6% | 31.7% | 53.1% | -1% | -1% |
| Veggie Burger | 22.6% | 39.4% | 28.0% | 22.8% | 7.0% | 23.2% | -3% | +2% |
| Bacon Cheeseburger | 27.7% | 20.2% | 24.6% | 15.5% | 4.0% | 19.0% | -3% | -5% |
| Turkey Burger | 14.0% | 30.3% | 18.8% | 13.6% | 4.0% | 14.6% | -9% | -16% |
| Patty Melt | 10.9% | 6.1% | 23.8% | 8.0% | 2.0% | 11.2% | -1% | -6% |
| Slider | 6.2% | 13.1% | 10.4% | 13.5% | 8.0% | 10.9% | +7% | +12% |
| Plant Based Burger | 4.9% | 17.2% | 9.1% | 10.6% | 6.0% | 9.0% | +64% | +++% |
| Mushroom Swiss Burger | 9.1% | 7.1% | 11.4% | 6.6% | 1.0% | 7.6% | -7% | -10% |
| Bleu Burger | 3.6% | 9.1% | 7.9% | 8.3% | 2.5% | 6.8% | -16% | -17% |
| Angus Burger | 5.3% | 4.0% | 7.2% | 7.2% | 6.5% | 6.6% | -3% | -10% |
| BBQ Burger | 5.5% | 11.1% | 6.4% | 6.8% | 0.0% | 6.1% | -10% | - |
| Cheddar Burger | 4.7% | 6.1% | 6.4% | 7.0% | 1.5% | 5.9% | -6% | -6% |
| Black Bean Burger | 4.0% | 13.1% | 5.2% | 5.6% | 1.5% | 5.2% | +3% | +38% |
| Mini Burger | 2.3% | 4.0% | 5.0% | 5.6% | 3.5% | 4.6% | - | -14% |
| Chicken Burger | 4.3% | 15.2% | 3.5% | 3.8% | 0.5% | 4.0% | +4% | +2% |
| Double Burger | 10.6% | 8.1% | 4.3% | 1.3% | 0.5% | 4.0% | -3% | -14% |
| Steak Burger | 2.6% | 3.0% | 3.3% | 4.7% | 2.5% | 3.7% | -12% | -13% |
| Pizza Burger | 7.9% | 3.0% | 3.5% | 1.6% | 0.5% | 3.2% | -1% | -2% |
| Garden Burger | 4.9% | 1.0% | 5.6% | 1.6% | 0.0% | 2.9% | -10% | -21% |
| Breakfast Burger | 2.1% | 5.1% | 2.3% | 3.4% | 2.0% | 2.9% | +14% | +94% |

+++ indicates growth over 200%

# BURGERS

## LTO STRATEGY REVIEW

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## No one industry segment claims burgers as a workhorse of its LTO strategy, but its presence across the restaurant space is consistent.

Besides salad, burger is the most likely menu category to account for the same — albeit small — share of limited-time introductions in all full-service sectors from midscale to upscale fine dining.

### CHAIN LTO INTRODUCTIONS BY ITEM TYPE

% of total introductions, Jan 2016 – Nov 2020)

| | QSR | FAST CASUAL | MIDSCALE | CASUAL DINING | FINE DINING |
|---|---|---|---|---|---|
| Alcoholic Beverage | 1% | 0% | 1% | 23% | 24% |
| Appetizer & Side | 7% | 5% | 4% | 15% | 17% |
| Breakfast Dish | 2% | 4% | 22% | 2% | 0% |
| Breakfast Pastry | 6% | 6% | 2% | 0% | 0% |
| Breakfast Sandwich | 3% | 3% | 1% | 0% | 0% |
| Burger | 5% | 2% | 5% | 5% | 3% |
| Combo & Value Meal | 8% | 2% | 7% | 5% | 11% |
| Condiment | 0% | 1% | 0% | 0% | 0% |
| Dessert | 17% | 12% | 20% | 8% | 8% |
| Kid Entree | 0% | 1% | 2% | 0% | 0% |
| Meat Entree | 2% | 2% | 8% | 9% | 4% |
| Mexican Dish | 6% | 4% | 1% | 2% | 0% |
| Non-Alcoholic Beverage | 20% | 20% | 6% | 2% | 0% |
| Pasta Dish | 0% | 3% | 2% | 5% | 0% |
| Pizza | 3% | 1% | 0% | 2% | 0% |
| Salad | 2% | 6% | 4% | 4% | 6% |
| Sandwich | 11% | 17% | 7% | 5% | 4% |
| Seafood Entree | 3% | 0% | 5% | 8% | 15% |
| Soup | 1% | 4% | 1% | 1% | 4% |
| Specialty Entree | 2% | 6% | 3% | 5% | 2% |
| All Items | 32% | 16% | 17% | 34% | 1% |

