

JUNE 2021

FOODSERVICE PATRON STUDY



blueberries
Inspiring Possibilities

Background & Methodology

Survey Objectives

- Provide understanding of consumer attitude and usage of blueberries in the foodservice landscape
- Understand how blueberries can play a role in elevating menu and chain perceptions, and potentially attract patrons
- Improve and grow knowledge of what consumers think about blueberries and what blueberries contribute or add to menu items
- Capture the data points and context that can be communicated to foodservice operators via ongoing marketing efforts



Methodology

The Foodservice Patron study was fielded in May 2021, using an online panel. A total of 1,004 foodservice patrons participated in the survey.

Participants met the following screening criteria:

- Aged 18+
- Visit a restaurant at least once every 6 months
- Half of sample required to have household income of \$60,000 or higher

Total	Fast food	Fast casual	Casual dining	Polished Casual	Fine dining
1,004	222	217	221	219	125



Executive Summary & Implications

Key Takeaways: Blueberry Perceptions

Patrons' top associations for blueberries are for being **“tasty/delicious”** and **“healthy/nutritious/good for my body.”**

A wide majority patrons across all restaurant types agree that blueberries: **increase the healthfulness of items (72%), increase an item's freshness (62%), brighten up flavors (64%) and improve taste (64%).**

59% of patrons agree that they **“wish there more exciting and adventurous applications for blueberries.”**

61% feel that blueberries increase the appeal of a dish, on top of making it healthier, fresher, and better tasting.

Of the fruits tested, **Blueberries** are perceived as **one of the most appealing and healthy.**

Blueberries are one of the top three most appealing fruits when it comes to use in dishes or as an ingredient.

80% of patrons feel blueberries are very healthy.

Key Takeaways: Blueberries in Restaurants

Half of all patrons want to see blueberries included in more of the items traditionally associated with the fruit: yogurt, baked goods, fruit sides & desserts, and breakfast items like pancakes, waffles, crepes, etc.

Nearly 30% also selected side salads and entrée salads as desired items for blueberry inclusion.

While smaller, there are additional opportunity areas where patrons would like to see blueberries applied to savory options, like main entrees, wings with blueberry sauce, etc. Some of these have stronger resonance within specific restaurant types.

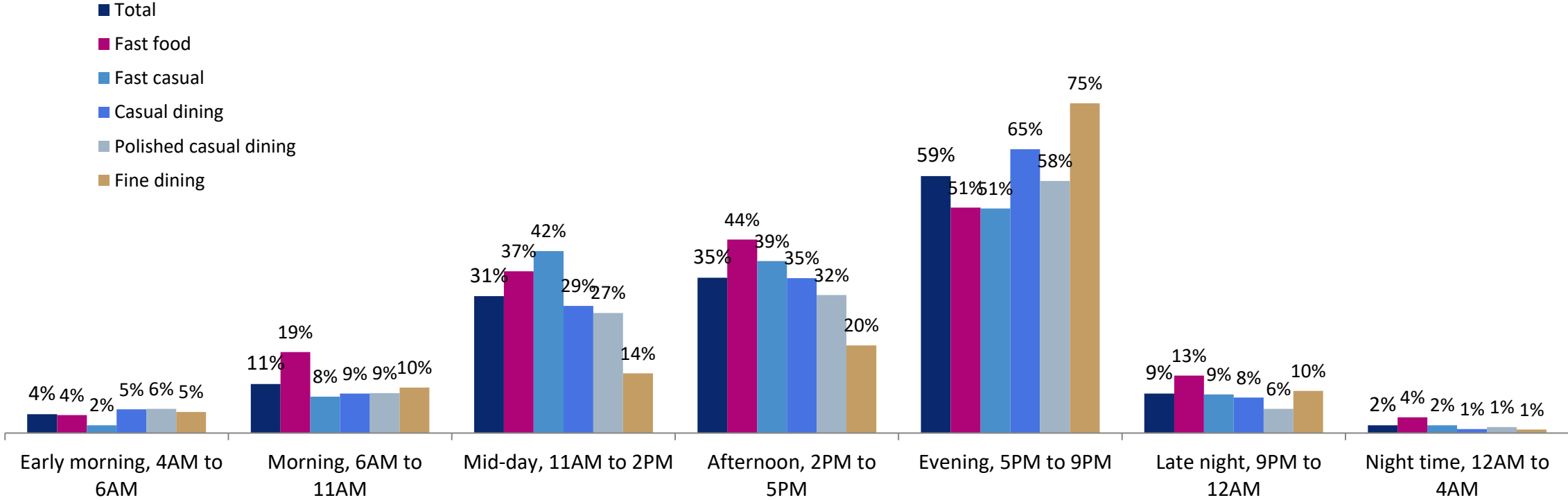
Over half of patrons would be at least somewhat likely to pay more for a wide range of items with blueberries. The strongest response, with over a third indicating they would be very likely to pay more include: baked goods, breakfast items (pancakes, waffles, crepes, etc.), fruit desserts & sides, juice/smoothies, and yogurt/parfaits.

Patrons perceive a lack of options with blueberries available to them and this becomes the leading barrier to increased eating/ordering of blueberries at restaurants: 75% agree that “there aren’t many menu items that have blueberries at the restaurants I tend to go to” while 47% ranked lack of availability as a top-3 reason why they do not eat more blueberries at restaurants.

Restaurant Habits & Behaviors

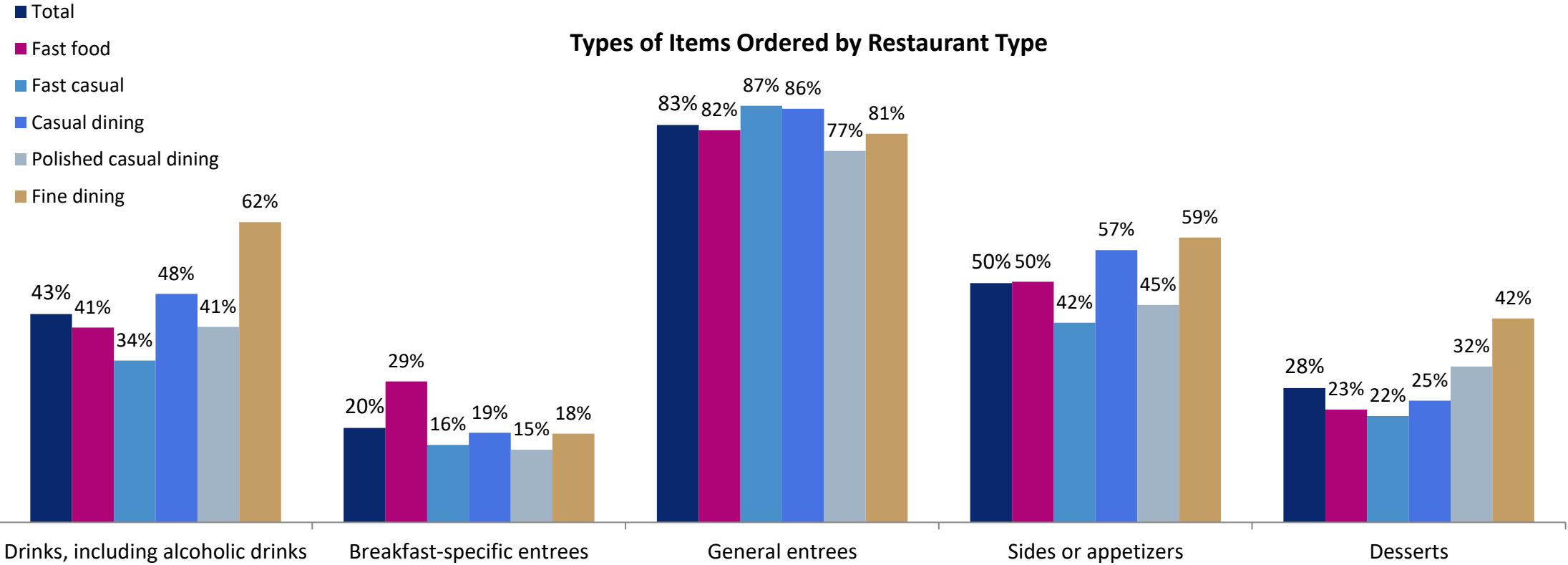
Compared to other restaurant types, patrons are more likely to visit fast food restaurants during the morning. Conversely, fine dining restaurants are most likely visited during the evening hours.

