

2022 TRENDS

OUR CHANGED FUTURE

If 2020 was about survival...

...and 2021 was about bouncing back...

...2022 is about **BIG IDEAS.**





75%

of consumers are looking forward
to new food and beverage trends
in 2022

Q: Are you looking forward to new food and beverage trends in 2022? | Fielded January 2022 (n = 1001)



A photograph of two children walking in a hallway. In the foreground, a young girl with long brown hair, wearing a yellow polo shirt and an orange backpack, is wearing a pink face mask with white polka dots. Behind her, a young boy with short brown hair, wearing a blue t-shirt and a backpack, is wearing a green face mask with white polka dots. They are walking on a grey carpeted floor next to a white wall.

83%

**of consumers think the
pandemic has permanently
changed how we live**

Q: Rate your level of agreement with the statement, “The COVID-19 pandemic has permanently changed how we live.” | Fielded January 2022 (n = 1001)





**71% of
consumers
think there will be another
pandemic of the same size or
larger than the COVID-19 pandemic**

'Not missing it': Some consumers will never go back to their pre-pandemic spending habits, research predicts

A Window Into a Changed America

In a National desk project, people across the country describe, in their own words, how the pandemic has transformed the way they live, work and think.

COMMENTARY • CORONAVIRUS

The year consumers changed for good

BY KATHY GRAMLING

January 10, 2022 5:15 AM CST

Covid-19: why your life will never be the same again | The Economist

How the Pandemic Has Changed Us Already



**WHAT WILL GEN Z DO
IN THE MONTHS AHEAD?**





Third-Party Delivery

does gen z plan to use third-party delivery services more less in the future?

	Gen Z	Gen Pop
Purchase more	26%	12%
Purchase the same amount	32%	33%
Purchase less	24%	18%
Completely stop purchasing	7%	7%
Never purchased and don't plan to	10%	31%



31%

of students say their school offers delivery

28%

of students have ever ordered delivery from their school's dining services

66%

of students have had food delivered from a restaurant or grocery store

D6: To the best of your knowledge, does your school dining services offer delivery?

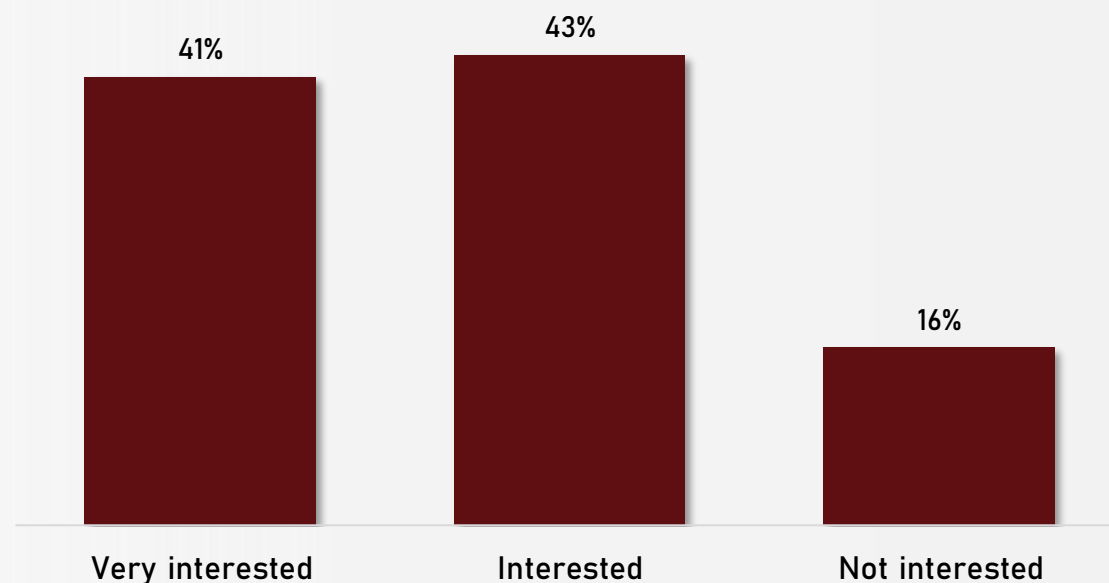
D7: Have you ever had food/beverage delivered from your school's dining services?

D9: Have you ever had food/beverage delivered from a non-school dining source like a local restaurant or grocery store when you were a student?

Delivery is not yet highly available from campus dining, but interest is high among students.

What's more, twice as many students have ordered delivery from restaurants or grocery stores than from their school. Students have familiarity and access to delivery from off-campus sources and so may start to demand it of campus dining.

