Datassential serves up well-done insights in the

Meat & Poultry Keynote

The Meat & Poultry Keynote combines the opinions and behaviors of over 1,000 consumers and hundreds of restaurant, onsite, and retail operators with insights from Datassential's cutting edge SNAP! suite which includes menu tracking databases MenuTrends and INSIDER and consumer sentiment trackers SCORES and FLAVOR. Dive into the meat and poultry landscape in both retail and foodservice, uncovering consumer and operator habits, perceptions, and preferences regarding meat and poultry varieties. You'll learn more about…

Meat & Poultry Consumption

Explore insights into consumption recency, frequency, and last meat or poultry occasion; Discover changes in consumption over the past year, consumption drivers and barriers, and other attitudes, trends, and tastes that Keynotes always cover.

Meat & Poultry Attitudes

Learn how meat & poultry fit into consumers' lifestyles; understand important purchase criteria and motivators; discover which supermarket areas consumers visit when shopping for meat and poultry; uncover which varieties and cuts consumers know and love.

Operator Perspectives

Understand what foodservice operators buy and why, learn which meat & poultry attributes are most important, pinpoint operational challenges, and discover what changes are planned for meat & poultry menuing.

Restaurant Menus

Follow meat & poultry growth over the past decade by restaurant segment and menu part and take a closer look at the flavors that are paired with each species. Also, take a closer look at what meat & poultry varieties test the best in LTOs.

Perceptions on Hot Issues

Understand what consumers and operators know about hot-button farming terms and food safety issues and how it affects their meat & poultry purchasing. Also, learn more about what consumers and operators think about meat & poultry alternatives from tofu and tempeh to lab-grown meat.

SNAP Keynote Reports are priced at **$6,500 per topic.**

Package pricing is available with the purchase of multiple topics.

DATASSENTIAL FOOD WITH A STORY

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SNAP! Keynote Report

SAMPLE SLIDES

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MEAT & POULTRY

THE KEYNOTE REPORT

SNAP! KEYNOTE

January 2018

DATASSENTIAL
FOOD WITH A STORY

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SNAP!

Keynote Report

Datassential's SNAP! Keynote Series leverages the power of SNAP's tools and combines them with exclusive consumer and operator survey data, from motivations to behaviors to opportunities, to bring together trends, data, and insights in a comprehensive report that dives deep into key industry topics and categories. SNAP! tools include:

- **MenuTrends** analyzes thousands of menus to track the top and fastest-growing foods and flavors.
- **INSIDER** tracks, analyzes, and reports on several thousand LTOs and new menu items per year.
- **SCORES** provides consumer ratings for every LTO and new menu item at hundreds of top chains.
- **FLAVOR** tracks consumer sentiment on thousands of foods, beverages, and ingredients.
- **FIREFLY** is a complex database of over 1.3 million operator profiles in the U.S. and Canada.
- **LOCAL** analyzes popular ingredients and flavors in major metro areas across the U.S.
- **BrandFingerprints** reveals the unique set of factors that determine which customers visit a chain and why, including more than 100 key metrics for 130 chains.

For more details, please contact **Brian Darr** at 312-655-0594 or brian@datassential.com

The **Global Flavors Keynote** explores how America's food has become a melting pot of influences from around the world (just like its population). Not only are the "big three" cuisines of Italian, Mexican, and Chinese being explored at a deeper level (think burrata cheese and black garlic), but interest in other countries' food cultures is also rising.

Discover the reasons why from nearly 300 operators, most of whom serve next-level global foods, and over 1,000 consumers. Also identify emerging dishes and ingredients and explore the distinct differences between restaurants and on-site operators in their approaches to global flavors.

The **Sandwiches Keynote** takes a complete look at sandwiches both at home and away from home by delving into perceptions and preferences regarding carriers, proteins, cheeses, toppings, condiments, and accompaniments.

We combined opinions from over 1,000 consumers with hundreds of operator perceptions on sandwiches and leveraged the power of MenuTrends, our trend-tracking menu database, for this extensive report. It will be an invaluable resource to understand the sandwich landscape.

CONTENTS

SHOW, BUT DON'T GIVE OR LEAVE BEHIND

This report can be presented live or via webinar, but can not be distributed to outside companies.

If your company has purchased this report, you are encouraged to excerpt key exhibits and build them into your own presentations.

However, you should not provide significant sections of this report to any outside company without express written consent from Datassential.

Objectives & Methodology

Objectives

- Identify consumer meat and poultry consumption habits, preferences, and perceptions at home, in restaurants, and in other away-from-home venues
- Understand consumer motivators for eating meat and poultry at home and away from home
- Understand consumer perceptions and behaviors around purchasing at retail and preparing meats/poultry at home
- Analyze operator motivators, preferences, and challenges with menuing meats/poultry
- In-depth analysis of meat and poultry's presence on restaurant menus
- Identify supplier opportunities where operators and consumers have unmet needs

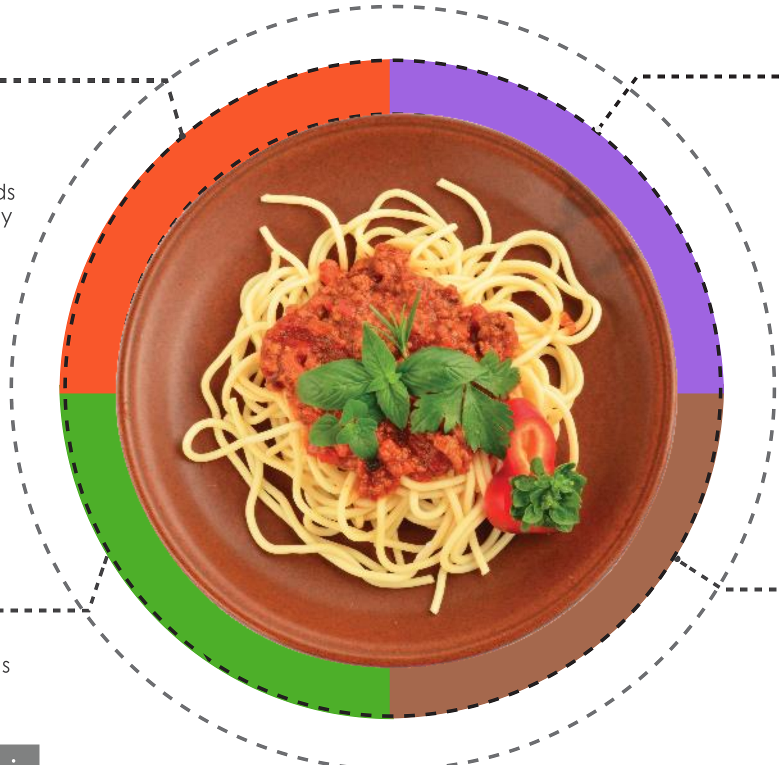
Methodology

- Main fielding completed November 2017 (online)
  - Consumers: 1033 respondents who consume both meat and poultry (GenPop)
  - Operators: 322 operators who offer meat and poultry(via the Datassential panel), including:
    - 151 restaurant operators
    - 144 on-site operators
    - 27 retail operators
  - Full respondent details available in the appendix

MENU ADOPTION CYCLE (MAC)

Food trends follow a predictable life cycle.

