



KANTAR

Foodservice overview and snack insights preview

June 2023

AGENDA

1 Why Kantar?

2 Kantar foodservice insights

3 Snacking insight examples

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Why Kantar?



A wide-angle photograph of a city street at sunset. The sun is low on the horizon, creating a strong golden glow that silhouettes the buildings and trees. The street is filled with cars and pedestrians, with long shadows cast across the pavement. A street sign for '2 Av' is visible on the right side of the road.


We help clients
understand people and
inspire growth.

We have a complete, unique and rounded understanding of people around the world: how they think, feel and act; globally and locally in over 90 markets.

Our validated insights, evidence and advice are proven to drive growth and are at the heart of our clients' decisions.

We don't just help clients understand what's happened, we tell them why, and how they can shape the future.

Our key differentiators help you maximize impact




Senior Level Involvement

Ensuring you're getting the best thinking through all phases of the engagement



Customized Solutions

Tackling complex challenges with a solution built specifically for your organization's needs



Best-in-Class Analytics

Applying sophisticated analytic techniques to drive keen insights from all types of data



Strategic Consultants

Data-powered marketing consultants/researchers to enhance your growth strategy



Deep Food Service Expertise

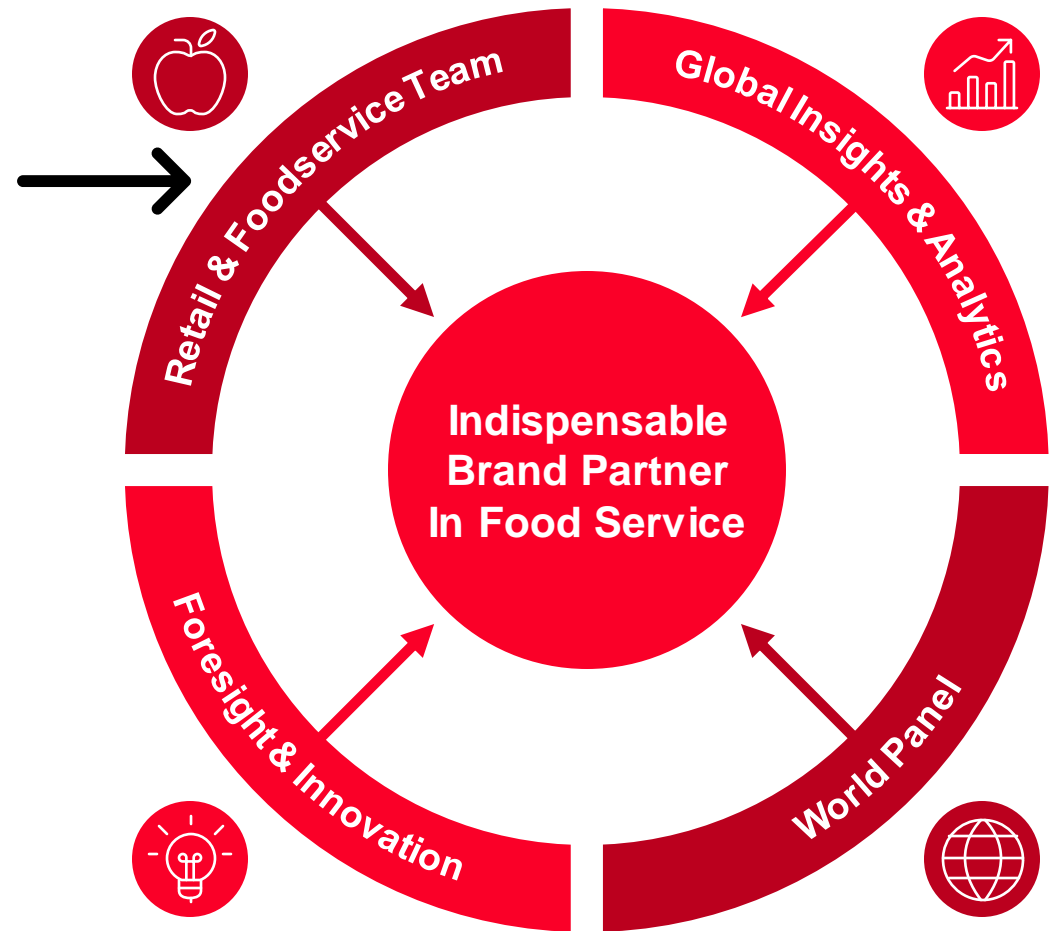
Bringing our broad understanding in the category to make us smarter from design through analysis

