



# HOT HONEY

the SNAP™ food profile

Proliferation

trend curve (Menu Adoption Cycle) stage



# HOT HONEY

- honey infused with hot chilies, also known as spicy honey
- an alternative to traditional honey and often used in similar applications
- frequently used as drizzle for pizza or as a dipping sauce for fried chicken

MAC™ Stage:  
Proliferation



found on **5.6%** of menus

(+111% since 2019)

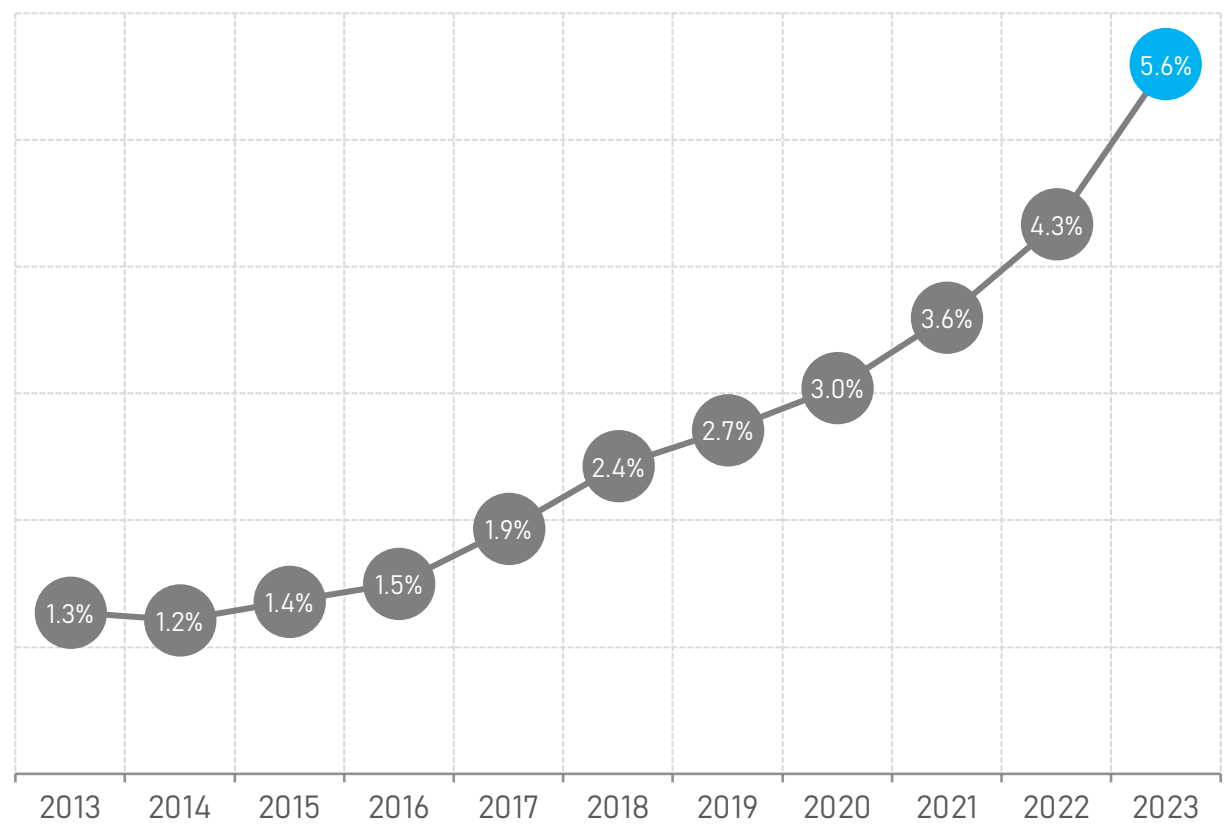
72%  
know it

42%  
tried it

36%  
love or like it

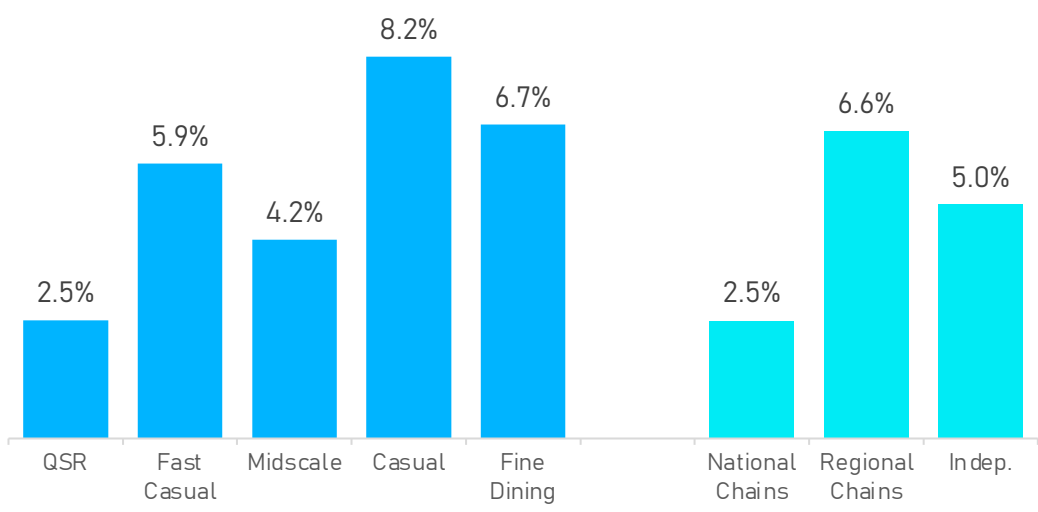
## HISTORIC MENU PENETRATION

% of US restaurant menus that feature;  
current year = annual data for YE Q3 2023