The MAC helps you determine a trend's current life stage, as well as its potential for future advancement.



1. INCEPTION

Trends start here. Inception-stage trends exemplify originality in flavor, preparation, and presentation.

IN FOODSERVICE:

Fine dining
Ethnic independents

AT RETAIL:

Ethnic markets

2. ADOPTION

Adoption-stage trends grow their base via lower price points and simpler prep methods. Still differentiated, these trends often feature premium and/or generally authentic ingredients.

IN FOODSERVICE:

Fast-casual restaurants
Casual independents

AT RETAIL:

Specialty grocery stores
Gourmet food stores

3. PROLIFERATION

Proliferation-stage trends are adjusted for mainstream appeal. Often combined with popular applications (on a burger, pasta, etc.).

IN FOODSERVICE:

Casual chain restaurants
Quick service restaurants

AT RETAIL:

Traditional supermarkets
Mass merchandisers

4. UBIQUITY

Ubiquity-stage trends have reached maturity and can be found across all sectors of the food industry. Though often diluted by this point, their inception-stage roots are still recognizable.

IN FOODSERVICE:

Family restaurants
School cafeterias

AT RETAIL:

Dollar stores
Drug stores

RESTAURANT SEGMENTS

Limited Service Restaurants (**LSR**)		Full Service Restaurants (**FSR**)		
QSR	Fast Casual (FC)	Midscale (MDS)	Casual (CAS)	Fine Dine
262,474 US units	63,488 US units	113,413 US units	190,424 US units	13,974 US units
counter service with no wait staff; focus on speed and food often served on disposables	counter service with focus on higher quality, fresh ingredients, and customization	waiter service at a moderate price; often breakfast-focused, and generally no alcohol	waiter service at a higher price point than midscale, and often offering a full bar	high-end table service with chef-driven menu; most entrées priced $25 or higher

Traditional Casual

Upper Casual

*unit counts include both chains and independents, Datassential Firefly 2016

contact Brian Darr at
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MenuTrends data is reported using two key measures: **PENETRATION** and **INCIDENCE**. Please take a moment to familiarize yourself with them.

PENETRATION

% of RESTAURANTS that serve that food, flavor, or ingredient.

This is a measure of **adoption**. Increases in penetration indicate that more restaurants are adding the item to their menu.

Penetration is the most important statistic and the best indicator of trend movement.

INCIDENCE

% of MENU ITEMS that feature that food, flavor, or ingredient.

This is a measure of **versatility**. A restaurant adding yet another chicken dish to its menu will result in an increase in incidence.

Incidence is a supporting statistic, to be used as a complement to penetration.

[EXAMPLE] Chicken **PENETRATION**: 96% | Chicken **INCIDENCE**: 11%

Chicken is found on 96% of all restaurant menus, and is featured in 11% of those dishes.

This report uses the terms: **AT/FROM HOME (AH)**, **AWAY FROM HOME (AFH)**, and **RETAIL OUTLET**. We defined these terms to consumers as:

AT/FROM HOME (AH)

Refers to seafood prepared at your home from ingredients purchased at the grocery store or homegrown.

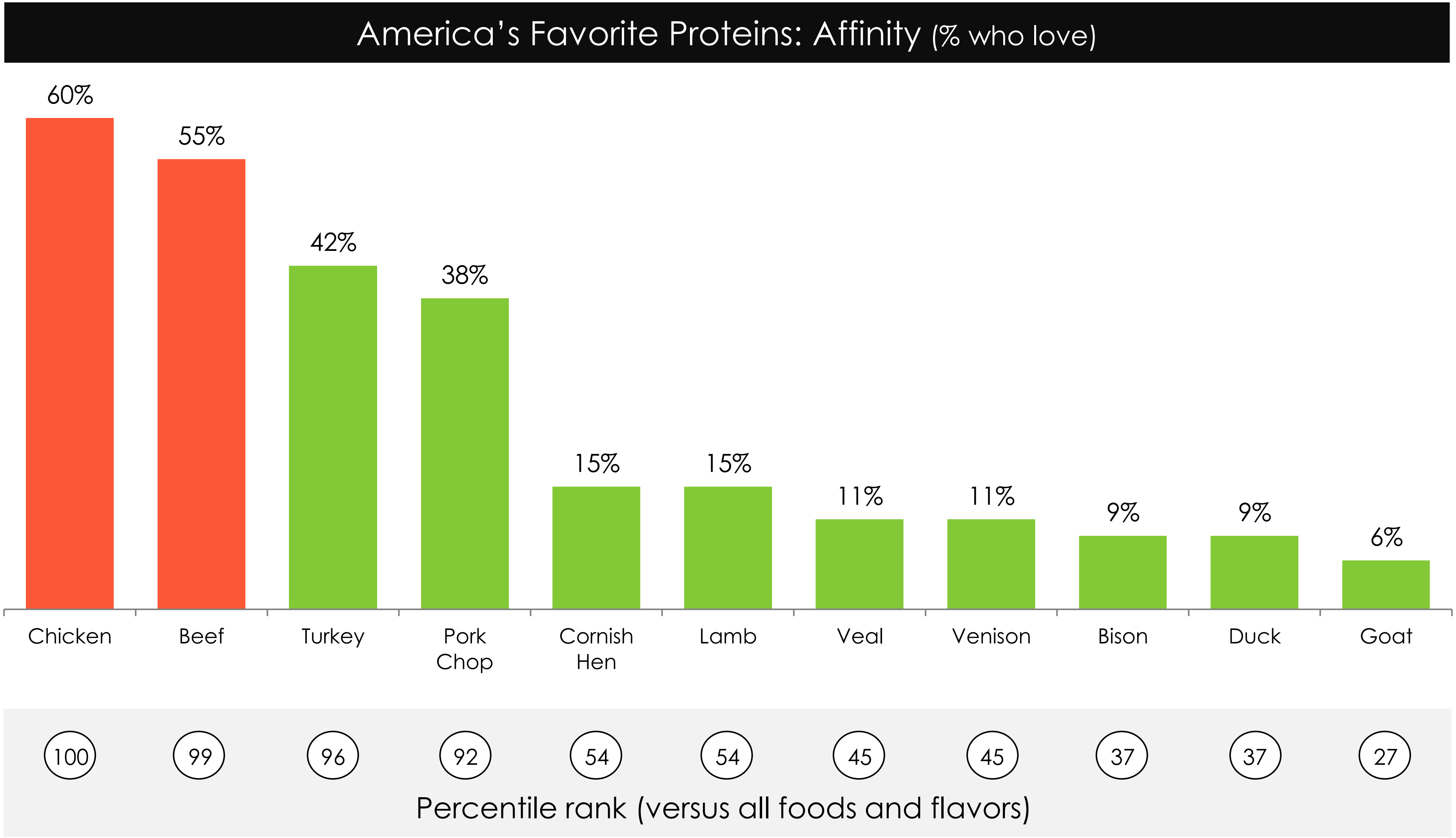
AWAY FROM HOME (AFH)

