



A
NATIONAL PORK BOARD
REPORT

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ALL ABOUT DINING OUT: EXECUTIVE SUMMARY



The landscape of dining out in America is experiencing seismic shifts. Where people expect to find meals made with fresh, healthy ingredients looks a lot different today than 10 years ago, with expectations now including venues from convenience stores to airport kiosks. As foodservice operators look to level up their offerings, competition has become more intense.

On a per capita basis, we eat at restaurants 31 fewer times per year than we did in 2000. And while restaurant dollars are expected to see slight growth due to price increases, traffic is expected to remain flat after several quarters of decline.¹

What's the secret to breaking through a crowded and competitive environment? How can foodservice operators drive traffic and increase sales during times of rising costs?

It requires finding a point of differentiation. And that's where pork comes in.

Our research into consumers' dining out habits, as well as

operators' opinions, shows areas of opportunity for pork, as well as large gaps in understanding. In fact, both consumers and foodservice operators have positive things to say about pork:

CONSUMER PERCEPTIONS	OPERATOR PERCEPTIONS
People enjoy eating pork when they dine out because they don't always make it at home	They think it's flavorful and versatile
They want to see more pork on menus	They're open to adding pork to their menu
They would visit a restaurant more frequently if it offered more pork dishes	They want to find more ways to menu pork
They're highly satisfied when they order fresh pork when dining out	One of the top three most important factors when dining out is menu variety, so new pork dishes give operators an opportunity to increase customer loyalty ²

With both consumers and operators feeling positive about pork, it's a protein that should be dominating menus. And while pork is featured on over 91% of menus as an ingredient, it only appears in 17% of entrees. When cuts such as bacon, sausage and pepperoni are removed, that number drops dramatically - less than 7% of menu entrees feature fresh pork.

As the No. 1 consumed protein globally, pork is on-trend, a source of healthy protein and a vehicle for popular, experiential multicultural flavors and dishes. Consumers look for all these attributes in their meals; pork should be a shining star on menus.

So, where's the disconnect? Why don't operators offer more pork options when consumers are clearly hungry for it?

That's what we set out to understand in our latest Insight to Action report, *All About Dining Out*. Like our inaugural report, *Dinner at Home*

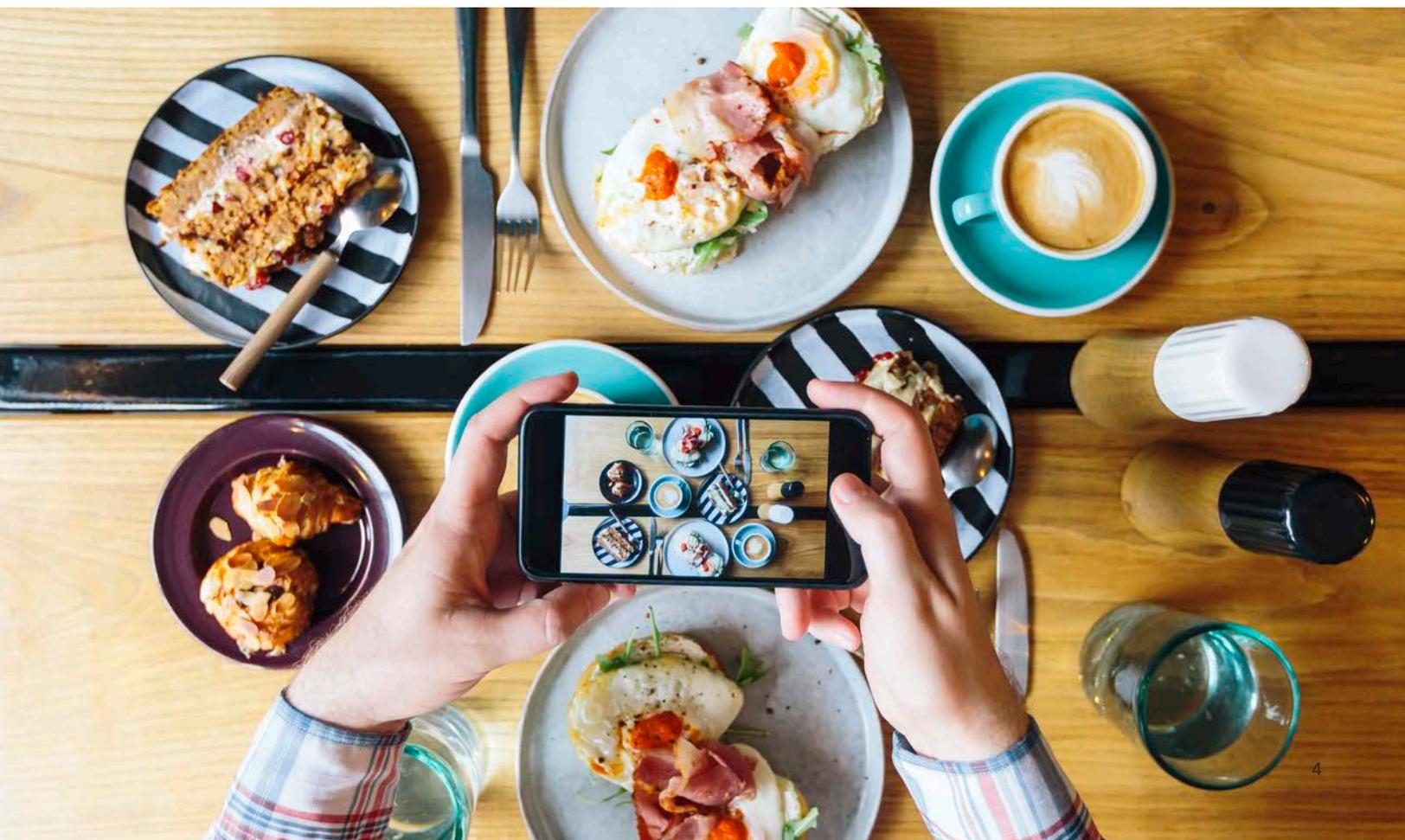
in America, this report combines more than 10,000 consumer interviews with demographic and spending data, as well as foodservice operator interviews, menu trends and omnibus data. The result is a comprehensive, in-depth look at the needs, considerations and motivators that impact out of home dining decisions when meat protein is present.

Like all industries, foodservice is experiencing monumental, rapid change. The competitive landscape, as well as ordering and delivery models, have completely revolutionized foodservice over the past few years, and the pace of change shows no signs of slowing.

Pork, and the meat industry in general, cannot continue to sit on the sidelines watching these changes unfold. We need to be part of the story and part of the solution - the innovators helping foodservice operators tackle these challenges, willingly and eagerly adapting to meet consumer demand.

In *All About Dining Out*, we'll review the occasions that define dining out decisions. What are the factors that go into choosing a dish in a foodservice establishment? What are the drivers, social considerations and needs that shape that decision? And how can pork more seamlessly fit into those occasions in ways that meet consumer demand and operator needs?

Within this report and throughout 2019, we identify growth opportunities in the foodservice industry and convert them into powerful, collaborative ideas and initiatives that empower industry partners to succeed. We will provide insights into the markets, occasions and behaviors that shape Americans' dining habits, and then drive action to adapt. From Insight to Action, we can be the disruptors, guiding the future of the industry.



RESTAURANT SEGMENTS

Throughout this report, we refer to different types of foodservice establishments. We define these as:

LIMITED SERVICE RESTAURANTS (LSRs)

- **Quick Service Restaurants (QSRs):** Counter service with no wait staff; focus on speed; food often served in disposables.
 - Examples: McDonald's, Burger King, Taco Bell, Subway, Wendy's, Domino's Pizza, Little Caesars, Sonic
- **Fast Casual:** Counter service with focus on fresh ingredients and customizations.
 - Examples: Chipotle, Panera Bread, Five Guys, McAlister's, Firehouse Subs, Smashburger, Blaze Pizza

FULL SERVICE RESTAURANTS (FSRs)

- **Midscale:** Waiter service at moderate prices; often breakfast-focused and generally no alcohol.
 - Examples: Denny's, IHOP, Steak 'n Shake, Perkins, Braum's, Friendly's
- **Casual:** Waiter service at a higher price point than midscale; often offering a full bar.
 - Examples: Applebee's, Olive Garden, Red Robin, Marco's Pizza, The Cheesecake Factory
- **Fine Dine:** High-end table service with chef-driven menu; most entrees priced \$25 or higher.
 - Example: Fleming's Prime Steakhouse, Ruth's Chris Steakhouse, The Capital Grille



THE DINING OUT LANDSCAPE

The dining out landscape has gone through dramatic changes in recent years – and changes continue to happen.

