

MEAL PLANS

While the 329 respondents to FoodService Director's 2016 Menu Survey all represent noncommercial foodservice, their answers are as varied as the segments they serve. We surveyed operators from across the U.S. (20 percent represented the Northeast;

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49%

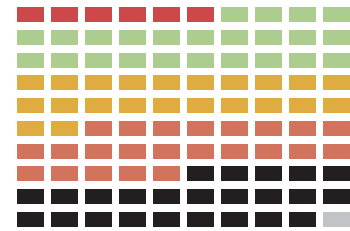
The percentage of operators who say there has been a considerable or moderate increase in the number of customers choosing healthier beverages compared to two years ago.

31 percent the South; 31 percent the Central region; and 18 percent the West) about current trends and future best-sellers in three menu categories; beverages, lunch and dinner. Here's our coast-to-coast snapshot of B&I, C&U, K-12, hospital and LTC/senior-living operators.

Note: Percentages may not add up to 100 due to rounding.

About the respondents

- Employee feeding in an office, plant or factory (6%)
- K-12 (24%)
- College and university (22%)
- Hospital (23%)
- LTC/senior living/retirement community/assisted living/nursing home (24%)



Consumers are drinking up healthy beverage options

Sorry, soda. Just 5 percent of operators surveyed picked carbonated soft drinks as the most likely to experience growth in the next one to two years. Due to a surge in talkability, FSD added vegetable juices and enhanced waters to our survey for the first time to see how noncommercial consumers are responding.

	PERCENT WHO OFFER			SHARE OF BEVERAGE SALES			HAS ONE- TO TWO-YEAR GROWTH POTENTIAL			* LESS THAN .5%			NA = NOT APPLICABLE					
	TOTAL	BUSINESS & INDUSTRY	COLLEGE & UNIVERSITY	K-12	HOSPITALS	LTC/SR. LIVING	TOTAL	BUSINESS & INDUSTRY	COLLEGE & UNIVERSITY	K-12	HOSPITALS	LTC/SR. LIVING	TOTAL	BUSINESS & INDUSTRY	COLLEGE & UNIVERSITY	K-12	HOSPITALS	LTC/SR. LIVING
MILK	92%	18%	12%	95%	5%	0%	91%	7%	6%	90%	37%	22%	93%	9%	4%	92%	19%	17%
FRUIT JUICE	88%	12%	22%	95%	7%	5%	85%	7%	14%	87%	16%	35%	90%	7%	16%	87%	18%	27%
COFFEE (REGULAR)	73%	14%	14%	95%	18%	19%	94%	10%	13%	11%	*	1%	90%	19%	12%	100%	28%	30%
TEA	71%	7%	15%	81%	7%	19%	87%	4%	26%	30%	2%	5%	82%	9%	13%	88%	12%	17%
BOTTLED WATER (PLAIN)	71%	15%	19%	95%	18%	29%	85%	15%	13%	86%	27%	33%	76%	12%	18%	25%	3%	9%
CARBONATED SOFT DRINKS	65%	15%	5%	100%	23%	0%	94%	20%	2%	17%	2%	5%	85%	26%	12%	58%	11%	4%
VEGETABLE JUICE	48%	2%	10%	67%	2%	24%	56%	2%	10%	17%	1%	13%	60%	2%	7%	58%	3%	6%
BOTTLED WATER (ENHANCED)	48%	5%	33%	67%	5%	48%	76%	6%	50%	47%	7%	30%	53%	5%	39%	10%	1%	12%
SPORTS DRINKS	44%	3%	10%	76%	5%	5%	80%	7%	13%	34%	4%	12%	47%	2%	14%	8%	*	1%
COFFEE (SPECIALTY)	42%	4%	25%	62%	5%	19%	82%	9%	46%	9%	1%	7%	50%	4%	34%	28%	3%	15%
ENERGY DRINKS	38%	3%	12%	71%	4%	10%	85%	8%	27%	10%	1%	5%	41%	3%	14%	12%	1%	5%
SMOOTHIES	30%	2%	24%	33%	1%	19%	74%	5%	41%	30%	2%	21%	15%	1%	13%	5%	*	19%
OTHER	13%	1%	NA	19%	2%	NA	9%	1%	NA	10%	1%	NA	18%	1%	NA	13%	1%	NA
NO BEVERAGE GROWTH	NA	NA	25%	NA	NA	29%	NA	NA	9%	NA	NA	21%	NA	NA	31%	NA	NA	39%



