

CUSTOMIZATION 2021

HOW TO ADAPT TO THE CHANGING FACE OF
PERSONALIZATION IN THE YEAR AHEAD.



NEARLY HALF OF CONSUMERS ARE EAGER TO DINE AWAY FROM HOME AGAIN. WILL THE EXPECTATION OF CUSTOMIZATION COME WITH IT?

And, if yes, how will you respond?

Customization, perhaps more than any other topic in foodservice, has been in a constant state of evolution. From the early days of “have it your way” and “white or wheat?,” the approach has been ever-changing. And over time, new challenges have popped up: cross-contamination, lifestyle trends, ingredient allergies. Operators pivoted by finding new ways to offer modifications and customization without disrupting service.

And then the Covid-19 pandemic came knocking, and many operators found themselves without the capability to customize. Survival and safety took precedence, and with good reason.



Customization in 2021 and the years ahead will begin with listening to customer needs, looking at future trends, and understanding ingredient concerns.

Chef Mike Minor
Custom Culinary®



The Evolution of Customization



Have it Your Way

Launched in 1974 in Burger King's advertising as mass customization took hold and led to a new expectation.



Build Your Own

Popularized by Subway and Chipotle, the model has been adopted by many cuisines, ethnicities, & non-commercial.



Pick 2 (or 3 or 4...)

Originally a value offer, this model quickly made it's way across limited service menus to deliver more choice.



Order Now

Consumer control has gone digital with online ordering, hyper-personalization and AI-enabled convenience.

HOW CUSTOMIZATION HAS SHIFTED.

CURATION OVER CUSTOMIZATION

Diners may think they want to build their own creation, but this can easily back-fire when non-complementary flavors come together poorly. Restaurants recognize the need to guide guests toward a curated offering. Piada, an Italian fast-casual chain based in Columbus, OH, offered build-your-own dishes in the beginning, but quickly pivoted to chef-inspired versions to guide diners and to keep the line moving. If guests require guidance in well-known cuisines like Italian, the same is likely true for more unfamiliar ethnicities.



ALTERNATIVES FOR HEALTH-CONSCIOUS DINERS

Customization has evolved for health, dietary and new allergies, as much as anything. Alternatives like meat-free, dairy-free, and carb-free have grown in popularity over the last several years and show no sign of stopping. Allowing swaps offers the benefit of inclusivity to meet a variety of diners' needs. Dunkin'® recently announced the addition of Oat Milk at all locations in the U.S. While it may come at an additional charge, it offers more choices to consumers to customize their favorite beverage.



In 2018, Boston Consulting Group, predicted personalization to shift \$800M by 2023 to the 15% of companies that get it right. Luckily, restaurants have a bit more time to prepare.

HYPER-PERSONALIZATION SHELVED FOR NOW

Pre-pandemic trends included gastronomic experiences far beyond the norm, like offers of tailoring dinner menus to guests' DNA profiles. As the current normal has settled in, restaurants have paused the added-value offers and placed their focus elsewhere, like outdoor dining areas and proper distancing between tables.



If I were running a restaurant today, I would approach customization very strategically by developing a small handful of creative, trendy, versatile sauces that address my customer demographic perfectly and have the inherent ability to be utilized across all day parts and menu categories.



Chef Michael Smith
Custom Culinary®

HOW OPERATORS HAVE ADAPTED.

ESTABLISHED THE BASE

Add the perks of customization with pre-portioned proteins, sauces, and garnishes for guests to personalize in their way. This approach is easy to adapt to global preparations and comfort foods, and even easier to add to ordering apps for takeout and delivery.

Most formats allow for a pre-determined base. Salads and bowls fit this model very well.



Accuracy is the 3rd most important factor in delivery orders, after taste and speed of service. Getting customized orders right will set operators apart.

FLIPPED THE EXPERIENCE



At Heirloom BBQ in Atlanta, GA, the pick-up menu highlights the meal of the day without the option to customize. The element of customization can be found in picking the day rather than the ingredients.

The appeal of customization is rooted in choice. On the flip side, consumers are weary of making decisions. Flipping the control back to your expertise could be a welcome reprieve.

TOOK BACK CONTROL

Customization will return to pre-2020 levels, but during recovery, the request for customization is best left to the kitchen. As ordering ahead becomes standard, options may expand. For now, skinny down the choices and offer customization with easy swaps, like proteins, broths, and sides.