Times of Day Visiting Restaurant Types



9 Q1. What times of day is it when you typically visit [S4 RESTAURANT TYPE]? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; polished casual dining, n=219; fine dining, n=125)

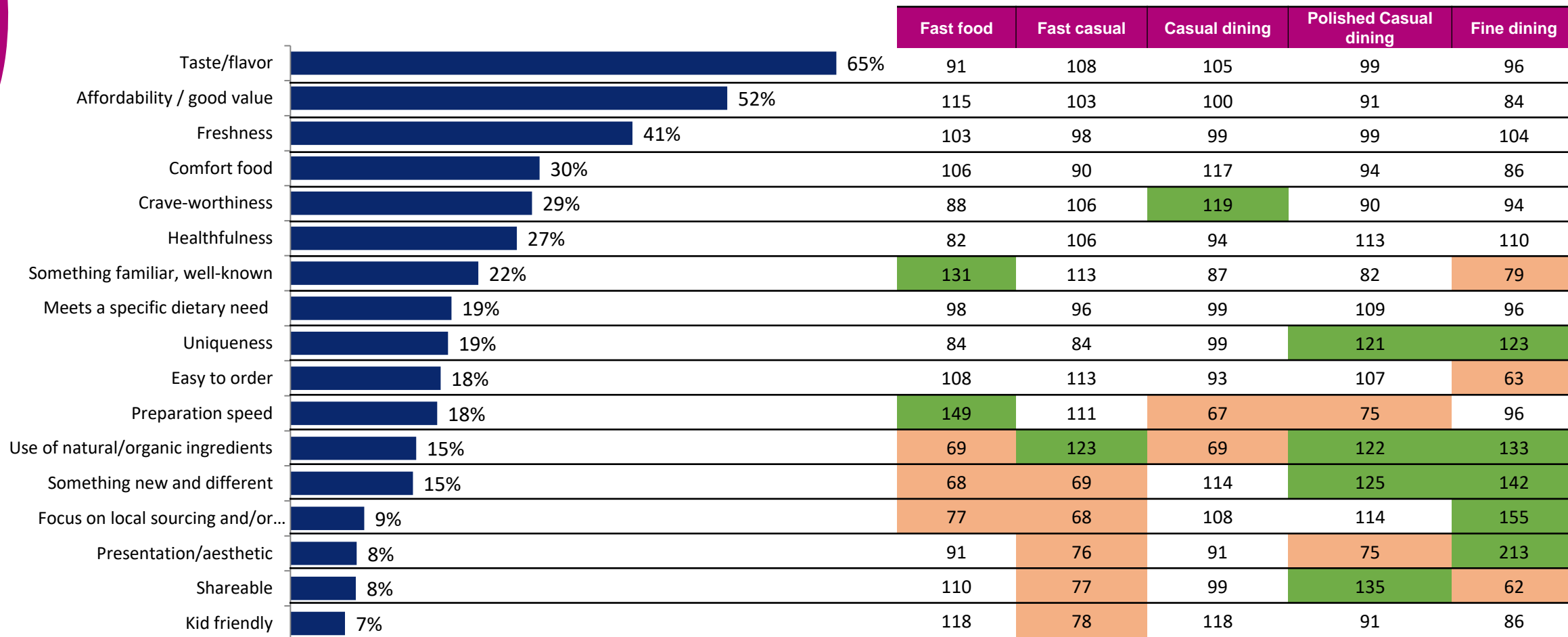
A wide majority of patrons are ordering general entrees at all restaurant types. Drinks, desserts, and sides/appetizers are more likely to be ordered at fine dining than fast food or fast casual.



10 Q2. What types of food and meals do you regularly order when you typically visit [S4 RESTAURANT TYPE]? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Taste and value are important regardless of restaurant type. Natural ingredients, local sourcing, and dish uniqueness increase proportionately with the price tier of operation.

Ordering Decision Factors – % Frequency Most Important



11 Q3. Please think about the factors that go into your ordering decision when you visit [S4 RESTAURANT TYPE]. How important, if at all, are the following in your decision? You will see groups of specific factors. For each one, please select the most important factor in your ordering decision, and also select the least important benefit.

(Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Blueberry Perceptions

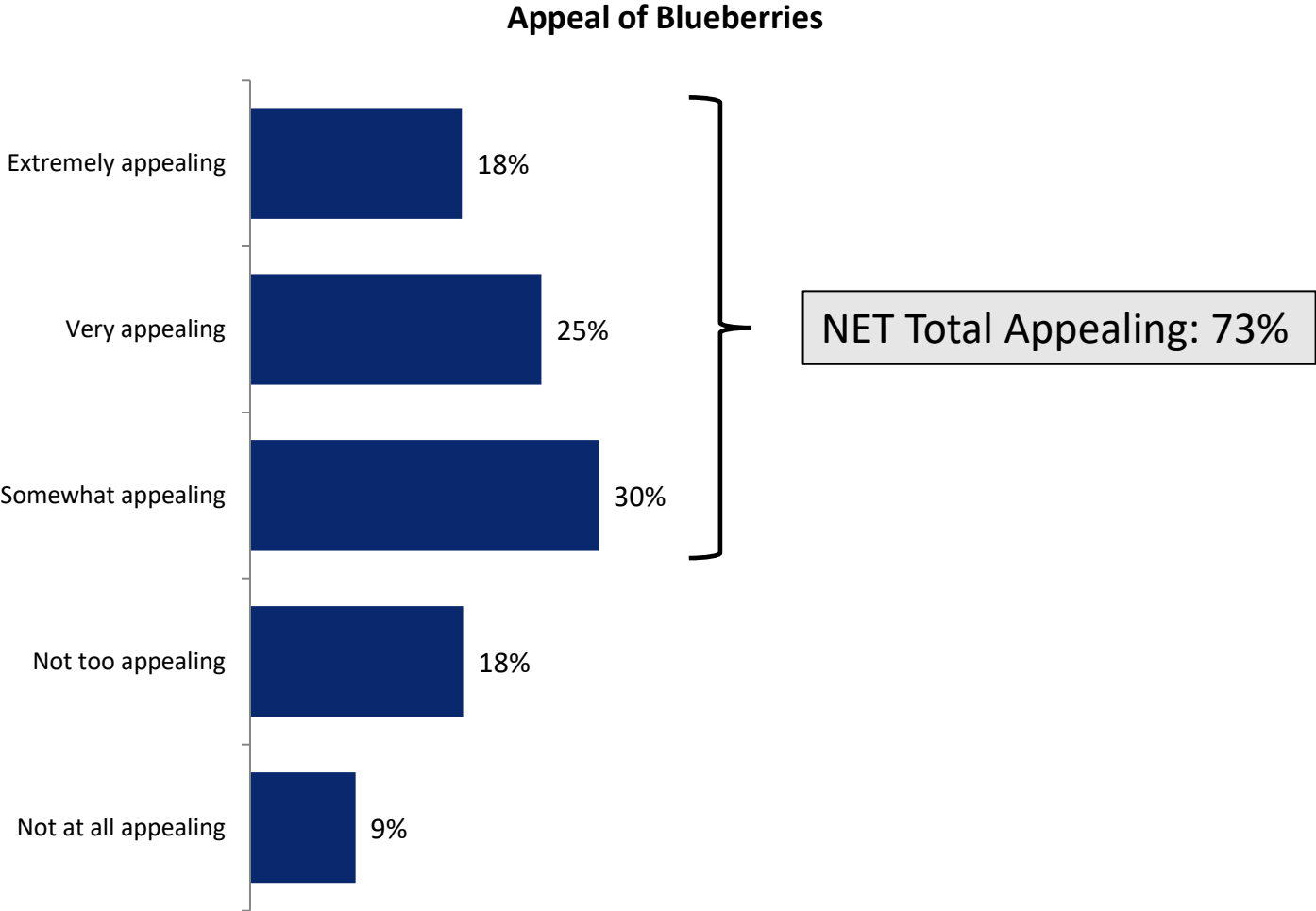
Blueberries are found appealing at all restaurant types.