Midday cravings

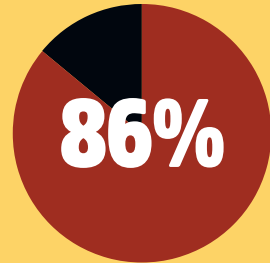
Since all respondents serve lunch at their operations, predictions about which center-of-the-plate/main entree categories will see the most growth in the next one to two years were all over the map. By and large, though, healthy items were top-of-mind—and 44 percent expect a traffic increase in their lunch daypart in the next two years, while just 2 percent expect a decrease in the lunch daypart. Overall, lunch represents 48 percent of the total business at operations that serve both lunch and dinner, and 75 percent at those that do not serve dinner.

	PERCENT SELLING			SHARE OF LUNCH SALES			HAS ONE- TO TWO-YEAR GROWTH POTENTIAL			* LESS THAN .5%			NA = NOT APPLICABLE					
	TOTAL	BUSINESS & INDUSTRY	COLLEGE & UNIVERSITY	K-12	HOSPITALS	LTC/SENIOR LIVING												
CHICKEN-BASED HOT ENTREES	96%	16%	25%	100%	14%	35%	94%	15%	20%	95%	23%	32%	98%	13%	24%	94%	14%	21%
SALADS/SALAD BARS	89%	12%	42%	100%	15%	60%	92%	12%	51%	91%	9%	37%	94%	16%	55%	72%	8%	22%
BURGERS	92%	10%	17%	100%	8%	30%	94%	11%	16%	97%	12%	15%	91%	10%	17%	82%	8%	16%
COLD/HOT SANDWICHES/SUBS	88%	11%	33%	100%	12%	40%	96%	12%	38%	83%	9%	27%	93%	13%	42%	76%	8%	25%
BEEF-BASED HOT ENTREES	90%	9%	8%	100%	9%	5%	87%	7%	0%	83%	9%	11%	94%	9%	8%	94%	13%	11%
FISH-BASED ENTREES	78%	5%	18%	90%	7%	30%	83%	5%	22%	55%	2%	8%	93%	7%	25%	82%	9%	15%
SOUP/CHILI	79%	6%	15%	100%	8%	15%	87%	4%	6%	52%	2%	8%	91%	8%	21%	86%	9%	26%
PORK-BASED HOT ENTREES	75%	5%	4%	74%	5%	0%	81%	4%	7%	52%	2%	1%	83%	5%	3%	90%	9%	8%
TURKEY-BASED HOT ENTREES	77%	5%	5%	74%	4%	10%	75%	4%	9%	67%	5%	3%	89%	5%	4%	80%	7%	6%
PIZZA/CALZONES	75%	8%	15%	68%	4%	5%	94%	12%	12%	97%	17%	30%	67%	3%	11%	40%	2%	10%
PASTA/RICE ENTREES	77%	5%	8%	90%	5%	0%	85%	6%	12%	72%	5%	9%	78%	5%	8%	68%	5%	6%
VEGETABLE/BEAN-BASED HOT ENTREES	65%	3%	29%	79%	4%	30%	87%	5%	51%	52%	2%	25%	80%	4%	24%	42%	3%	16%
BREAKFAST ENTREES SERVED AT LUNCH	46%	3%	14%	53%	4%	10%	49%	3%	22%	59%	3%	15%	26%	2%	8%	44%	4%	12%
OTHER	10%	1%	NA	11%	1%	NA	11%	1%	NA	8%	*	NA	15%	1%	NA	8%	1%	NA
NO LUNCH ITEM GROWTH	NA	NA	14%	NA	NA	10%	NA	NA	3%	NA	NA	17%	NA	NA	11%	NA	NA	27%

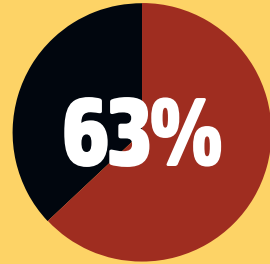


Scratch that!