A few decades ago, about two-thirds of food and beverage spending went to in-store purchases, typically at supermarkets.³ Today, Americans spend more than 50% of their food budgets on away from home (AFH) meals.⁴ Yet while people are spending a larger portion of their food budget AFH, they are actually eating AFH less often.⁵

Part of this is due to consumers enjoying foodservice meals at home, choosing to order takeout and delivery through options like GrubHub and Uber Eats. When they do eat out, consumers have an overwhelming number of choices, from restaurants to retail and food trucks to convenience stores. In fact, convenience store foodservice sales reached about \$38 billion in 2017, up 38% from 2012, with continued growth expected.⁶

In this challenging environment, some restaurant chains thrive and grow while others struggle and dwindle. For example, Hawaiian restaurants are opening at a faster rate than other cuisines, while Chinese and steakhouse growth is slowing.⁷

Regardless of cuisine type, consumers expect higher quality – they want to feel good about the food they're eating, whether that's because it's the highest quality

available or because their food options reflect their values.

Consumers say personal values, such as their concern for the environment (43%), where pork is sourced (44%) and how animals are treated (44%), are increasingly important in their pork choices.⁸ Operators agree: Nearly two-thirds of operators (65%) say they think consumers would increase their consumption of fresh pork if it was marketed as "antibiotic-free," and 56% think consumption would increase if it was marketed as "sustainably raised."

By segment, limited service restaurants and other eating places such as cafeterias, grills/grill buffets and snack/non-alcoholic beverage bars now bring in more revenue than full service restaurants, and the gap is growing.⁹ Propelling the limited service restaurant segment is the rise of fast casual venues that offer counter service with a focus on high quality, fresh ingredients and customization.¹⁰

The growth of fast casual, however, does not equate to growth for the pork industry. There has been a 2% decline in pork's appearance on restaurant menus in the fast casual segment over the last 10 years.

Providing dishes that will better meet diners' needs can help foodservice operators combat these challenges – attracting not only more people, but also a larger variety of people, increasing the frequency of their visits and ultimately maximizing profit.

Getting there, however, requires innovation on the part of foodservice operators and packers alike.

For example, many consumers stick to the items they know and love. More than one in five consumers (22%) say they will always stick with what is familiar, while more than half of consumers (51%) are only sometimes willing to try new things.¹¹ Foodservice operators should understand what dishes consumers know and love, and capitalize on their routine.

On the other hand, not only are half (51%) of consumers sometimes willing to try something new, more than one in four consumers (27%) consistently look for something new to eat.¹² Among the people who dine out most frequently, innovative menu options and limited time offers are important.¹³ Our research found that consumers seek out menu options they don't usually make at home. This represents an opportunity for foodservice operators to keep things fresh and experiment with the dishes they offer.

Finally, as fewer consumers eat the traditional three square meals a day, lines between dayparts are blurred. This offers an opportunity for foodservice operators to leverage these nontraditional dayparts with all-day offerings like snacks and appetizers to drive incremental business.¹⁴

MULTICULTURAL IS MAINSTREAM

With Hispanic and Asian cultures leading the charge in sought-after cuisines, multicultural dishes and fusion foods have significantly increased in popularity. In fact, almost one in three Americans consumes foods that contain multicultural flavors at least once a week.ⁱ

In many markets, food trucks have become a popular way to introduce multicultural dishes and flavors to consumers. Traditionally, this is a similar pattern to how many ethnic cuisines have gotten a foothold in America: through specialty retail and small restaurants.ⁱⁱ

With the growing popularity of Asian and Latin flavors, it's no surprise that spicy foods are also growing in popularity. Ethnic-inspired cuisine and ingredients account for roughly half of the 20 top food trends in the National Restaurant Association's 2018 Culinary Forecast. Meanwhile, a focus on new cuts of meat, especially heritage breeds, also rank high.ⁱⁱⁱ

Something many of these cultures all agree on is pork – and its versatility. Pork can play many roles, from being the centerpiece to just an ingredient. It can also be found in many different types of dishes: pozoles, pho, tacos, ramen, sandwiches and many more.

WHAT'S HOT 2018 CULINARY FORECAST TOP 20

Ethnic-inspired and meat-focused trends dominate

RANKING		HOT TREND
1	New cuts of meat (e.g. shoulder tender, oyster steak, Vegas Strip Steak, Merlot cut)	69%
2	House-made condiments	64%
3	Street food-inspired dishes (e.g. tempura, kabobs, dumplings, pupusas)	64%
4	Ethnic-inspired breakfast items (e.g. chorizo scrambled eggs, coconut milk pancakes)	63%
5	Sustainable seafood	62%
6	Healthful kids' meals	61%
7	Vegetable carb substitutes (e.g. cauliflower rice, zucchini spaghetti)	61%
8	Uncommon herbs (e.g. chervil, lovage, lemon balm, papalo)	61%
9	Authentic ethnic cuisine	61%
10	Ethnic spices (e.g. harissa, curry, peri peri, ras el hanout, shichimi)	60%
11	Peruvian cuisine	60%
12	House-made/artisan pickles	60%
13	Heritage-breed meats	60%
14	Thai-rolled ice cream	62%
15	African flavors	69%
16	Ethnic-inspired kids' dishes (e.g. tacos, teriyaki, sushi)	64%
17	Doughnuts with non-traditional filling (e.g. liqueur, Earl Grey cream)	64%
18	Gourmet items in kids' meals	63%
19	Ethnic condiments (e.g. sriracha, sambal, chimichurri, gochujang, zhug)	62%
20	Ancient grains (e.g. kamut, spelt, amaranth, lupin)	61%

i The Nielsen Company, "Tacos, tequila and more: how multicultural cuisine is influencing what consumers eat and drink while dining out," 2016.

ii Food Processing, "For global cuisine, it's a small world," 2018.

iii National Restaurant Association, "What's Hot: 2018 Culinary Forecast," 2018.

LSRs SEE GROWTH IN FRESH PORK

A new study by Datassential found fresh pork is a significant growth opportunity for limited service restaurants (LSRs), which currently include it on menus less often than full service restaurants (FSRs) and onsite operations. Adding pulled pork to nachos or ground pork to a burrito, meatball sandwich or pork tacos can offer a new take on popular dishes.

When looking at daypart, foodservice operators who participated in the survey expect to see growth in fresh pork sales during lunch and dinner, but they don't expect to see growth in snacks or sides. LSRs expect 46% growth at lunch and 49% growth at dinner. FSRs expect 46% growth at lunch and 57% at dinner, according to the survey.

LSRs are seeing the most growth in fresh pork sales compared to a year ago. They reported 43% growth at lunch and 39% at dinner, compared to 26% growth at lunch and 29% at dinner on average for all operators.

Adding pork to lunch and dinner menus outside the center of the plate can surprise customers used to seeing it as a main dish. This is especially true for fresh pork. Nearly 60% of all operators in the survey who already have fresh pork on their menu primarily use it as a center-of-plate entree. However, just a third of LSRs who have fresh pork on their menu uses it as an ingredient.

There is also an opportunity to promote fresh pork as a limited time offer (LTO), especially in LSRs. A third of all operators offered a fresh pork LTO in the past three months, including 41% of LSRs. Another 28% of LSRs plan to offer a fresh pork LTO.

Among all foodservice operators in the survey offering LTOs, most typically use chops or loins. Nearly a quarter offered a chop LTO and 22% offered a loin LTO. Bone-in pork chops are preferred over boneless because operators believe their customers view bone-in as more premium, even if boneless chops are easier to work with.

The survey included 310 operators who have food and beverage purchasing responsibility and serve fresh or processed pork in their operation.

WHAT DRIVES DISH DECISIONS?

To identify growth opportunities for pork, we set out to discover: when a consumer orders a dish with meat when dining out, what goes into that decision?