Kantar foodservice insights



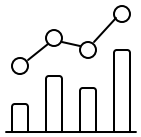
Kantar's Food Service Expertise is Broad & Far-Reaching

Deep expertise beyond your immediate project team, making us smarter in the work we do



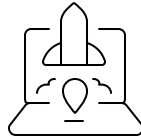
How does Kantar's Retail IQ inform food service strategy and execution?

We understand the convergence of retail and food service



Retailing industry expertise

Other third-party insights providers do not have the breadth and depth of retailing expertise that Kantar has.



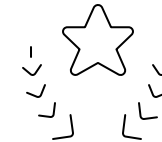
Actionable insights

Our content is actionable, providing true insights, strategies and tactics, versus just data and facts.



Deep operational experience

We have a deep bench of food service operator talent with decades of industry experience.



Convergence of food service in retail

Food service is exploding in traditional retail and, as retailing experts, Kantar has the pulse.

Our food service insights cover a broad range of topics

Five Slides for the top QSRs (Quick Service Restaurants)

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McDonald's

The Five Slides You Need

Chris Miles
Analyst
April 2023



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Starbucks

The Five Slides You Need

Berry Thomas
Senior Database Consultant
April 2022



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Taco Bell

The Five Slides You Need

Tyler Dungey
Senior Analyst
March 2023



Innovations in Food Service

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Impulse opportunities in food service

Insights and ideas to support impulse sales growth

Berry Thomas
Senior Thought Leader
January 2023

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Learnings from the Global Restaurant Leadership Conference

Berry Thomas
Senior Thought Leader
December 2022

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The evolution of restaurant digital sites and apps

Berry Thomas
Senior Thought Leader
January 2023

Global restaurants and trends

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Global restaurants of the month: April 2023

Spotlighting five restaurants from around the world to inspire and educate

Berry Thomas
Senior Thought Leader
April 2023

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Loyalty marketing: The restaurant firewall for turbulent times

Insights and ideas to support loyalty marketing and growth

Berry Thomas, Senior Thought Leader
Global Retail Insights Consultant
January 2023

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12 food service trends to expect for 2023

A food service view with learnings for retailers and FMCGs

Berry Thomas
Senior Thought Leader
October 2022

Restaurants in retail

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The future of commerce and restaurants

How commerce and restaurants are evolving today and tomorrow

Berry Thomas
Senior Thought Leader
September 2022

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Restaurant opportunities for FMCG brands

Why and how FMCG brands grow in restaurants

Berry Thomas
Senior Thought Leader
November 2022

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The growth of food service and grocery product partnerships

A retail, food service, and FMCG view

Berry Thomas, Senior Thought Leader
Contributor to IP Retail and Grocery
June 2022

A quick tour of our Food Service Insights Center

Available to Retail IQ subscribers

The screenshot displays the Kantar Retail IQ Food Service Insights Center dashboard. At the top, there is a navigation bar with the 'KANTAR RETAIL IQ' logo on the left and a search bar on the right. Below the navigation bar, the main content area is titled 'Food service' and includes a sidebar with navigation options: Dashboard, Trending, Insights, Data & Tools, Experiences, Training, Resources, and My Account. The main content area is divided into several sections: 'Latest Insights' featuring two 'SLIDES' cards with abstract orange and yellow background images, each dated 10 MAY 2023 and 8 MAY 2023 respectively, both by Barry Thomas; 'Featured' section with a link to a webinar on beverage alcohol; 'Data Downloads' section listing various reports like 'US Macroeconomic Scorecard' and 'US government-reported retail sales charts'; and 'News' section with two 'NEWS' cards dated 10 MAY 2023, one about Hardee's and another about Wendy's. A 'Need Help?' button is visible in the bottom right corner of the dashboard.