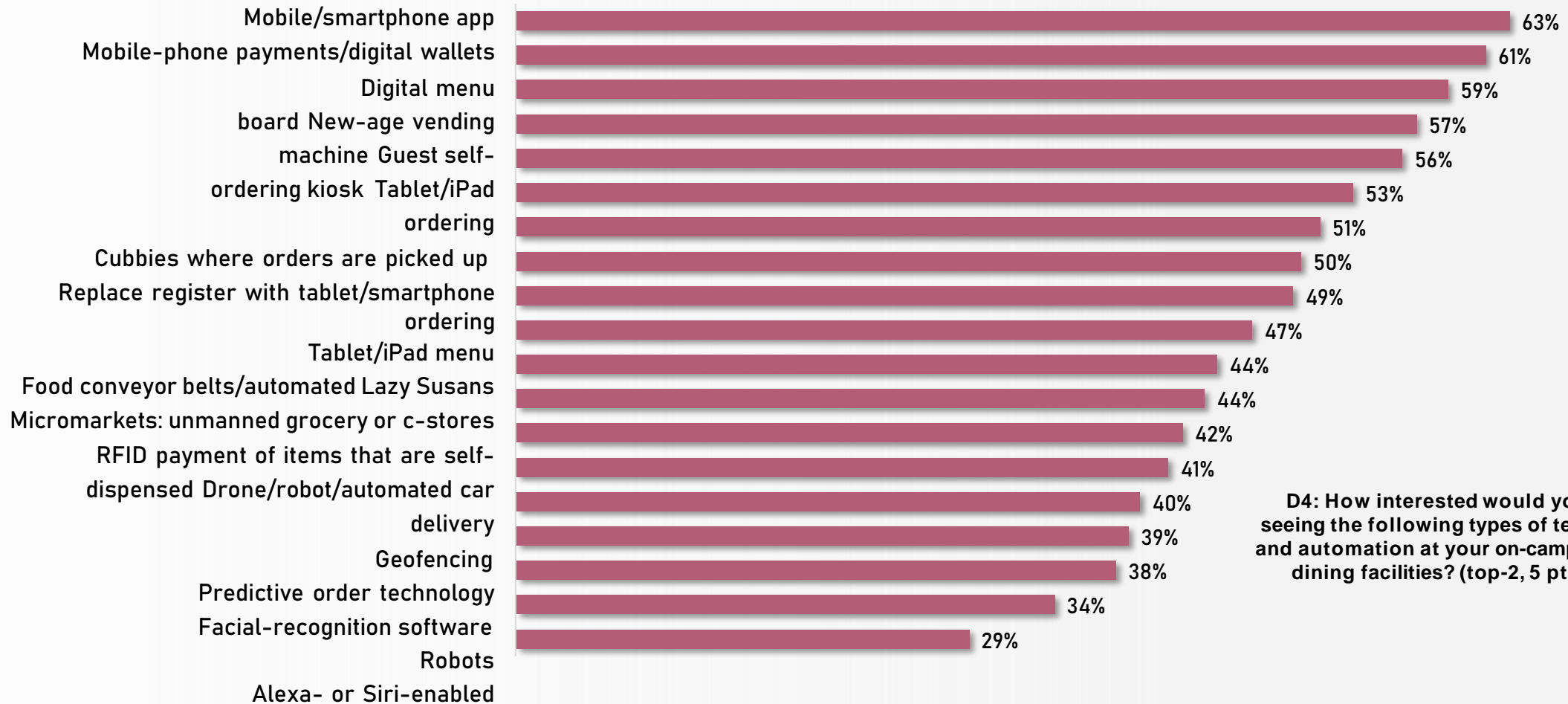
On-Campus Delivery Interest



D8: If it were available, how interested would you be in having food delivered from your school's dining services?

Students love technology that leverages their smartphones. Although older generations may not always have smartphones or want them to be used for everything, students want mobile apps and digital payments. Digital menu boards, new-age vending machines, kiosks, and tablet ordering also have high interest with over half of students.

Student Interest in Technology



D4: How interested would you be in seeing the following types of technology and automation at your on-campus school dining facilities? (top-2, 5 pt. scale)

Premium Foods & Products

does gen z plan to purchase more less premium products in the future?

	Gen Z	Gen Pop
Purchase more	17%	13%
Purchase the same amount	48%	55%
Purchase less	18%	19%
Completely stop purchasing	3%	3%
Never purchased and don't plan to	13%	10%





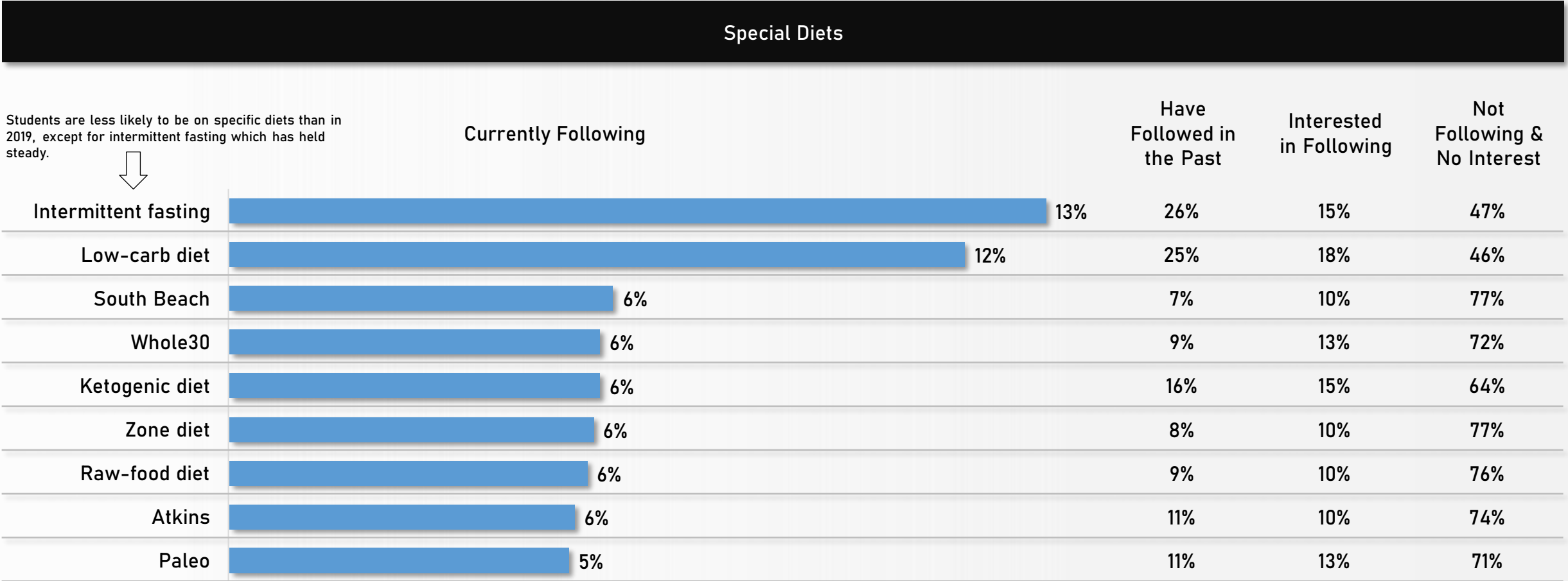
Healthy Foods

does gen z plan to eat more or less healthy foods in the future?

	Gen Z	Gen Pop
Purchase more	42%	39%
Purchase the same amount	39%	46%
Purchase less	9%	6%
Completely stop purchasing	4%	3%
Never purchased and don't plan to	5%	6%



Intermittent fasting and low-carb are the most followed diets by students. Other diets are followed by a small sub- set of students, but those students may be very passionate about their diets.



A6: What is your relationship with the specific diets listed below?

Trips & Vacations

does gen z plan to spend more on trips and vacations in the future?

	Gen Z	Gen Pop
Purchase more	32%	23%
Purchase the same amount	38%	40%
Purchase less	19%	22%
Completely stop purchasing	5%	5%
Never purchased and don't plan to	6%	11%





Clean Label Products

does gen z plan to purchase more clean label products in the future?

	Gen Z	Gen Pop
Purchase more	31%	26%
Purchase the same amount	44%	52%
Purchase less	11%	8%
Completely stop purchasing	3%	3%
Never purchased and don't plan to	11%	12%





Fast Food Restaurants

does gen z plan to eat more fast food in the future?

