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# Burger Sound Bytes

## The All-Mighty Burger



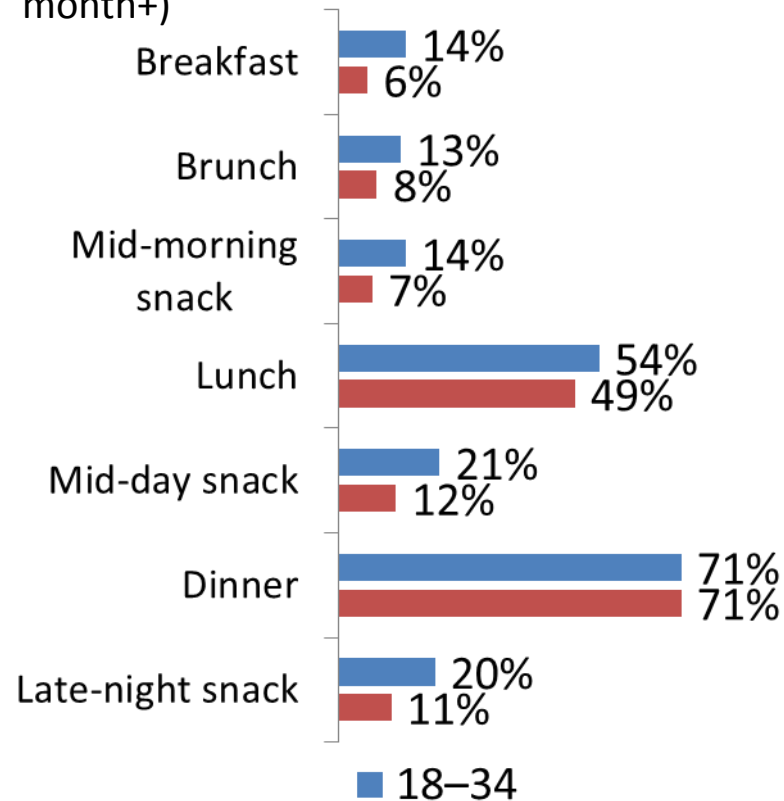


# Fewer Burgers, More Occasions: Frequency Of Burger Consumption Is Down, But Off-Peak Dayparts Thrive

Recent burger price increases have resulted in a slight decrease in consumption between 2013 and 2015

↓ **38%**  
Since 2013

How often do you eat burgers for \_\_\_\_\_? (Once a month+)



*Burger consumption during off-peak dayparts is driven by younger consumers. This suggests an opportunity to market burgers as snacks to younger consumers looking for a portable, filling item.*