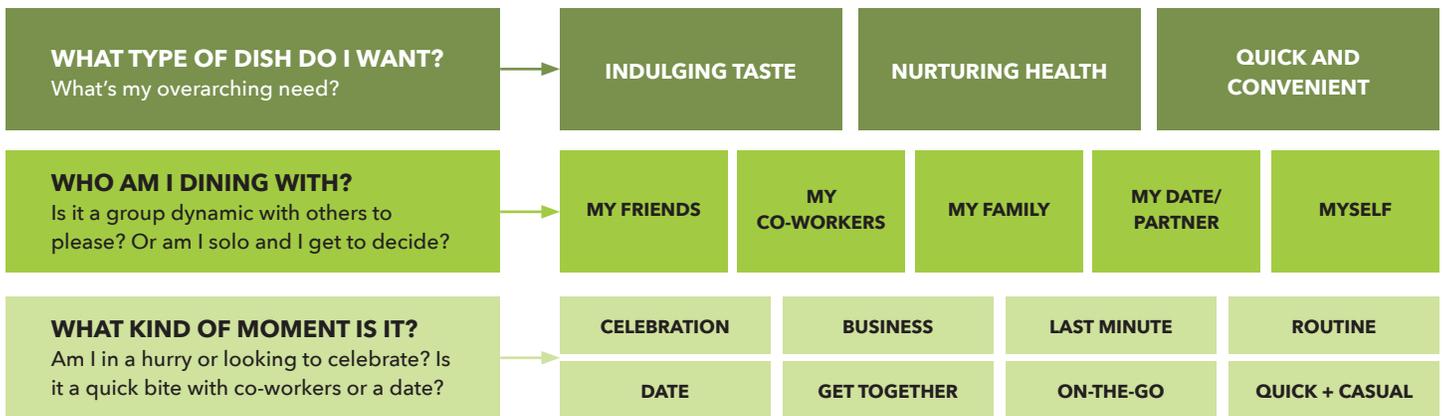
We saw in *Dinner at Home in America* that there are three basic needs driving the decision of what to eat:

- Taste
- Health
- Convenience

These needs are still relevant when dining out, but other dynamics also play a greater role, such as group decision making and the type of dining occasion. These decision drivers are captured in three questions that each dining occasion needs to answer:

- What type of dish do I want?
- Who am I dining with?
- What kind of moment is it?

DISH DECISION DRIVERS



These three questions work simultaneously to determine what people decide to eat when they dine out. Together, they lead to nine unique dish decision drivers that we will detail in this report.

But first, let's look at each question to see how it influences when and where we go out to eat.

WHAT TYPE OF DISH DO I WANT?

When we go out to eat, we are looking for a particular kind of food experience. The three factors driving the decision, particularly when meat is on the table, are:

- Indulging Taste is the prominent need in 37% of occasions: The act of dining out is viewed as a treat by most consumers.¹⁵ Diners at this occasion are looking for food that tastes good – something they crave or something new and flavorful. Ultimately, they want to indulge their taste buds.
- Nurturing Health is the prominent need in 25% of occasions: While health isn't the main reason people dine away from home, it's important to them that menus have healthy options – regardless of the daypart.¹⁶ When a diner is motivated by a health-conscious need, they want food they consider good for their health and appropriate for their diet.
- Quick and Convenient is the prominent need in 38% of occasions: Many consumers report dining out to save time.¹⁷ Diners in a hurry want food that is served quickly and can be eaten anywhere – at work, in the car, at home or elsewhere. Depending on where they go, eating out is often viewed as more convenient than cooking at home.¹⁸



WHO AM I DINING WITH?

Going out to a restaurant is highly social in nature. Nearly three-fourths of consumers (74%) dine out to spend time with family and 61% dine out to spend time with friends.¹⁹ Who is going – Family? Friends? Co-workers? A partner? – can influence the choice of where to go.

As a result, the choice of where to dine is often a group decision that sometimes may have to accommodate conflicting desires. In these cases, restaurants with a wide variety of items on their menus can best fit the bill.

On the other hand, many people also dine out by themselves. Although convenience sometimes drives the decision on where to eat solo, it is also influenced by a desire to indulge or to eat healthy.

WHAT KIND OF MOMENT IS IT?

The type of occasion can also influence where diners go out to eat.

If it's an everyday event, the occasion may be a family dinner or a softball team win celebration. On the other hand, a more special occasion might be a birthday party, engagement or graduation.

Other moments might be a chance to connect with friends or co-workers during a quick meal at lunch during work hours or a social get together after work or on the weekend.

Finally, more romantic occasions could be with a partner or a date.

In addition to these factors, daypart also comes into play. In our research, we asked consumers about a recent dining out occasion in the past month during which meat was ordered. Of the more than 8,500 dining out occasions captured:

- 9% were breakfast
- 27% were lunch
- 63% were dinner

9 DISH OCCASIONS

Looking at our three questions and their potential scenarios, we end up with nine dish occasions to help show why diners decide what to eat when they dine out.

1. Friendly Flavors
2. Dining Duos
3. Family Celebrations
4. Personal Cravings
5. Fit Fuel-Up
6. A Healthy Balance
7. Quick Picks
8. Convenient Catch-Ups
9. On the Fly

INDULGING TASTE

FROM PERSONAL CRAVINGS TO FAMILY CELEBRATIONS, EATING OUT IS FUN

A majority of consumers dine out for special occasions and for an indulgent meal, so it's clear that going out to a restaurant is often viewed as a treat.²⁰ Diners having an "Indulging Taste" occasion go out to eat to have something flavorful and to satisfy a craving.

The urge to indulge is a key factor present in four of the nine dish occasions.

FRIENDLY FLAVORS



Going out to dinner with friends is fun and is often a cherished part of weekly social rituals. It's a time for friends to connect, unwind and catch up over flavorful dishes. This occasion overindexes for seeking comforting flavors, too. If possible, it's fun to sit outside to eat. The rule is to order food that feels like a treat.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 6%

DINERS

- friends
- 2-3+ people
- overindex single
- foodies
- slightly more ethnic

DAYPART

- 69% dinner
- lunch underindexes

WHAT'S ON THE PLATE

Mostly dinners featuring center-of-plate steak and shrimp

OPERATOR OPPORTUNITIES

Increasingly, consumers are looking for preparations that convey flavor. Consider pork dishes marketed as "slow-roasted" or "braised" that deliver on both flavor and comfort to potential diners. Because this occasion overindexes for multiple diners enjoying the same meat cut, consider including pork in shareables, appetizers and tapas-style dishes.

PACKER OPPORTUNITIES

To help operators menu and serve hearty, comforting meals packed with flavor, packers could offer pork cuts packed with ready-to-go braising liquids or pre-seasoned cuts that make slow roasting a breeze.

DINING DUOS



Whether it's date night for a couple, a one-on-one dinner with parent and child, or a business dinner with a co-worker, this occasion calls for a table-for-two. Often, it's last minute and the duo just wants to eat out. It's usually a spur of the moment decision for just the two to dine out together. They love to share fun, flavorful food while enjoying their one-on-one dining.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 17%

DINERS

- spouse
- partner or date
- 2 people
- married with 2-plus household
- no rush

DAYPART

- 70% dinner
- lunch underindexes

WHAT'S ON THE PLATE

Craveable, shareable dinners, like pizza

OPERATOR OPPORTUNITIES

Items that are shareable and indulgent, such as pork "wings" or carnitas-topped nachos, could resonate particularly well with diners in this occasion.

PACKER OPPORTUNITIES

Help operators (particularly casual chains and bars) save time by offering pre-seasoned shareable options.

"Hog wings" have considerable opportunity to steal share-of-stomach from traditional chicken wings if cut and packaging innovation makes this possible.

FAMILY CELEBRATIONS



Maybe there's a new graduate, or grandma just turned 75, or someone in the family got a promotion at work. Whatever the case, it's time to celebrate with a meal out. Although family celebrations often focus on good occasions in life, sometimes they are just celebrating the chance to get together. Such occasions often include more than just the immediate family, are held on the weekends and may be outside, if possible. They are fun, lively dinners where everyone can choose to get the food they love – preferably something fun and delicious they don't get at home.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 9%

DINERS

- adults
- often kids
- 3-plus people
- few singles

DAYPART

- 72% dinner
- lunch underindexes

WHAT'S ON THE PLATE

Celebratory dishes like steak, shrimp and pepperoni-topped pizza

Pork ribs and pulled pork also overindex

OPERATOR OPPORTUNITIES

The perception of a treat is important to diners in this occasion. Consider marketing dishes with intriguing names like "Peruvian Roasted Pork Sandwich" instead of "Pork Sandwich" to capture diners looking for a treat they don't make at home. Larger portions, multi-dish meals (pick-two or pick-three options) and shareables are also opportunities to showcase innovative and craveable pork options.

