

SEPTEMBER 2023

Stomach Share



STOMACH SHARE ABOUT THE REPORT

NUMERATOR'S STOMACH SHARE offers insight into consumer food purchasing habits and potential future trends for manufacturers, retailers, and food service providers.

During a period of rising prices and reduced volumes, food industry leaders must gain a clear understanding of consumers' preferences across food choices, cooking habits, and dining options to maximize growth opportunities.

Utilizing Numerator's omnichannel capabilities, we analyze consumer behavior across **four primary consumption categories**: limited-service restaurants, no/low-cook foods, prepared foods, and raw ingredients. This enables brands to pinpoint actionable opportunities to drive growth in the market.



Methodology & Approach

To gain a comprehensive understanding of how consumers navigate the complex landscape of food products available for consumption, we have categorized food consumption into four main components:

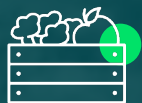
- **Raw ingredients:** These are foods typically used as the foundational elements of a meal and generally require some form of preparation (e.g., produce, baking ingredients, raw and frozen meats).
- **No/low-cook foods:** These are foods that demand minimal processing and are typically ready for consumption without extensive preparation (e.g., frozen dinners, candy and snacks, canned goods).
- **Retailer-prepared foods:** These are foods primarily processed within retail stores, including items like baked goods, premade pizza, and hot dogs.
- **Out-of-home dining:** This category centers around limited-service restaurants.

Please note that products such as gum, mints, beverages, ice, and alcoholic beverages have been excluded from our analysis. For specific category definitions and information regarding limited-service restaurant coverage, please reach out to your Numerator account partner.

All insights presented in this report are based on data from the latest 52 weeks ending in Q3'2023, unless otherwise specified.



Four Stories for Leaders to Remember



FUTURE FLAVORS

Food leaders must adapt to changing food preferences. Savory ingredients are facing price increases and changes in dietary trends. Fresh tropical fruits are rising in popularity. Brands should innovate with fruity flavors. Investing in fun, approachable global flavors is crucial.

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DRIVING THRU VALUE

Amid rising inflation and increased mobility, dining out gains value, posing a challenge for grocery brands. To adapt, brands should forge partnerships with restaurants. Limited-service restaurants are winning with Gen Z guests by bringing timely and relevant collaborations with brands and celebrities.

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THE RETAIL FOOD COURT

Retailers have untapped potential in their bakeries and deli counters. Diverse customer groups crave new eating experiences in-store. Retailers can also look to find a signature item, like Casey's pizza or Costco's hot dog, to drive sales, requiring collaboration between brands and retailers.

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BRAND VALUE

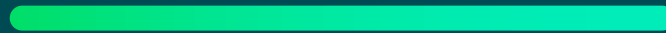
Better-for-you brands drive growth in no/low-cook foods. Manufacturers can secure their positions through strategic investments in emerging brands. Amid elevated prices, consumers also turn to private label options. Brands must adapt to private label trends and define their unique shopper appeal.

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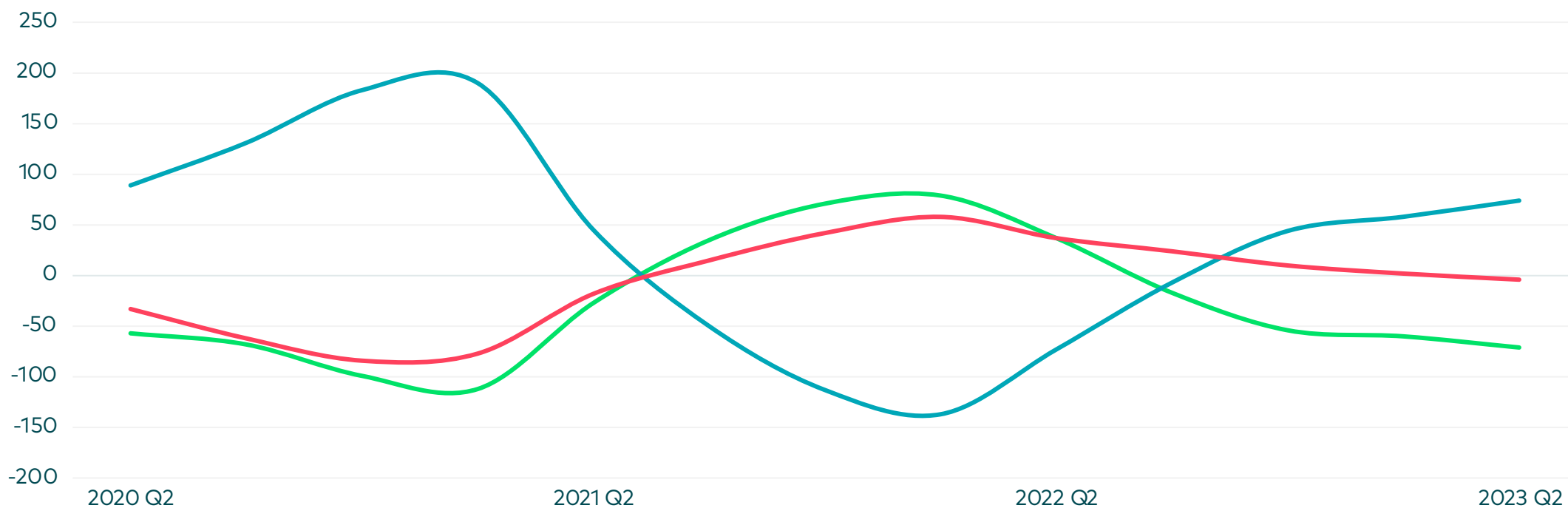
Future Flavors



Consumers are changing how they consume. Volume is moving towards scratch cooking products once again.

UNIT SHARE CHANGE VS YAG (IN BPS) BY FOOD TYPE
 Within Grocery | Rolling 52 Weeks by Quarter Ending Q2'23

■ No / Low Cook ■ Raw Ingredients ■ Prepared Foods



The movement towards scratch cooking is due to consumers finding it more affordable than buying processed goods.

MAJORITY OF CONSUMERS FIND SCRATCH COOKING MORE AFFORDABLE THAN PROCESSED GOODS

% of Respondents

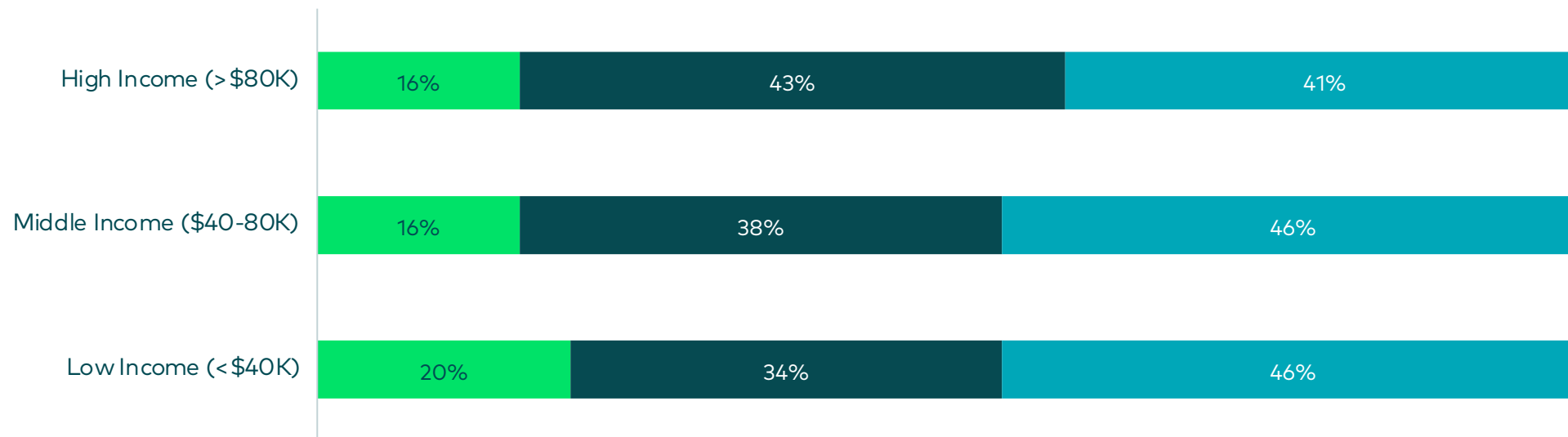


Consumers across all incomes are taking a larger interest in scratch cooking.

CONSUMERS ARE SWITCHING TO SCRATCH COOKING

% of Respondents

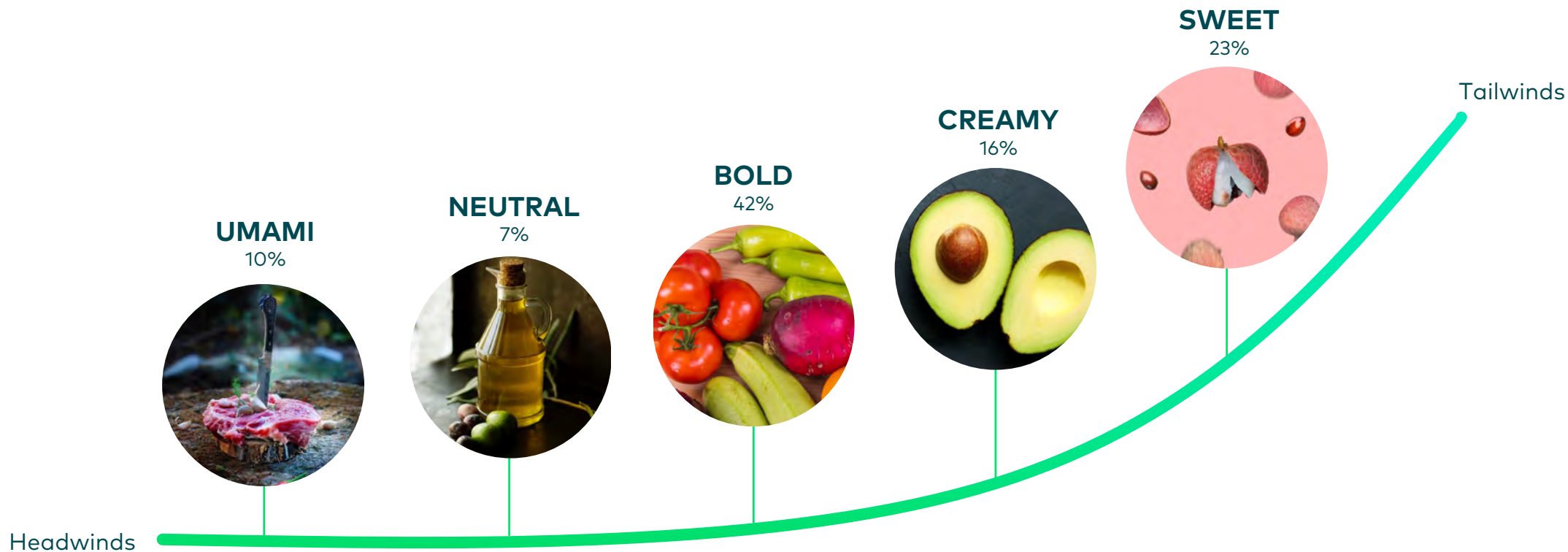
■ Moving towards Pre-Made
 ■ Unchanged
 ■ Moving towards Scratch Cooking



Sweeter flavor profiles are becoming more popular, but bold flavors continue to make up the bulk of volume.

UMAMI IS LAGGING WHILE SWEET FLAVORS ARE GROWING FAVORABILITY

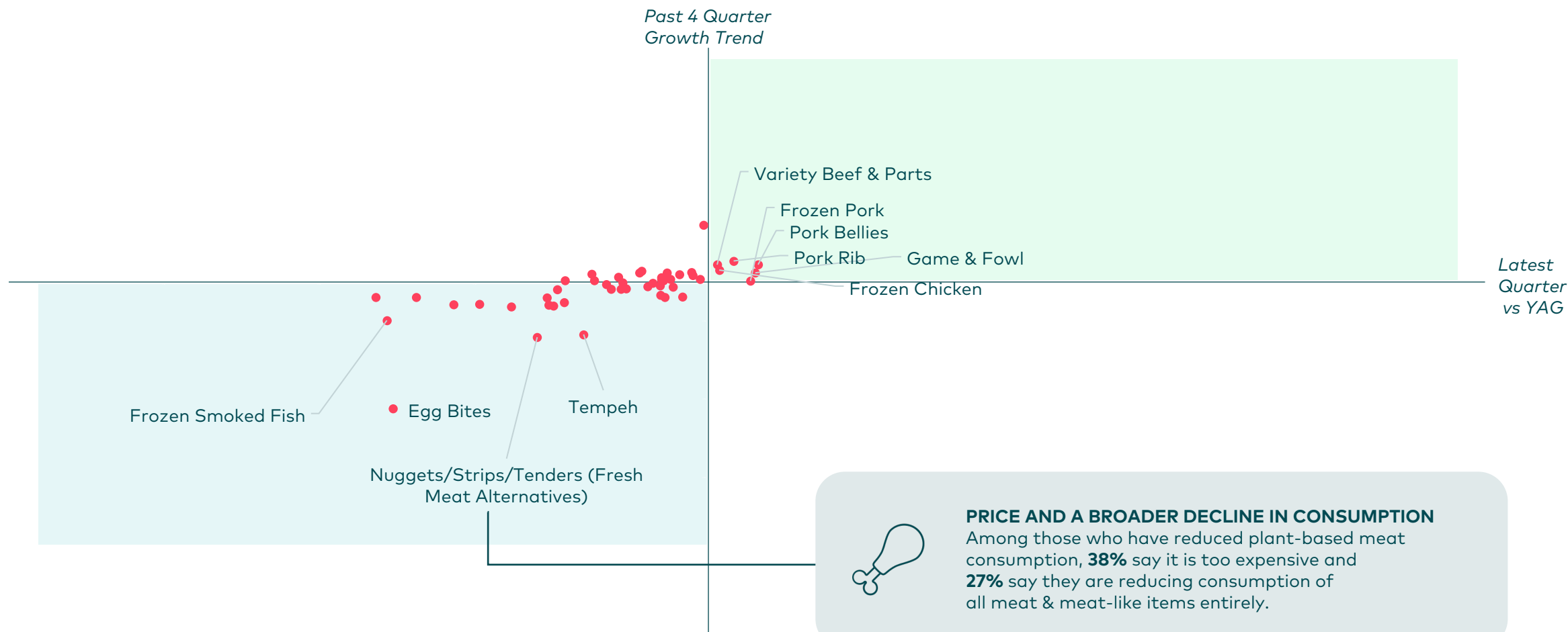
Looking at % of Scratch Cooking Categories Growing and % of Categories Declining within Flavor Set
% of Units within Grocery



Few meat categories are accelerating in growth, with meat alternatives slowing down due to price and broader trends.