Appeal of Fruits Used as Ingredients or Add-ons - % Very/Somewhat Appealing

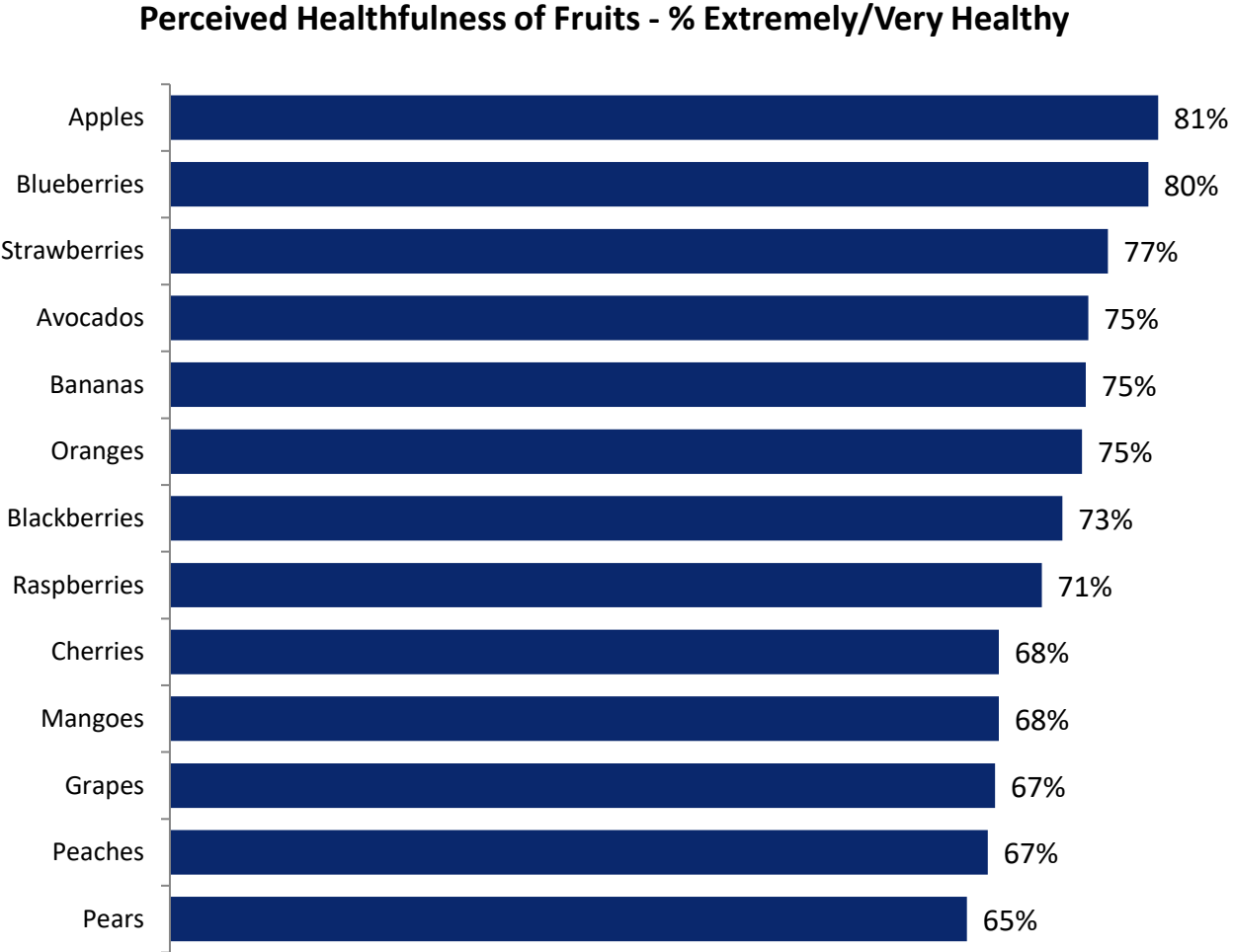
		Fast food	Fast casual	Casual dining	Polished Casual dining	Fine dining
Strawberries	54%	92	105	103	102	97
Avocados	43%	76	111	102	100	120
Blueberries	43%	90	104	94	106	112
Raspberries	42%	85	105	96	100	124
Cherries	41%	85	118	90	100	112
Peaches	40%	95	107	86	102	120
Apples	38%	97	103	93	100	113
Bananas	38%	92	109	99	94	112
Grapes	38%	101	104	82	106	115
Blackberries	38%	91	108	94	102	109
Mangoes	36%	91	108	104	89	112
Oranges	36%	96	104	95	99	110
Pears	33%	79	112	93	101	126

13 Q5. When eating at [PIPE IN S4 RESTAURANT TYPE] how appealing is it when the following fruits are used as ingredients or add-ons to dishes you order? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

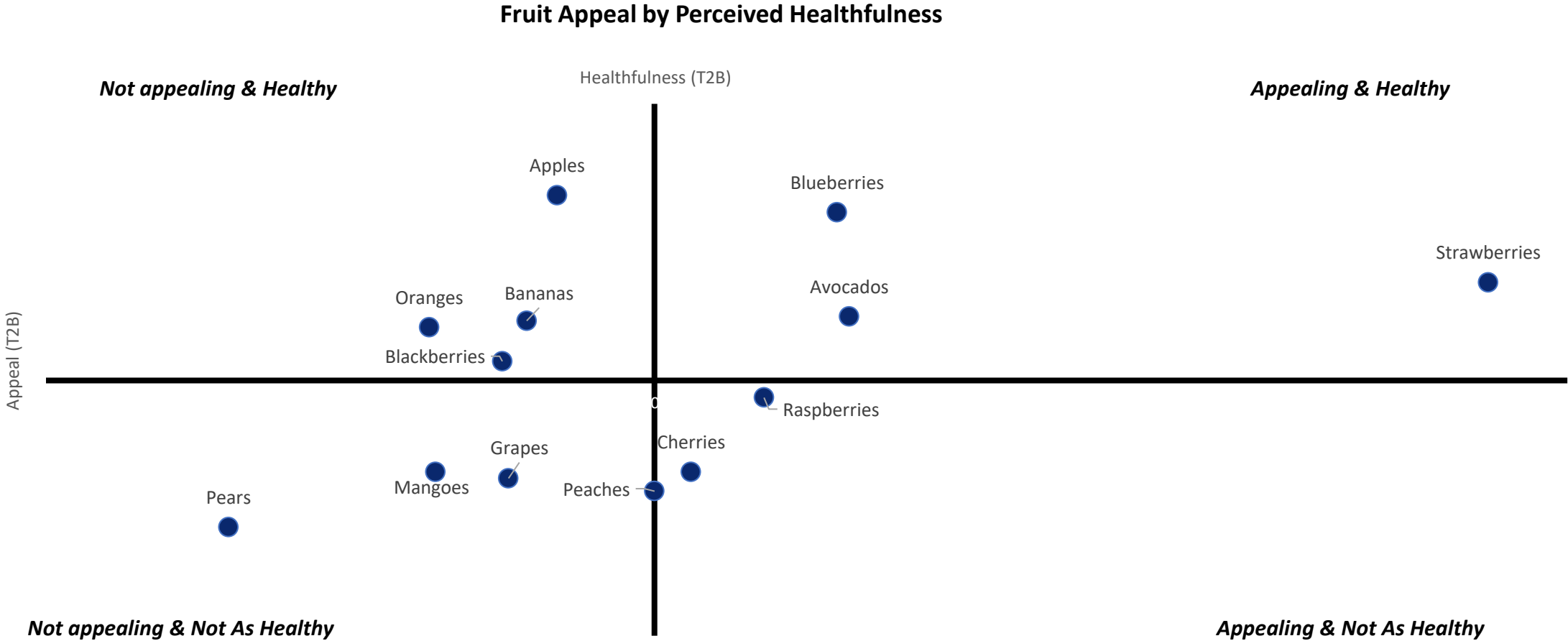
Nearly three in four say blueberries are appealing when used in dishes or as an ingredient.



Blueberries are perceived as one of the healthiest fruits; with four in five patrons considering them extremely/very healthy.