PACKER OPPORTUNITIES

Showing the versatility of cuts to operators in the ways it comes to life on menus through creative packaging may help operators see cuts in a new light and recognize the ways they can better leverage one cut in multiple applications across the menu. For instance, elevating ribs as an indulgent treat for a family celebration while also offering shareable appetizer platters featuring a quarter or half rack, perfect for operators to use excess inventory.

PERSONAL CRAVINGS



When you're hungry, you're hungry. When busy young people, especially young men, get hungry, they like to grab big, flavorful food that satisfies a craving. They don't think about whether or not it's "healthy" for them. They go to their regular spot, often going to a quick service restaurant or in-retail, such as a hot bar or convenience store.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 5%

DINERS

- solo
- single
- male
- eat whatever they want
- overindexes more ethnic

DAYPART

- Breakfast over-indexes

WHAT'S ON THE PLATE

Hamburgers for lunch or dinner

Also skews toward pork sausage for crave-worthy breakfast

OPERATOR OPPORTUNITIES

There are numerous opportunities to better meet personal cravings. This occasion overindexes on routine weekday breakfasts; why not offer zesty carnitas omelets or chorizo breakfast tacos for the morning rush?

PACKER OPPORTUNITIES

Reinforcing versatility of cut across applications within restaurants is essential for success. To break through with quick service restaurants, consider showing how one fresh pork item can be leveraged throughout breakfast, lunch and dinner menus to earn a menu spot (for instance, pre-seasoned pork shoulder ready to convert into carnitas that tops breakfast tacos and creates a flavorful lunch or dinner burger or a nachos topping).

SOCIAL SHARING INTEGRAL TO DINING EXPERIENCE

Food likely became central to social gatherings shortly after man tamed fire for cooking. Today's food experiences, however, are as likely to be shared on Instagram and Pinterest as they are around the dinner table. Food is ubiquitous with our social media interactions: more than 23 billion recipes are posted on Pinterestⁱ and 333 million posts on Instagram use #food. Restaurants are responding by changing food presentation, décor and even their restroom designsⁱⁱ to create a more social-sharable experience.

Plating used to be a concern mainly for fine dining restaurants. Today, presentation and "shareability" are an important focus across all restaurant categories. Chili's, for example, changed its bun style and added stainless steel serving cups for fries to make its meals more Instagramable.ⁱⁱⁱ

Some restaurants have even created menu items mainly for their social media appeal, like Unicorn Frappuccinos, squid-ink pasta, rainbow desserts and "selfieccinos" – cappuccinos with a selfie scanned into the foam using a special printer.^{iv} The trend extends outside the kitchen, as more restaurants focus on social media friendly décor. Restaurant supplier Cintas even runs an "America's Best Restroom" contest.^v

According to Zagat's annual National Dining Trends survey, 75% of people who browse food photos have picked a restaurant based on photos shared on social media, and half say they've stopped eating during a meal to take and share photos.^{vi}

Food influencers also are helping introduce their followers to new foods. Avocado toast, ramen, Sriracha and pork belly are all foods that have taken off because of social sharing.^{vii} And chef and restaurateur David Chang, who has more than 1 million Instagram followers, is credited with making pork buns – the Chinese street food made of barbecued pork in a steamed or baked dough – a trend in North America.^{viii}

Still, the foodservice industry's digital transformation is lagging behind other consumer categories. In a recent Euromonitor survey of professionals across industries, 81% of all professionals saw digital presence as an important component of their company's value proposition, compared to just 65% of those who work in foodservice^{ix}.

Yet, 39% of consumers say they turn to social media first as a source of information, according to PwC's annual Global Consumer Insights Survey.^x Foodservice companies have an opportunity to drive interest and sales among the growing number of customers whose food preferences are sparked by their social media feeds.

i <https://blog.hubspot.com/marketing/pinterest-categories>

ii <https://www.nrn.com/operations/setting-instagram-stage-restroom>

iii Baron, Madalyn. "Restaurants: Social Media & Visual Culture." CMI ViewPoint. Sept. 2016.

iv <https://baronmag.ca/2018/10/hot-instagram-food-trends/>

v <https://www.nrn.com/operations/setting-instagram-stage-restroom>

vi <https://www.zagat.com/b/2018-dining-trends-survey-highest-tippers-social-media-habits-and-more>

vii <https://zagat.googleblog.com/2016/09/hot-trends-and-food-photos-zagat.html>

viii <https://www.viralnation.com/blog/the-8-food-influencers-to-follow-on-instagram/>

ix <https://table.skift.com/2018/11/14/why-restaurants-still-lag-on-digital-transformation/>

x <https://www.pwc.com/gx/en/consumer-markets/consumer-insights-survey/2019/report.pdf>

THE STARS OF LATIN-ASIAN FUSION CUISINE? MENDIN AND PORK.

Puerto Rican-born Chef Jose Mendin's culinary style bends the rules of culinary genres by fusing Latin influences and Asian flavors. He has developed a wide array of restaurants in Florida, Mexico and Dominican Republic that reflect his background growing up in the Caribbean and his training in Asian cuisines and European techniques.

But if there is one theme, one tradition, that ties together the varied and creative food concepts of this 5-time James Beard nominee, it is this: They all feature pork dishes.

"Pork is the foundation of my cooking," he says. "I grew up eating pork." Besides being a staple in the Latin and Asian cuisine styles, Mendin likes pork's flavor, versatility and affordability. Cuts like pork butt and pork shoulder offer a great return on investment because "you can get a lot out of it and do a lot with it," he says. Pork also helps to keep down the prices on his menus.

Medin uses the whole pig, from "nose to tail." No part goes to waste, from the shoulder, butt, loin and ribs to the blood, head and cheeks. Mendin says other chefs could benefit from this approach to pork, which not only is cost effective but also enables him to offer some distinctive cuts and dishes. For example, using the whole pig also allows Mendin to make his own sausages and cured pork.

"We like to concentrate not only on the popular cuts but also the not-so-popular cuts," he said.

Medin features pork in different ways, depending on the restaurant. Most of his restaurants have an Asian theme, including Pubblely Sushi and Pubblely Noodle Bar restaurants in Florida, Mexico City and Dominican Republic. Pubblely Sushi's menu features such pork items as spare ribs and pork belly cooked on Japanese-style robata (charcoal-fired) grills as well as Asian-glazed pork chops. There is even cooked pork that is served sashimi-style.

"La Placita," Mendin's new restaurant in Miami, is his first restaurant that hearkens back to his Puerto Rican roots. Its name refers to Mercado Santurce, an iconic old market plaza in San Juan, Puerto Rico. La Placita offers such dishes as carne frita, a traditional crispy pork shoulder with house glaze and onions; mofongo, a popular family-style platter of the mashed plantain dish topped with pork or other protein options; pastel boricua, Puerto Rican-style tamales with lechon guisado; and pan con lechón, a sandwich made with house-roasted pork and mojo aioli.

"People come to La Placita to satisfy their Puerto Rican food cravings," he says. "They're looking for an experience, music, great dishes and things that bring them back to the island."

And for Mendin, bringing them back to the island requires pork. "In Puerto Rico, pig is big," he says.

Ultimately, Mendin's love for pork transcends culture and culinary traditions. "It's straight-up delicious," he says.