UMAMI CATEGORIES ARE SEEING LESS UPSIDE

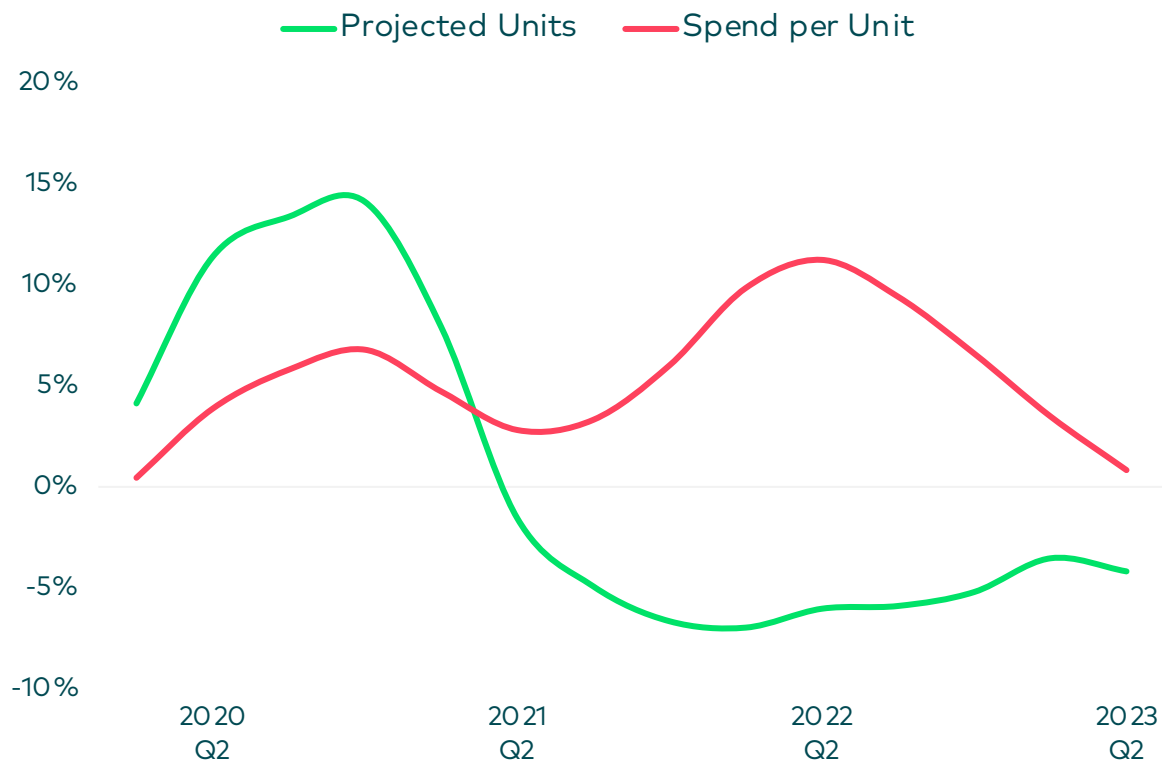
Umami Categories | Rolling 52 Weeks by Quarter Ending Q2'23



Meats lagged as inflation peaked and diet trends are shifting away from Keto and Paleo towards a more balanced approach.

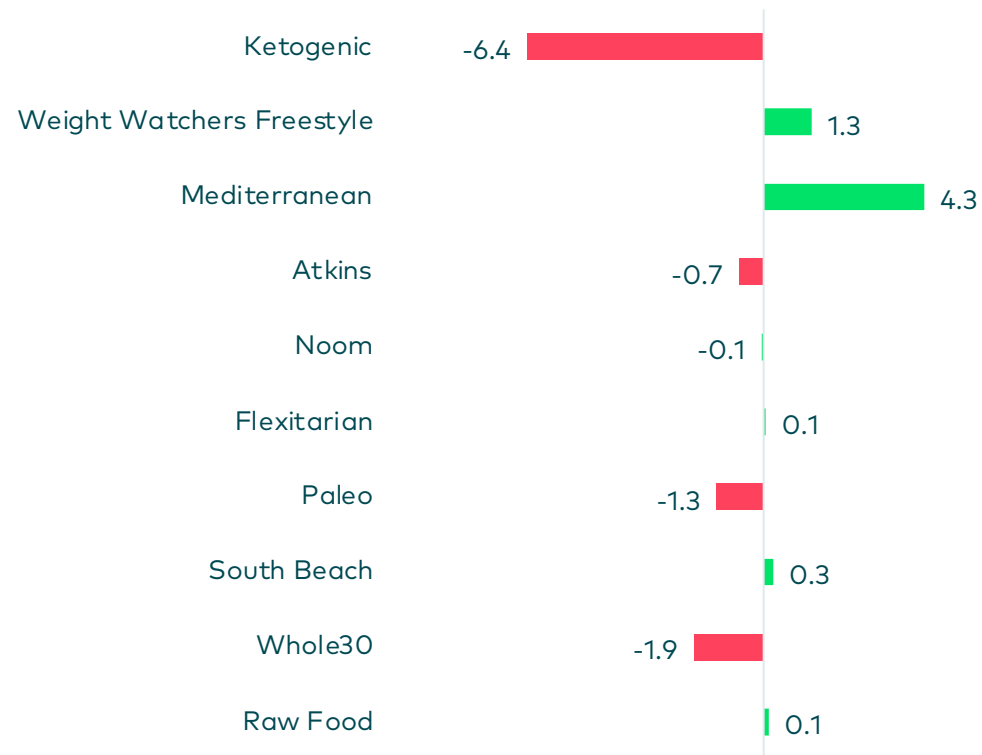
MEAT INFLATION DROVE UNIT DECLINES...

Meat Projected Units and Spend per Unit % Change vs Year Ago Rolling 52 Weeks by Quarter Ending Q2'23



DIET TRENDS ARE ADDING HEADWINDS TO THE MEAT CATEGORY

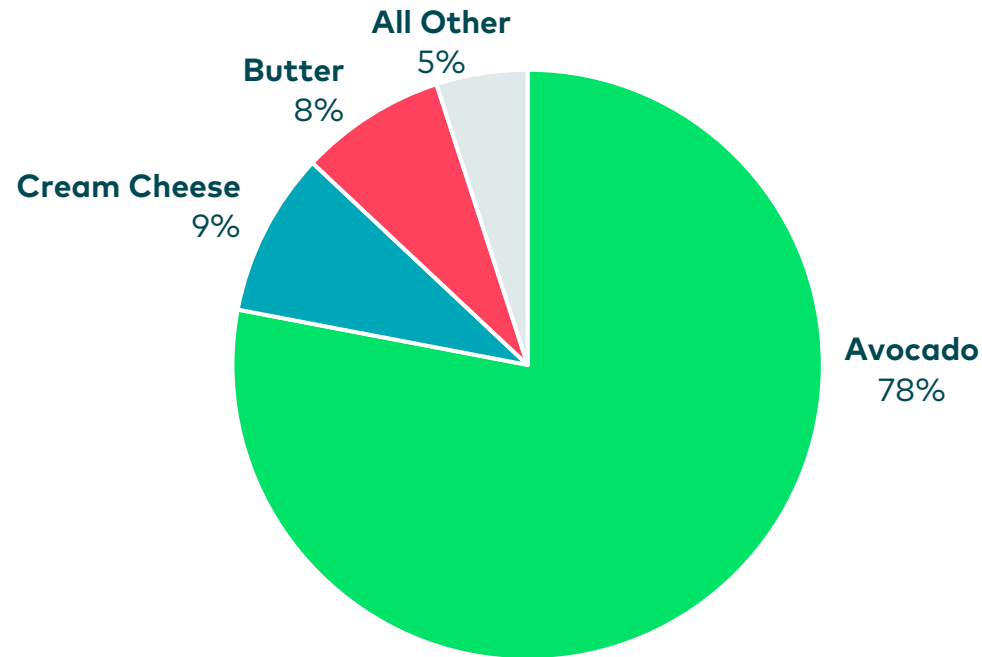
Percent Point Change Among Those Participating in a Diet July 2023 vs July 2021 | Ranked by % of Dieting Households



Avocados continue to be a growing staple– driving nearly all growth within 'creamy' based categories– particularly within Gen Z.

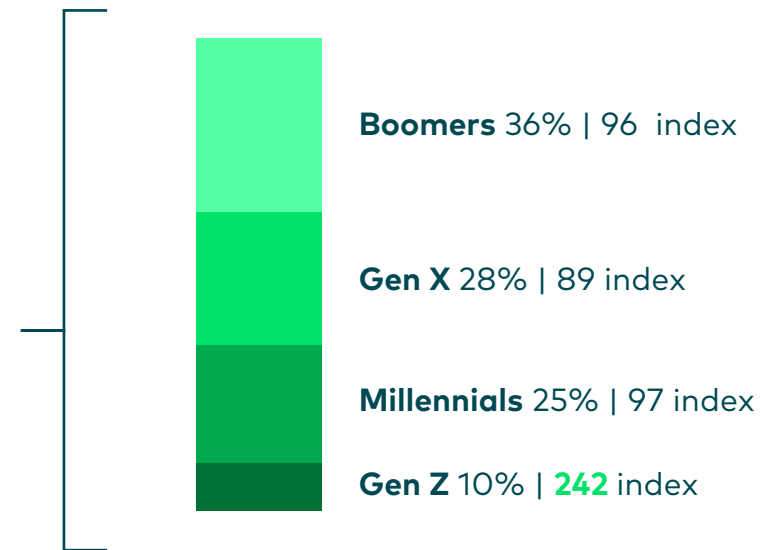
AVOCADOS DREW NEARLY 4 IN 5 CREAMY UNIT GROWTH

% Contribution to Creamy Flavor Grouping Unit Growth
Rolling 52 Weeks by Quarter Ending Q2'23



BOOMERS DROVE UNITS BUT GEN Z GREW TWICE THEIR WEIGHT

% Contribution to Avocados Unit Growth | Index to % HHs
Rolling 52 Weeks by Quarter Ending Q2'23

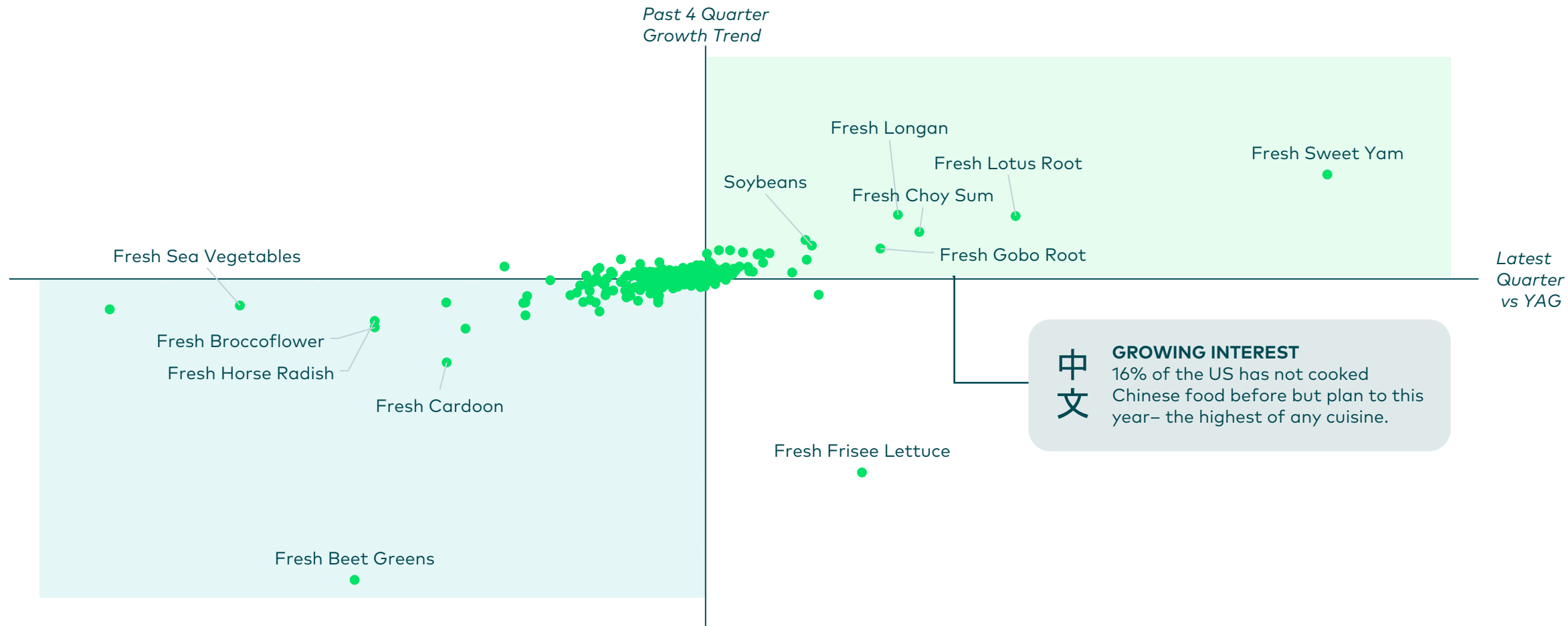


Asian ingredients within bold flavor categories are growing in popularity and offer an opportunity for cuisine innovation.