Senior Insights Expert Barry Thomas offers decades of global retail, food service, and future-of-commerce experience

Custom on-sites/webinar can help you tackle your biggest questions

Barry Thomas






Senior Retail Commerce Thought Leader

✉ barry.thomas@kantat.com

📍 Atlanta, GA



Areas of expertise

					
Future of commerce	Global commerce/retail	Strategic planning	O2O/omncommerce	Shopper marketing	Restaurant and food service

Topics I can bring to life for your team

- Future-proofing your business in the evolving post-pandemic landscape
- Innovating to engage underdeveloped and emerging growth channels
- Keeping pace with innovation in restaurants seeking more meal occasions
- Global growth of ecommerce and online-to-offline retail
- Strategic planning in the era of connected, algorithmic, and automated commerce
- Connected O2O shopper marketing growth approaches

Barry has recently been quoted by:

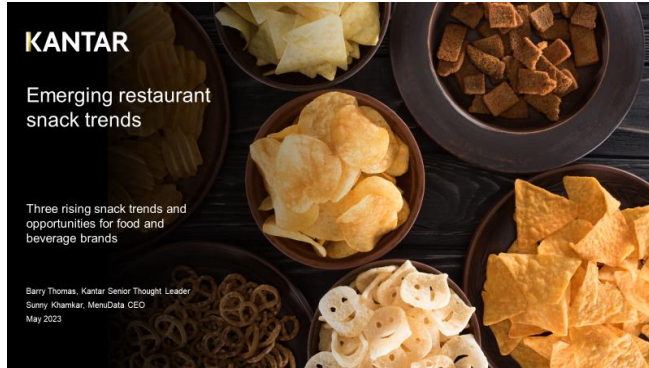
Barry is on the advisory boards of:

Snacking insights examples



Examples of snack insights

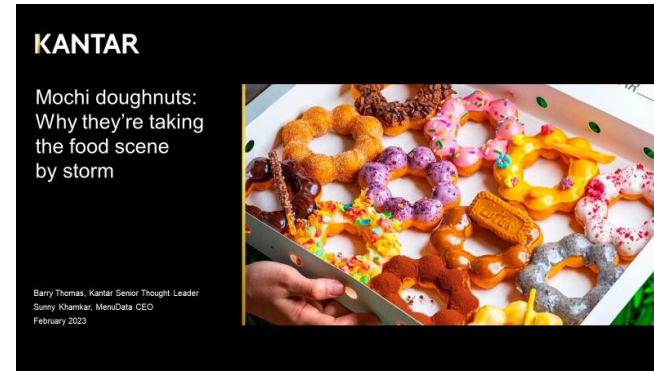
Available to Retail IQ subscribers



Emerging snacks



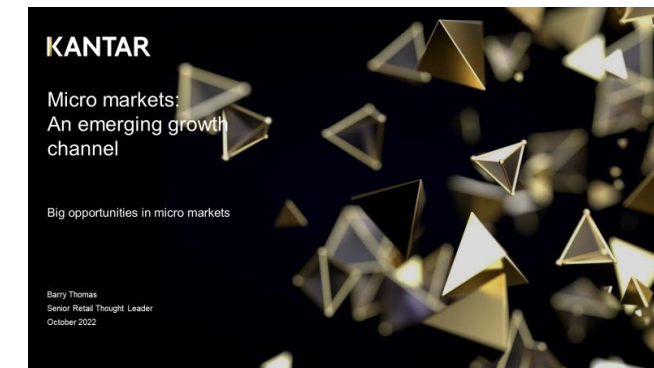
Bubble tea



Mochi doughnuts



Magic of Yuzu



Micro markets



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Emerging restaurant snack trends

Three rising snack trends and
opportunities for food and
beverage brands

Barry Thomas, Kantar Senior Thought Leader
Sunny Khamkar, MenuData CEO
May 2023

Our analysis shows snack innovation is accelerating in three areas



Rise of **global** flavors



"**Instagrammable** snacks"



Healthy indulgence



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The emergence of bubble tea

Behind the bubbles with how
bubble tea is growing globally and
an opportunity for the industry