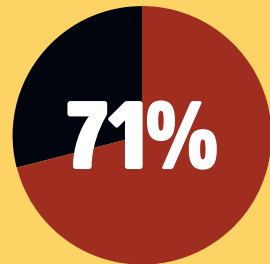
Slightly more than one-third (36 percent) of operators plan to increase their from-scratch lunch cooking in the next year. Currently, operators surveyed prepare an average 59 percent of their lunch items from scratch. But those operators who plan to increase scratch cooking at lunch don't agree on their reasons for doing so. Some interesting comparisons across segments:



of employee-feeding operators plan to increase from-scratch lunches because they're fresher, while 32 percent of senior-living operators cite the same reason.

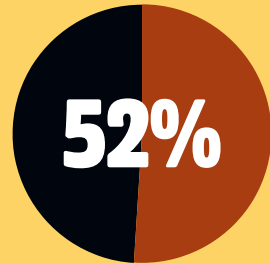


of K-12 operators said the industry was moving in the direction of more scratch cooking, while 8 percent of hospital operators agree.



of B&I operators called from-scratch lunches more cost-effective; 29 percent of K-12 operators said the same.

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C&U operators said their customers are asking for an increase in scratch items at lunch; 47 percent of senior-living operators and 14 percent of B&I operators said the same.

Night moves

Dinner represents 29 percent of the total business at the 70 percent of operators surveyed who serve both the lunch and dinner dayparts. Of those who serve dinner, 57 percent have completely different lunch and dinner menus. Here's what's ringing the cash registers at dinner-serving operations.

		PERCENT WHO OFFER			PERCENT OF DINNER SALES			HAS ONE- TO TWO-YEAR GROWTH POTENTIAL			* LESS THAN .5%		
		TOTAL	COLLEGE & UNIVERSITY	HOSPITALS	LTC/SR. LIVING								
	CHICKEN-BASED HOT ENTREES	96%	16%	27%	95%	18%	44%	98%	14%	16%	94%	15%	22%
	BEEF-BASED HOT ENTREES	91%	11%	13%	88%	9%	10%	98%	11%	12%	88%	14%	16%
	COLD/HOT SANDWICHES/SUBS	72%	9%	20%	84%	8%	8%	81%	12%	31%	54%	7%	18%
	BURGERS	82%	9%	15%	86%	9%	10%	85%	9%	19%	75%	9%	16%
	FISH-BASED ENTREES	81%	7%	22%	84%	6%	38%	88%	6%	16%	75%	9%	16%
	SALADS/SALAD BARS	77%	9%	29%	84%	8%	24%	85%	14%	40%	65%	6%	23%
	PORK-BASED HOT ENTREES	79%	6%	11%	86%	6%	18%	81%	5%	3%	75%	8%	14%
	TURKEY-BASED HOT ENTREES	79%	6%	8%	77%	5%	11%	85%	5%	6%	73%	7%	10%
	SOUP/CHILI	82%	7%	14%	84%	4%	3%	88%	8%	12%	81%	10%	27%
	PASTA/RICE ENTREES	77%	6%	10%	88%	7%	14%	78%	6%	10%	62%	5%	5%
	PIZZA/CALZONES	67%	6%	10%	93%	11%	11%	71%	4%	8%	44%	4%	11%
	VEGETABLE/BEAN-BASED HOT ENTREES	67%	4%	23%	86%	6%	41%	76%	4%	16%	40%	3%	14%
	BREAKFAST ENTREES SERVED AT LUNCH	32%	2%	12%	40%	1%	22%	22%	1%	3%	40%	3%	11%
	OTHER	14%	2%	NA	16%	1%	NA	10%	1%	NA	13%	2%	NA
	NO DINNER ITEM GROWTH	NA	NA	23%	NA	NA	11%	NA	NA	28%	NA	NA	27%

Note: B&I and K-12 operators' responses were not included because of the low sample size of those serving dinner.