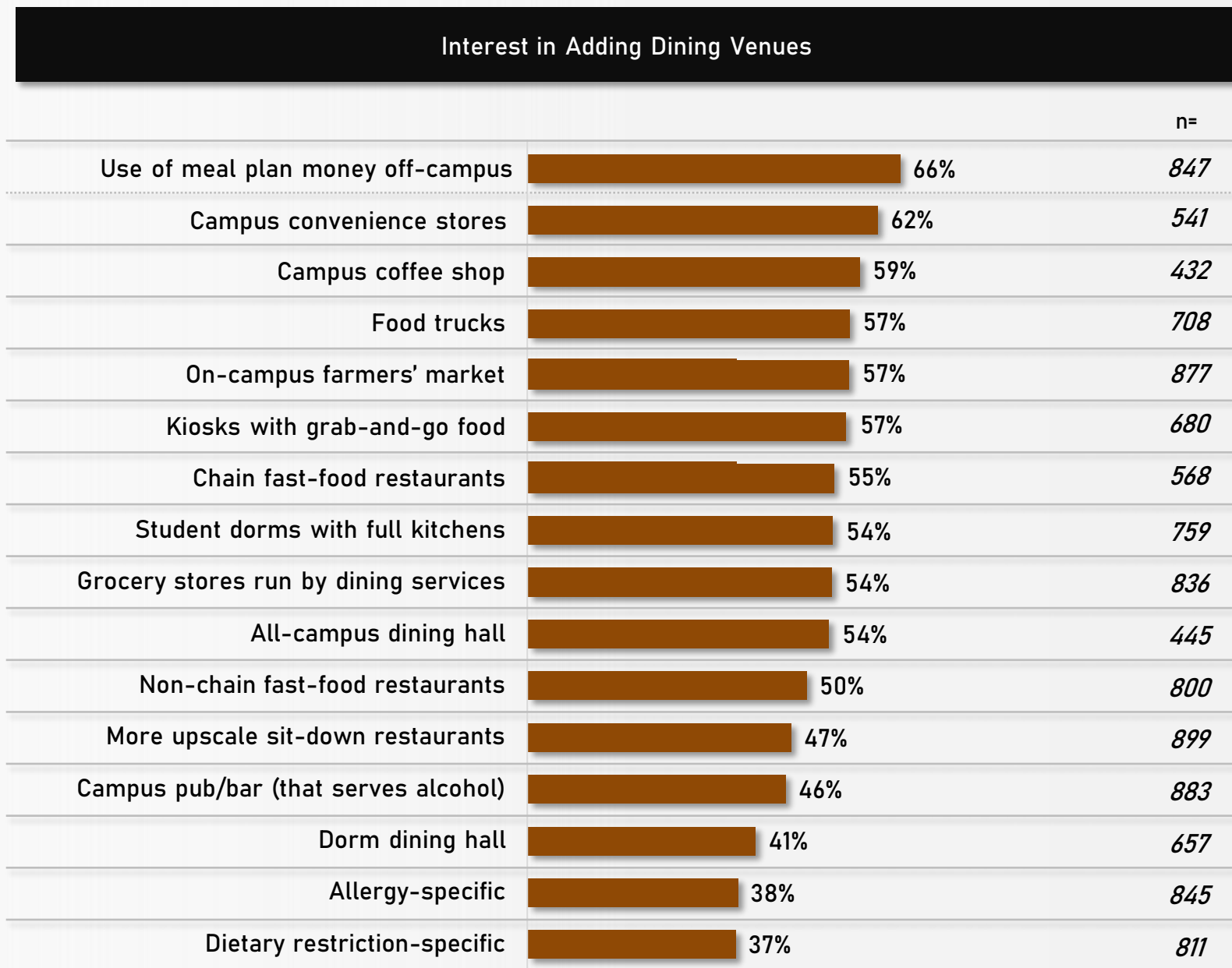
	Gen Z	Gen Pop
Purchase more	25%	13%
Purchase the same amount	46%	59%
Purchase less	22%	22%
Completely stop purchasing	4%	3%
Never purchased and don't plan to	3%	3%



Students are interested in seeing additional dining venues on campus.

Although using meal plan money off-campus may not work for many schools, c-stores, campus coffee shops, and food trucks have the next highest interest and are all venues that require less up-front capital than large dining halls and may be a realistic addition to many campuses.

B7: How interested would you be in your college ADDING the below dining options? (top-2, 5 pt. scale; among those who don't currently have at their school)





School Cafeteria or Buffet

does gen z plan to eat at more school cafeterias and buffets in the future?

	Gen Z	Gen Pop
Purchase more	15%	7%
Purchase the same amount	42%	33%
Purchase less	23%	18%
Completely stop purchasing	6%	8%
Never purchased and don't plan to	13%	35%





Global Foods

does gen z plan to eat at more or less globally-inspired restaurants in the future?

	Gen Z	Gen Pop
Purchase more	33%	19%
Purchase the same amount	51%	60%
Purchase less	10%	12%
Completely stop purchasing	2%	3%
Never purchased and don't plan to	5%	5%

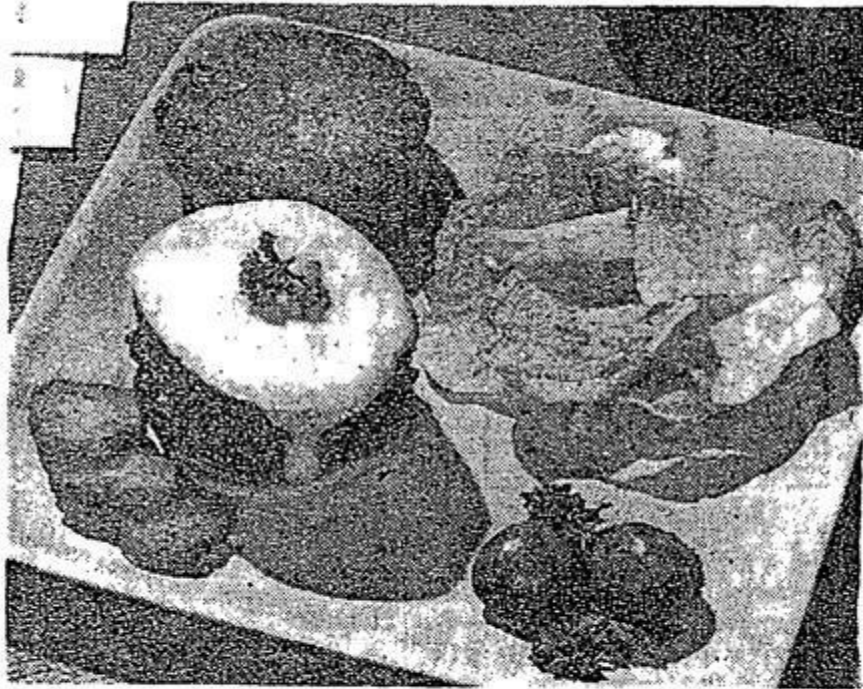


2022 MACROTREN
D
CHANGING TASTES





SET-UP FOR SUNDAY NIGHT SUPPER



Chopped beef, tomato and cheese combine together in what's called in the hamburger bars about town a cheeseburger. Additional props are potato chips, pickles and olives.

(Recipe for cheeseburgers appears today.)

CHILD STUDY
'BAD,' 'GOOD'

...ing infants to 1
for Parents and
to Discernment

...CHILD STUDY
...ing infants to 1
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to Discernment

News of Food

Pizza, a Pie Popular in Southern Italy, Is Offered Here for Home Consumption

By JANE NICKERSON

One of the most popular foods "imported" from the south of Italy, especially in the vicinity of Naples, is pizza—a pie made of dough, topped with tomato sauce, meat, and cheese. It is offered here for home consumption.