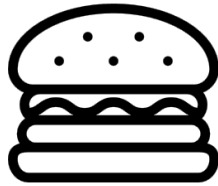




# Additive-Free = Premium: Consumers Pay Attention To What Goes Into Their Burgers

*How much do you agree that the following make a burger "premium"?*

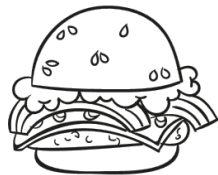
High-Quality Type of Meat  
**61%**



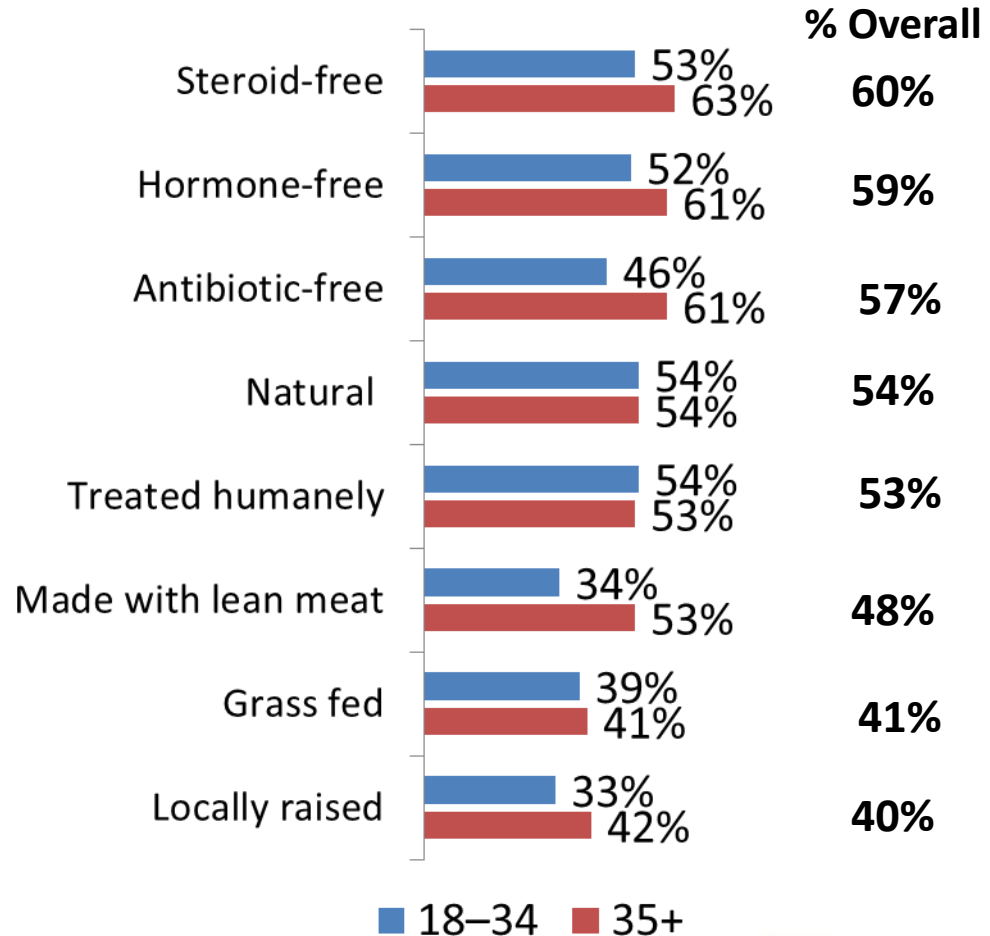
High-Quality Cut of Meat  
**60%**



Natural Ingredients  
**46%**



*How Important Are The Following For The Meat Used To Make Your Burger Patty?*





# Emergence Of Alternative Proteins: The Rising Cost Of Beef Continues To Challenge Burgers

Technomic's MenuMonitor reveals that burger prices have increased 6% at Top 200 LSRs and 9% at Top 200 FSRs since 2013

I have noticed that burger prices have increased over the past year. Agree & agree completely

45%

45%

47%

52%

49%

18-24

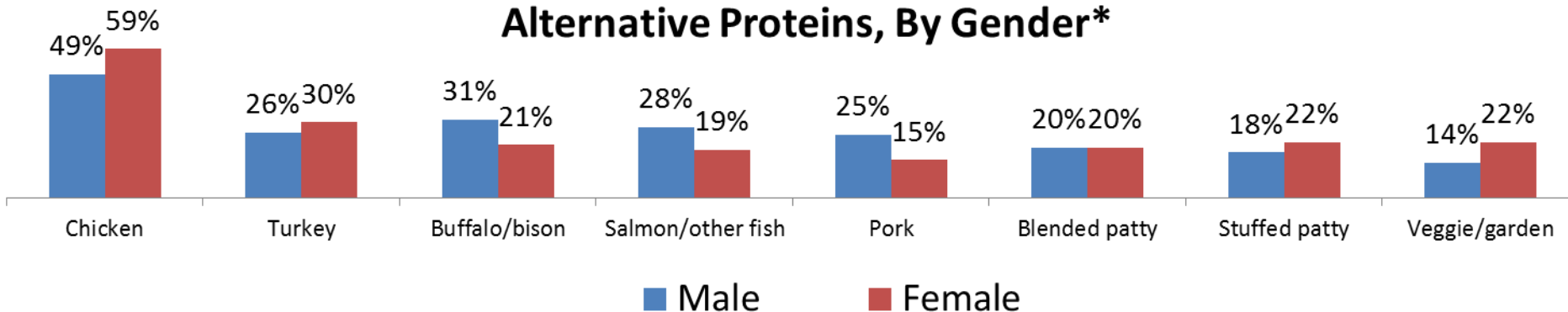
25-34

35-44

45-54

55+

## Alternative Proteins, By Gender\*



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# BYOB: Consumers Crave Customizable Condiments, Build Your Own Burger Options

**47%**

say condiments/toppings bars are very appealing

**52%**

of consumers are interested in BYO-Burger concepts/offerings



Women (63%) and older consumers (59%) are particularly adamant about being able to customize burger condiments and toppings.



*Overall, consumers find the ability to simply customize condiments and toppings more important than the availability of build-your-own (BYO) burger options, as BYO takes more effort and consumers may just want to alter a few condiments or toppings.*







# Spicy Catches Fire: Hot Flavours Are Growing Across Burger Builds

Fastest-Growing ('14-'15)\* Burger\_\_

Proteins		Cheeses		Condiments		Ingredients		Breads	
Wagyu	+64.0%	Queso	+44.4%	Gravy	+100.0%	Beets	+142.9%	Tortilla	+38.7%
Pepper Bacon	+39.3%	Smoked Gouda	+35.3%	Sriracha Sauce	+86.7%	Corn	+71.4%	Brioche	+31.9%
Chicken Breast	+35.5%	Havarti	+33.3%	Vinaigrette	+50.0%	Cilantro	+64.0%	Hawaiian Bun	+28.6%
Salmon	+31.1%	Fontina	+11.1%	Marmalade	+44.4%	Wild Mushroom	+57.1%	Bun	+7.2%
Ground Beef	+29.5%	Pepperjack	+10.0%	Jam	+41.0%	Butter Lettuce	+55.0%	Pretzel Bread	+7.1%
Prime Rib	+28.6%	Muenster	+8.3%	Chipotle Barbecue Sauce	+35.7%	Banana Pepper	+50.0%	Potato Bun	+4.4%
Bison	+20.7%	Jalapeno	+8.0%	Cheese Sauce	+33.3%	Radish	+40.0%	Wheat Bun	+4.4%