PORK IMPLICATIONS

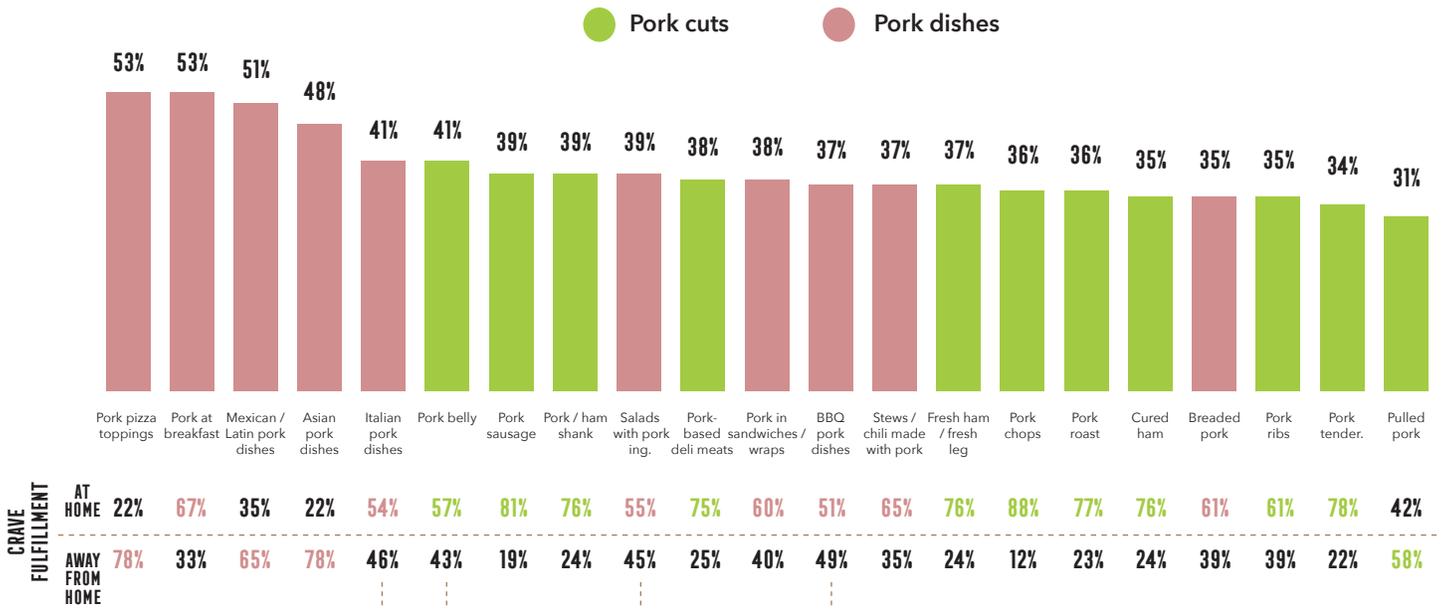
Most foodservice operators already believe marketing pork as flavorful is one of the best ways to sell more pork. And they believe this shouldn't be a difficult sell because pork is flavorful – not just processed pork like bacon and sausage, but fresh pork. But they need it to be easy to use, too.

One way foodservice operators can do a better job of marketing pork's delicious taste can be as simple as naming. For instance, dishes with names like "Smokehouse Mountain Sandwich," "Bourbon Glazed Pork Chop," "Korean BBQ Pork Rice Bowl" and "Grilled Pork Ribeye with Herbed Butter" all are popular menu offerings, according to Datassential.²¹

When people are after flavor from pork, processed pork may be on their plates, but fresh pork generally is not. This is our challenge and imperative: Align fresh pork with great flavor by showcasing its role in preparations, cuisines and dishes people crave. For example, when asked what dishes people crave, 51% said they crave Mexican and Latin pork dishes and 48% said they crave Asian pork dishes. In addition, 39% said they crave pork/ham shank and 39% said they crave salads with pork ingredients. Yet, many of those dishes don't appear on menus.²²

21 PORK DISHES / CUTS THAT AT LEAST 30% OF CONSUMERS CRAVE

CRAVEABILITY: PORK CUTS / PORK DISHES



A few pork varieties are equally viable both in and out of the home.

Datassential 2018 Chain Analyzer

B2B/B4A: How often would you say that you CRAVE [PORK CUT / DISH]?
 B2B/B4B: When you CRAVE [PORK CUT / DISH], do you typically...?

EATING HEALTHY

**FROM HEALTHY FUEL-UPS TO BALANCED
FAMILY NIGHTS OUT, DINERS WANT HEALTHY
OPTIONS NO MATTER WHERE THEY GO**



While health isn't the main reason people dine away from home, it's still important to consumers that menus have healthy options, regardless of daypart.²³ Consumers rank healthy options as more important than indulgent options, even though they also say they dine out more to indulge than to eat healthy.²⁴ Roughly six in 10 diners in our survey having "Eating Healthy" occasions said they want a food that is "reasonably healthy," and roughly four in 10 want a food that fits their diet.

Healthy options are especially important for group dining. Having a healthy option on the menu can help reduce the veto vote from one person in the dining party who insists on ordering a healthy menu item, including consumers with special diet needs.²⁶ The health-conscious diner is not focused on finding food that is a treat or a comfort, sharable or can be eaten on the go.

Operators are missing an opportunity to differentiate their healthy options with pork. Topping a salad with lean pork tenderloin strips or grilled pork kabobs offers unique options not found on most menus. Marketing this item with today's buzzwords can also help drive purchases, such as a protein-packed Mediterranean salad.²⁶

The desire for healthy options is the key factor present in two of the nine dish occasions detailed below, which represent 25% of dish occasions featuring meat.

FIT FUEL-UP



This occasion focuses on quick but healthy dishes. Whether alone or with friends from work, diners in this occasion don't want calorie bombs, diet busters or food that makes them feel guilty. They want food that is light and a good diet choice – and expect it to taste good, too.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 10%

DINERS

- solo
- friends
- co-workers
- usually 1-2 people
- slight skew African-American or Asian
- frequently eat lunch out

DAYPART

- Overindexes at weekday and lunch

WHAT'S ON THE PLATE

Healthy salads topped with chicken or fish mixed with veggies, pork deli meat

OPERATOR OPPORTUNITIES

Communication highlighting pork's health benefits needs to seep into pork menu items targeting health-conscious diners, while also offering health-conscious diners an alternative to another chicken or fish dish. Consider menuing the calorie and protein content of pork as a salad-topper. Options such as a "Southern Caesar Salad" or "Pulled Pork Salad" could intrigue those looking for a healthy fuel-up. Also consider messaging around local and sustainable pig farming.

PACKER OPPORTUNITIES

Helping operators understand the healthy and diet-conscious attributes of fresh pork may help it earn a place on menus as a healthy add-on to salads, while developing and communicating local production stories can appeal to restaurants looking to highlight farm-to-table offerings.

A HEALTHY BALANCE



These occasions feature fresh and healthy menu options enjoyed with family. Diners in this occasion want food that is lighter and a good diet choice. They like to go out on the weekends when they have time to sit together with their family over a nice meal.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 15%

DINERS

- often women
- going out with spouse
- kids
- other family members
- 2-plus

DAYPART

- 74% dinner
- breakfast and lunch both underindex

WHAT'S ON THE PLATE

Chicken, fish or shrimp-topped salads, or hot dinners with the same proteins mixed with veggies, pasta or rice; overindex on Asian cuisine

OPERATOR OPPORTUNITIES

Diners in this occasion want flavor, but not at the cost of health. Menuing pork breaks up the boring chicken/fish routine and is a surprisingly healthy and protein-packed option. The same communications tactics that will resonate with health-conscious diners eating solo will also resonate with those dining within a family setting.

PACKER OPPORTUNITIES

Convincing operators to use pork as an alternative to chicken or fish in healthy dishes may be achieved by showing how it gives a flavorful platform to creatively healthy dishes. For instance, as the protein-packed choice to add to stir fry to deliver a flavor punch, with the flexibility to also top rice bowls and salads.

PORK'S LEADING THE PACK ON TRANSPARENCY

Consumers making meat choices are increasingly concerned about sustainability. Among other issues, they want to know where the meat came from, its impact on the environment and how the animal was treated.ⁱ



More than two of every five consumers are concerned with sustainability issues when it comes to choosing the meat they eat.ⁱⁱ They think “a lot” about animal welfare.ⁱⁱⁱ For example, the importance of eating pork from humanely treated pigs is particularly important to younger men and older women.^{iv} Many of these consumers (see accompanying graphic) are willing to pay more for meat that is sustainable.^v Perhaps even more important, nearly half of consumers say concerns about how pigs are treated (cleanliness, what they are fed and how they are raised) influence how much pork they buy.^{vi}

As consumer demand for healthier and plant-based options grows, meat alternatives are increasingly showing up on restaurant menus.^{vii} Among pork consumers, 19% overall (28% of Millennials) say they are very likely to order a plant-based alternative.^{viii}

For decades, the U.S. pork industry has recognized the importance of advancing responsible production practices to keep pace with the changing marketplace. The We CareSM initiative was launched in 2008 as a joint effort of the National Pork Board, the National Pork Producers Council, state pork associations and pig farmers. We Care is the pork industry's promise to our stakeholders and pork consumers that pig farmers are engaged in and actively promote ethical and responsible practices from farm to fork.