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French Handbags as Leather Shortage

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Hot, Hearty Pizzas

By JANE NICKERSON

Convert your kitchen into an Italian pizzeria, the place where pizzas are turned out, hot and hearty. A round of dough is baked with tomatoes and anchovies and cheese atop, cut into wedges, then eaten with the fingers between gulps of wine. This is informal food, good for the porch suppers and back yard parties in vogue during warm weather. The pizza could be as popular a snack as the hamburger if Americans only knew more about it. Make pizzas this way:

ITALIAN PIZZAS

1 yeast cake
1/4 cup lukewarm water
1 teaspoon sugar
2 teaspoons salt
2 tablespoons shortening
2 cups boiling water
6 cups sifted all-purpose flour (about).

Soften yeast in lukewarm water. Put sugar, salt, shortening and boiling water in a large bowl and stir till sugar is dissolved. Cool to lukewarm. Add yeast. Add about





Italian cuisine is America's favorite cuisine – 82% love or like it. But things are changing...



Favorite global cuisines by generation...

Boomers

Italian	90%
Chinese	84%
Mexican	78%



(% who love or like it vs. the total population)

Gen X

Italian	85%
Chinese	83%
Mexican	82%



Millennials

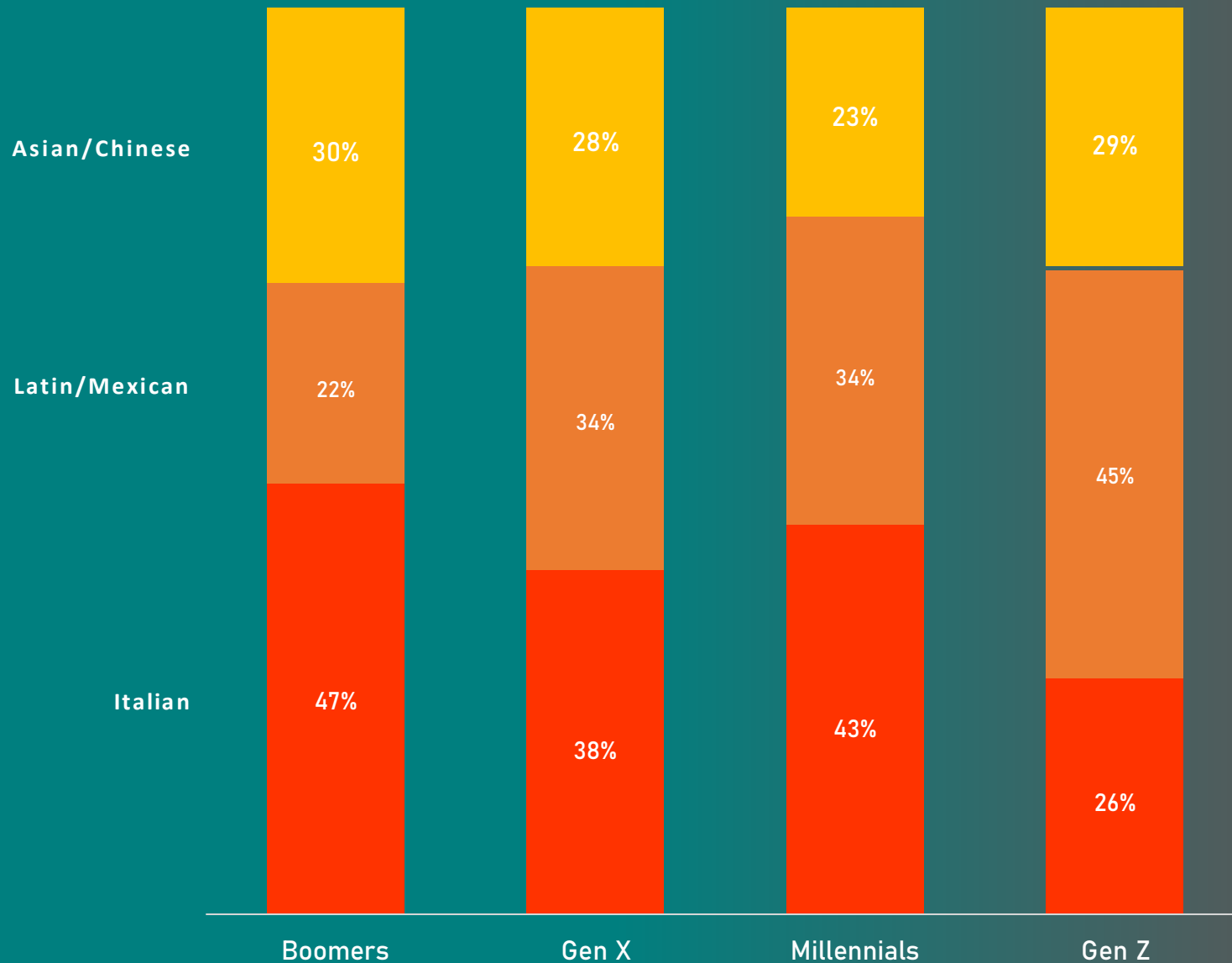
Mexican	82%
Italian	79%
Chinese	77%



Gen Z

Mexican	75%
Chinese	71%
Italian	70%





If you could
only eat one
cuisine for
the rest of
your life...

...younger consumers
are far more likely to
choose Latin/Mexican
cuisine, and the only
generation to also
choose Asian/Chinese
cuisine over Italian.

Half of the foods that skew towards Gen Z are Asian- or Latin-inspired.

Cake Pops	+21%
Boba	+21%
Nutella	+16%
Mochi	+16%
S'mores	+15%
Smoothie Bowls	+15%
Ramen	+15%
Bubble Tea	+14%
Slushies	+14%
Churros	+13%
Chocolate Chip Pancakes	+12%
Dragon Fruit	12%
Sports Drinks	12%
Thai Rolled Ice Cream	12%
Frappes	10%

TOP GEN Z FOODS

(% who love or like it
vs. the total
population)



The Hispanic population has quadrupled in the past four decades. It is also becoming more diverse.

Latinos account for over half of the country's population growth

One of the biggest findings is the big growth in Latinos who identified as more than one race, while the number of Hispanics who identified as white dropped significantly.

Asians in the U.S. are the fastest growing racial group. What's behind the rise.

The Asian population in the U.S. grew by 35.5 percent over the past 10 years.

Census Shows Sharply Growing Numbers of Hispanic, Asian and Multiracial Americans

Overall population growth slowed substantially over the past decade, but the number of multiracial Americans more than doubled.