Barry Thomas, Kantar Senior Thought Leader

Sunny Khamkar, MenuData CEO

Charlotte Page, Insight Consultant

May 2023

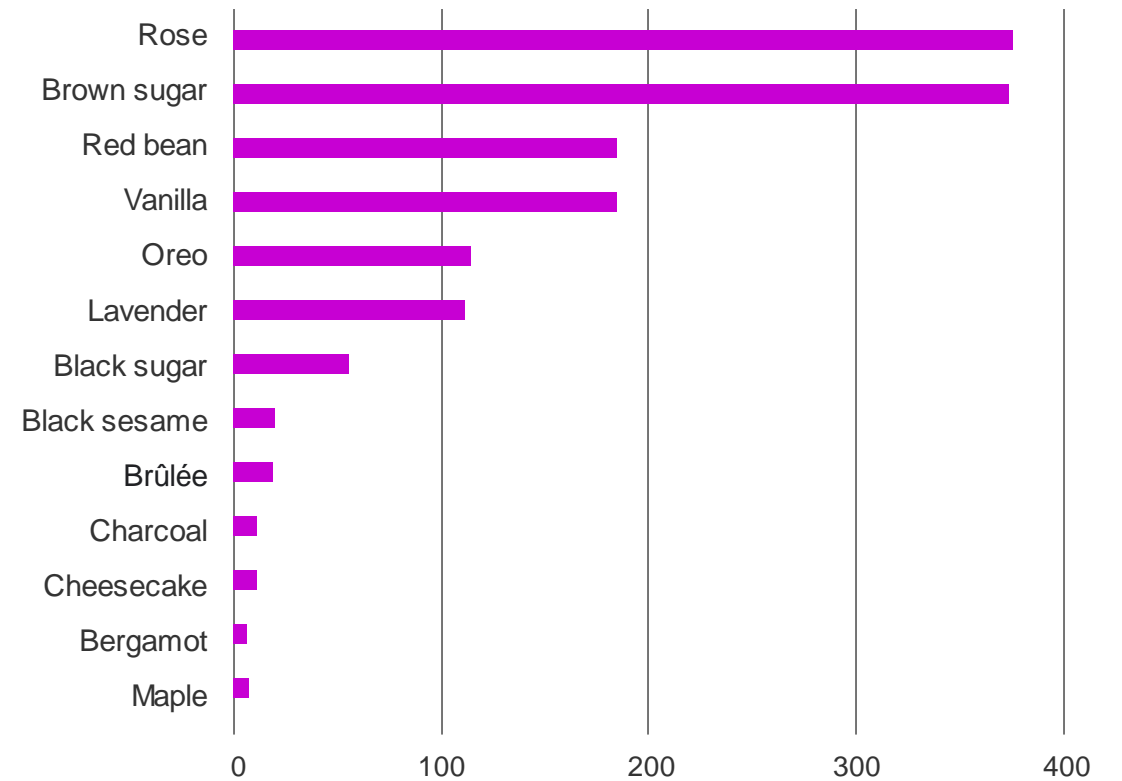
Bubble tea flavors

Innovative Toppings & Flavors:

Its interesting to see bubble tea chains offering popular flavors such as '**rose**', '**oreo**', '**brown sugar**' mentioned on menus along with unique flavors such as **cheesecake**, **bergamot**, and **brulee**.



Bubble Tea – Top menu flavors



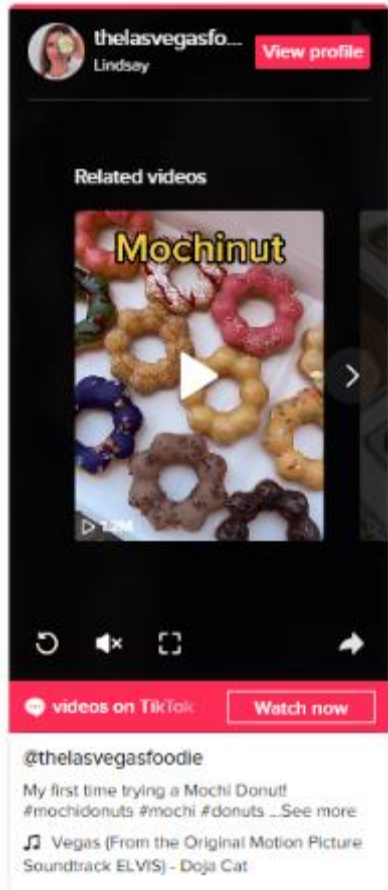
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Mochi doughnuts:
Why they're taking
the food scene
by storm