Refers to meat & poultry purchased ready-to-eat from a foodservice establishment such as a restaurant, workplace or school cafeteria, or food truck.

RETAIL OUTLET

Includes ready-to-eat meat & poultry purchased from a c-store or supermarket deli or packaged grab-and-go.

Chicken and beef are consumers' favorite proteins, loved more than nearly all other foods. Turkey and pork also are well-loved, but affinity drops for other species, likely because of lower trial for varieties like venison and goat.



DATASSENTIAL FOOD WITH A STORY

NOTE: Findings are from FLAVOR, a consumer rating tool covering more than 2,600 foods and ingredients. For more information on how FLAVOR can help you decode consumer preferences, contact Brian Darr at 312-655-0594 or brian@datassential.com.

flavor

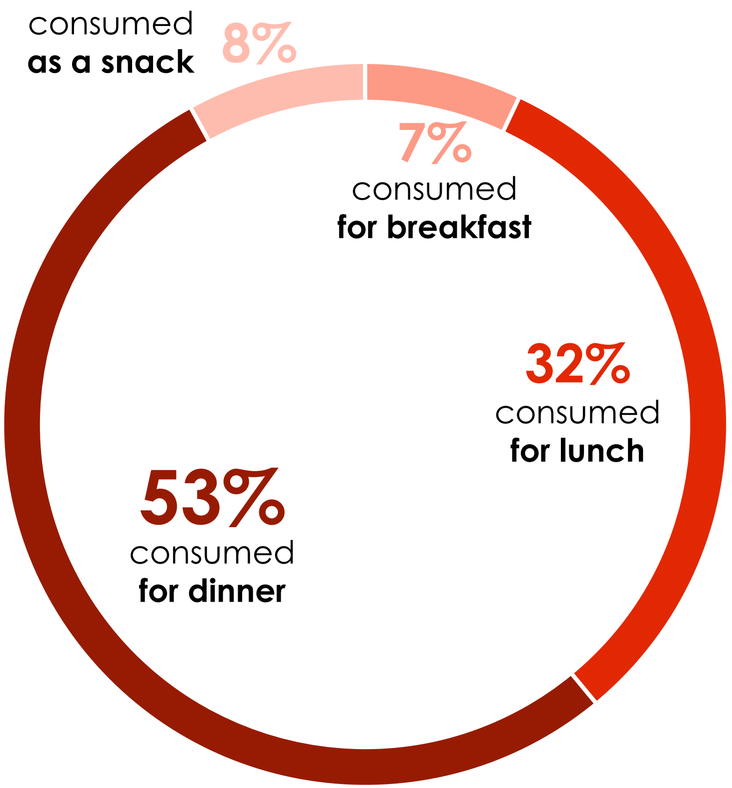
Nine out of 10 consumers have eaten meat or poultry in the past three days, mostly for dinner.

Few occasions were for breakfast or snacking, perhaps revealing untapped dayparts.

Last Meat or Poultry Dish: When Eaten

Within the Past Day/Today	51%
Within the Past 2-3 Days	41%
Within the Past Week	5%
Within the Past 2 Weeks	2%
Within the Past Month	1%

Last Meat or Poultry Dish: Daypart Eaten



Note: Consumers were required to eat poultry and either beef or pork at least monthly to participate in survey.