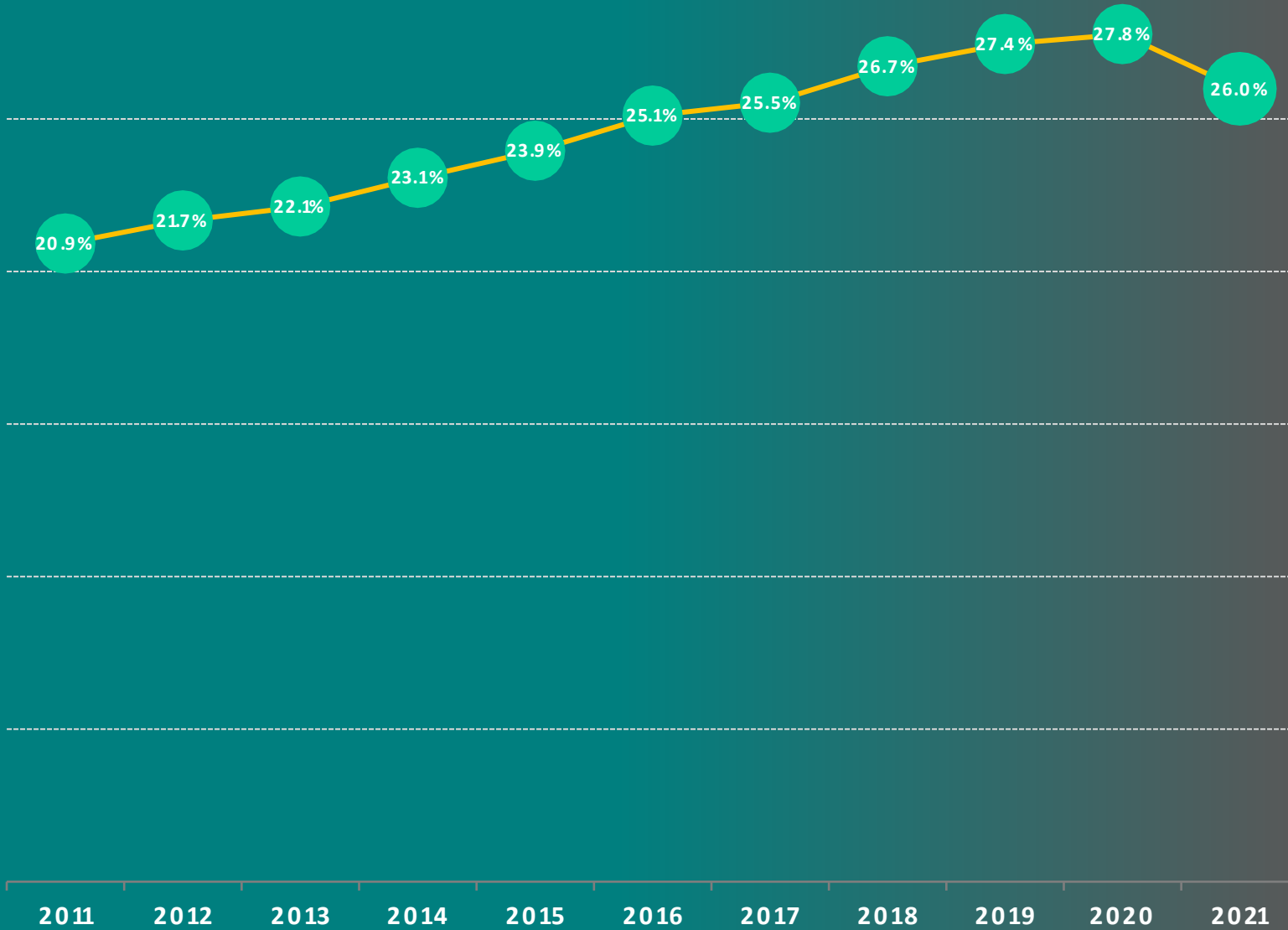
Latinos See U.S. as Better Than Place of Family's Ancestry for Opportunity, Raising Kids, Health Care Access

Most Latino immigrants say they would come to the U.S. again

REPORT

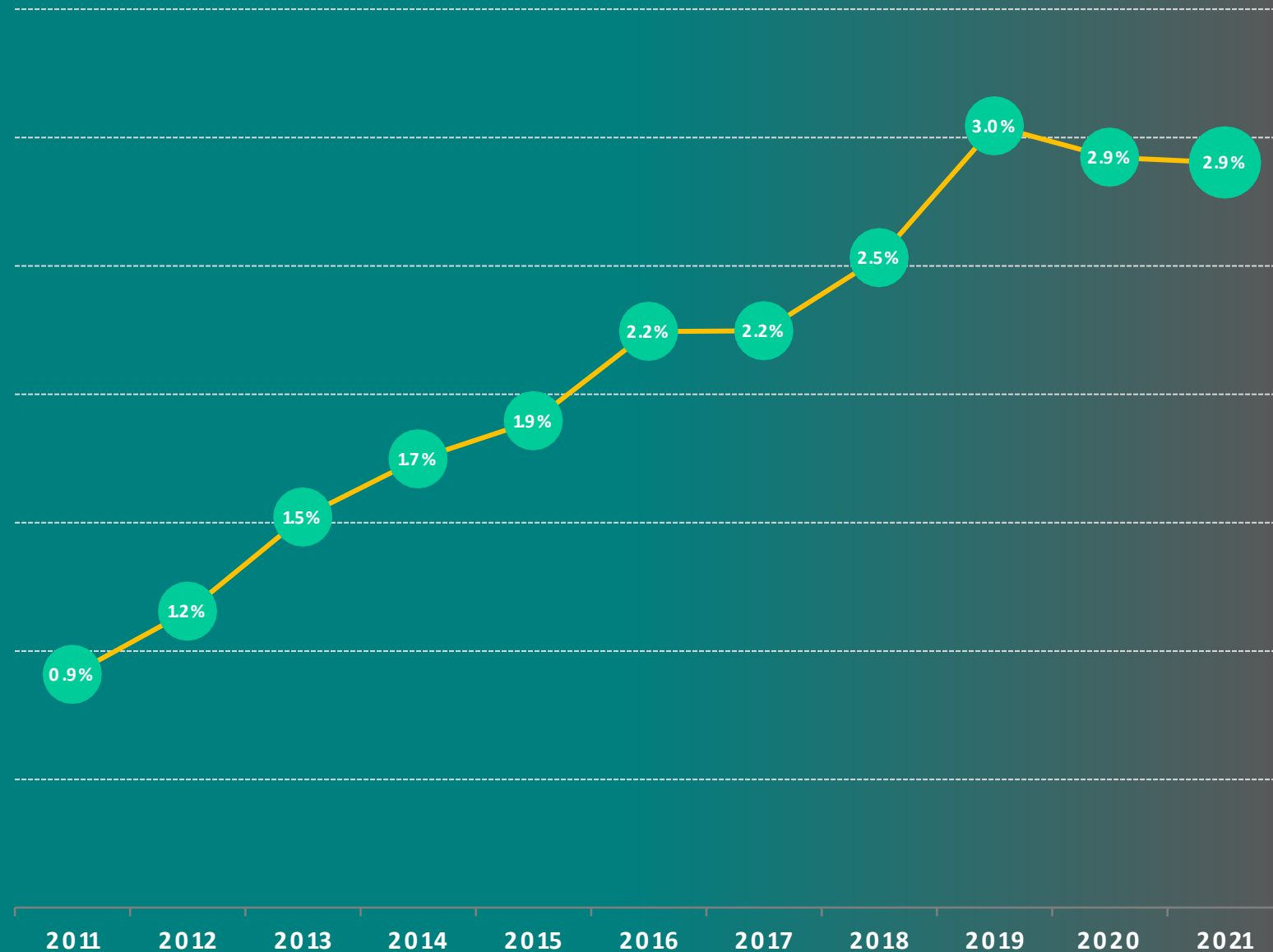
The nation is diversifying even faster than predicted, according to new census data