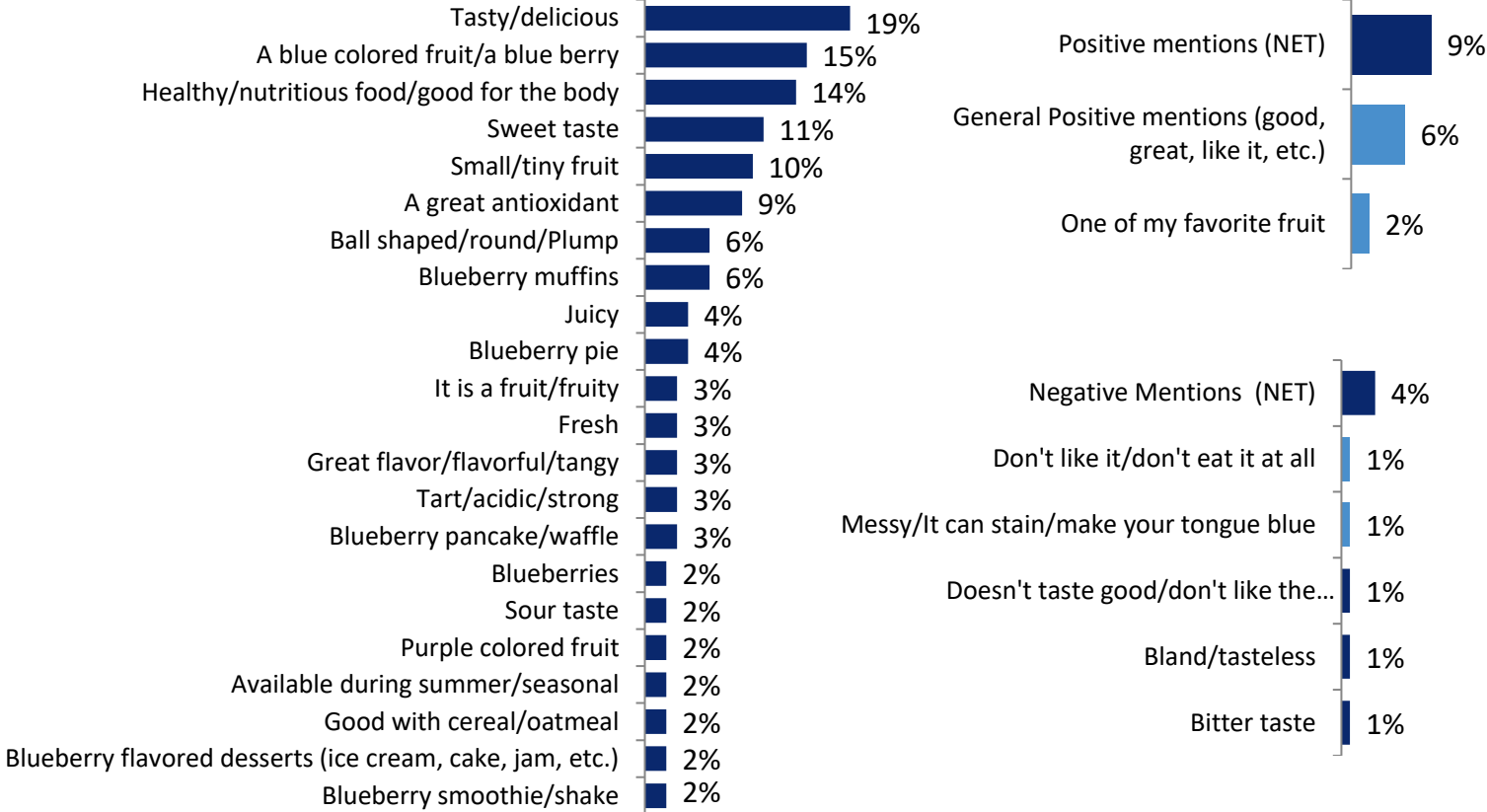
Blueberries are perceived as both appealing and healthy, besting avocados and strawberries in healthfulness perceptions.



16 Q5. When eating at [PIPE IN S4 RESTAURANT TYPE] how appealing is it when the following fruits are used as ingredients or add-ons to dishes you order? (Total, n=1,004)
 Q6. Now please rate each of the following fruits on how healthy you believe they are (Total, n=1,004)

Flavor, appearance, and health benefits are the most top of mind associations with blueberries.

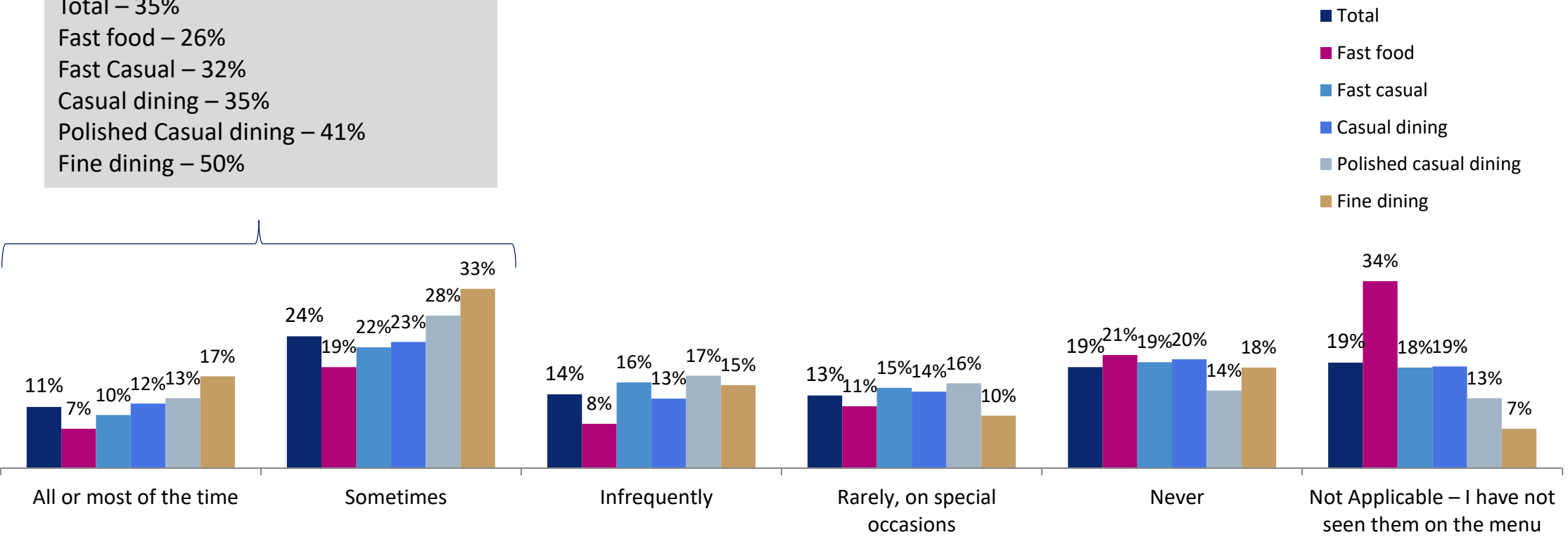
Top of Mind Associations with Blueberries
(Top answers shown)



The frequency of ordering blueberries increases along with the cost of the establishment.

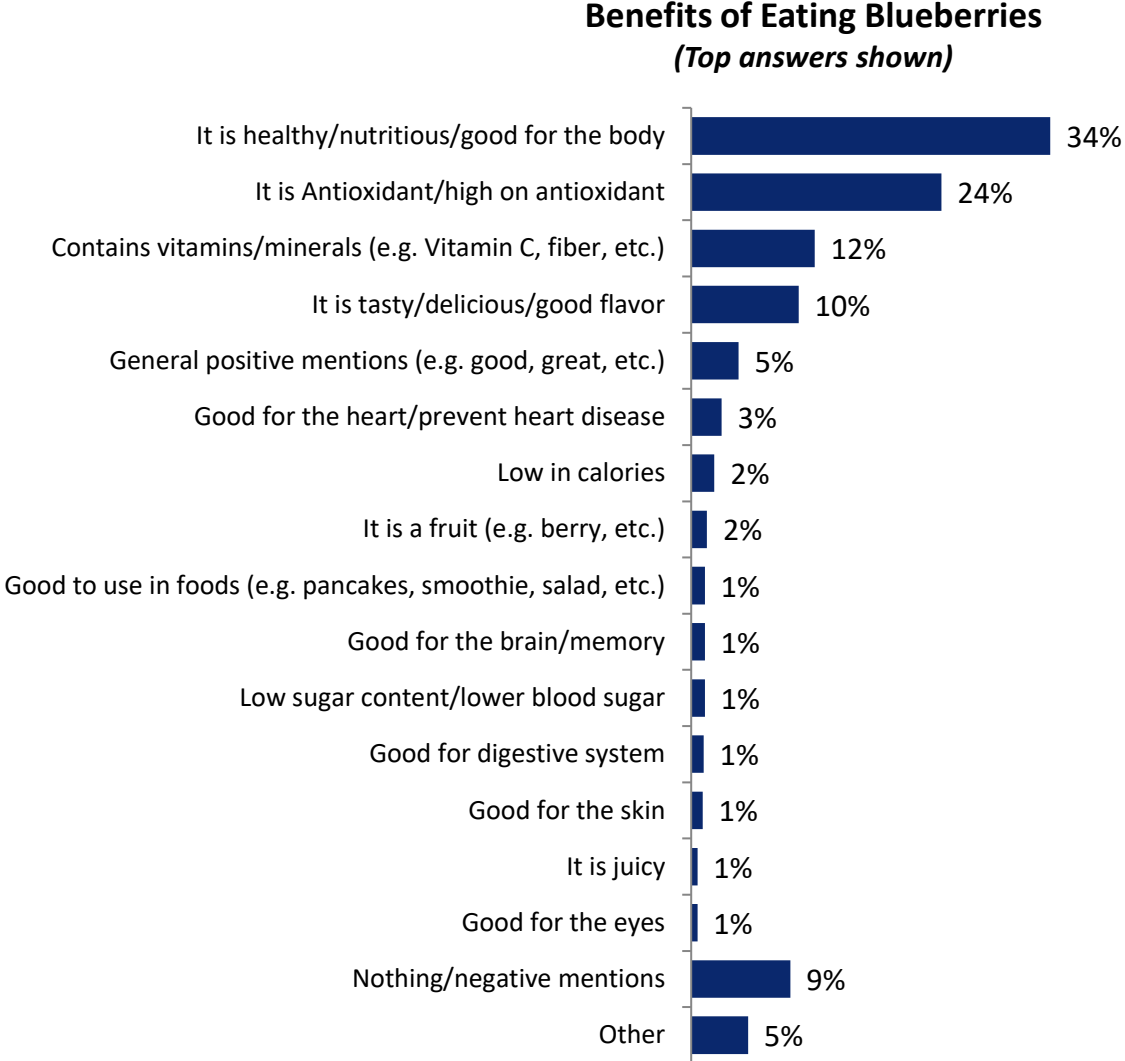
NET All or most of the time/Sometimes:
 Total – 35%
 Fast food – 26%
 Fast Casual – 32%
 Casual dining – 35%
 Polished Casual dining – 41%
 Fine dining – 50%