CONSUMERS ARE MOVING TOWARDS ASIAN INGREDIENTS

Bold Categories | Unit Growth | Rolling 52 Weeks by Quarter Ending Q2'23

Past 4 Quarter Growth Trend



中文 **GROWING INTEREST**
 16% of the US has not cooked Chinese food before but plan to this year- the highest of any cuisine.

Brands could consider ways to co-partner with emerging Asian brands to incorporate Asian flavors into core products.

FASTEST GROWING ASIAN BRANDS

Projected Units within Grocery | Among Select List | Rolling 52 Weeks by Quarter Ending Q2'23 vs YAG



MOMOFUKU

Momofuku is a renowned restaurant group founded by David Chang, known for its innovative fusion cuisine, blending Asian and American flavors.

Their release of their [chili crunch sauce](#) has seen strong performance with distribution in Target.



FLY BY JING

Fly by Jing culinary brand is celebrated for its authentic Chinese sauces and condiments. [Founded by Jenny Gao](#), the brand brings the bold and complex flavors of Sichuan cuisine to global kitchens.

Similar to Momofuku, the brand built success off their chili sauce.



J-BASKET

JFC's J-Basket products encompass a diverse selection of authentic Japanese culinary essentials. From the brand's premium soy sauces and rice to snacks, condiments, and specialty ingredients, [J-Basket](#) delivers the rich and diverse flavors of Japan to the kitchen.



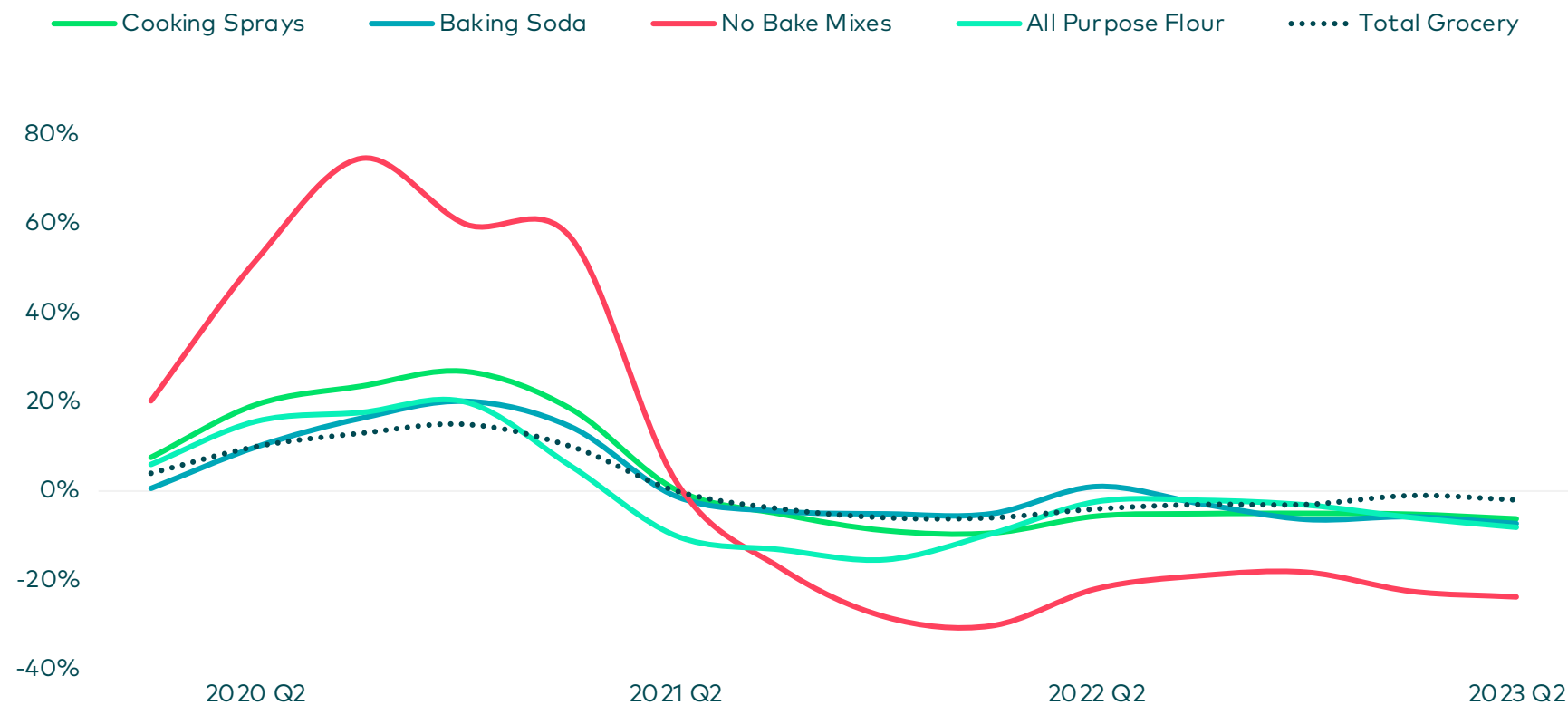
KEWPIE

Kewpie Mayo is a [Japanese mayonnaise brand](#) known for its creamy texture and unique flavor. What sets it apart from other mayo is its smoother, richer, and slightly sweeter taste. Kewpie has grown unit volume by over 50% year over year.

Although scratch cooking has grown, baking ingredients and no-bake mixes have not sustained their quarantine boost post-COVID.

BAKING INGREDIENTS HAVE SLOWED DOWN IN VOLUME

Neutral Flavor Categories | Projected Units | Rolling 52 Weeks Ending Q2'2023



Consumers are also starting to switch out dessert ingredients with fresh fruits– including more exotic ones– to get a sweet fix.

CATEGORIES WITHIN THE TOP 20 SWEET CATEGORIES

Projected Units | P52W Ending Q2'23 vs YAG



LYCHEE



PITAHAYA /
DRAGON FRUIT



SAPOTE



COCONUT



SOURSOP



Eight of the top 20 sweet categories are fruits originating outside of the US

CATEGORIES WITHIN THE BOTTOM 20 SWEET CATEGORIES

Projected Units | P52W Ending Q2'23 vs YAG



BROWNIES &
DESSERT BARS



SUGAR CANE



CANDY MAKING
WAFERS



COOKIE DOUGH



LOW CALORIE
SWEETENER

INSPIRATION FOR FUTURE FLAVORS



HAVE A FRESH TAKE ON FOOD

Although consumers are looking to cook from scratch more, the ingredients they purchase may look different than what we have seen prior. Ingredients known for their robust umami flavor have experienced a slowdown, influenced by inflation and dietary shifts. Conversely, there is a rising popularity in fresh, tropical fruits, with consumers shying away from ingredients that contain refined sugars.

Brands should continue to innovate on bringing fresh, fruity flavors in their product lineup. In fact, Firmenich– the world's leading fragrance & taste company– said dragon fruit would be [2023's flavor of the year](#).



BUILD A GLOBAL FLAVOR PORTFOLIO

Today's supply chains enable cooks to experiment with ingredients sourced from various corners of the world. Americans are actively buying ingredients typically associated with Asian cuisine, including choy sum, lotus root, gobo root, and lychee. Additionally, consumers are increasingly open to trying more exotic fruits.

Allocate resources to research and development efforts aimed at discovering appealing and accessible global flavors. One example is McCormick launching a [Vietnamese x Cajun style seasoning](#) to kick off 2023.

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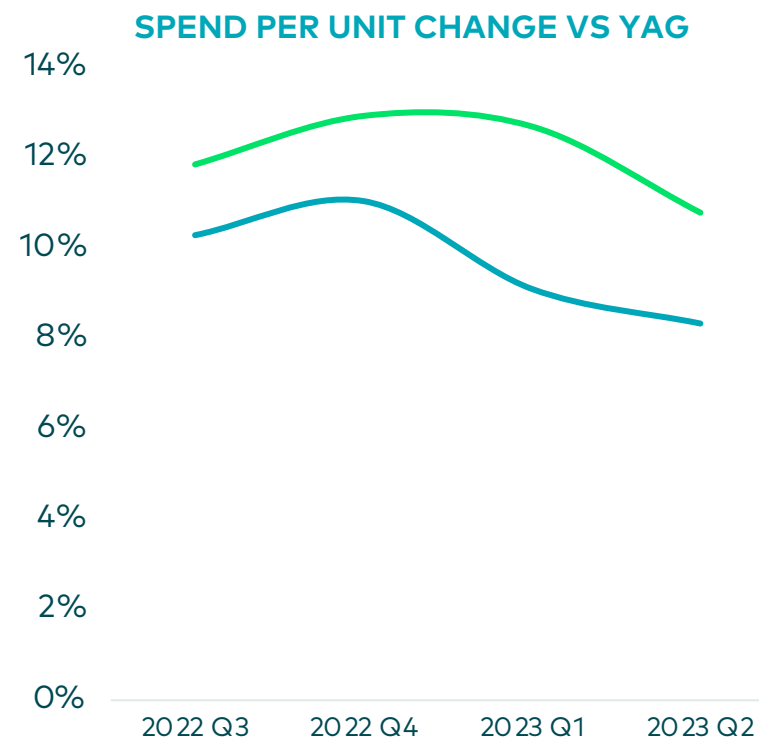
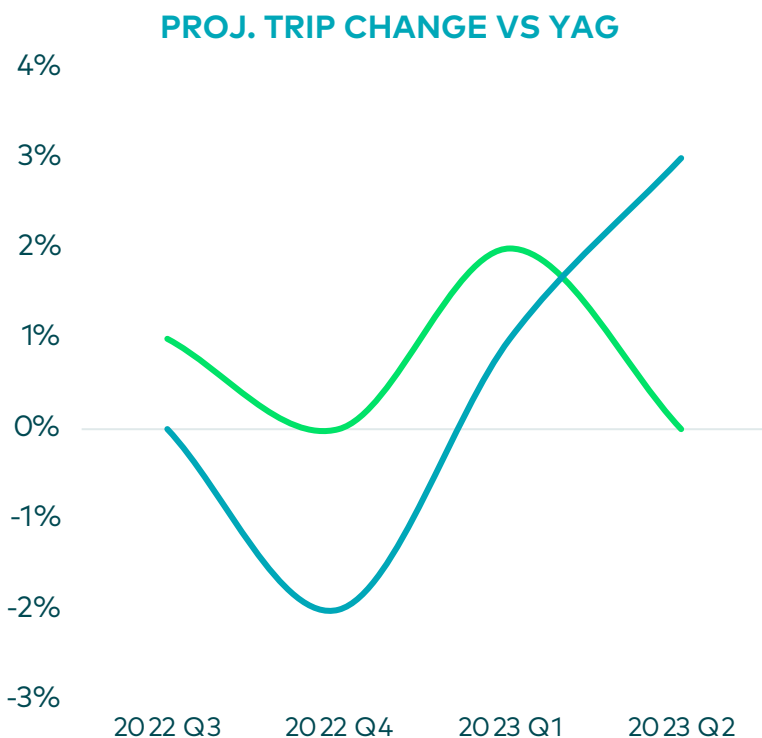
Driving Thru Value

Trips to limited-service restaurants are growing as in-store grocery prices outpace dining out.