PAUSED BUFFET OPTIONS



59% of consumers would feel more comfortable if restaurants switched to pre-packaged single-serve condiments.

Hotels and midscale buffet restaurants have reinvented their models in a short amount of time. Salad bars and breakfast buffets have been replaced with innovative solutions like breakfast bags to go, "table brunch" where waitstaff bring the buffet dishes tableside, and family-style table service. Golden Corral has pivoted their famous buffet to a "no-touch" and a "we serve you" offering with endless helpings without requiring a guest to touch serving utensils.

HOW CONSUMERS HAVE ADAPTED.

Family meal bundles, in-restaurant markets, and meal kits have kept restaurants open. As customers return to dining rooms, the offerings borne out of necessity have gained popularity beyond the pandemic. Almost two-thirds of Americans have either tried or are interested in trying many of these new products, according to Datassential. Even more, once diners try the new options, almost all are interested in continued purchases even after the pandemic ends.

Nearly nine out of ten consumers plan to continue ordering takeout from upscale restaurants, yet many consumers are growing bored. Customization offers a chance to defeat boredom by mixing in new variations on favorite dishes. Here's how:

- Refresh digital menus to offer new choices on existing bases
- Introduce LTOs to entice consumers to try something new
- Consider merchandising customized options for on-premise only
- Offer premium upgrades on value offerings for an upcharge



56% of restaurants are currently offering delivery.

Source: Datassential

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With today's consumer's increased food knowledge, as well as numerous dietary needs, customization is critical. 2020 has been a challenging year to say the least, yet it's no longer a novelty to offer customization. It's critical to every foodservice establishment.

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Chef Mike Speranza
Custom Culinary®



HOW TO CUSTOMIZE NOW: TIPS & TAKEAWAYS



CHOOSE CURATION OVER CUSTOMIZATION

Consumers are experiencing decision fatigue, and when ordering online, too many choices can become overwhelming. Make it simple by focusing on curated options, family-worthy bundles, and suggested combinations that complement one another. One-third of consumers want to be allowed to customize their orders. However, a menu that still offers choice without the headache of too many options may give the satisfaction of choice.

"We've focused much of our innovation around curated bowls because students gravitate toward them," says Jackie Bertoldo, Assistant Director of Nutrition at Stanford University. "We're reimagining customization in the time of COVID, and it's working."

Source: Flavor & the Menu



35% of consumers say they'd like a mix of different price options, according to Datassential.

Tips

- Build-your-own is intimidating with global items, so offering small and manageable choices may be enough to put guests at ease. Supply options such as choose your protein, like pork, chicken, or tofu, on a bāhn mì, or pick your spice level in a bowl of pho.
- Consumers are sensitive to price right now. Rather than tacking on fees, offer different price options and allow guests to build their meal bundle. Think of it as a modern-day mix & match menu.
- Half of consumers cut back on restaurant spending in the last month. Yet, convenience is still desired. Offer easy-to-order meal bundles with sides to feed a small group and feel like a value.

OFFER CHOICE WITH LIMITS

The emphasis on value is pronounced right now as consumers manage their stress into the new year. Balancing price, quality, and quantity will continue to be important in 2021. Rather than reverting to menus of the past, take stock of the year ahead. If a limited menu worked, stick with it and add in a few choices. If choices add stress to the kitchen team, collaborate on the choices that feel possible. Once decisions are made, be transparent with customers so they know what to expect when they make their next order.



31% of consumers want to be allowed to customize their meal.

Source: Datassential

Tips

- **STREAMLINE MENUS** Survey ordering habits from 2020 to understand how the menu can be simplified. From there, define opportunities for customization and easy add-ons to build check. At Moe's Southwest Grill®, diners can choose from 21 ingredients for their bowls or burritos. But for their third-party delivery menus, they cut their options to 12 to give guests less choice.
- **MIX IN CHOICE** Learn from the mix-and-match strategies of successful fast-casual chains. Panera Bread® has offered a You Pick Two® menu for years with limited options. Guests can pick their bread, cheese, and sides to fit their preferences without straining restaurant staff or holding up the line. Recently, they took their combos one step further with the launch of Panera Duets, an offering of their classic favorites in pre-picked pairs at one low price.
- **EXPAND YOUR REACH** Consumers have found a new set of challenges in the breakfast and lunch hours. Grab the opportunity to grow the daytime dayparts by offering convenient and cost-effective offerings to address the new version of the lunch rush.
- **MERCHANDISE BUNDLES** Interest continues to grow for family meal bundles that offer customization, with nearly 80% of consumers stating they would like to see mix-and-match options. Explore build-your-own bundle menus as an offer to guests.