## BY RESTAURANT TYPE

% of US restaurant menus that feature



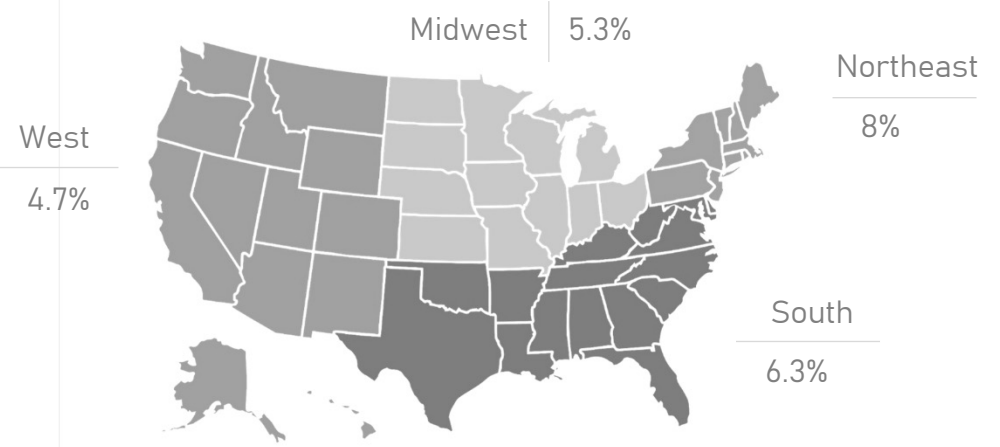
**5.6%** current menu penetration

### menu growth rate

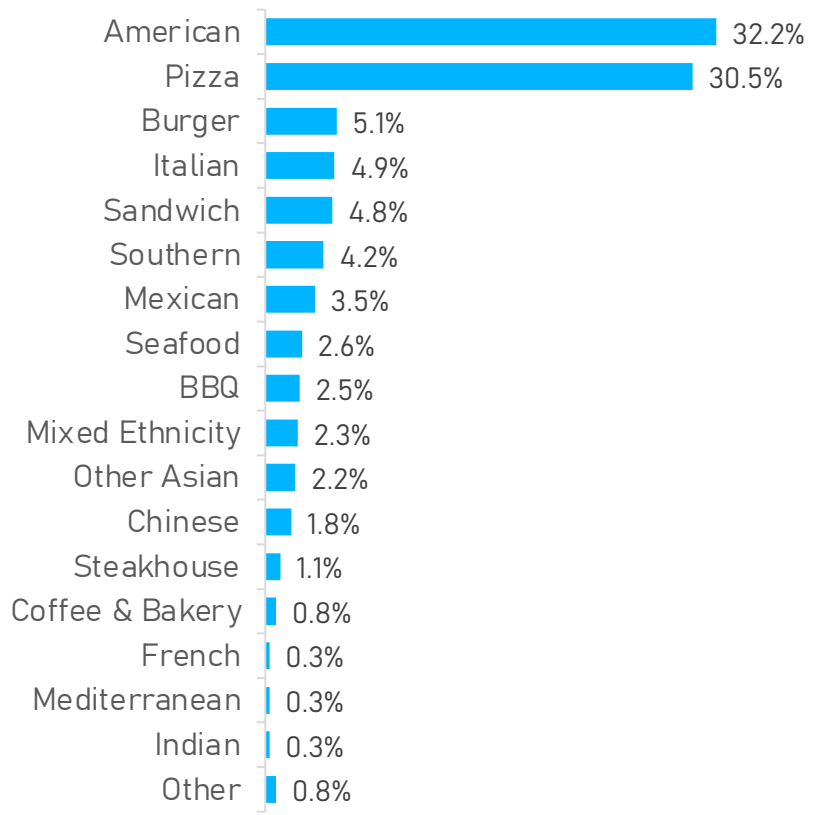
12 MONTHS  
**+40%**

4 YEAR  
**+111%**

SINCE 2013  
**+354%**



## FOUND ON MENU TYPES share of total incidence



ETHNIC MENUS <b>16.5%</b>	NON ETHNIC MENUS <b>83.5%</b>	menu versatility score <b>20</b>
a high MENU VERSATILITY SCORE indicates an item that works well in many different cuisines		

## APPLICATIONS share of total incidence

Pizza	22.5%
Wings	17.1%
Hot Sandwich	14.2%
Chicken Main Entree	7.1%
Condiment/Topping	5.2%
Cold Sandwich	3.1%
Bread Appetizer	2.3%
Burger	2.3%
Entrée Salad	2.3%
Cocktail/Mixed Drink	2%
Combos/Multi Protein	1.8%
Mexican Entree	1.5%
Non-Fried Protein App	1.2%
Non-Fried Veggie App	1.2%
Pork Main Entree	1.1%
Handheld Protein	1.1%
Hot Tea	1.1%
Other	12.9%