MEASURE BY FOOD TYPE

Within Grocery & LSR Food | Rolling 52 Weeks by Quarter Ending Q2'23

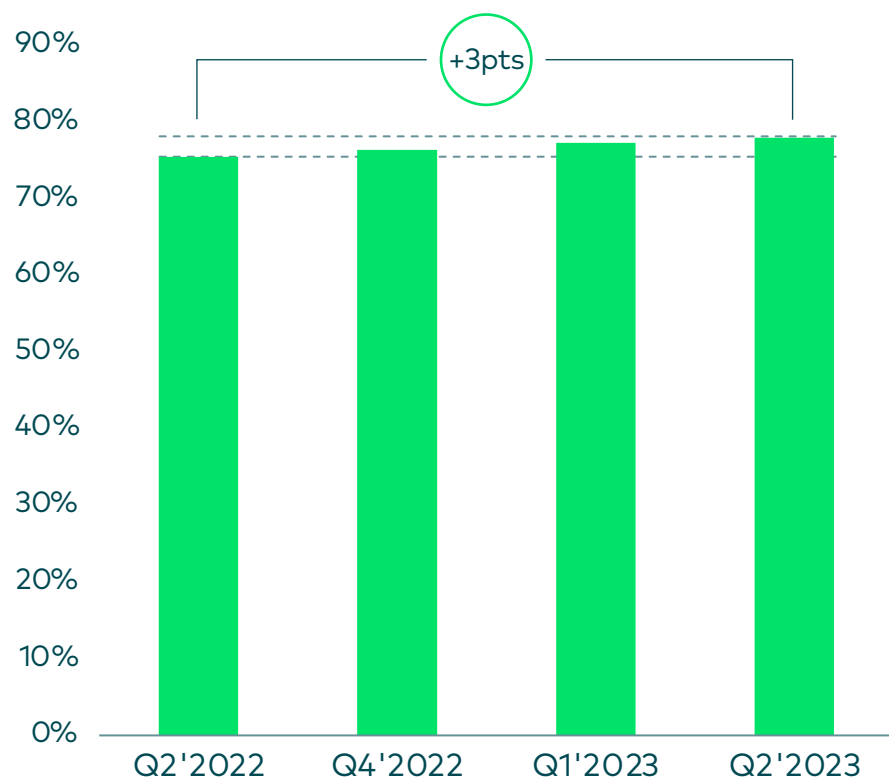
■ In-Store Grocery ■ Limited-Service Restaurants



Consumers are becoming more satisfied with eating out and find limited-service restaurants to provide good value.

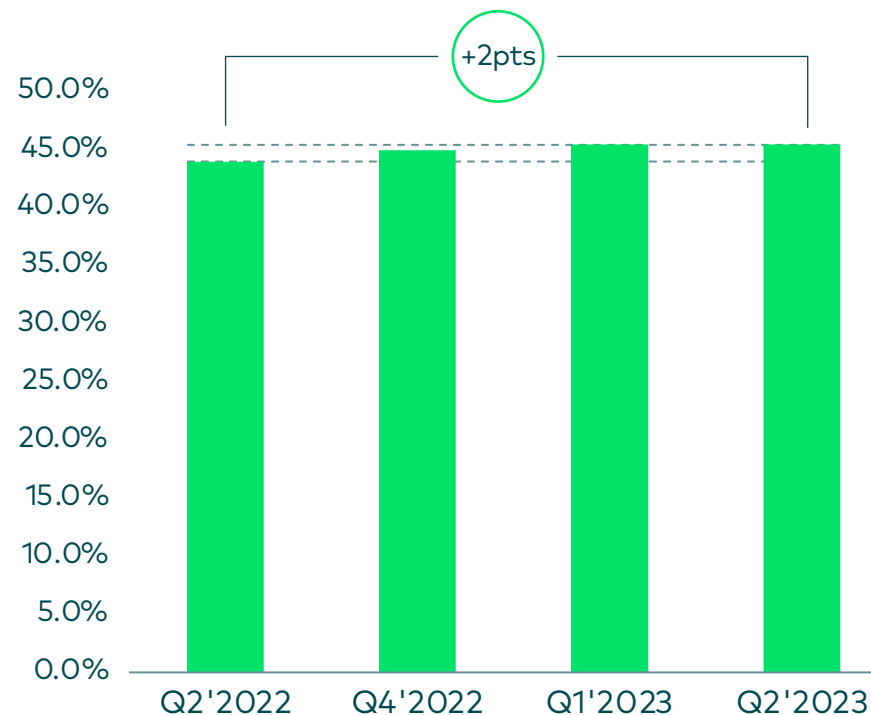
LSR NET SATISFACTION SCORE

% of Respondents | Rolling 52 Weeks by Quarter Ending Q2'23



LSR GOOD VALUE

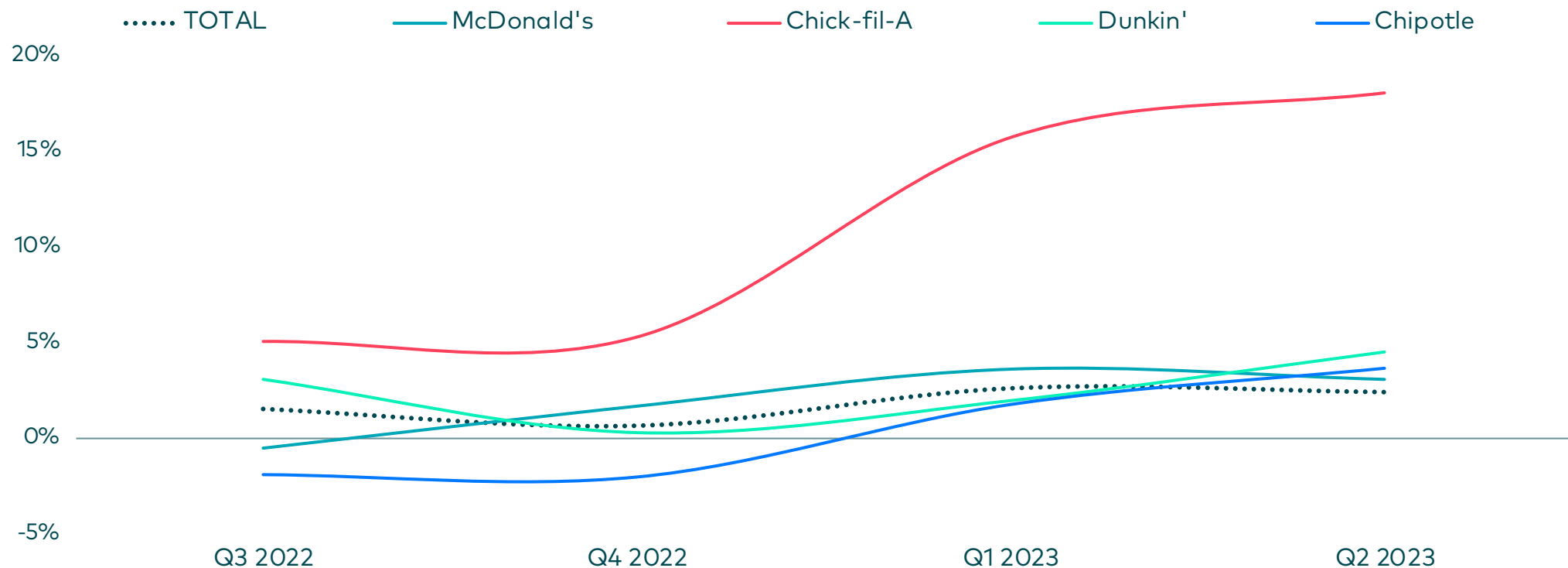
% of Respondents | Rolling 52 Weeks by Quarter Ending Q2'23



McDonald's, Chick-Fil-A, Dunkin' & Chipotle are driving traffic growth for limited-service restaurants.

CHICK-FIL-A, CHIPOTLE, MCDONALD'S AND DUNKIN' ARE DRIVING TRAFFIC FOR LSR

Limited to LSR Food | Projected Trips vs YAG | Rolling 52 Weeks by Quarter Ending Q2'23

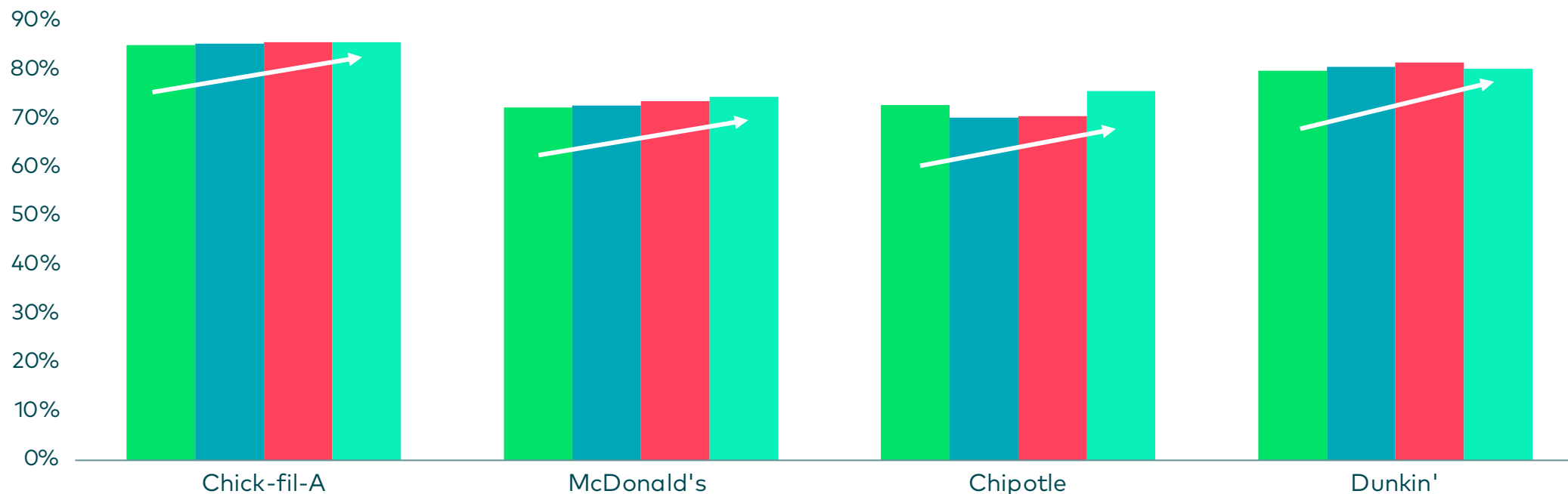


The LSRs driving traffic are also growing in customer satisfaction. Chick-fil-A consistently outpaces other stores.

NET SATISFACTION SCORE

% of Respondents | Rolling 52 Weeks by Quarter Ending Q2'23

■ Q2'2022 ■ Q4'2022 ■ Q1'2023 ■ Q2'2023

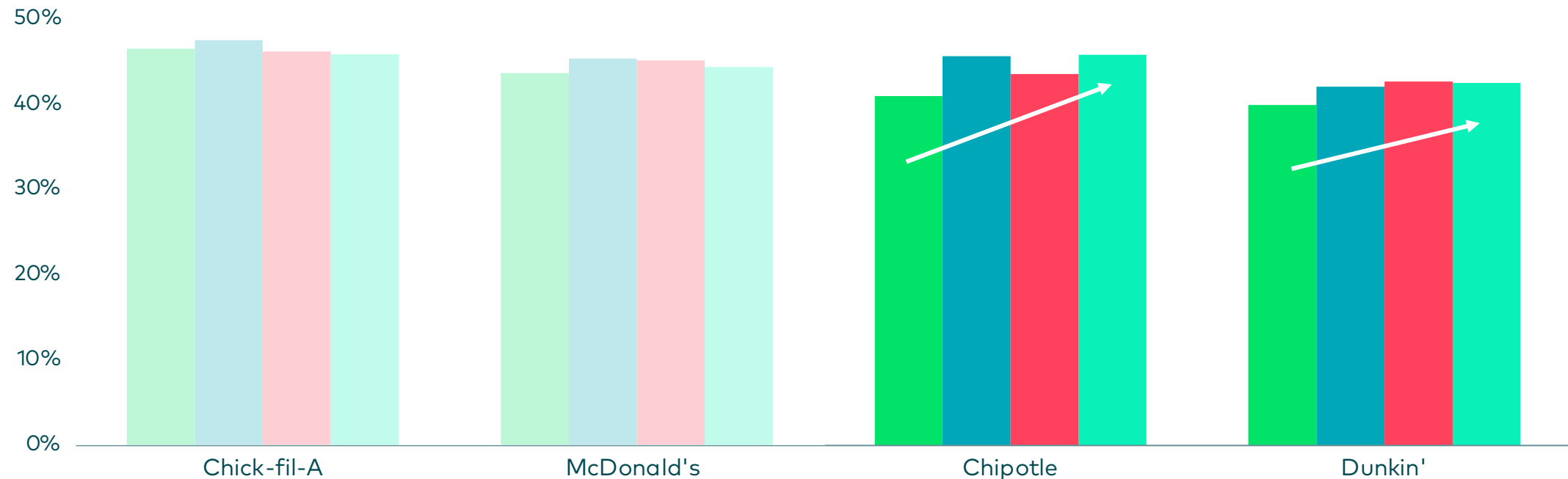


Chick-fil-A and McDonald's showcase strong performance on value. Chipotle and Dunkin' made significant gains this year.

GOOD VALUE

% of Respondents | Rolling 52 Weeks by Quarter Ending Q2'23





■ Q2'2022 ■ Q4'2022 ■ Q1'2023 ■ Q2'2023



The chains growing the fastest in traffic have done so with similar cohorts— particularly with valuable Gen Z consumers.