Frequency Ordering Dishes With Blueberries



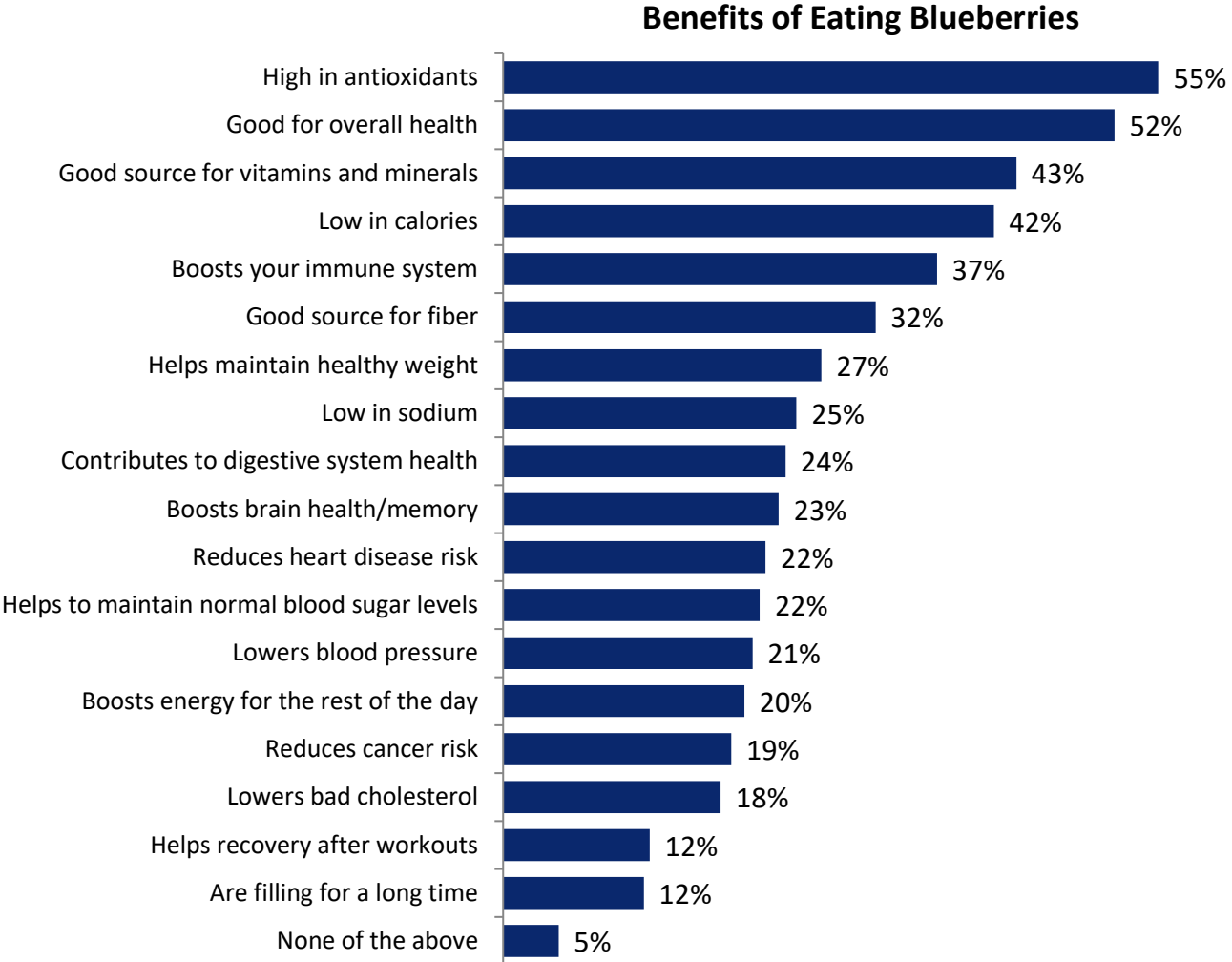
18 Q8. When ordering from [S4 RESTAURANT TYPE] how often do you order any foods with blueberries, if they are on the menu? Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Blueberries are a fruit with a “health halo.” More than two-thirds of patrons cite the fruit’s nutrients and antioxidants as benefits provided by blueberries.



19 Q9. In your own opinion, what do you see as the benefits, if any, of eating blueberries?(Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Antioxidants and being generally healthy rise to the top of perceived benefits provided by blueberries. Other meaningful benefits include being a good source for vitamins and minerals and being low in calories.



20 Q10. Which of the following do you believe to be benefits of eating blueberries? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

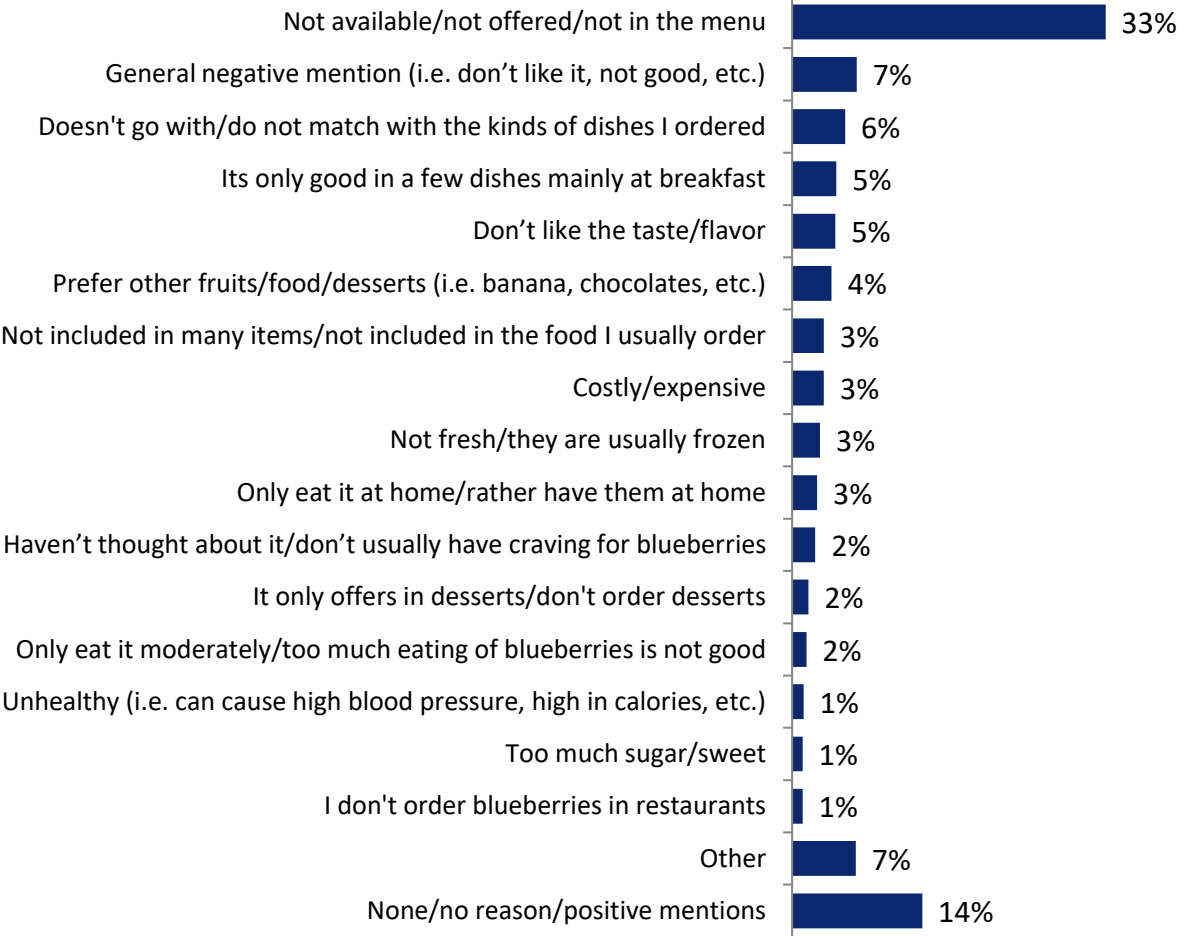
Large majorities agree that blueberries are an easy way to get vitamins/antioxidants, add a pop of color, and generally make dishes healthier. Yet, three in four note that blueberries tend not to be featured on menus and wish for more exciting menu applications for blueberries.

