

# A Side of Success

## Introduction

According to a recent Mintel study, consumers increasingly see appetizers and sides as a preferable meal, with 80% reporting to have ordered appetizers instead of entrees to make up their own meal. This is partially due to portion sizes. 85% of consumers surveyed say portion size is important to them when selecting a restaurant. As a way to appeal to consumers who may not always want a traditional full-size meal, menuing a grouping of appetizers or side dishes not just for sharing, but as a meal alternative, may be a strategy to drive incremental sales.

## Appetizers: An Overview

Appetizers allow for restaurant operators to focus on driving innovation, promoting sharing, expand their snacking options and address health concerns.

**Drive Innovation-** Customer retention and loyalty is strongly linked to innovation, and innovation often starts with appetizers. At a time when consumers are cautious about their restaurant spending, an excellent way to drive trial and grow average spend is by menuing more and better appetizers. As menus evolve to address changing consumer tastes, appetizers provide a safe point of entry for both the restaurant and the consumer.

- Smaller portions and lower prices reduce barriers to trial. Incremental appetizer sales can grow average spend, and provide consumers with more variety via mix-and-match appetizer meal options in place of a traditional entrée.
- Appetizers provide chefs with opportunity for more creative and frequent menu changes on top of core favorites; driving repeat business and building retention and loyalty.

**Promote Sharing-** Sharing is alive and well. Sharing plates vs. small plates or appetizers is the term that chefs are using, and sharing is the thing that consumers are doing. In fact, the term small plates is used less, but also “small plates” have by necessity become a bit larger and better positioned for sharing. Following a wider family-focused and socially driven dining trend, we’re likely to see more sharing at the restaurant table in 2014 and beyond.

- Bundling appetizers with meal deals can promote sharing, while growing average spend and provide consumers with a shared flavor adventure.

**Expand Snacking-** A well-developed appetizer menu can drive incremental sales during non-core mid-afternoon and late night snacking and more traditional happy hour occasions. Despite fears that more and better appetizer options may cannibalize entrée sales (thus lowering average spend), appetizers do more good than harm when properly positioned within the overall menu mix.

- While appetizer growth is sourced to all major restaurant segments, the family dining/midscale segment could benefit from more innovation and experimentation with appetizers to drive both core lunch/dinner and on-core snacking occasions.

**Address Health-** A report from *Nation’s Restaurant News* cited health concerns as the number one reason people will dine out less often in 2014. Appetizers are not exempt from consumers’ discriminating eye and need to be in line with the prevailing trend towards healthier (yet satisfying) fare. Appetizers are not exempt from the consumer’s focus on healthier options. At the same time, appetizers should also provide for an indulgent extra for the majority of consumers who are concerned about health but only eat healthy at restaurants some of the time.



*Romano’s Macaroni Grill® Goat Cheese (Stuffed) Peppadew Peppers*



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## Appetizers: Top Menu Items

Pizza and flat bread appetizers, along with garlic bread and bruschetta are showing gains. Bold experimental flavors have the capacity to drive growth in the buffalo wing category, as new consumers seek variation on a now old theme. Seafood remains a popular choice as many consumers still have hesitation about purchasing and preparing seafood in the home.

## Appetizers: Top Cuisine Types

Traditional American cuisine has the greatest menu penetration. However, appetizer incidence gains are largest among Mediterranean cuisine types. Incidence growth is linked to a healthy halo around Mediterranean fare. Also, the natural fit between global tastes, consumer readiness for a safe culinary adventure, and more affordable smaller/sharable portions make these items a good fit for today's more adventurous but cost-conscious eater.

## Appetizers: Top Ingredient Flavors

Today's cuisine-savvy and more adventurous eater is increasingly receptive to experimentation with bold and spicy flavors. From cold smoking, hot smoking, smoke roasting or smoke baking, smoking adds layers of flavor. While in-home barbecuing remains popular, consumers continue to seek out this flavor profile when dining out of home. The focus should be on offering more complex smoked flavors that consumers can't easily replicate in the home. Honey flavor posted strong incidence gains. A sweet alternative to refined sugars, honey pairs well with the growing Mediterranean and authentic-ethnic items appearing on more menus.

## Appetizers: Top Menu Claims

While the singular claim Healthy posted a decline, a range of more specific health-related claims posted strong gains such as Gluten-free and Vegetarian/Vegan. General health claims are making way for more targeted claims that align with a wide and growing range of consumer health strategies. While consumers are more discriminating and controlled spenders, they are also receptive and open to premium claims, and pricing, when they perceive good value and find unique offers. Also, consumers continue to look for restaurants for those specialty items they are not able to easily replicate in the home.

APPETIZER: TOP MENU ITEMS % Change 2010-2013		
1	BUFFALO WINGS	-5%
2	APPETIZER SAMPLER	-2%
3	SEAFOOD- OYSTERS	30%
4	NACHOS	7%
5	FRIED CALAMARI	-3%
6	PIZZA-FLAT BREAD	160%
7	CHICKEN FINGERS	4%
8	MOZZARELLA STICKS	-8%
9	SEAFOOD- MUSSELS	30%
10	DIP- SPINACH/ARTICHOKE	20%
11	SEAFOOD- SHRIMP	-1%
12	BRUSCHETTA	5%
13	BREADSTICKS	8%
14	CRAB CAKE	-17%
15	SHRIMP COCKTAIL	19%

  

APPETIZER: TOP 10 CUISINE TYPES % Change 2010-2013		
1	NORTH AMERICA- TRAD.AMERICAN	19%
2	MEDITERRANEAN-ITALIAN	8%
3	MEXICAN	-7%
4	NORTH AMERICA- SW/TEX-MEX	19%
5	ASIAN- CHINESE	1%
6	ASIAN- PAN-ASIAN	36%
7	ASIAN- JAPANESE	-16%
8	NORTH AMERICA- SOUTHERN	15%
9	ASIAN- THAI	-4%
10	MEDITERRANEAN- FRENCH	-6%

  

APPETIZER: TOP 10 INGREDIENT FLAVORS % Change 2010-2013		
1	SPICY	8%
2	GARLIC	16%
3	SEASONED	-17%
4	SMOKED	22%
5	SWEET	3%
6	HOT	24%
7	TOMATO	-6%
8	CHIPOTLE PEPPER	27%
9	LEMON	16%
10	HONEY	25%

  

APPETIZER: TOP MENU CLAIMS % Change 2010-2013		
1	GLUTEN-FREE	151%
2	VEGETARIAN/VEGAN	34%
3	SIGNATURE	23%
4	CLASSIC	39%
5	FRESH	60%
6	TRADITIONAL	0%
7	HOUSEMADE	280%
8	ORIGINAL	6%
9	NO MSG	300%
10	SEASONAL	-20%

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Source: **MINTEL** Menu Insights