TRAFFIC GROWTH DRIVERS ACROSS DEMOGRAPHICS

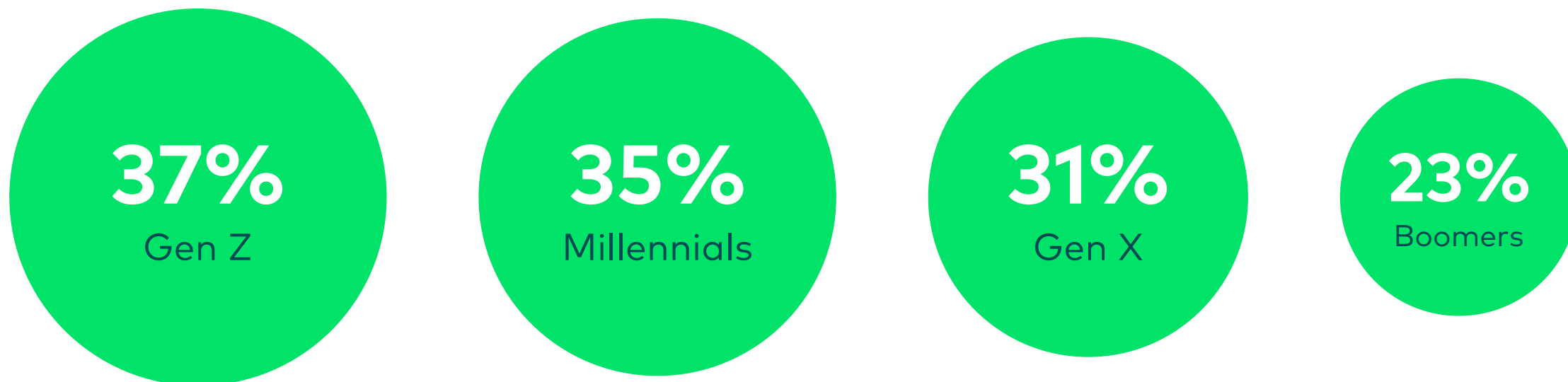
Highlighting Cohorts Driving the Fastest Traffic Growth Year over Year | Rolling 52 Weeks by Quarter Ending Q2'23

	 GENERATION	 REGION	 ETHNICITY	 PURCHASE POWER
MCDONALD'S	GEN Z	MIDWEST	HISPANIC/LATINO	LOWER THIRD
CHICK-FIL-A	GEN Z	MIDWEST, WEST	WHITE, ASIAN	UPPER THIRD
CHIPOTLE	MILLENNIALS & BOOMERS	NORTHEAST SOUTH	WHITE, HISPANIC/LATINO	MIDDLE THIRD
DUNKIN	GEN Z	NORTHEAST MIDWEST	HISPANIC/LATINO	UPPER THIRD

Gen Z is the most likely of all generations to view eating out as comparable to grocery shopping when it comes to price.

GEN Z IS THE MOST LIKELY TO FIND EATING OUT TO BE MORE AFFORDABLE THAN SHOPPING FOR GROCERIES

% Respondents



Additionally, restaurants winning with Gen Z are activating through collaborations with brands and celebrities.



LOVIN' THE MCCOLLABORATIONS

McDonald's recent marketing activations have looked to reach younger consumers by introducing collaborations with art brands & music stars. Two examples include:



- **Cactus Plant Flea Market** where the nostalgic children's happy meal is repackaged for adults including toys [reselling for thousands of dollars](#).
- **Cardi B & Offset** crafted the latest celebrity meal with McDonald's to [kick off Valentine's Day](#).

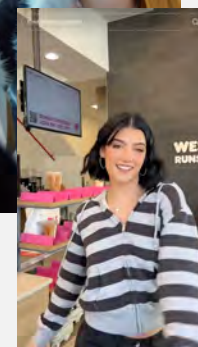
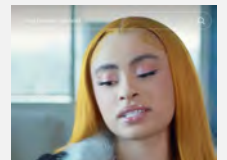


In the month each of these activations, Gen Z traffic grew the fastest year over year compared to any other generation within McDonald's.



DUNK-TOK

Many marketing pundits questioned whether the Dunkin' rebranding and strategy shift would work.



One area Dunkin' has placed efforts in is with Gen Z as **Gen Z penetration grew by 2.1 percentage points**. It should come as to no surprise as Dunkin' is the most followed Tik-Tok account among coffee shop brands with [3.1 million](#) followers (Starbucks at [2.1M](#) and Krispy Kreme at [61K](#)).

The Tik-Tok account highlights celebrities followed by Gen Z such as Charlie D'Amelio and Ice Spice with Ben Affleck.

INSPIRATION FOR DRIVING THRU VALUE



GO BEYOND THE SHOPPING CART

As inflation continues to creep and consumer mobility grows, dining out is increasingly viewed as a cost-effective option. Furthermore, consumers are reporting improved overall satisfaction with dining out, which presents additional consumption challenges for grocery brands.

Brands should explore partnerships with restaurants to capitalize on consumption opportunities as consumers progressively return to dining out. A prime example is how alternative meat brands have historically found growth outside of grocery by [partnering with fast food chains](#). Another instance is the the introduction of the [Doritos Locos Taco](#).



RESONATE WITH GEN Z

The top chains driving the fastest growth are doing so with Gen Z, and it should come as to no surprise given the various activations and collaborations being done with Gen Z brands, celebrities and influencers.

Limited-service restaurants have an opportunity sustain this growth for the long-term by understanding who the [Gen Z consumer is in detail](#). Examine the specific menu items they prefer, understand their reasons for choosing particular restaurants, and explore their interests in depth.

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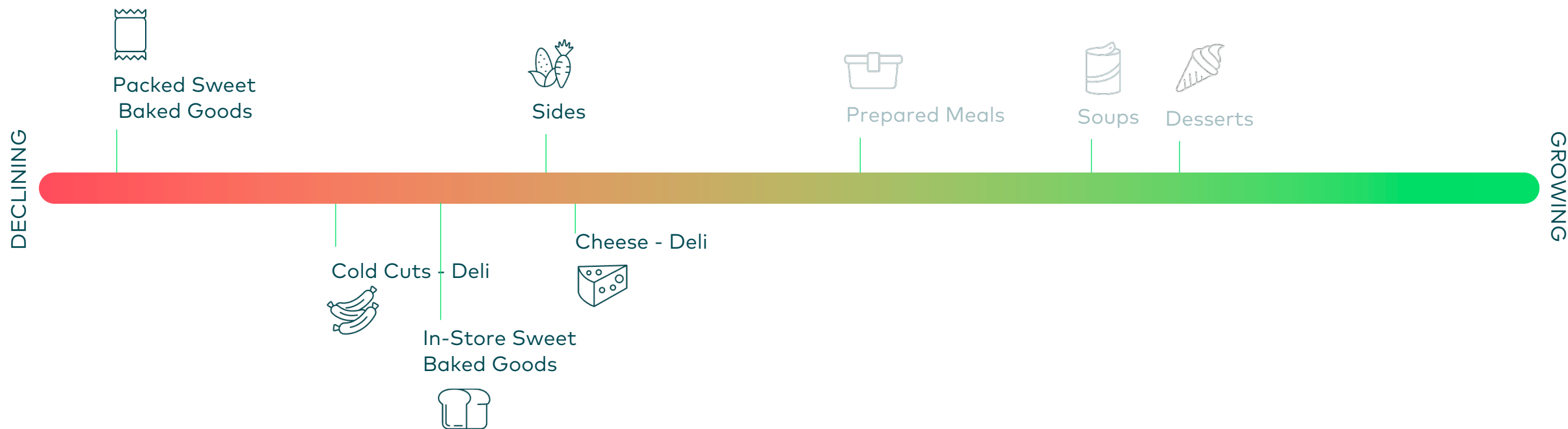
STOMACH SHARE

The Retail Food Court

Retailers need to rethink the floorplan for prepared foods as the traditional bakery and deli are declining.

BAKED GOODS AND DELI ITEMS ARE SEEING HEADWINDS

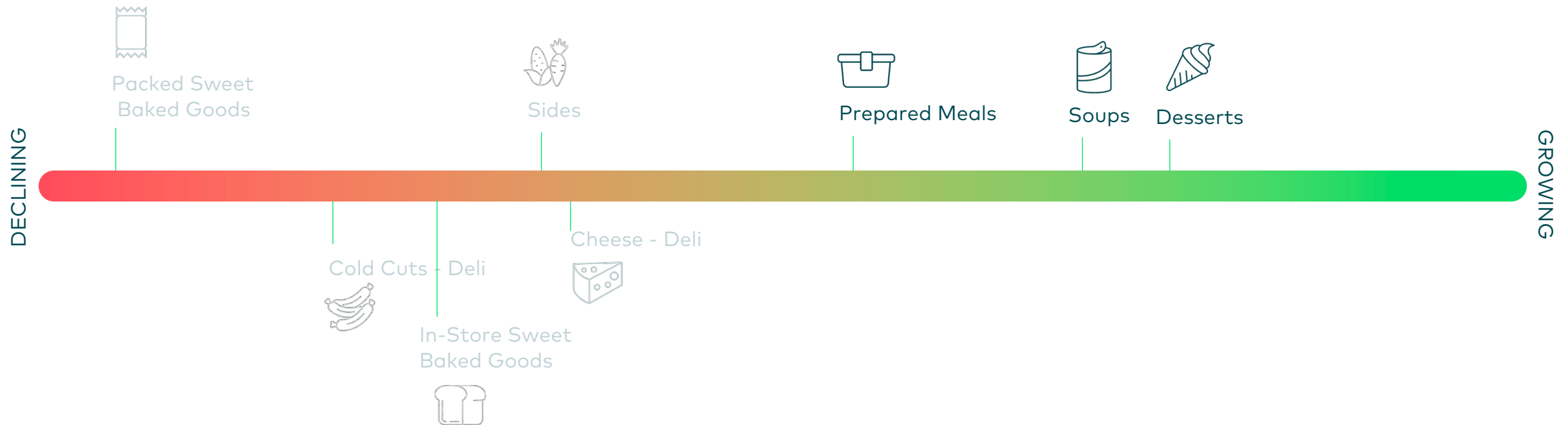
Prepared Foods | Projected Units % Change vs YAG | Rolling 52 Weeks by Quarter Ending Q2'23



While retailer prepared meals, soups & desserts have seen growth in volume.

WHILE PREPARED MEALS, SOUPS AND DESSERTS ARE GROWING

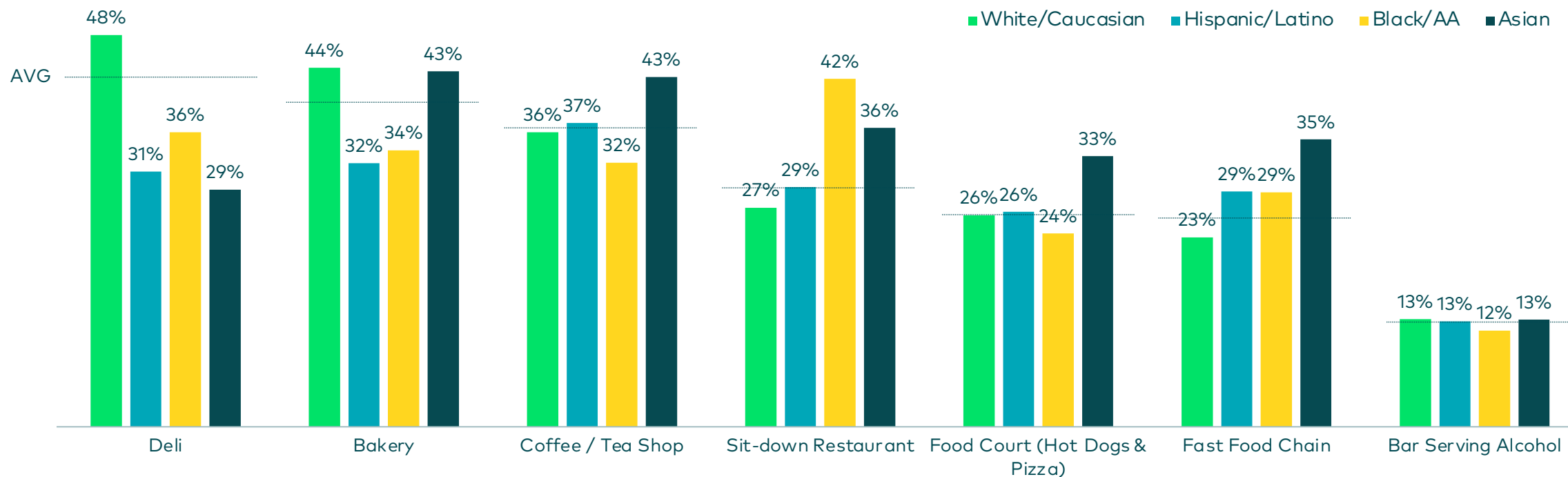
Prepared Foods | Projected Units % Change vs YAG | Rolling 52 Weeks by Quarter Ending Q2'23



The bakery and deli are still appreciated by consumers, but multicultural consumers want to explore variety within retail.