One recent way the industry is meeting this promise is through an agreement with ripe.io pilot blockchain technology use in the U.S. pork industry. This partnership will enable pig farmers to monitor, evaluate and continuously improve their sustainability practices related to food safety and public health, animal well-being, the environment and quality of life for the pork industry's people and communities.

This partnership will demonstrate the value of having a responsible supply chain by consolidating sustainability data and activities gathered on the ripe.io platform (the data are visible to partners in the ecosystem to ensure valid certifications).^{ix} The data remain anonymous in order to create a benchmark indicator for each of We Care's six ethical principles.

Over the last 50 years, America's pig farmers – using principles on which We Care is based – have become increasingly sustainable, using 75.9% less land, 25.1% less water and 7% less energy; this resulted in a 7.7% smaller carbon footprint.^x Through this blockchain technology partnership and other emerging technologies, the pork industry can make even more improvements through benchmarking its performance and increasing transparency of the entire pork value chain.^{xi}

Through such radical transparency efforts, the pork industry will lead the meat industry in efforts to improve its sustainability practices while addressing related questions from consumers.

CONSUMER WILLINGNESS TO PAY

29% are willing to pay more for meat that is antibiotic-free, clean label and hormone-free;

28% (30% among Baby Boomers) will pay more for food transparency;

23% will pay more for meat that is locally sourced or non-GMO;

22% will pay more for grass-fed meat;

21% (higher among Millennials) will pay more for meat that is free-range or certified humane;

20% will pay more for meat that is certified organic; and

11% will pay more for meat that is gluten-free.

i Center of the Plate: Beef & Pork. Consumer Trend Reports. Technomic. 2019.
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PORK IMPLICATIONS

Foodservice operators can benefit by talking about pork in new ways: Fresh pork, especially tenderloin and chops, is high in protein and a low-fat option. Pork's health attributes and craveable flavor profile make it uniquely positioned to meet consumers' health needs while also delivering on taste and flavor.

Operators have an opportunity to offer a fresh take on healthy menu options with pork dishes. While many health-conscious diners have become accustomed to seeing the same healthy chicken and fish options on menus, pork dishes offer an opportunity to try something new while staying on track – provided operators include messaging on menus around pork's health attributes.

In addition, providing the farm-to-table and local-sourcing stories for pork options can give diners permission to enjoy pork as part of their diets.





QUICK AND CONVENIENT

**FROM FAMILIES ON THE RUN TO GRABBING A QUICK BITE,
SOME DINING OUT OCCASIONS DEMAND CONVENIENCE**

As previously noted, more than one third (35%) of consumers dine out to save time.²⁷ For many occasions, dining out is not only a special time to socialize for diners, but also a way to get a meal that is more convenient than cooking at home.²⁸ Many customers are looking for affordable and convenient takeout options to fit their lifestyle.

So what drives the menu choices of the diner in a hurry? Up to six out of 10 diners say they want to be able to eat on the go, while four of 10 are looking to meet a craving or want a good value.²⁹ What does not matter for most of these diners: Health considerations, being sharable, being fun or tapping into nostalgia.³⁰

From convenience stores to food trucks, consumers have more choices of where to dine. As a result, restaurants and other foodservice operators must think about convenience – whether that means an easy to-go meal, online ordering options or the ability to make mobile reservations.

As retail competition heats up, restaurants should continue to position themselves as fast but enjoyable experiences.³¹ For example, operators must offer portable options (such as fried pork tenderloin sandwiches or pork nuggets) and make ordering convenient by using mobile pick-up and ordering.³² In addition, when marketing value to-go options, restaurants should consider appealing to a wider base of customers looking for affordable options.³³

Multicultural options are also key and give foodservice operators an opportunity to emphasize the convenience and individuality of their establishments.³⁴

The desire for quick and convenient options is an important factor present in three of the nine dish occasions featuring meat.



QUICK PICKS



Busy lives sometimes require meals to be eaten on the go between kids' activities, soccer games, music lessons, drop-offs at school, night classes and other activities. Fast food restaurants give them the food they like – often a childhood favorite – in a hurry, with little fuss or surprise, and at times in the car. Those having this occasion tend to be married with larger families who live in suburban or rural areas. This is not the time for them to look for fancy food choices – the main goal is to get it quickly and get on to the next item on the agenda.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 10%

DINERS

- tend to be with spouse or kids
- 2 people
- skews rural
- married
- larger households

DAYPART

- 70% dinner
- lunch underindexes

WHAT'S ON THE PLATE

Family-friendly chicken strips/nuggets and hamburgers

OPERATOR OPPORTUNITIES

Pork has an opportunity to be more than a pizza topping – it can be a favorite for the family that eats on the go. Operators looking to increase volume sold to cost-conscious diners may be swayed by the value of pork in a format proven to garner love: nuggets.

PACKER OPPORTUNITIES

Kids and adults alike love shareable, no-mess and quick-to-eat chicken nuggets and their adult counterpart, chicken tenders. Pork has an opportunity to steal some of the love by creating a nugget product that's flavorful and more affordable.



CONVENIENT CATCH-UPS



Sometimes when friends or co-workers go out to eat, food that is quick and easy on the budget trumps food that's indulgent or healthy. Skewing young and Hispanic, these people often look for something lighter and shareable. But the key is to get it fast before getting back to work or off to an appointment.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 13%

DINERS

- friends, co-workers or family
- 2 plus people
- often single
- younger
- Hispanics
- budget conscious (skews < \$60K)
- purchases at stores (hot bar, c-store, etc.) or cafeteria

DAYPART

- Lunch overindexes (34%)

WHAT'S ON THE PLATE

On the go favorites hamburgers or pizza

OPERATOR OPPORTUNITIES

Fresh pork options for quick lunches with pork as the star, such as in handhelds, can make in-roads at lunches and dinners with friends and co-workers.

PACKER OPPORTUNITIES

Pork deli meat, ham steaks, fried tenderloin and pulled pork are versatile and flexible options to meet the needs of this audience. Packers have an opportunity to show operators how pork is a star complement to their handheld options.



ON THE FLY



Men, often single and dining alone, are busy with work most days and don't want to waste time sitting down for a meal. They eat what they want, and they want something fast they can count on – and doesn't break the bank. It's their decision, and it's as often as not a take-out burger, breakfast sandwich or chicken sandwich with fries.

SNAPSHOT

PERCENT OF DINING OUT MEAT OCCASIONS 15%

- DINERS**
- solo
 - often male
 - single
 - frequent AFH diner

- DAYPART**
- Breakfast (13%) and lunch (36%) overindex
 - dinner underindexes
 - weekday overindexes (73%)

WHAT'S ON THE PLATE

Ubiquitous hamburgers, deli sandwiches

OPERATOR OPPORTUNITIES

Burgers rule in this occasion, so pork needs a worthy challenger, such as ground tenderloin or mixed protein burgers, or fried pork tenderloin sandwiches.

PACKER OPPORTUNITIES

Innovation around pork "burgers" may prompt interest from operators who turn to tried-and-true hamburgers to reach this on the go audience. The potential to offer a pork burger topped with bacon at potentially a lower price point than its beef counterpart may help operators see the opportunity for pork as the new go-to burger.

CONSUMERS SEEK EXPERIENCE AND CUSTOMIZATION

Seismic changes in retail have been dubbed a “retail apocalypse” by some, but for many savvy start-ups, these changes have presented unique opportunities. As Millennials and Generation Z gain spending power,ⁱ the new generations of shoppers are seeking more experiences, higher quality and greater value, and companies able to adapt to these changing preferences are winning their loyalty.