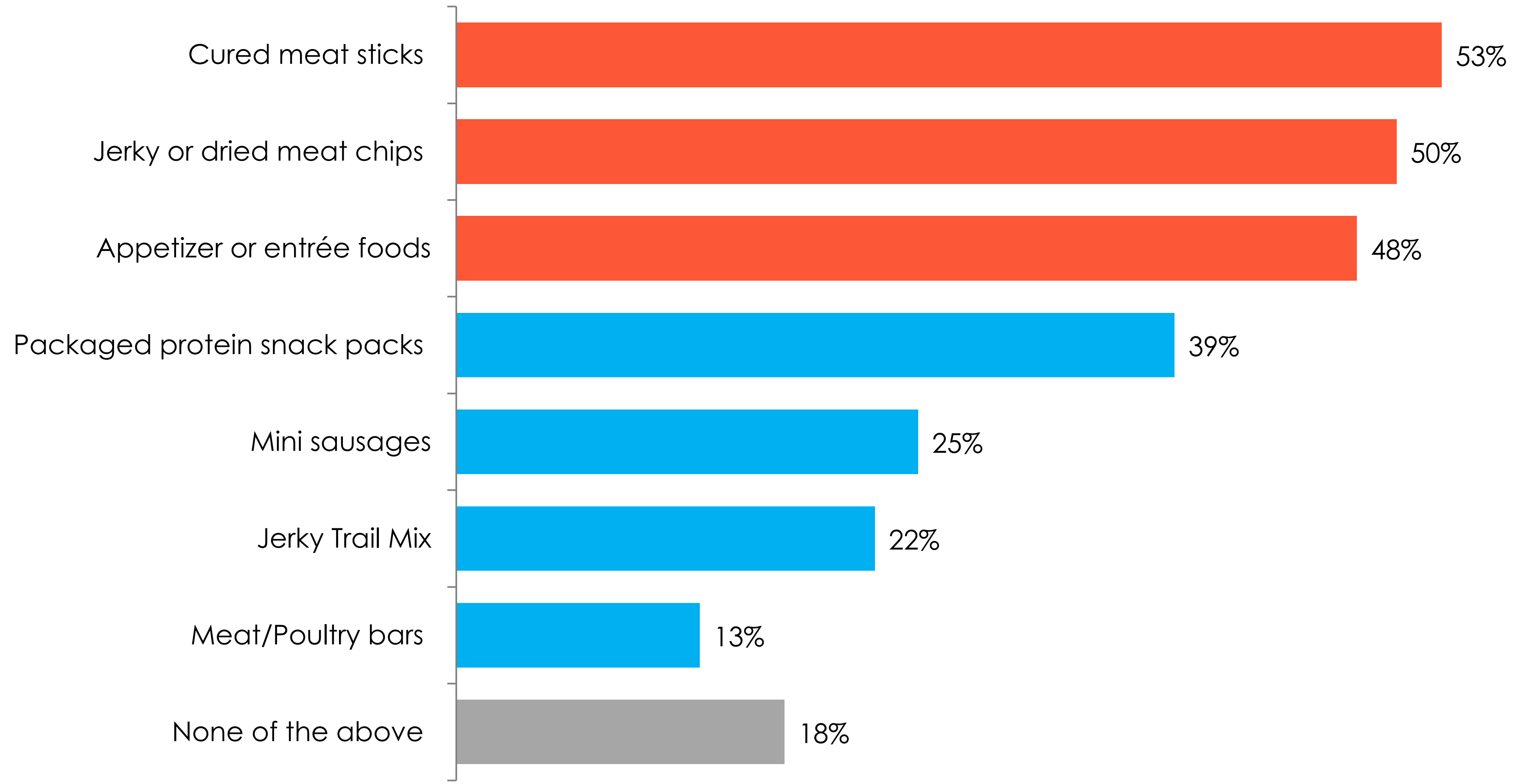
B2: Think back to your VERY LAST MEAL or SNACK containing any type of meat or poultry. When did you have it?
B5: Still thinking about this very last meat/poultry meal, what time of day did you eat it?

n=1033
n=1020

Meat and poultry are common snacks, with roughly half of consumers having reached for cured meat sticks, jerky, or appetizer/entrée foods for a quick bite.

More recent product innovations, such as jerky trail mix and meat bars, have significant room to grow.

Meat & Poultry Snacking (% selecting)

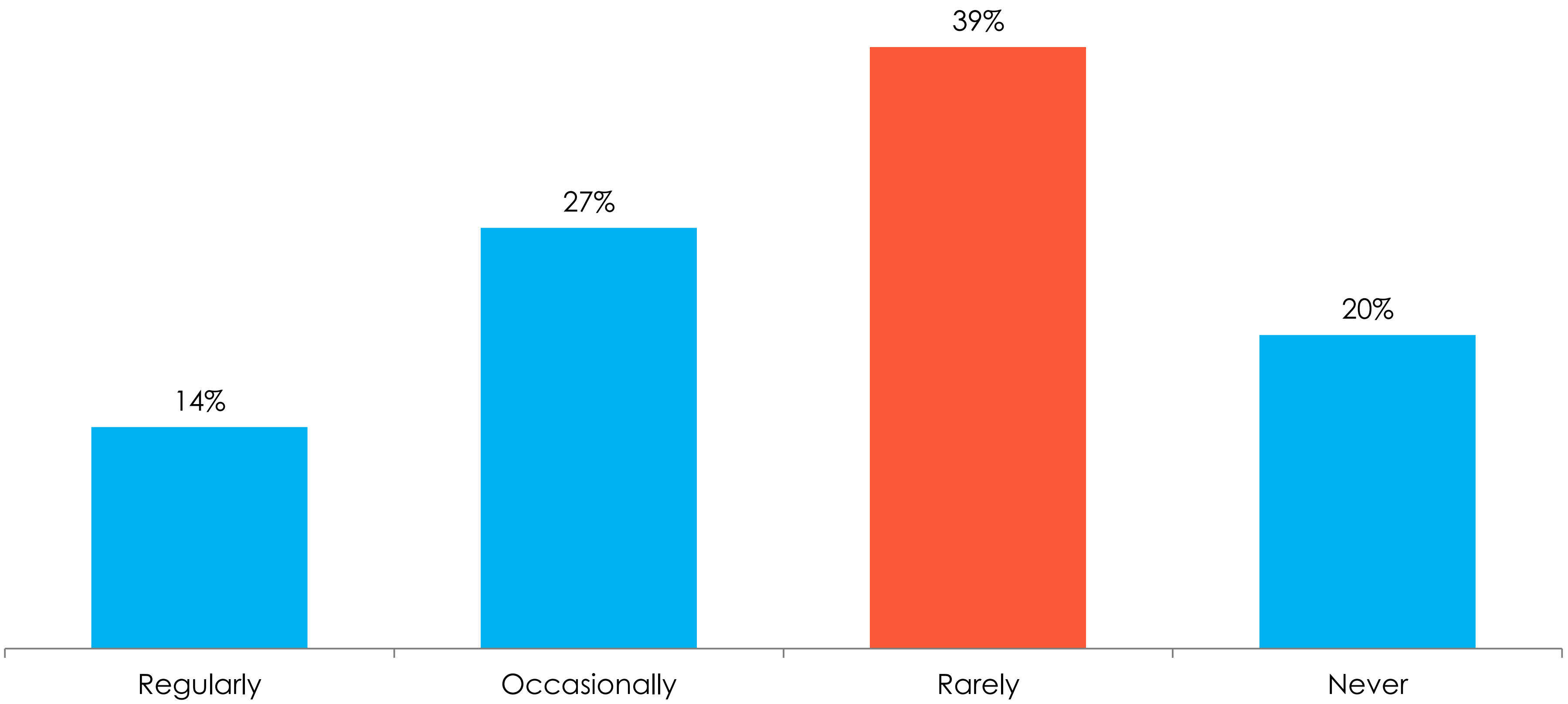


A6: Which of the following types of MEAT / POULTRY items have you ever eaten as an on-the-go snack? Select all.

n=1033

In-store butchers and department specialists are untapped resources for information about meat and poultry. Inviting shoppers to ask questions and promoting guidance on cuts or preparation methods could encourage greater trial of new products.