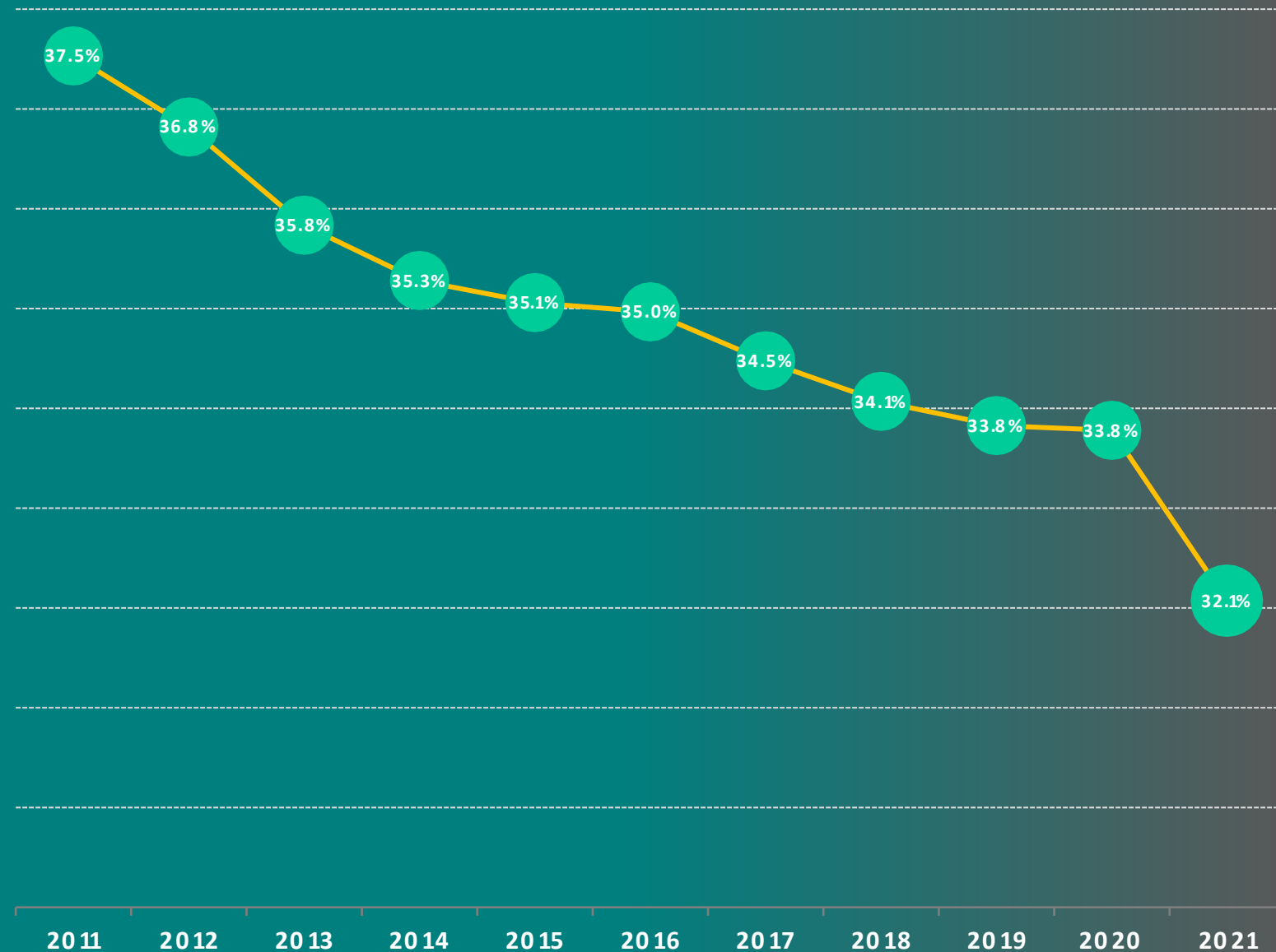
Tacos have increased their menu penetration 24% in the past decade, only seeing a small dip in the past year due to COVID-related menu changes.





Asian and Asian-inspired continue to grow. **Ramen** has been increasing its menu penetration steadily over the past decade.





Yet **pizza**, that Italian-inspired consumer favorite, has been declining on menus over the past decade. In fact, of the ten most common Italian entrees on menus, all of them have declined over the past 4 years, including lasagna (-15%), ravioli (-12%), and Italian sausage (-9%).





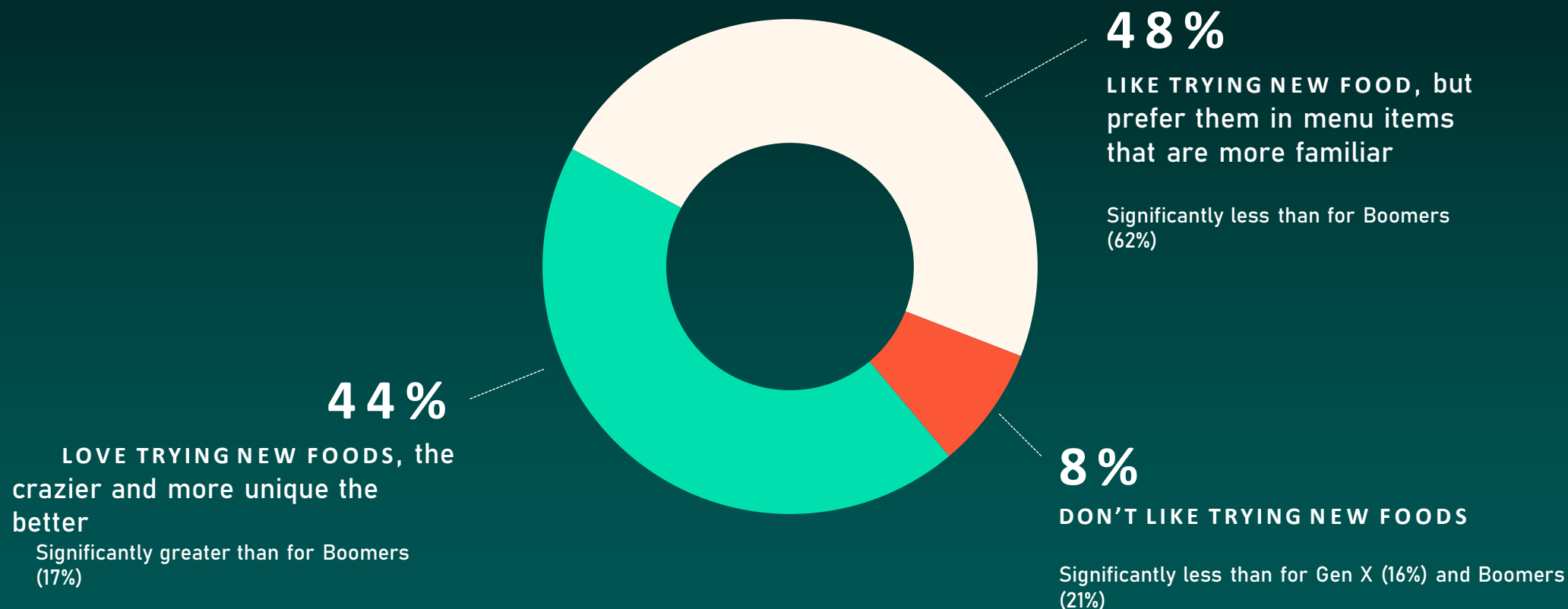
That doesn't mean Italian cuisine is disappearing – consumers can and do love and purchase foods from many cuisines. And new, unique Italian foods and flavors can excite consumers again – burrata has grown 24% on menus in the past 4 years. **Innovation is key.**