Barry Thomas, Kantar Senior Thought Leader
Sunny Khamkar, MenuData CEO
February 2023



Mochi doughnuts are especially popular on TikTok



 Mochi doughnuts are predominantly talked about on TikTok, where users are highly engaged. This could be due to the visual nature of the dessert and the fact that users can post videos of their own mochi doughnut creations.



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The magic of yuzu

How a little-known fruit is
becoming a top ingredient in 2023

Barry Thomas, Kantar Senior Thought Leader

Sunny Khamkar, MenuData CEO

April 2023



Yuzu menu features are showing up on fine dining menus and often in innovative culinary features

While yuzu has been a staple for many years in fine dining, its increased popularity has largely been driven by its ability to be used in common dishes as a substitute or pairing with lemon and honey.

From sauces and dressings (cilantro-yuzu pesto, yuzu-lemon dressing) to add-ons to existing dishes (guacamole, brussels sprouts), chefs are finding more and more creative ways to incorporate yuzu into their menus.

Yuzu: Fine dining

Restaurant	City	State	Menu Item Name	Description
Per Se	New York	NY	Yuzu and Pistachio Crusted Duck	Cauliflower, Persimmon and Pistachio Jus
Nobu	Los Angeles	CA	Nobu Honey Toast	French Toast, Yuzu Lemon Curd, Creme Chantilly, Mixed Berries, Honey
Alinea	Chicago	IL	Swirl	Apple, Yuzu and Lemon verbena

Yuzu: Innovative items

Restaurant Name	City	State	Menu Item Name	Description
Brizo Bar & Restaurant	marina del rey	ca	shrimp ceviche	blue corn tostada, yuzu fish sauce, avocado smash, red onion, hijiki, tomato, mango, cilantro, purple radish & jalapeno
The Rooftop by JG	beverly hills	ca	truffle cheeseburger*	brie, yuzu pickles, black truffle aioli
Intercrew	los angeles	ca	seared dry scallop	parsnip puree, warm yuzu endive salad, parsnip crisp, mustard frills, watercress, grilled lemon
The Cannery Restaurant	newport beach	ca	jack's catch of the day	furikake green beans, mashed potatoes, yuzu butter sauce, sea beans
La cha cha chá	los angeles	ca	callos en salsa negra*	baja bay scallop, yuzu salsa negra, passionfruit, green onion, mexican furikake
Mochinut	seattle	wa	yuzu	
Flipper's Gourmet Hamburgers	oakland	ca	crab cake salad	house-made crab cake, lemon-dill sauce, alfalfa sprout, organic spring mix, cucumber, red onion, cherry tomato and side of yuzu-lemon dressing.
Trestle	san francisco	ca	shrimp cavatelli	cilantro-yuzu pesto, toasted peanut, spigarello. add a pasta for \$12. \$39 prix fixe - choose one option per course. january 5th - january 10th
Koi	los angeles	ca	lobster tacos	mango salsa, yuzu guacamole.
Flower Child	newport beach	ca	yuzu brussels sprouts	charred onion, savoy cabbage, golden miso (vegan, gluten-free)

The background of the slide is a dark, almost black, field filled with numerous golden, three-dimensional pyramids of various sizes and orientations. Some are in sharp focus, while others are blurred, creating a sense of depth and movement. The pyramids are scattered across the entire frame, with a higher density in the lower right quadrant.

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Micro markets: An emerging growth channel

Big opportunities in micro markets

Barry Thomas
Senior Retail Thought Leader
October 2022

Micro-market annual sales are often four times higher than a standard vending setup

Approximate expected gross profit (before cost to serve) from a vending machine setup is \$4,800/year.

A micro market's annual gross profit will be approximately \$19,200.

The typical break-even point for a micro market investment averages **7.5 months** versus **17 months** for a vending machine.

Micro markets generate on average **\$20 per customer each month** versus **\$7** for a vending machine.