MULTICULTURAL CONSUMERS SHOW PREFERENCES OUTSIDE OF TRADITIONAL DELI & BAKERY

Prepared Foods | Projected Units % Change vs YAG | Rolling 52 Weeks by Quarter Ending Q2'23

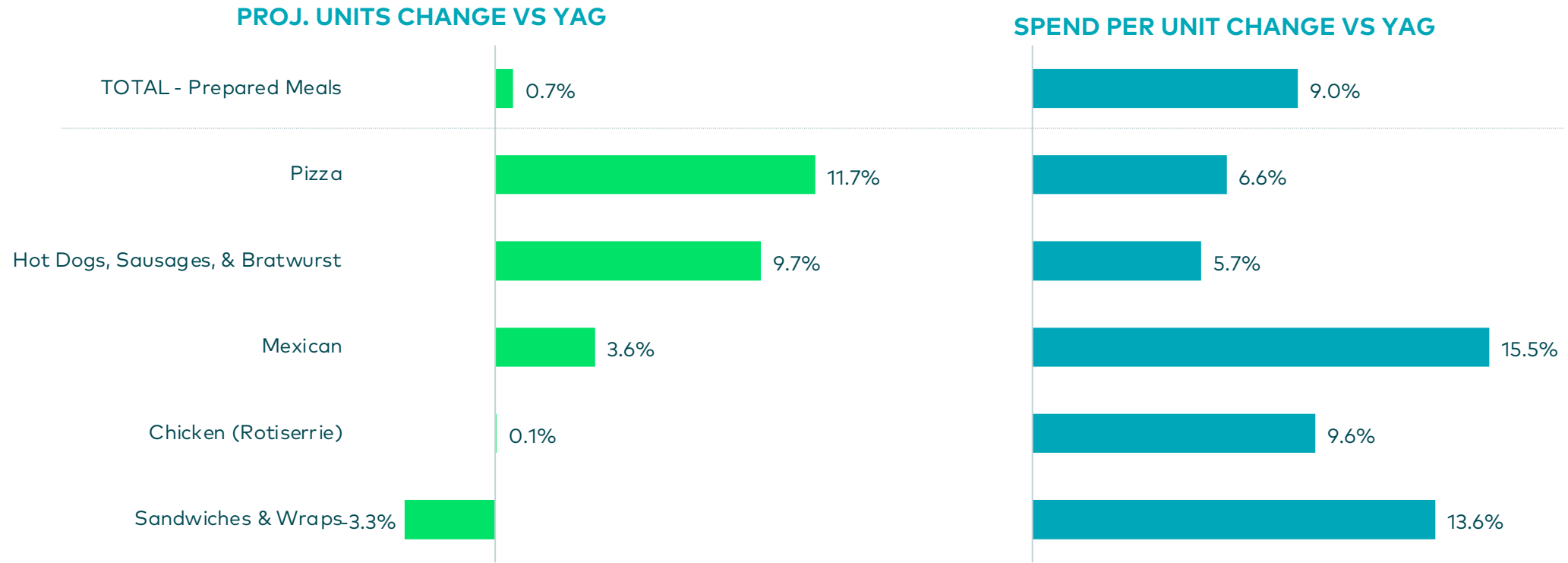


Source: Numerator | N=1966 | Fielded 8/23/2023

Q. Which of the following do you / would you enjoy having at your typical grocery store? Select all that apply.

Consumers want simple & convenient foods such as pizza and hot dogs, which have remained inflation resistant.

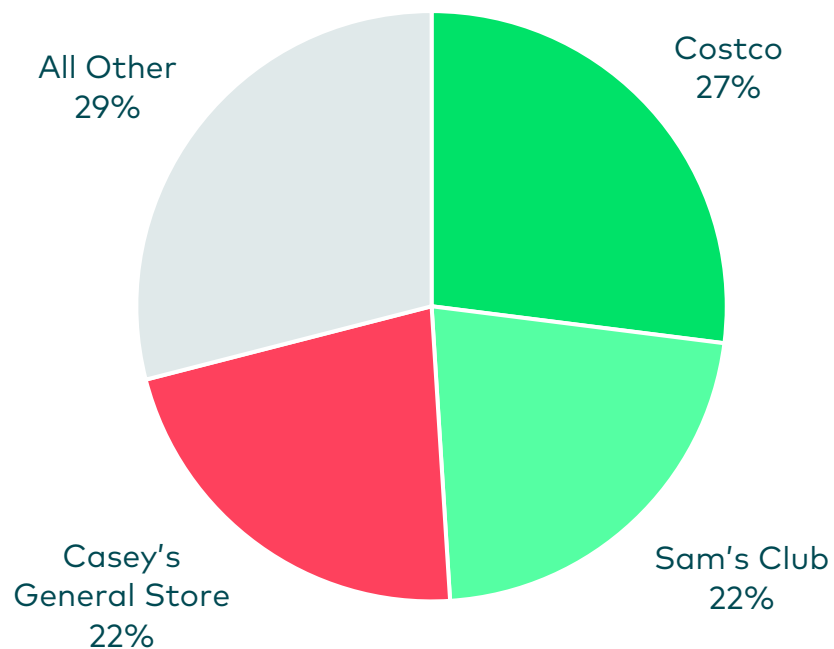
CONSUMERS LOOK FOR SIMPLE & AFFORDABLE MEALS
Within Prepared Meals | Rolling 52 Weeks by Quarter Ending Q2'23



While pizza is buoyed by club stores, one regional c-store is staking its claim in the pizza game.

CLUB RETAILERS DRIVE MAJORITY OF PIZZA GROWTH & CASEY'S IS A KNOCKOUT

% Contribution to In-Store Prepared Pizza Growth | Rolling 52 Weeks by Quarter Ending Q2'23



THE CASE OF CASEY'S GENERAL STORE



Found in the Midwest, nearly 1 in 5 Midwesterners purchase [Casey's General Store](#) pizza.

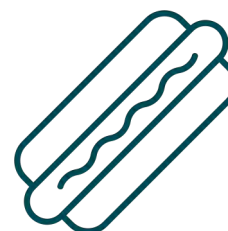
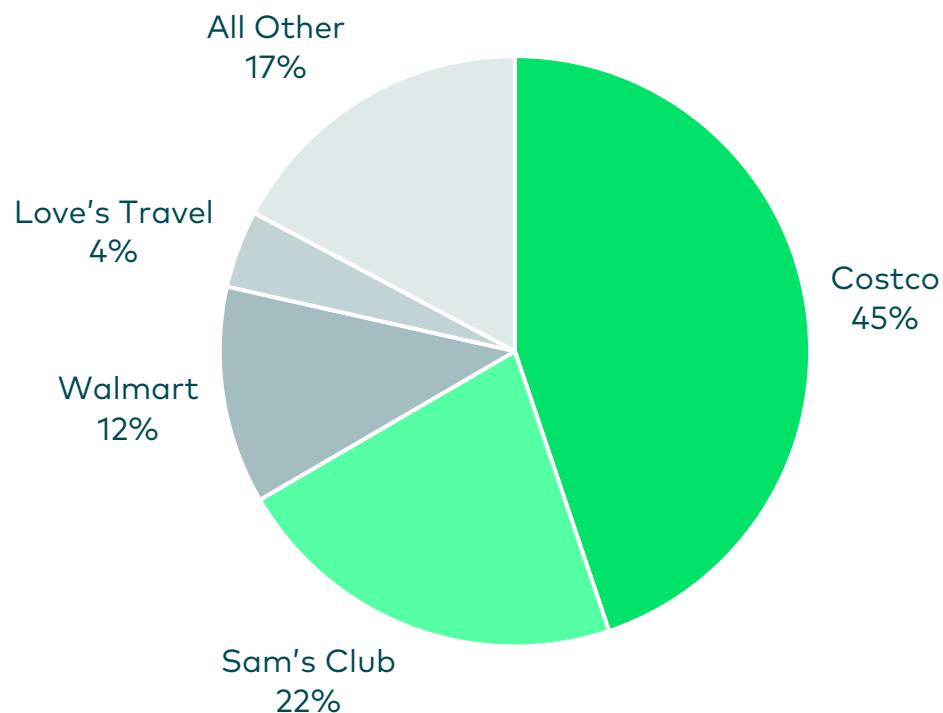
Casey's General Store shoppers have moved over +400bps of Pizza (frozen, prepared, limited-service restaurant) unit share year over year ending Q2'2023.

Unit share was taken from Walmart (-230bps) and Pizza Hut (-280bps).

Club stores have driven much of the success within hot dogs—encouraging a loss leader strategy to incentivize traffic.

COSTCO AND SAM'S CLUB DRIVES TWO-THIRDS OF GROWTH

% Contribution to Prepared Hot Dog Growth | Rolling 52 Weeks by Quarter Ending Q2'23



Same-day Hot Dog & Grocery Trips Within Club Stores Grew

+26%

(+12.5 MILLION MORE TRIPS)
year over year.

"Hold the price on the hot dog and the soda a little longer... forever."

- Richard Galanti, Costco CFO

INSPIRATION FOR THE RETAIL FOOD COURT



RENOVATE THE KITCHEN

Retailers have an opportunity to change up what has been traditionally an untouched part of the store– the bakery and deli counter. Growing multicultural cohorts are wanting to try new formats from Asian households wanting to have tea & coffee shops to Black households looking for a sit-down restaurant experience.

Globalizing the foods offered within the bakery or deli and testing different types of store layouts offering new, hot foods could drive more traffic. If a car brand can manage to [bring a restaurant into their retail footprint](#), so can you.



HERALD YOUR HERO ITEM

It's not just a hot dog, it's a [Costco hot dog](#). Casey's General Store rebranded and transformed [their SEO](#) to focus on pizza-first messaging followed by food & grocery. Good, affordable prepared food is helping drive traffic for these retailers and is growing in popularity.

Retailers should look to see if there is opportunity to craft their own distinct hero item that helps drive traffic, and brands should partner with retailers to win that potentially lucrative consumption occasion before it is done in-house.

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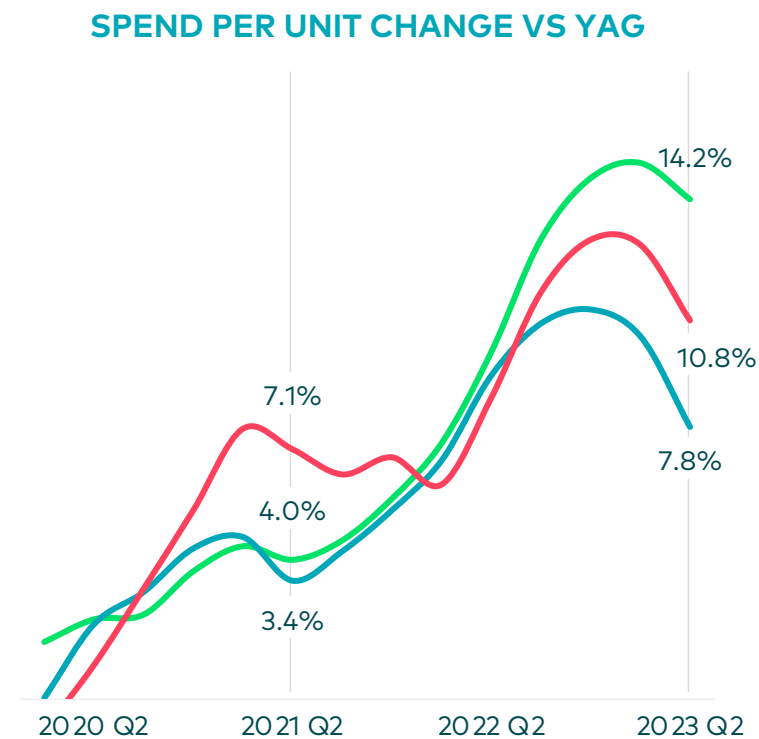
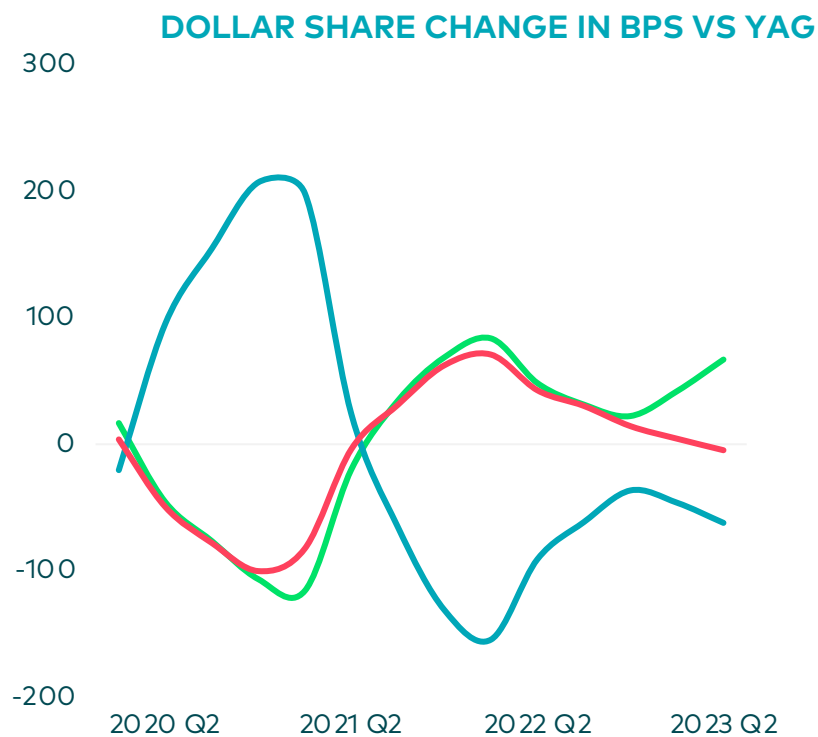
Brand Value

Increased pricing has set the stage for dollar share gains for no/low cook foods, which has offset any unit share losses.