# RESPONDENT PROFILE

# 1,500 consumers

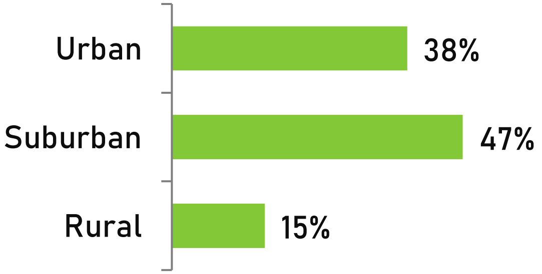
## Gender

50% | 49%

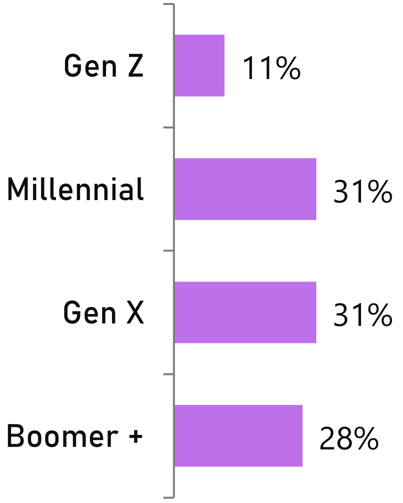
## Ethnicity

| | |
|---|---|
| White | 70% |
| Black | 12% |
| Hispanic | 13% |
| Asian | 4% |
| Other | 2% |

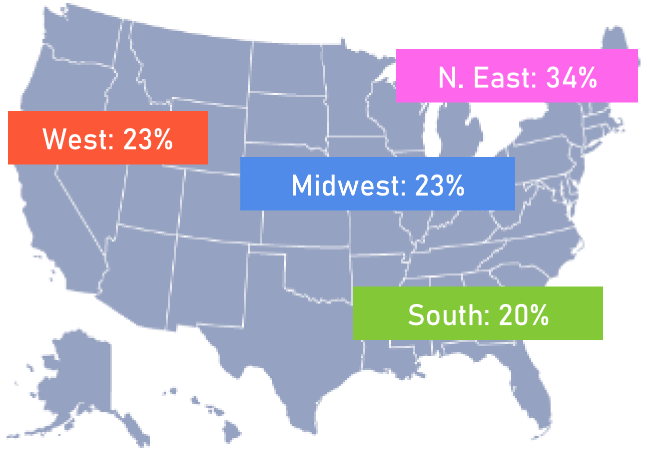
## Area Type



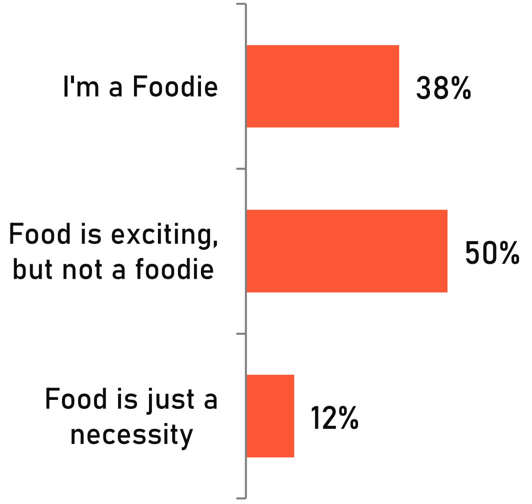

## Age



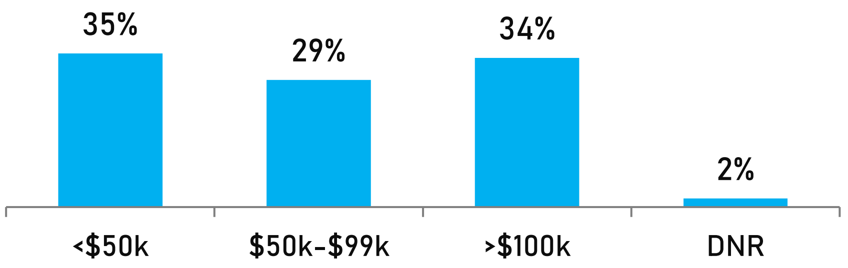

## Region




## Food Attitudes




## Household Income




## Marital Status

| | |
|---|---|
| Single | 42% |
| Have a significant other, but not married | 16% |
| Married | 42% |