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Consumers expect customization, especially younger generations. Offering menu variety, global flavors, socially-responsible sourcing, and plant-forward selections is a great start and will become critical as guests seek to feed their lifestyle.

Chef Michael Hornback
Custom Culinary®

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DELIVERY SPOTLIGHT: Packaging

56% of restaurants are currently offering delivery and 87% are doing takeout, according to Datassential. To deliver a customized experience, proper packaging becomes essential. Even when groups are small, packaging sauces, garnishes, and accompaniments in sealed containers allow guests to build their meal off-premise.





"During and after the last recession, people were entertaining at home more and dialing back on in-restaurant business. As restaurants start to open, it's going to be phased and not super pleasant at first, with temperature checks and plexiglass barriers and limits on group sizes. But people are craving social connections."

Source: Technomic

REIMAGINE CATERING & TAKEOUT IN 2021

While takeout and delivery ramped up, catering programs were pulled way back. In fact, two-thirds of operators suspended their offering. In 2021, perhaps there is an opportunity to feed groups differently as people find new ways to gather.

Tips

- Offer a reimagined version of catering to maintain the revenue stream and meet consumers where they are. The potlucks and quarantining of 2020 may give rise to a new wave of catered dinner parties.
- Customizable group meals by delivery may be a winning option for homebound diners who still crave their favorite foods. NYC-based Dos Toros Taqueria offers a catered meal with 20 ingredients laid out assembly line-style. With lettuce and tortilla bases, slow-simmered beans, and protein options, consumers are free to build and customize their tacos with better-for-you choices.
- Customization might be an expectation, but choice can be overwhelming when ordering online. Organize the menu by the bestsellers and help diners focus.

WORKING WITH PARTNERS COMMITTED TO GROWING YOUR BUSINESS WILL HELP YOU STAY TRUE TO YOUR MISSION, REGARDLESS OF HOW YOUR MISSION HAS EVOLVED. CONSUMERS ARE CONCERNED ABOUT THEIR SAFETY, CLEANLINESS, AND WELLBEING, BUT THEY MISS THE DINING OUT EXPERIENCE. AND PART OF THE EXPERIENCE IS CHOICE. NOW MORE THAN EVER, CONSUMERS ARE SEEKING THE DELICIOUS FOODS THEY CRAVE. WE CAN HELP WITH ADDING THE +1 DELICIOUSNESS WITH OUR LINE-UP OF BASES, SAUCES, AND GRAVIES. EASY TO CUSTOMIZE, EASY TO PREPARE, AND ONE MORE WAY TO LET YOUR GUESTS KNOW THAT ADDING FLAVOR IS ALWAYS INVITED AND WELCOMED IN YOUR KITCHEN.



At Custom Culinary®, we believe supporting the industry we serve is just as important as the products we make. It's the promise we've made to ourselves and our customers. You can find out more on our website, or we can tell you all about it. Either way, know that being true to the food feels even better when you know what you're working toward. That's why we are committed to promoting food safety in our actions and our products, reducing our footprint, innovating with wholesome ingredients, and giving back to our surrounding communities.

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Sources: QSR web, How Millennials' Love for Customization is Changing Quick Service, March 2017; KTCHN Rebel, Ultra-personalization: the next big thing?, October 2018; Technomic What Recovery Looks Like, May 2020; The End of the Breakfast Buffet, Eater, June 2020; Datassential Staying Power Report, Aug. 2020; Datassential Operators Hunker Down Report, Oct. 2020; Datassential Sticker Shock Report Oct. 2020; Datassential Life Goes On Report Sept. 2020; Flavor & the Menu, Flavor RO: Setting the Bar, Nov. 2020; Technomic, Where does Covid-19 leave catering? August 2020; Technomic Optimize for Off-Premise, Sept. 2019