MEASURE BY FOOD TYPE

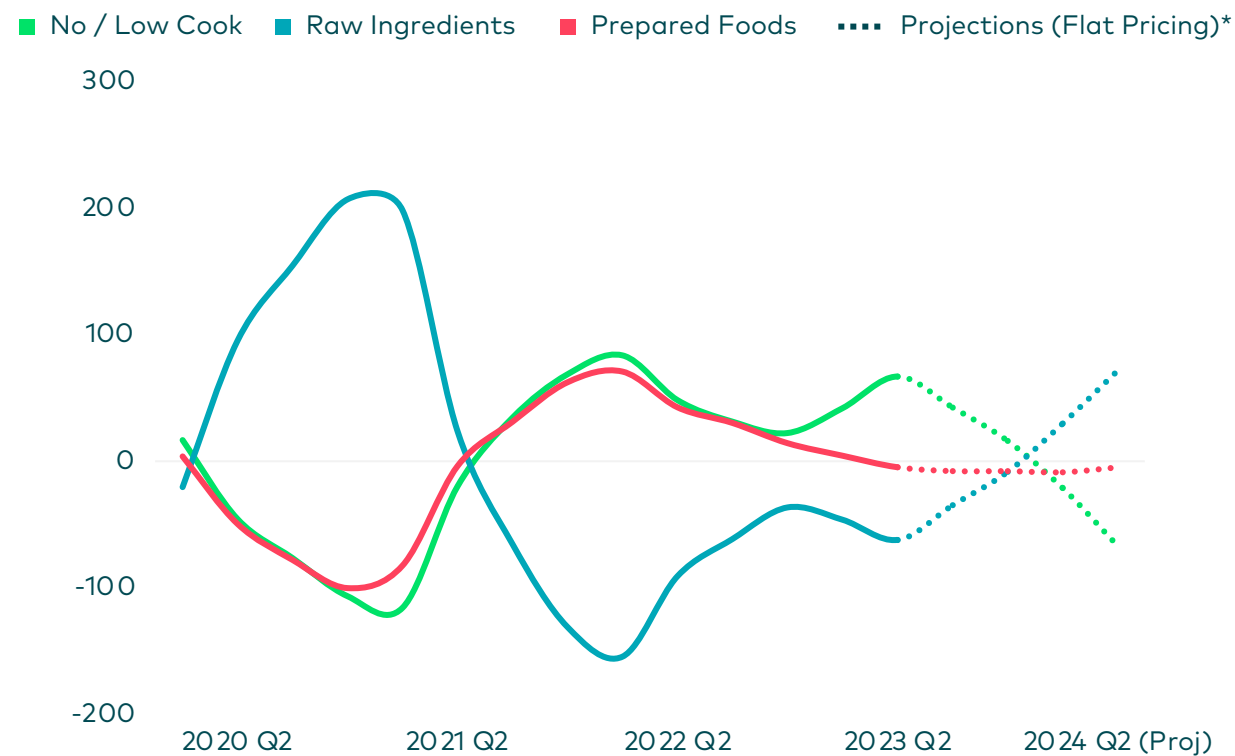
Within Grocery | Rolling 52 Weeks by Quarter Ending Q2'23

■ No / Low Cook ■ Raw Ingredients ■ Prepared Foods



However, no/low cook foods could face dollar share loss to raw cooking if unit trends continue and pricing stabilizes.

DOLLAR SHARE CHANGE IN BPS VS YAG BY FOOD TYPE
 Within Grocery | Rolling 52 Weeks by Quarter Ending Q2'23

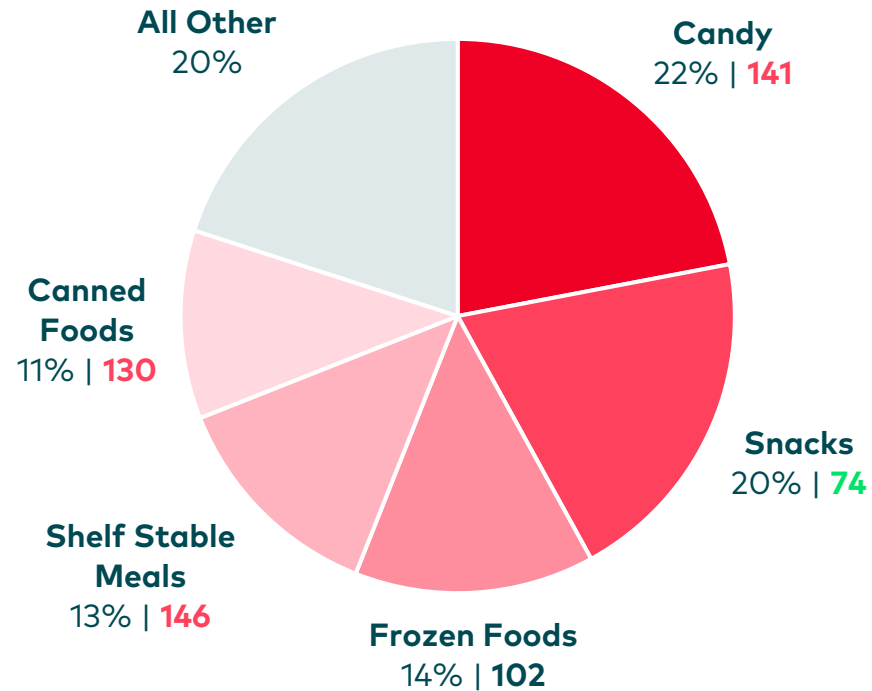


Source: Numerator

*Projections were determined through a linear regression model with an assumption of no inflation.

Candy and shelf-stable foods are driving disproportionate declines among No/Low Cook Foods. Snacks shows some resiliency.

% CONTRIBUTION TO UNIT DECLINES FOR NO/LOW COOK
Within No/Low Cook | Rolling 52 Weeks by Quarter Ending Q2'23
Indexed to Fair Share



Candy losses are driven by chocolate bars, but consumers are moving toward better-for-you brands in the category.



57%

of candy losses are driven by Chocolate Bars.

GROWING BRANDS WITHIN CHOCOLATE BARS

Projected Units | P52W Ending Q2'23 vs YAG



FEASTABLES

Mr. Beast, a digital creator known for his YouTube videos, launched a chocolate bar with gluten-free claims and an ingredient list containing of four simple ingredients.



HU KITCHEN

Acquired by Mondelez in 2021, Hu's tagline is "Get back to human." The brand highlights organic & fairtrade chocolate with 'No Weird Ingredients. Ever.'



GATSBY

Emphasizing a calorie count lower than even sugar-free brands, Gatsby chocolate was founded by Doug Bouton-cofounder of Halo Top.

Private label brands are driving snacks' resiliency– predominantly Great Value & Trader Joe's due to price.



Although private label snacks make up

20%

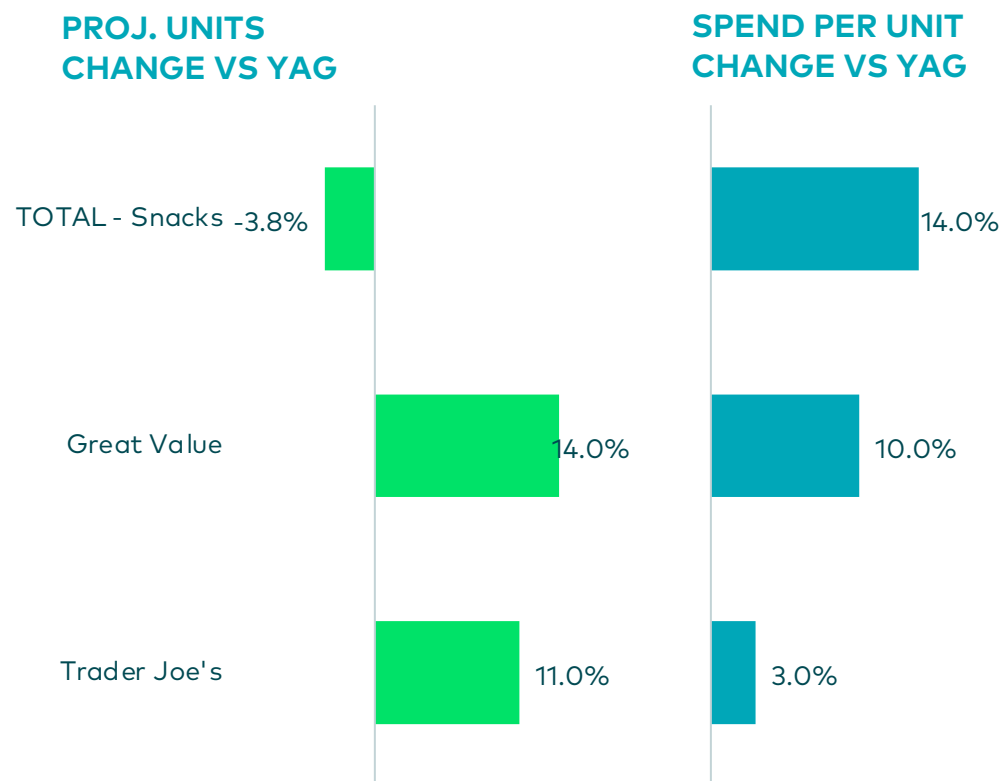
of snack unit sales, they only contributed to just

4%

of snack declines.

GREAT VALUE & TRADER JOES ARE THE TOP TWO BRANDS GROWING UNITS IN SNACKS

Rolling 52 Weeks by Quarter Ending Q2'23 vs YAG



INTERESTING FLAVORS & INGREDIENTS

The top selling snacks at **Trader Joe's** include a counterpart to Barcel Takis that offers a kick of spice in a rolled tortilla chip format. The second best performer is a play on a typical Funyun, but uses lentil & rice as the base instead of cornmeal.



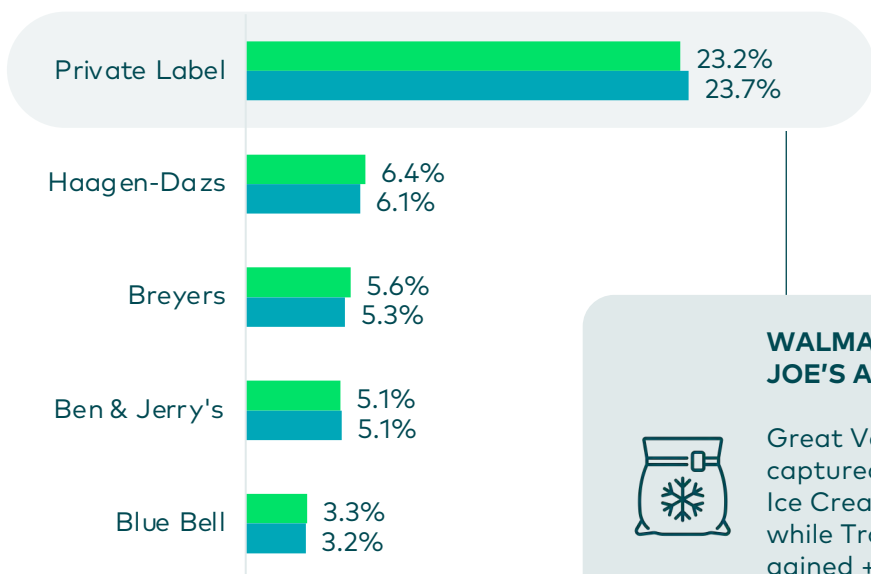
Private label continues to be a share threat for national brands within frozen foods.

PRIVATE LABEL HAS GROWN IN UNIT SHARE YEAR OVER YEAR FOR FROZEN FOODS

Unit Share | Rolling 52 Weeks by Quarter Ending Q2'23 vs YAG

ICE CREAM & FROZEN NOVELTIES

■ Year Ago ■ Current Year

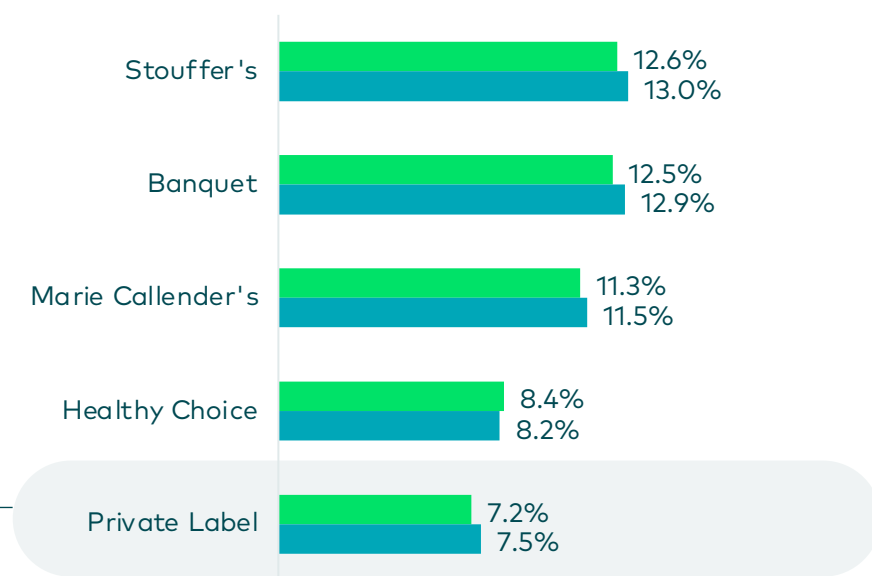


WALMART & TRADER JOE'S ARE LEADING

Great Value has captured +100bps of Ice Cream unit share while Trader Joe's has gained +60bps in frozen dinner & meals.