Frequency of Requesting Information From Meat Specialists (% selecting)



A9: When grocery shopping, how often do you ask the meat specialist or butcher for information? Select one.

n=1033

Selected Consumer Verbatims: **Innovative Retail Meat & Poultry Products**

"Good quality **pre-cooked ground meat 'crumbles'** to use in recipes when you really don't have the time or facilities to cook up large amounts of ground beef or pork. **Frozen in a package where you can take out as much or as little as you need** would be even better."

"I would like to see **creative sauces** being poured over top of the chicken **like spicy mango**."

"Prime rib already sliced and prepared to heat and that tastes just as good as a restaurant one."

"I want **ready-prepared meat dishes** more like they do with meatball mix or meatloaf mix."

"New or unique meat products I would like to see at the grocery store and at restaurants would be **lean cuts of meat that are stuffed with great flavors** (seafood or flavored stuffing)."

"I would like to see **meat filled with delicious sauces and marinated in unusual flavors."**

"I would like **authentically pre-seasoned fajita meat.** I don't want to visit a specialty market to get this. It would be nice if it was **in the fresh meat section so I could cook it up quick without having to thaw it** and add my own onions/peppers."

"Marinated chicken besides fajitas, perhaps with **Greek or Middle Eastern spices**."

C11: What new or unique meats or meat products would you like to see at the grocery store and at restaurants? This could be any type of red meat food – beef, pork, lamb, venison, bison, etc. Free text. **D13:** What new or unique poultry or poultry products would you like to see at the grocery store and at restaurants? Free text.

n=1033

Selected Operator Verbatims: **Innovative Meat Products**

Operator Finding

"I'd like to see a **wider variety of seasoned raw meat products** to help reduce labor while increasing flavor consistency."

"**I want the price of cheap cuts go back to being cheap.** Short ribs were so affordable, which was great, but because of their sudden popularity it seems that the prices have gone up."

"I'm interested in portion cost less than $4.00 per portion. **Every new beef item becomes popular and the price goes up** – flat iron steak, skirt, spinalis (If you can even find it), short rib, etc."

"I believe there is a pretty good variety on the market now. **But the more in-depth the cuts get, the more they are renamed and it can be confusing for procurement.**"

"I want to see **more ethnic cuisine and trending items that are frozen and ready to serve** rather than having to cook from scratch."

"Honestly, in my view **focusing more on alternatives is going to drive sales in the future more than focusing on animal-based proteins**."

"I want **more variety in high-quality frozen pre-cooked items**. Most of the frozen pre-cooked items that are available are of lesser quality and taste."

"We serve 1800 people per day, so **anything that is easy to prepare and cost-effective** would be appreciated."

B14 (Operator): What new or innovative meat products would you like to see from food manufacturers to help drive sales? Free text.

n=322

Selected Operator Verbatims: **Innovative Poultry Products**

Operator Finding

"I want **better packaging for chicken breast** – whether frozen of fresh, chicken slime is awful to deal with."

"I would like to see **more natural options and better practices in poultry farming**, mostly because I know that it is a safer, cleaner, healthier option for our food future.

"Consider offering **more poultry products that come pre-marinated**. This would cut down on thawing or handling time, thus reducing risk of spoilage and foodborne-illnesses."

"Give us **more options with turkey** – we're running out of ideas!"

"Hormel produces a **fire-braised line that is highly popular** in our operations when menued. It'd be great for them **take the line into more specific flavor profiles**. Say Asian, Latin, etc."

"**New flavors of chicken-based sausages**. Every time we offer a new chicken sausage it does surprisingly well."

"Poultry that could be cooked to a safe temperature without drying out. For safety reasons and cooking times, I've switched to a pre-cooked wing. Although the price of this product is 33% higher, there's value."

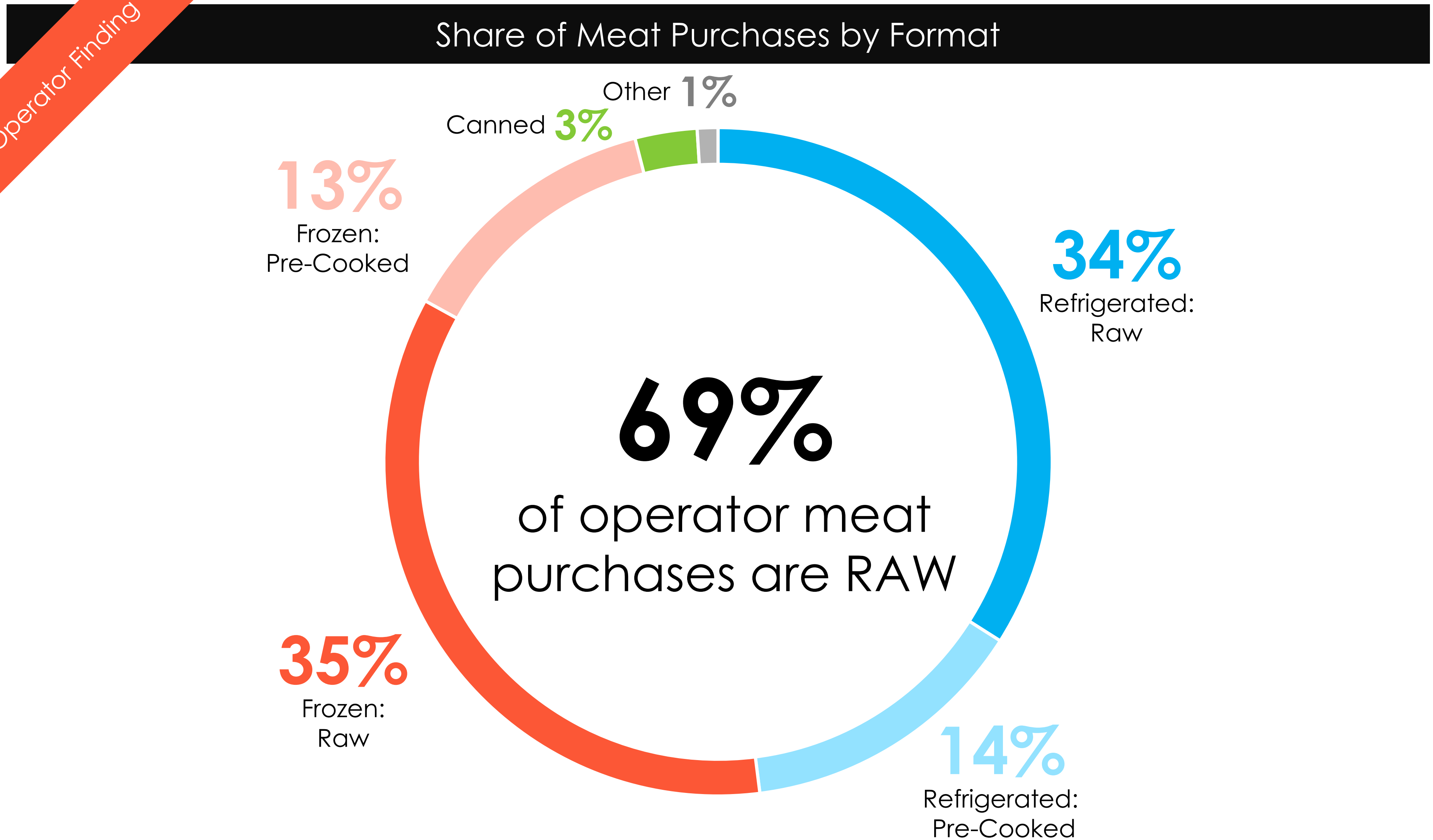
"I want **poultry sausage that is affordable and flavorful**. Also, pulled pre-cooked poultry that is flavorful and tender."