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Over 90% of Gen Z consumers like trying new foods and beverages, though nearly half want them prepared in familiar formats.

FIVE IN FOCUS: New Food Experiences for Gen Z



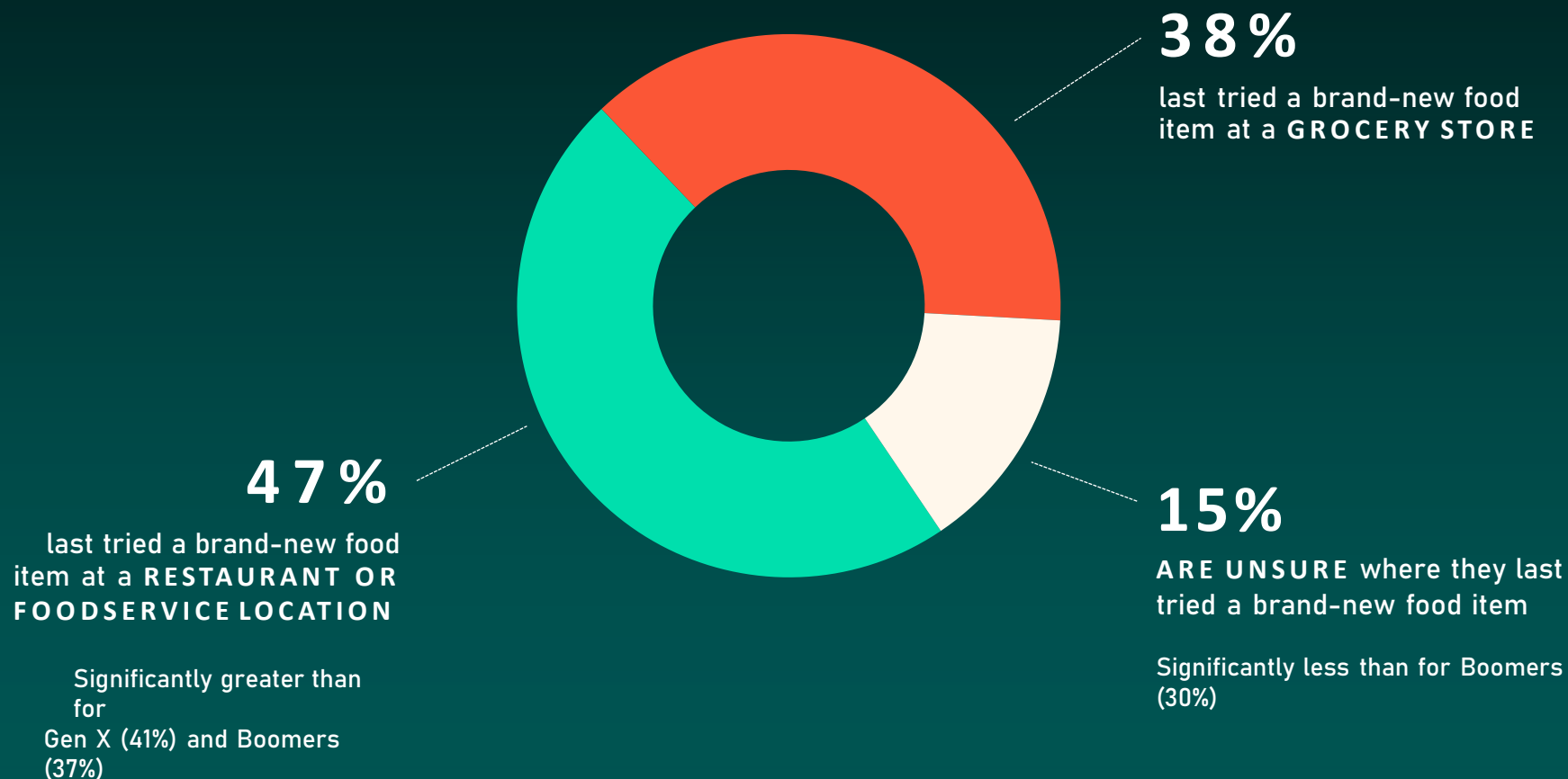
Among all generations, **Gen Z consumers are most willing to take a leap of faith** with new and experimental dining experiences.

51%
will try a new food
**JUST BECAUSE IT SOUNDS
EXCITING**
Significantly greater than for Boomers
(31%)



49%
will only try a new food **IF
THEY THINK IT WILL TASTE
GOOD**
Significantly less than for Boomers
(69%)

Over two in five Gen Z consumers look first to restaurants and foodservice venues in their search of new foods and beverages.



HOW WELL DO YOU KNOW
GEN Z?





are they...

MORNING
PEOPLE

OR

NIGHT
PEOPLE?





are they...

MORNING
PEOPLE
31%

OR

NIGHT
PEOPLE?
69%





are they...

HEALTHY
EATERS

OR

UNHEALTHY
EATERS





are they...