Consumers today expect a seamless experience, defined as “consistently personalized, on-brand... for each individual customer, at every touchpoint – anytime and anywhere,” according to Accenture.ⁱⁱ They want brands to cater to them and are willing to pay more for quality. Three-quarters of Millennials prefer to spend money on an experience or event,ⁱⁱⁱ while 69% say they want a curated brand experience.^{iv}

Specialized or niche retailers are among the winners in this new consumer landscape. Digitally native niche retailers, such as Casper and Warby Parker, plan to open 850 retail stores in the next five years.^v The trend extends beyond retail, too. Boutiques are the most rapidly growing segment of fitness, with gyms like Soul Cycle and Orangetheory popping up across the country.

The desire for quality and experience is also driving the trend in shorter menus and small-format restaurants.^{vi} Restaurants with fewer options are better able to deliver higher quality and can offer diners the chance to customize their meal. Five Guys, for example, offers just five core menu items (hot dogs, burgers, sandwiches, fries and milkshakes) but multiple toppings and customization options.^{vii} Bigger is not necessarily better. An estimated 80% of a restaurant’s sales come from just 16% of its menu items.^{viii}

Fast casual restaurants like Five Guys are also seeing competition from emerging “fast fine” dining.^{ix} These restaurants offer a fine dining experience with fewer menu items and reduced staff. While food quality, ambiance and prices reflect fine dining, the format is less formal. Diners may order at the counter from servers who may be wearing jeans.^x

Specialists like these are succeeding because they are better able to adapt to changing consumer preferences.^{xi} They also are more likely to offer bold marketing campaigns that respond to issues important to consumers today, such as sustainability.

And all signs point to staying power for these trends. In fact, Baby Boomers are increasingly mimicking the shopping behaviors of their children.^{xii} Successfully delivering a memorable experience and strong value can deliver loyalty not just among Millennials, but their parents too.

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DINING OUT AT THE CONVENIENCE STORE

“Truck stop” doesn’t traditionally conjure the image of fine dining, but consumer trends are rapidly changing. Foodservice in convenience stores is growingⁱ, and an increasing number of c-stores are offering options beyond traditional snacks and soft drinks. While quick breakfasts are common options for travelers, more convenience stores are serving fresh food options from prepared lunches to sit-down dinners.

Foodservice drives strong profits and loyalty for c-stores, making it an important investment consideration.ⁱⁱ Consumers spent \$39.2 billion on c-store foodservice in 2018, up 5.9% from the year before and 33% since 2013.ⁱⁱⁱ



Foodservice accounts for about a quarter of in-store sales, but it contributes a third of gross profit dollars^{iv}. Nearly 80% of c-stores reported in-store sales growth during the first half of 2018, according to the National Association of Convenience Stores, and retailers said a focus on fresh and healthy items contributed to the growth.^v

As stores expand their foodservice options, some are even developing a cult following among those who will go so far as to line up around the block for their food. East-coast-based chains Sheetz and Wawa both saw 9% growth in foodservice in 2018, according to Mintel. Wawa has built a loyal fan base for its built-to-order hoagies. It also serves salads, wraps, soups and sides.^{vi} Its food options are so popular the chain is now expanding into catering.^{vii} Sheetz offers made-to-order salads, burritos, sandwiches and melts, burgers and other grill items. The rivalry among Sheetz and Wawa fans is so strong, a documentary about the chains, “Sheetz vs Wawa: The Movie,” is in development.^{viii}

Even as loyalty grows, consumers are looking for more healthy options, according to Mintel. While nearly half say c-store foodservice is improving, only 15% say they are satisfied with current healthy options.^{ix} One in five customers say they are interested in more natural and organic options.

Convenience stores can stand out by offering not just breakfast but lunch and dinner. Cuts of pork, especially tenderloin and chops, can equally be touted as fresh, healthy options apart from the chip and candy aisles. Particularly in areas with limited access, c-stores are becoming the future of dining.

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FRESH AND LOCAL PORK SCORES SALES GAINS FOR RUTTER'S



Four years ago, Pennsylvania-based convenience store Rutter's wanted to diversify its protein-heavy foodservice menu. Director of Foodservice Ryan Krebs, a self-admitted pork enthusiast, knew he wanted to bring more pork to the menu. But it would take some careful planning and partnerships with local manufacturers to find the right cuts that would keep customers coming back without cannibalizing other menu items.

Chef Ryan's first pork addition was pulled pork. He found a Boston-based provider who had a Carolina barbecued pork and worked with the company to customize it by simplifying the recipe down to a vinegar-based marinade and special seasonings. The shredded pork is now used in burritos, sandwiches and a variety of other menu items. And, with its simplicity, customers can customize their pork experience to their liking.

"The pulled pork clearly demonstrated our customers want more pork," Chef Ryan says. "Today, we're number one in volume for this SKU in the country."

Following this early success, Chef Ryan looked for pork belly options. Most producers had large slabs of pork belly intended for full-service restaurants, which weren't c-store friendly. He worked with a producer to cut the slabs into pre-portioned slices and caramelized the pork belly to bring out the color. The slices are then packed in small packs that are easy for stores to use. Rutter's was the first foodservice establishment to use this new, custom pack, and they were the only one in the country to use it for the first three months of its development.

"I saw the resurgence of pork belly everywhere, from top steakhouses to macaroni and cheese recipes, and I knew I wanted to have it on our menu," Chef Ryan says. "So we put it all over our menu, including pizza, in burritos, on breakfast sandwiches and tacos. It can be on just about anything, and our customers love it."

Partners have played a critical role in Rutter's foodservice success, according to Chef Ryan. While Rutter's initially had to encourage them to think uniquely about the needs of c-stores, the producers have realized sales growth too. Multiple items developed exclusively for Rutter's are now sold to c-stores and restaurants nationally.

Many of these partners are local. According to Chef Ryan, Rutter's customers want to know where their food is coming from and see their dollars go back to the local community. Rutter's now promotes its fresh and local options, which they continue to expand with their ongoing transparency initiatives.

"The sky is the limit, particularly with pork: bone-in pork chops, St. Louis ribs, pork tenderloin," Chef Ryan says. "But, we need to make sure it remains high quality and can be cooked quickly. People prefer not to wait 12 minutes in a convenience store, so we have to be able to cook it relatively quickly without drying it out. We're working with several manufacturers on additional items and plan to continue expanding our menu offerings."

Most importantly, Chef Ryan says, each of these menu additions have helped foodservice sales grow, and sales of other menu items remained strong. This indicates pork is bringing in new customers and not cannibalizing other menu items, which makes the pork enthusiast very satisfied.



FUELING UP WITH FRESH TEX-MEX FLAVORS



Texas-based Laredo Taco Company is so popular, it's a top draw – to the gas station.

The chain, now owned by 7-Eleven, Inc., has carved out a niche in gas stations and c-stores in the Southwest, including Stripes, APlus and 7-Eleven. And it's surprising fans of Tex-Mex cuisine, who discover they can get authentic flavors at the c-store.

It differentiates itself by offering handmade tortillas, a fresh salsa bar and dishes cooked to order. Tacos, enchiladas and quesadillas feature fresh ingredients and authentic flavors. The chain is such a hit it's now the No. 2 reason customers come to the c-stores behind fueling up their vehicle, according to a recent customer survey.

"As our restaurant business has grown, we've found it is driving the majority of our in-store traffic and sales," says Chris Switzer, product director for 7-Eleven.

As a result, the chain has expanded its in-store seating and menu, including more ready-to-eat meals. Many of these options feature pork, including chorizo, carnitas, asado de Puerco and bacon. Laredo Taco uses 3 million pounds of pork annually, Switzer says. Pork is offered across all dayparts and many of the options are now top sellers: bacon and egg is the top selling breakfast taco, chorizo and egg is the No. 3 most popular breakfast taco (made using a proprietary ground chorizo recipe), and carnitas is the No. 5 overall bestselling taco.

To meet its growing demand, Laredo Taco has relied on its partnerships with suppliers who help prepare cuts that also fit c-store operational needs.

"We needed cuts that are easy to prepare, and we needed to train our team to handle, prep and cook pork," Switzer says.

Packers can help, he says, by becoming more familiar with how pork is used in Tex-Mex food; demand is growing as customers seek new flavors and more multicultural dishes.