# OPERATOR PROFILE

DATASSENTIAL

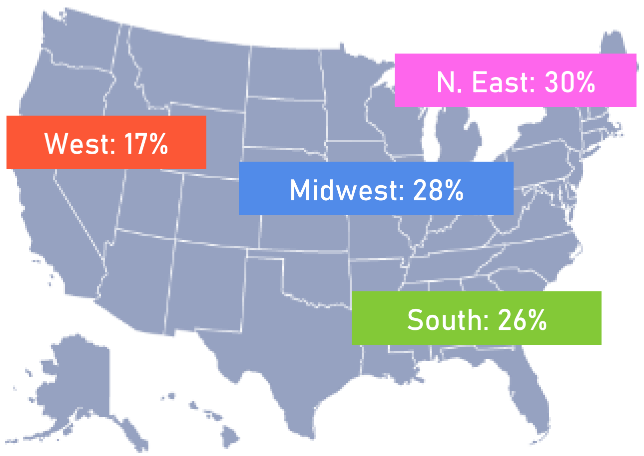
# 316 operators

## Segment

| 51% Restaurant | | 39% On-Site | | 11% Retail | |
|---|---|---|---|---|---|
| QSR | 2% | Corporate | 9% | Supermarket | 3% |
| Fast Casual | 10% | C&U | 9% | C-Store | 8% |
| Midscale | 13% | Healthcare | 7% | | |
| Casual | 13% | K-12 | 7% | | |
| Fine Dining | 13% | Lodging | 7% | | |

## GPO Status


## Region

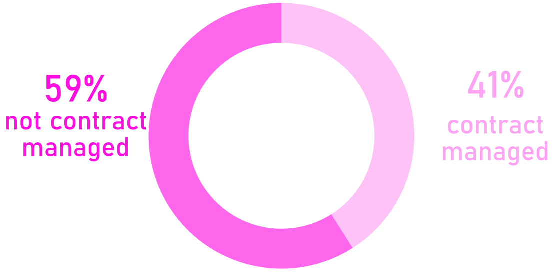



## Distributor

| | |
|---|---|
| Sysco | 39% |
| U.S. Foods | 21% |
| Gordon | 10% |
| PFG | 4% |
| Cash and Carry | 4% |
| Other | 22% |

## Restaurant Chain Affiliation

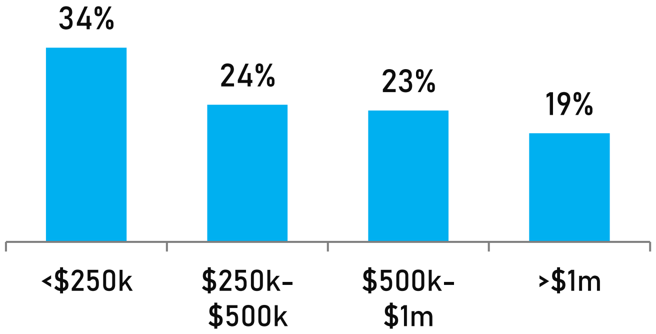

## On-Site Contract MGMT



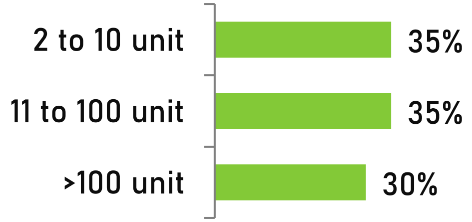

## Job Title

| | |
|---|---|
| Owner / Operator | 26% |
| General Manager | 22% |
| Manager | 17% |
| Exec. Chef / Chef | 13% |
| F&B Manager | 10% |
| Other | 12% |

## Annual F&B Purchasing




## Restaurant Chain Size




## Contract MGRs Used

| | |
|---|---|
| Sodexo | 37% |
| Compass | 29% |
| Aramark | 20% |
| Other | 14% |

## Skill Level

| | |
|---|---|
| All/Almost All Scratch | 10% |
| Majority Scratch | 38% |
| Half Scratch/ Half Pre-Made | 40% |
| All/Almost All Pre-Made | 11% |

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