HEALTHY
EATERS
40%

OR

UNHEALTHY
EATERS
60%





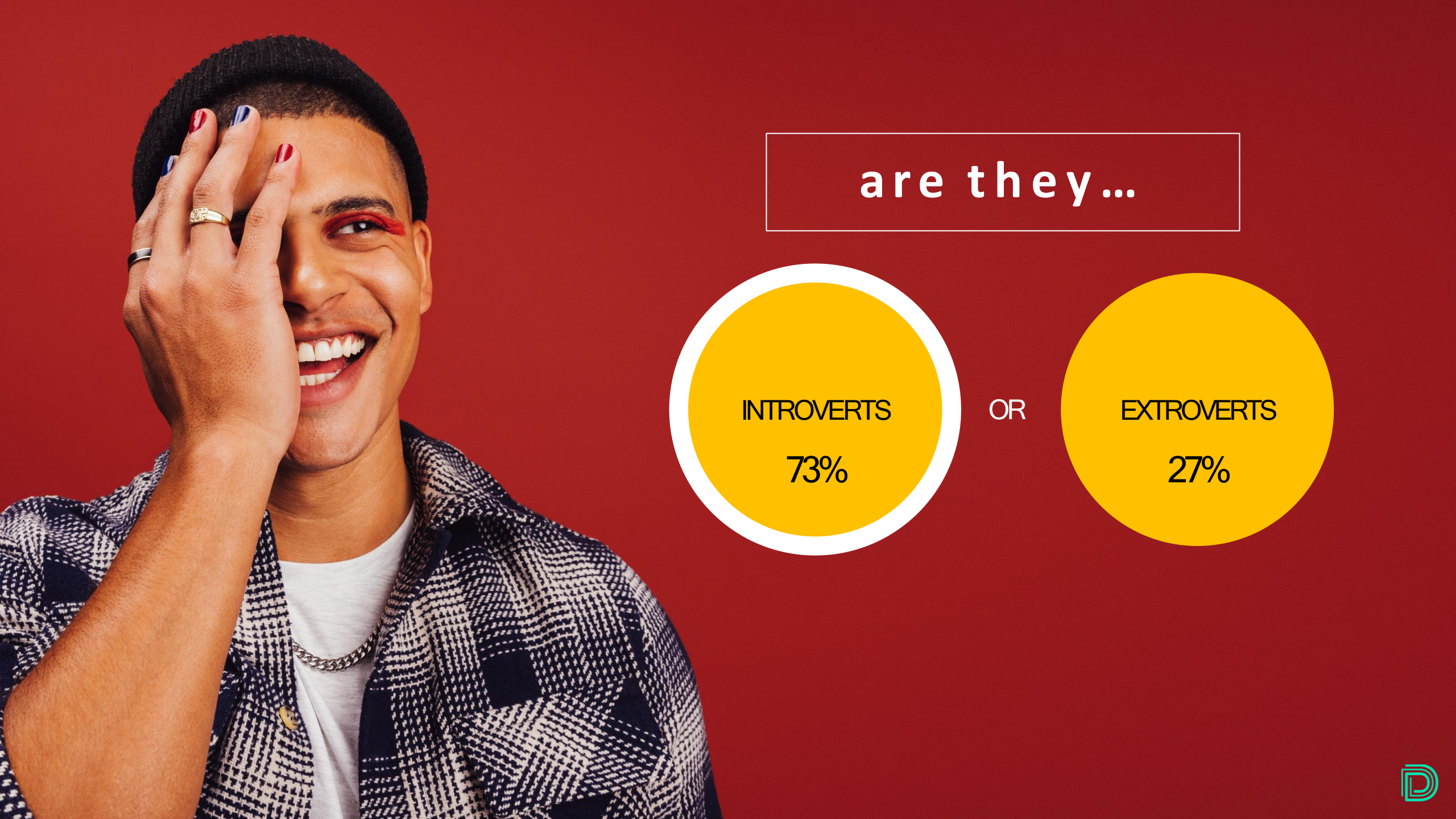
are they...

INTROVERTS

OR

EXTROVERTS





are they...

INTROVERTS

73%

OR

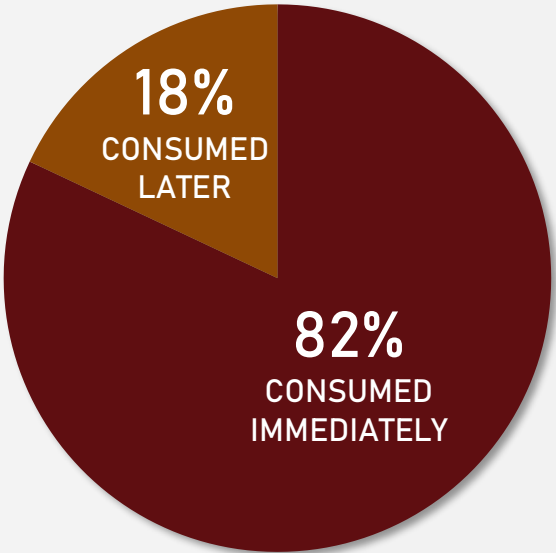
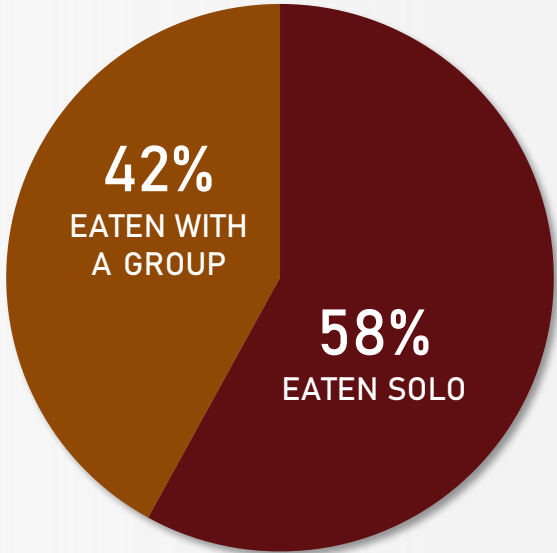
EXTROVERTS

27%



Students are somewhat more likely to eat by themselves on campus than to eat with others. They also overwhelmingly are consuming items immediately and much less likely to save them for later.

C7: Under what circumstance did you CONSUME what you purchased from your campus dining location? Select the option that best applies to this last occasion.





are they...

CHOCOLATE
LOVERS

OR

VANILLA
LOVERS





are they...

CHOCOLATE
LOVERS
54%

OR

VANILLA
LOVERS
46%





are they...

SALTY
LOVERS

OR

SWEET
LOVERS





are they...

SALTY
LOVERS
50%

OR

SWEET
LOVERS
50%





do they prefer...

RESTAURANT
FOOD

OR

FOOD MADE
AT HOME





do they prefer...

RESTAURANT
FOOD
56%

OR

FOOD MADE
AT HOME
44%





are they...

DOG PEOPLE

OR

CAT PEOPLE





are they...

DOG PEOPLE

62%

OR

CAT PEOPLE

38%



KEY TAKEAWAYS

- Consider how your customer base has changed permanently over the course of the pandemic.
- Technology investments should include delivery and a mobile app.
- 81% of Gen Z plans to purchase at least the same amount or even more healthy foods in the future, but consider their diets (intermittent fasting has become far more common) and awareness that it's a difficult choice.
- Look at your global food mix – does Asian and Latin cuisine predominate over Italian cuisine?
- Think through your core customer and their needs – they are likely to be an introverted night owl who knows they don't always eat healthy (but want to), slightly prefer away-from-home food, and probably wish they had a dog.





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