C12 (Operator): What new or innovative POULTRY products would you like to see from food manufacturers to help drive sales or alleviate your BOH challenges? Free text.

n=322

Operators clearly rely on raw meat formats over pre-cooked. However, operator purchases are split almost evenly between frozen and refrigerated products.

Operator Finding



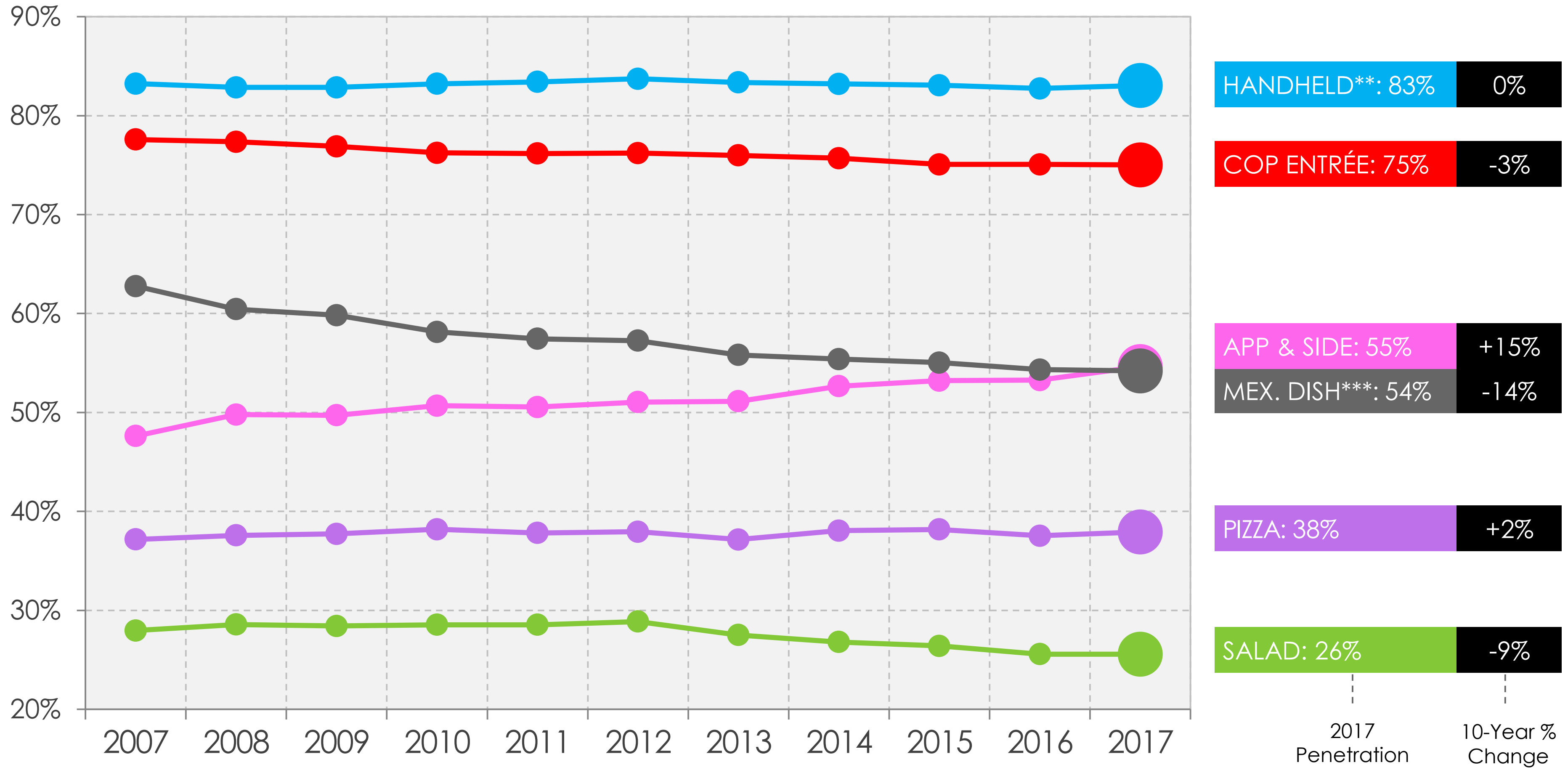
B1 (Operator): Please tell us what % of your MEAT purchases are in each format. Numeric free text.

n=322

No longer just a center-of-plate option, beef is well-established in most areas of the menu. Handhelds have the highest penetration (primarily burgers, which are still growing despite their ubiquity), featured on 83 percent of menus; pizzas featuring beef have seen an uptick.

Beef* Time Trend by Menu Part

penetration time trend by menu part



*Beef includes chuck, angus, bistec, brisket, burger, carne asada, carpaccio, filet, kobe, new york strip, pastrami, prime rib, ribeye, short rib, sirloin, steak, t-bone, wagyu, and beef.

MENU PENETRATION: of all restaurants offering each menu part, % that offer beef

**Handheld includes burgers, sandwiches, and hot dogs/sausages. ***Mexican Dish includes dishes like burritos, tacos, quesadillas, enchiladas, and fajitas.