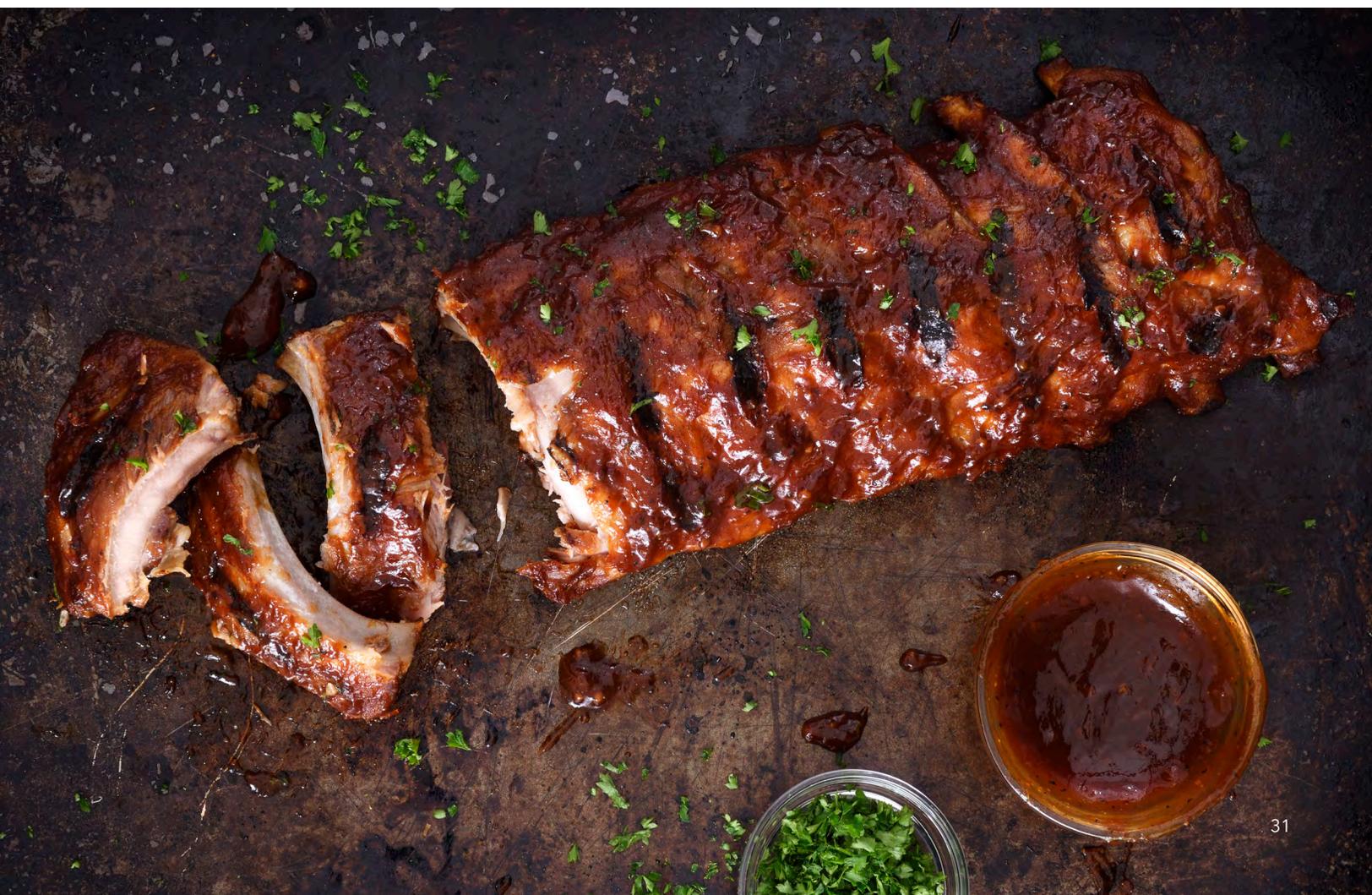
"Customers are more adventurous these days," Switzer says. "They are seeking authentic and delicious foods to try."



PORK IMPLICATIONS

To get more fresh pork on the menu, we need to show how foodservice operations would benefit by appealing to the diner on the go and offering pork substitute/spin-offs, such as pork nuggets, ground pork burgers, pork kabob wraps and other low-mess handhelds.

In addition, while foodservice operators already see they can benefit by marketing pork as flavorful and as a good value, we need to reinforce this trend by showing fresh pork can be a good option for the diner who is in a hurry.



LOOKING AHEAD



Consumers dine out to treat themselves – with food, with drink and with the company of others.³⁵ Although convenience will always be an important factor, foodservice operators should not lose sight of what makes dining out a unique and attractive experience: Consumers associate dining out with having an enjoyable experience – a special occasion, excitement and fun.

Pork has an opportunity to be a larger part of that equation, but we need to adapt to better meet consumers' and foodservice operators' needs. We need to better address the barriers – everything from negative health perceptions to a lack in cooking technique training – keeping pork off menus.

We have to present pork in ways that meet consumer desires: Not just pork chops and other center-of-plate preparations, but craveable dishes that feature pork as an ingredient.

It begins with offering cuts, packaging and prepared products to help operators see the potential in pork as an ingredient.

And it requires thinking globally. As we'll explore in a report due out this fall, America's future is multicultural. This presents a great opportunity for pork, but only if we can embrace this shift and celebrate it.

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RESEARCH METHODOLOGY

The following research was conducted by C+R Research:

- Three 15-minute modular online surveys were fielded between March 27 and April 29, 2018 and again between August 10 and September 20, 2018.
 - In the first fielding of the surveys, 10,163 interviews were collected among panelists in Numerator's InfoScout Omnipanel. These surveys were fielded in English-only.
 - In the second field period, an additional 952 interviews were collected among panelists from Offerwise's U.S. Hispanic panel. These surveys were fielded in both English and Spanish, and all of the respondents identified as Hispanic/Latino.
- The total ending sample size is 11,115 U.S. meat consumers including:
 - 9,086 Non-Hispanic, and
 - 2,029 Hispanic
- In order to participate in this research, all respondents were required to meet the following criteria:
 - Males/Females age 18+ residing in the U.S.
 - Personally eats meat
 - Has at least some influence in buying or preparing food for the household
- The subject of each modular survey was:
 - Module 1 Survey: in-home meat consumption
 - Module 2 Survey: out-of-home meat consumption
 - Module 2 data includes both dine-in and take out occasions where the meat evaluated was eaten by the respondent, but not necessarily by others at the table.
 - Occasions evaluated were limited to those that included meat. Therefore, breakfast occasions where meat was not eaten are not accounted for in this study.
 - Module 3 Survey: personal attitudes about meat; personal food/health/nutrition attitudes; and awareness/engagement in contemporary food, diet and nutrition trends
- Certain data (such as demographic measures) were obtained from InfoScout's or Offerwise's panelist profiling databases; all other data was obtained through the surveys, except for retail spending on meat (Module 1) which were obtained using InfoScout's receipt database.
 - While consumers may have purchased/eaten multiple meats, they were assigned one meat to evaluate for the occasion-based questions based on recency:
 - For Module 1, they evaluated the meat they have eaten most recently at home in the past two weeks.
 - For Module 2, they evaluated the meat they have eaten most recently away from home in the past month.

The following research was conducted by Datassential:

- Operator Demand Landscape Methodology (Survey 1 fielded December 2017 - 1,002 participants; Survey 2 fielded October 2018 - 1,003 participants, 300 respondents were processed pork only users)
 - Online survey of commercial and on-site operators from Datassential OPERA panel, the industry's largest unbiased operator research panel. Respondents must:
 - At least share responsibility in F&B decision-making
 - Offer lunch, dinner, banquet/catering, takeout or delivery
- Operator Omnibus (Fielded February 2019)
 - Online survey of 395 commercial and on-site operators for Datassential OPERA panel, the industry's largest unbiased operator research panel. Respondents must:
 - Have F&B purchasing responsibility
 - Serve fresh or processed pork
 - 310 serve fresh pork
 - 379 serve processed pork
- Chain Analyzer (Fielded September 2018)
 - Online survey of 6,132 consumers
 - 5,520 Gen Pop
 - 612 Hispanic consumers (includes 302 unacculturated Hispanics)
 - Respondents must:
 - Be 18-64 years old
 - Purchase food and beverage AFH at least once a month
 - Be a meat eater (does not exclude meat entirely from their diet)
 - Include pork in their diet (respondents are at least indifferent about eating pork)