FROZEN DINNER & MEALS

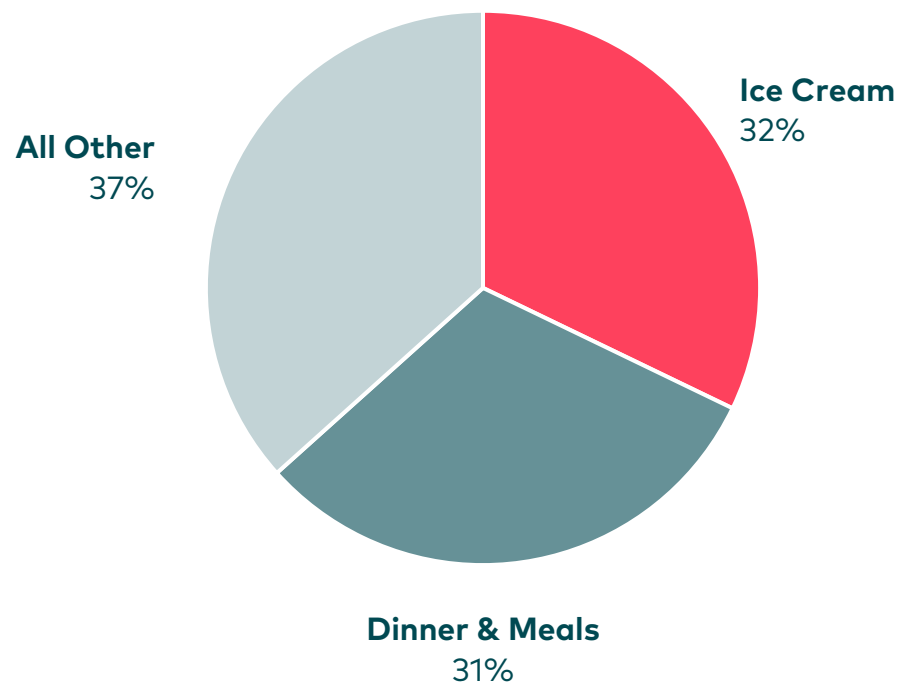
■ Year Ago ■ Current Year



Ice cream consumption is also moving out of home—particularly during lunch hours.

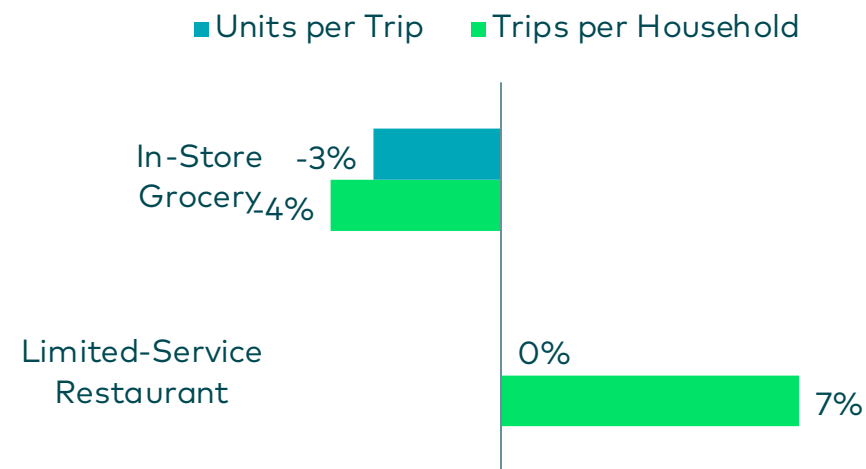
% CONTRIBUTION TO UNIT DECLINES FOR FROZEN FOOD

Within No/Low Cook | Rolling 52 Weeks by Quarter Ending Q2'23



ICE CREAM OCCASSIONS ARE MOVING OUT OF HOME

Ice Cream & Frozen Novelties | Rolling 52 Weeks by Quarter Ending Q2'23



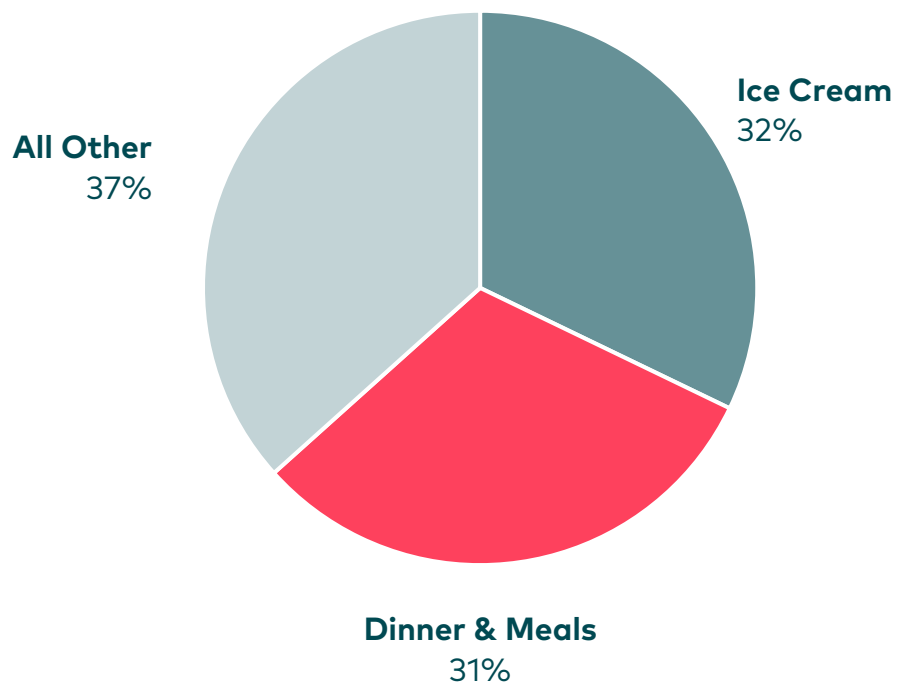
A MIDDAY TREAT

While the dinner day-part drives the largest growth in traffic for ice cream within LSR, lunchtime (11:00am-1:59pm) grew the fastest at 19%.

For Frozen Dinners & Meals, brands focused on emerging flavors and diets are offsetting some losses.

% CONTRIBUTION TO UNIT DECLINES FOR FROZEN FOOD

Within No/Low Cook | Rolling 52 Weeks by Quarter Ending Q2'23



GROWING BRANDS WITHIN FROZEN DINNERS & MEALS

Projected Units | P52W Ending Q2'23 vs YAG



DEVOUR

Contrary to the plant-based craze, Kraft-Heinz's Devour wants you to 'Eat Like an Animal' by offering meats, cheeses and ingredients to unleash your inner animal.



CJ BIBIGO

As one of the top food companies in Korea, CJ Foods have hit the US market offering Korean-inspired meals that can be made in just minutes.



IMPOSSIBLE FOODS

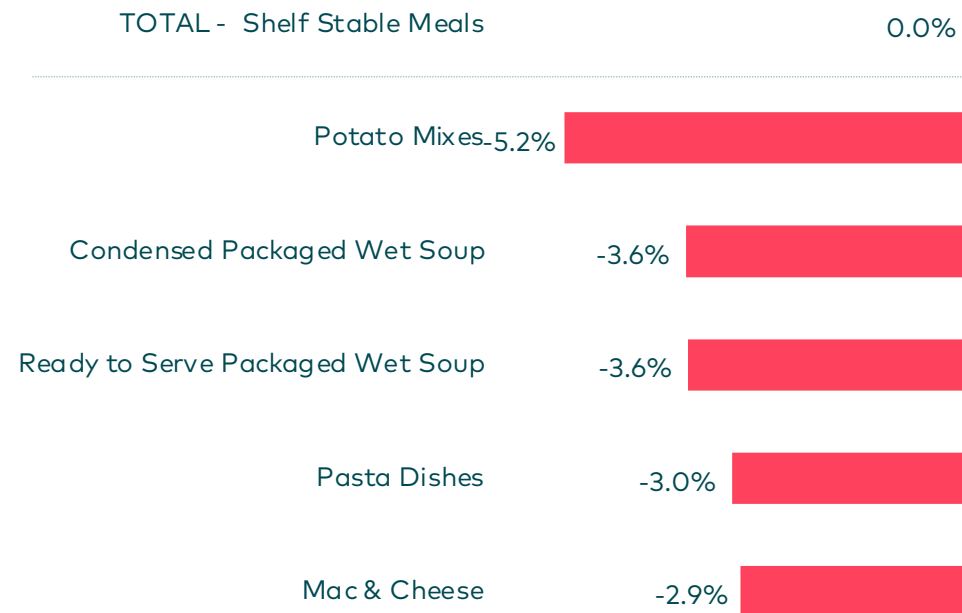
The alternative meats brand has expanded into the frozen meals category. While alternative meats is facing headwinds, Impossible managed to become the third fastest growing frozen meal brand based on absolute unit sales.

Consumers are consolidating categories within shelf-stable meals and entering private label.

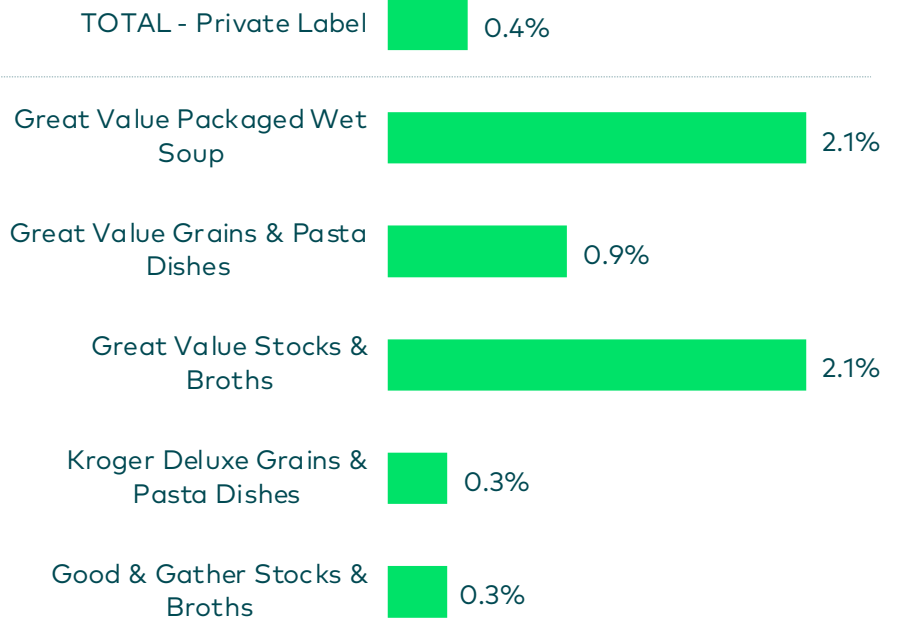
CONSUMERS ARE CONSOLIDATING CATEGORIES AND ENTERING PRIVATE LABEL BRANDS

Absolute Household Penetration Change vs YAG | Rolling 52 Weeks by Quarter Ending Q2'23

BY CATEGORY



TOP PRIVATE LABEL BRANDS DRIVING UNIT GROWTH



INSPIRATION FOR BRAND VALUE



BRING BETTER-FOR-YOU TO THE FOREFRONT

This isn't the first time we have called out [better-for-you](#). Better-for-you (BFY) continues to be a trend that resonates across the entire eating journey. Within no/low cook foods, BFY brands continually rank as some of the only brands driving unit volume growth across core departments. Retailers are going to look to stock shelves focused on BFY and brands need to listen.

Manufacturers can insulate themselves from volume declines by looking into potential M&A targets of emerging brands. Mondelez and Hershey's both made strategic investments in brands such as [Hu Kitchen](#) and [Lily's](#), respectively.

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CRAFT YOUR VALUE STORY TO RETAILERS

As prices continue to stay elevated, consumers are looking to make cuts within no/low cook foods by trading down to private label brands. Private label snacks is exceptionally salient given private label is 20% of snack volume but only drove 4% of the unit decline. In frozen foods & shelf stable meals, consumers are moving towards private label within mainstream mass and Trader Joe's.

Brands will need to stay tuned in to [private label trends](#) to forecast their growth properly and determine what their angle is when talking to retail buyers. Is it better-for-you, an entry level price point, or an offering that appeals to a particular cohort?

Take your food innovation to the next level with Numerator.



TRACK OMNICHANNEL BEHAVIOR

As consumers move between in-home and out-of-home dining, tracking traffic and share between the two will be an imperative for demand planning.

[LEARN HOW](#)



LOOK BEYOND YOUR CATEGORY

If you are looking within your category only when doing brand planning, you are missing unique opportunities to innovate on what consumers are doing entirely. Take the time to analyze adjacent categories and broader macro trends.

[LEARN HOW](#)



WATCH RESTAURANT TRENDS

Restaurants are taking bold moves to capture emerging cohorts such as Gen Z. By tracking how consumers are engaging in this channel, brands can identify new ways to engage and connect with core consumer groups.

[LEARN HOW](#)

Your single data source for **infinite** consumer insights.

Brands can understand the full omnichannel landscape and go beyond the grocery store and their categories to find the insights they need to grow in ever-changing markets.



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