Agreement with Statements - % Strongly/Somewhat Agree

		Fast food	Fast casual	Casual dining	Polished Casual dining	Fine dining
Blueberries are an easy way to get vitamins and antioxidants.	82%	99	101	105	95	99
There aren't many menu items that have blueberries at the restaurants I...	75%	103	105	95	99	97
Blueberries add a pop of color to dishes I order.	74%	95	111	102	91	101
Blueberries make a dish healthier.	72%	99	106	95	99	103
Blueberries in baked goods or pastries make them seem healthier.	71%	93	104	100	98	108
My kids prefer dishes with blueberries.	65%	93	107	109	89	107
Blueberries brighten up the flavor of sauces and dressings.	64%	95	103	100	99	105
Blueberries make a dish taste better.	64%	94	106	102	100	97
Blueberries make menu items more fresh.	62%	102	101	99	92	110
The health benefits of blueberries encourage me to order dishes with them.	60%	98	106	97	97	102
I wish there were more exciting and adventurous applications for blueberries.	59%	102	109	100	84	111
I think blueberries are a seasonal ingredient, mainly in the summer.	58%	96	105	83	104	121
I wish more menu items included blueberries.	58%	96	105	98	97	107
I wish blueberries were included more on lunch and dinner menus.	56%	97	107	101	91	107
Blueberries give me energy throughout the day.	54%	102	104	101	95	98
I would try a blueberry cocktail if it was on the menu.	54%	99	97	97	95	120
I only eat blueberries at breakfast.	40%	69	100	106	110	127

Availability is the biggest hurdle for patrons to eat more blueberries.

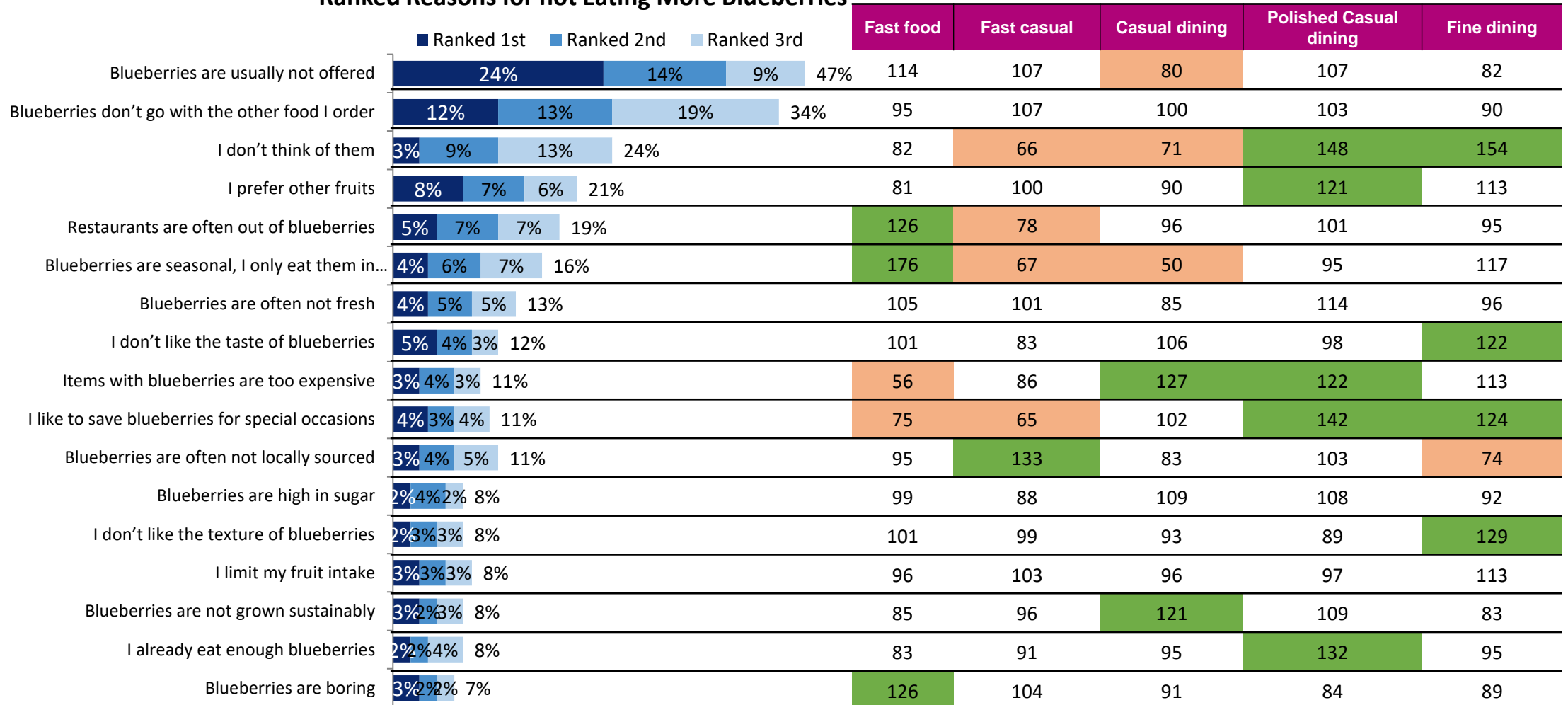
Barriers to Not Eating More Blueberries at Restaurants
(Top answers shown)



22 Q13. What are reasons you do not eat more blueberries at restaurants, as part of the food you normally order? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Lack of availability and not complementing other food(s) ordered are the top barriers to eating more blueberries, followed by not being top of mind.

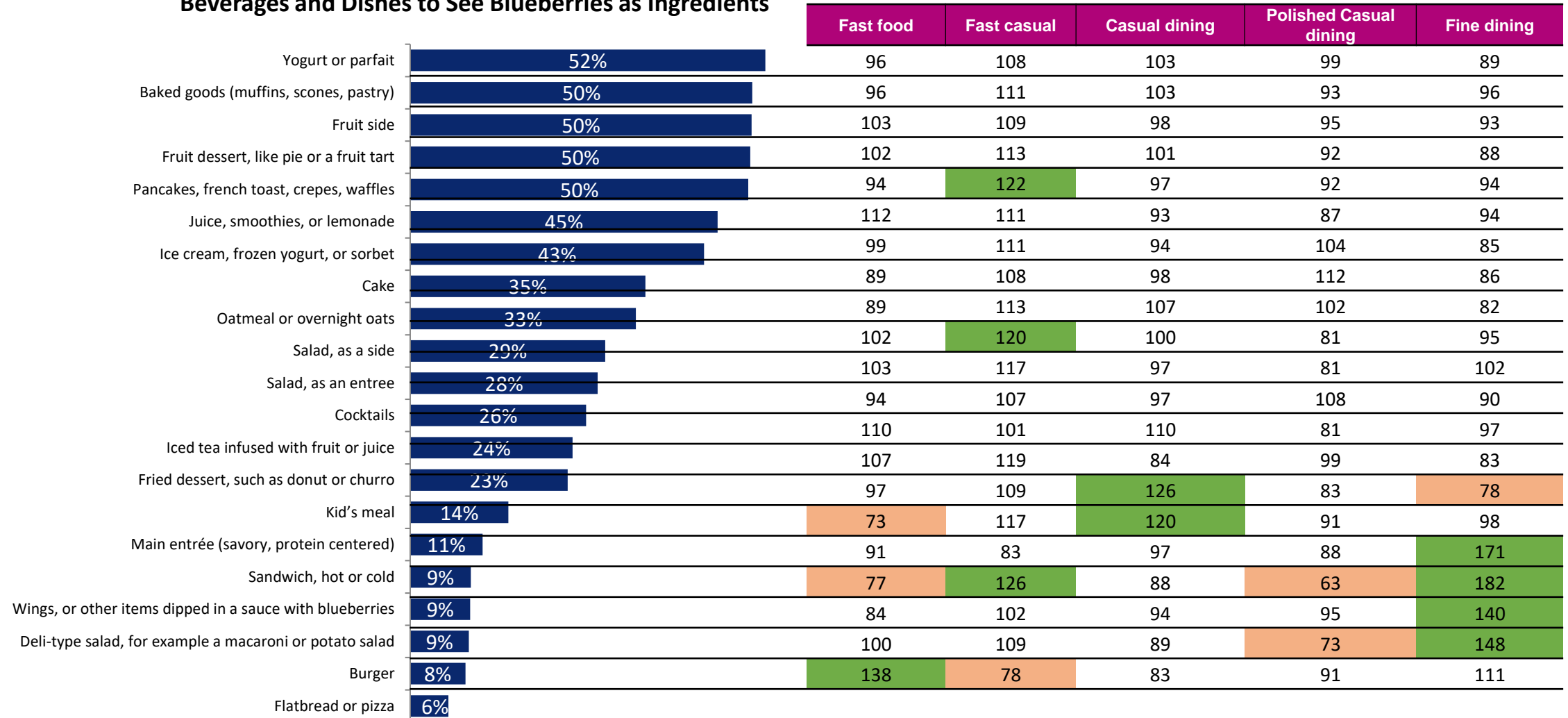
Ranked Reasons for not Eating More Blueberries



23 Q14. Which of the following, if any, are reasons that you do not order blueberries or items with blueberries in them more often at [S4 RESTAURANT TYPE]? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Across restaurant types, there is still a lot of love for traditional blueberry applications. Sweet breakfast items and side salads over index as where patrons would like to see blueberries included at fast casual restaurants.