NASHVILLE HOT CHICKEN

Regional variety starts going national

Currently on <1% of menus

This Southern specialty is heavily spiced with cayenne pepper and paprika, fried, and served on white bread; the recipe was recently added to the menu at KFC and O'Charley's

+++% since 2015

DATASSENTIAL
Menu Adoption Cycle

inception

+++ indicates growth over 300%

Despite hormones being prohibited in poultry production, menus are increasingly using "hormone-free" as a turkey descriptor. Free-range and local also are growing mentions.

Premium Terms & Descriptors in Turkey Dishes

ranked by penetration

	2017 PENETRATION	GROWTH	
		1 YEAR	4 YEAR
Natural	5%	-4%	+15%
Organic	3%	+1%	+46%
Free-Range	1%	+7%	+65%
Local	1%	+13%	+29%
Antibiotic-Free	1%	+2%	+27%
Hormone-Free	1%	+25%	+133%
Grass-Fed	<1%	-18%	+41%

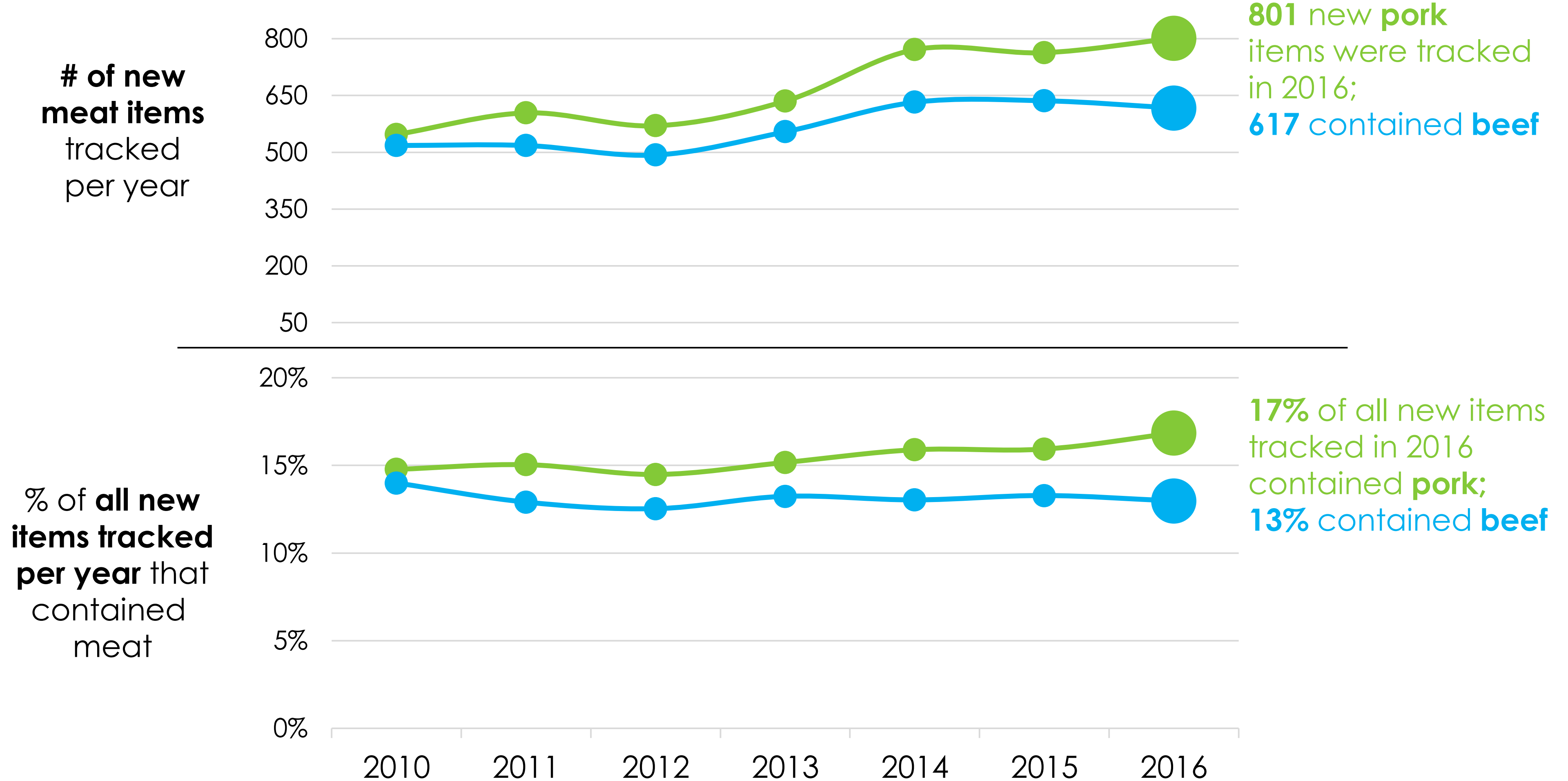
MENU PENETRATION: of all restaurants offering turkey apps, entrées, or sides, % that offer…

Pork's footprint in LTOs and new menu items has increased slightly since 2010; beef's presence in LTOs and new menu items has held steady at around 13%.