Break-even point

Vending machine
17 months

Micro market
7.5 months

Average monthly customer spend

Vending machine
\$7

Micro market
\$20



Minus Forty micro market

Summary



Hungry to learn more about snacking?

Shopping for Meals and Dining Decisions

Kantar's multi-wave shopper study coming soon!

Covering shopping for meals and snacks as well as eating at-home and away-from-home

Breadth of research topics



Multi-part series covering shopping and dining decisions surrounding meals and snacks.

Four waves:

1. Meals at home and away 2022 wave
2. **Snacking occasions at home and away**
3. Gatherings and special occasions
4. Meals at home and away 2023 trend

Summer 2023: Snacking focus!



Summer 2023 research wave will focus on **Snacking occasions at home and away:**

- Snacking consumption, behaviors, sentiment
- Shopping for snacking including insights around most recent trip, shopping habits, retailer choice and more
- If snacking "out", where are snacks purchased and consumed?
- Covers snack food and drinks

Ready to learn more?

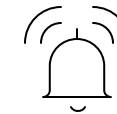


The study can be accessed the following ways:

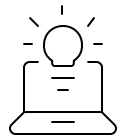
1. ShopperScape license holders have access to select thought leadership content
2. Full study available within ShopperScape database
3. Opportunity to purchase full reports/deep dive bundles:
 - Full length report
 - Dataset
 - Technical orientation

The benefit of our Shopper Deep Dives

In Depth Look



Practical Application



Expert Authored Work



Shopper first POV



Reach out to learn more!
kantarshopper@kantar.com

Introducing the new Kantar Retail Public IQ

Read for yourself

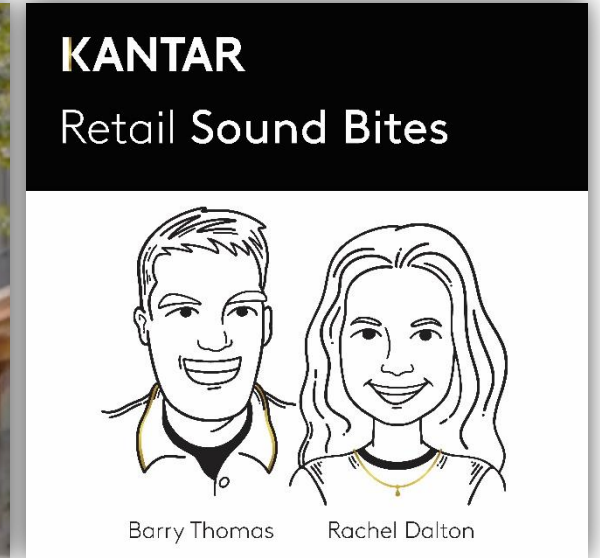
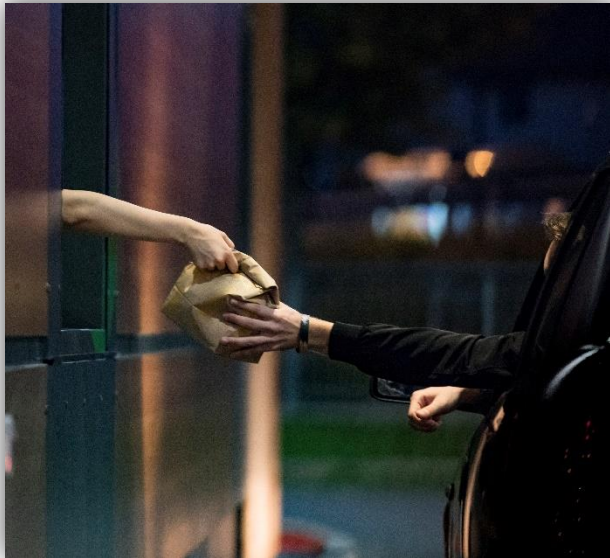
Focusing in on available food service content for everyone


Crafting late-night menus: What do shoppers really want?


Can 7-Eleven crack Europe this time around?

Snack Time with Kantar: The rise of mochi doughnuts


Retail Sound Bites: The state of food service with Jonathan Maze



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Thank you