Beverages and Dishes to See Blueberries as Ingredients

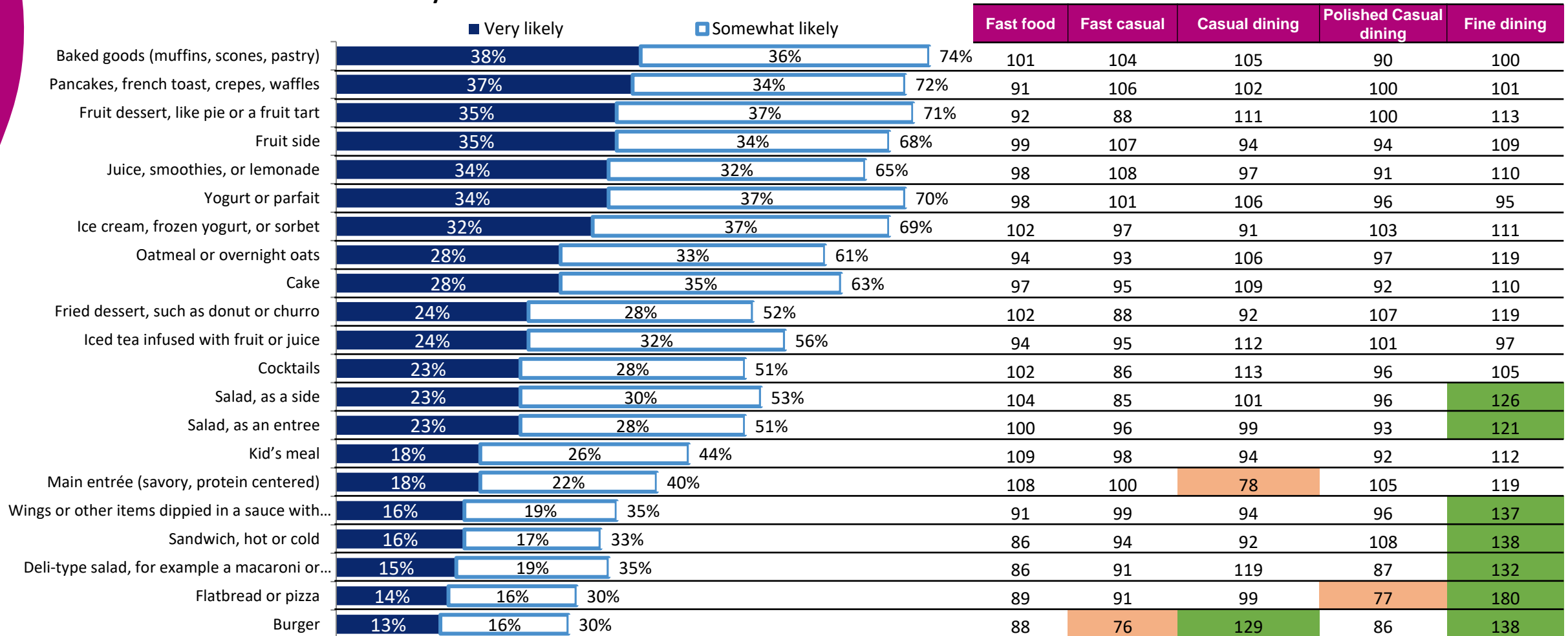


24 Q15. Of the beverages and dishes listed below, which do or would you like to see blueberries included as an ingredient? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

The dishes patrons indicate a likelihood to pay more for blueberries are similar to those they desire blueberries to be included – baked goods, sweet breakfast items, and fruit-forward dishes. Fine dining patrons over index on being likely to pay for more innovative blueberry applications like savory sauces, flatbreads and burgers.

Likelihood to Pay More to Include Blueberries

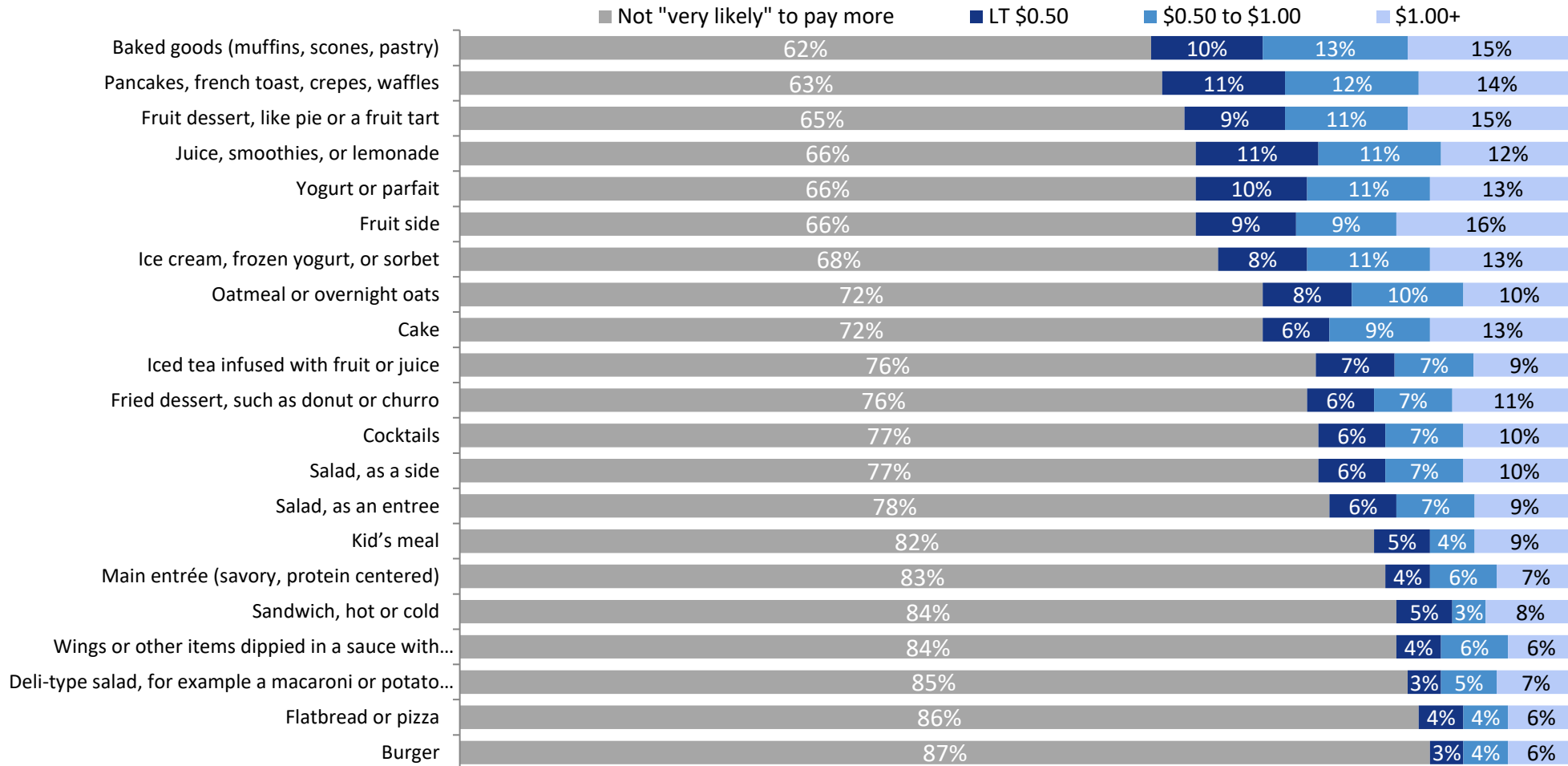
*Indexed by "Very Likely"



25 Q16. If at a [S4 RESTAURANT TYPE] type restaurants how likely would you be to pay more to add blueberries to the items listed below? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Patrons indicate more of a willingness to pay extra to include blueberries in items that traditionally include the fruit – baked goods, breakfast sweets, fruit desserts.