INSIDER

New Meat Introductions Per Year, 2010-2016

time trend in chain restaurants, 2010-2016*

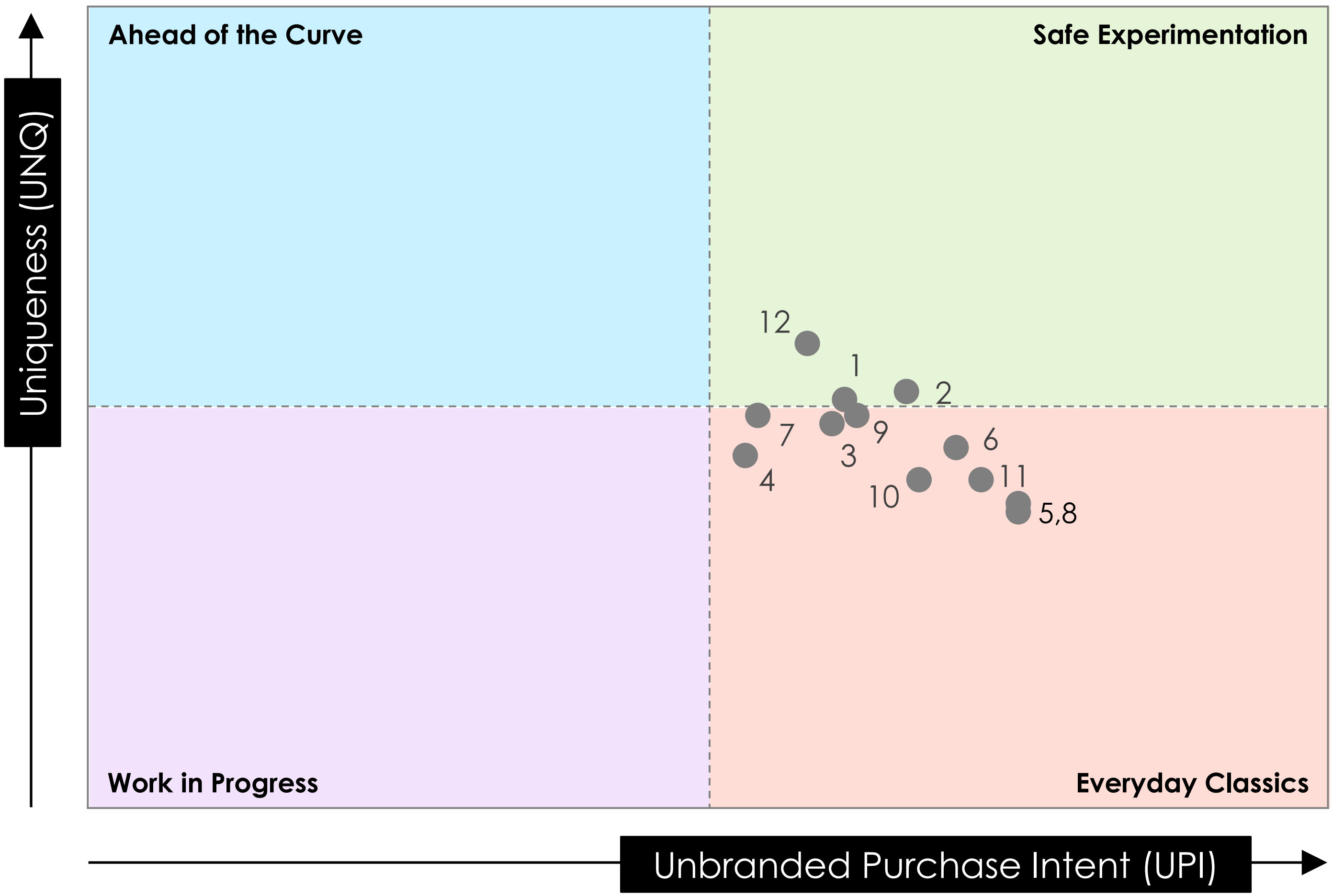


*Data is from Datassential's **INSIDER** database, which tracks LTOs and new menu items from the top 250 chain restaurants and c-stores on a monthly basis. The base size for all restaurant LTOs and new menu items containing meat & poultry is over 19,000.

All poultry varieties have above-average purchase intent, but few stand out from the crowd. Pulled chicken, which has the highest average uniqueness, could add a healthy twist to a dish that would ordinarily contain pulled pork.

Poultry Varieties in LTOs & New Menu Items

average uniqueness and unbranded purchase intent in LTOs and new menu items since June 2014



Legend	
1	Grilled Chicken
2	Chicken Breast
3	Turkey
4	Wing
5	Chicken Strip
6	Fried Chicken
7	Chicken Salad
8	Chicken Tender
9	Turkey Sausage
10	Turkey Breast
11	Turkey Bacon
12	Pulled Chicken

Slow cooking methods – both wet and dry – are trending on menus, but may put off those who are time-strapped or lack equipment. Products that make prep quicker can also be used to add unexpected flavors.

KEY DATA POINTS

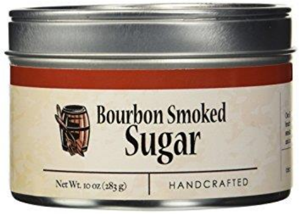
Among beef dishes, **roasting and braising are up 8% and 16%,** respectively, on menus. **Rubbed and smoked** pork are the among the fastest growing prep methods, while **brined chicken is up 182%** over the past four years.

In addition to great taste, **eight out of 10 consumers say they eat meat and poultry because they are versatile** and can be used in many ways. They also are more likely to make meat- or poultry-based comfort foods like roasts at home than order them at a restaurant.

OPPORTUNITIES

While many slow cooking methods are uncomplicated, "set it and forget it" affairs, suppliers and retailers can make them even more attractive by bringing together everything that is needed, from **brines and rubs to cooking or finishing sauces.**

Not every kitchen has a smoker, despite the popularity of pulled pork and other BBQ classics. That doesn't have to keep anyone from adding **real smoky flavor.** Ingredients like liquid or powdered smoke are usually made by burning wood chips or sawdust and condensing the resulting vapor, which can also be combined with sugar or other seasoning for complex flavors.



Select Meat- and Poultry-Centric Operator Examples

Belcampo Meat Co.

8 locations
Oakland, CA

Educating Consumers From Farm to Fork

Belcampo brings the supply chain in-house, what it calls "farm to fork traceability." The company website includes videos on everything from Belcampo's soil to grazing to processing. The company even runs regular "Meat Camps" at its farm where participants learn how to "cut, grill, serve, and sauce meat." Educating and connecting customers with their brand is essential to justifying higher price points – "It's expensive to do meat the way we do it," president Bronwen Hanna-Korpi told *Los Angeles* magazine. The menu offers classics alongside adventurous choices – french dip eclairs and chivitos (meat and cheese sandwiches with fries). Almost everything is used, such as bone broths in "Boney Marys."

PRO TIP **Belcampo sells its own tallow balms online and in its retail shops.**

Dai Due

1 location
Houston, TX

Chicken as the "Gateway to Well-Raised Meat"

While most butchers are focused on pork and beef, Dai Due chef Jesse Griffiths specializes in chicken. "Chicken is the gateway to buying well-raised meat," Griffiths told *Bon Appetit*. "Plus, it's the only whole animal that most people will ever buy and cook." Griffiths and his wife Tamara oversee a concept that combines a butcher shop and retail counter with a full-service restaurant. The counter sells everything from hand-cut feral hog to German, Mexican, and Cajun sausages, plus ancillary products like broths and lard. The dining room offers an a la carte menu for breakfast, lunch, and dinner, but Dai Due is known for its nightly Supper Club menu, featuring family-style multi-course dinners.

PRO TIP **Tuesdays and Wednesdays feature a "wild card" menu with items like wild game; Sundays are reserved for Griffith's beloved chicken.**

EXHIBIT GUIDE

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