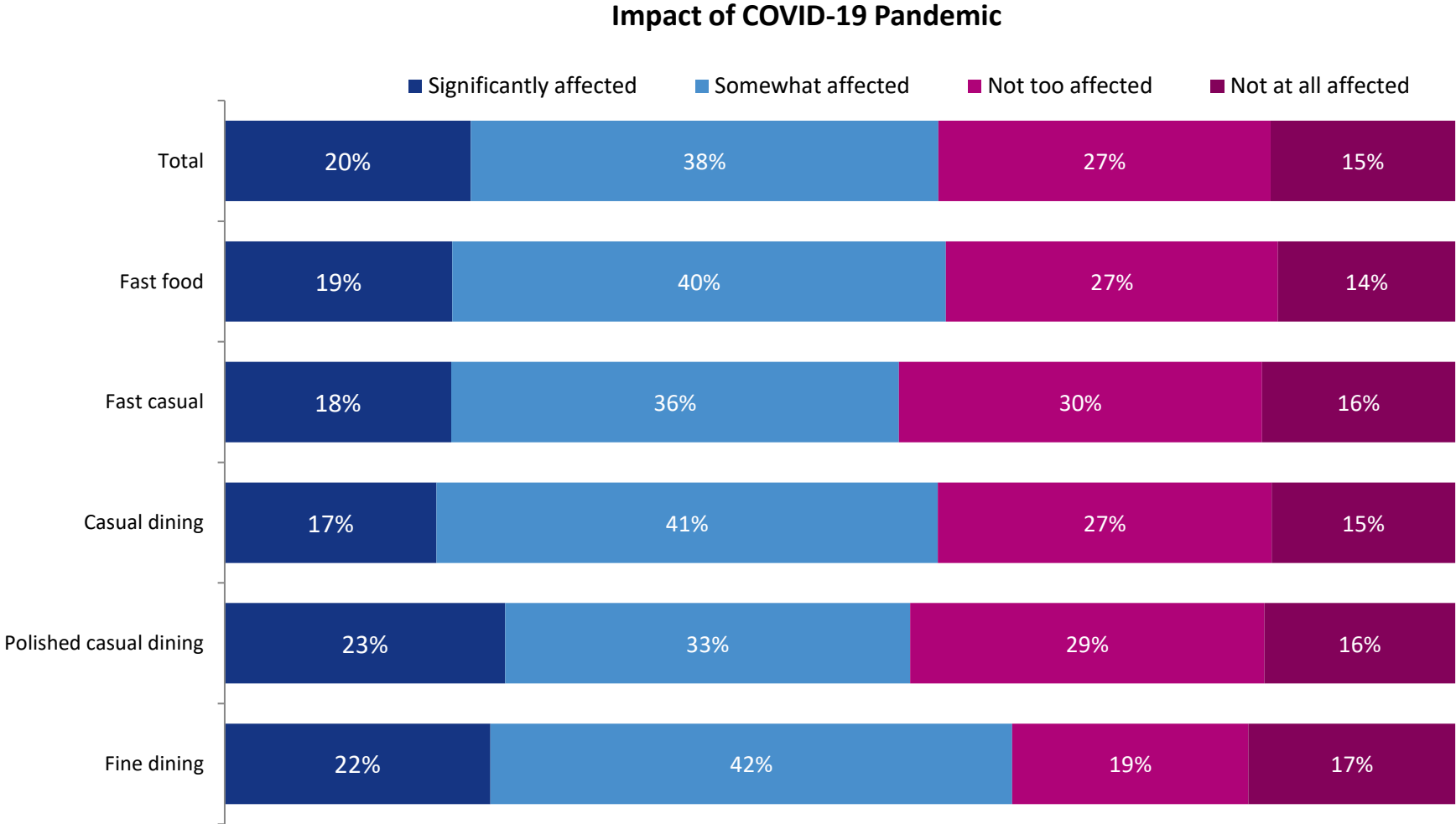
Extent Willing to Add a Premium to Include Blueberries with Dish
(Price premium willing to pay only asked among those "Very Likely" to pay more for item with blueberries)



26 Q17. For each of the items below, how much more would you be willing to spend (above the normal cost) to add blueberries to the item? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

COVID-19 Impacts

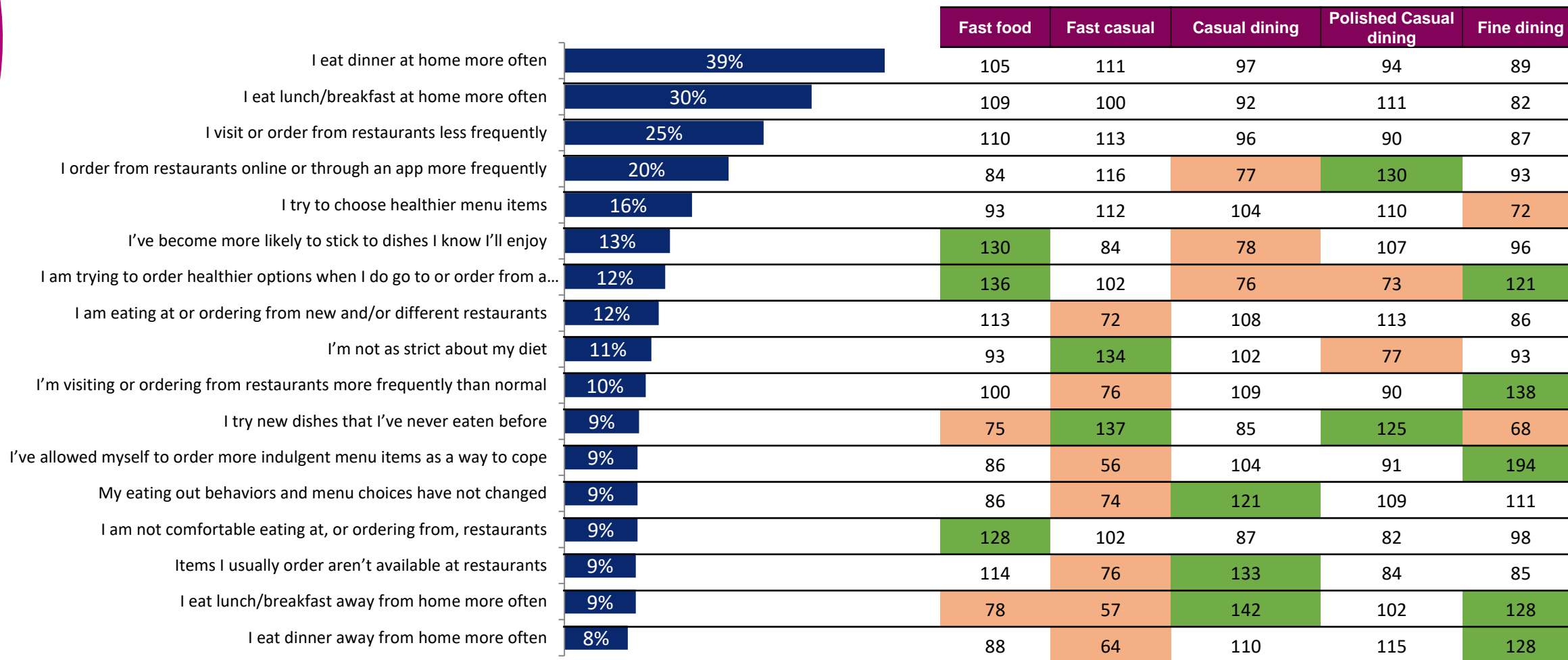
Most patrons across restaurant types say they were impacted by the COVID-19 pandemic, with about one in five considering themselves significantly affected.



28 Q18. Have you (including others in your household), been affected by the pandemic and/or Covid-19? (Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125)

Across all restaurant types, patrons report eating at home more frequently and a general decline in going out to eat. Fast food visitors are more likely to say they stick with what they know while fine diners indicate a desire to be indulgent.

Pandemic Impacts on Going Out to Eat & Ordering
(Of those impacted by COVID-19 pandemic)



29 Q19. In the past year, how, if at all, has the pandemic/Covid-19 impacted you as it relates to eating out and deciding what to order?(Total, n=1,004; Fast food, n= 222; fast casual, n= 217; casual dining, n= 221; Polished Casual dining, n=219; fine dining, n=125) ^= Low base size, findings are directional



THANK YOU!