food versatility score <b>28</b>	a high FOOD VERSATILITY SCORE indicates an item that works well in many different applications.
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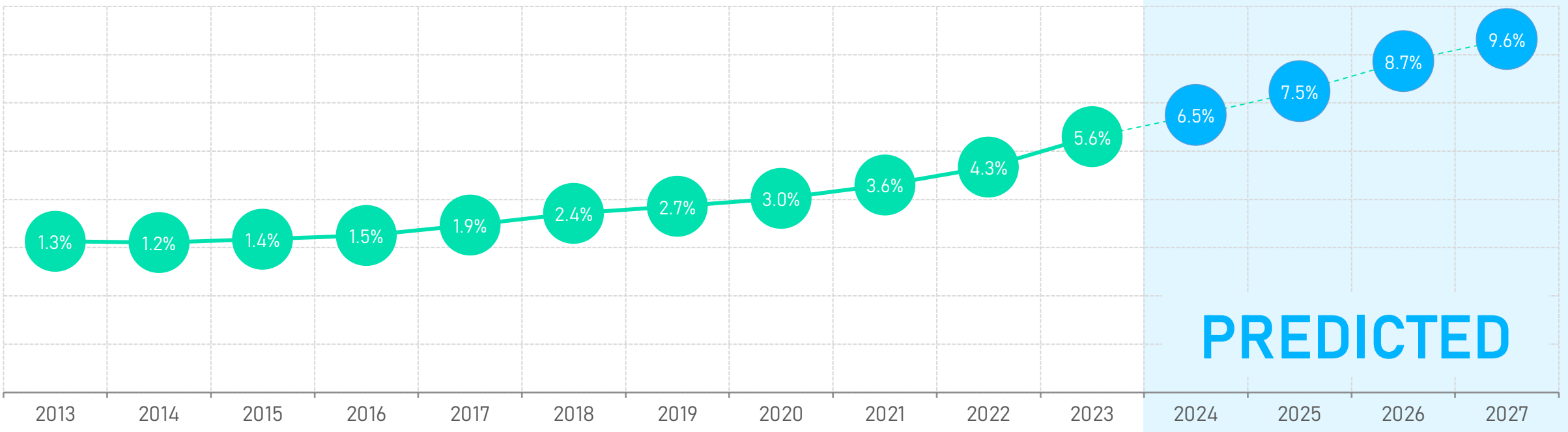
## PAIRED FLAVORS overlap with other items

CHICKEN	43.4%
FRIED	26.5%
FRIED CHICKEN	19.5%
WING	19.5%
FREE	18%
PIZZA	17.6%
GLUTEN FREE	16.9%
RANCH	16.5%
ONION	16.2%
BACON	15.1%
DRIZZLED	14.7%
MOZZARELLA	13.6%
JALAPENO PEPPER	12.5%

among menu items with HOT HONEY, % that also contain each of the above; use this to find flavors that go together

## MENU PENETRATION

% of US restaurant menus that feature;  
current year = annual data for year ending Q3 2023



4-YEAR PROGNOSIS  
**VERY STRONG**

HOT HONEY ranks in the **100th percentile** for future growth potential.

Its growth is predicted to outperform 100% of all other foods, beverage, and ingredients over the next four years.

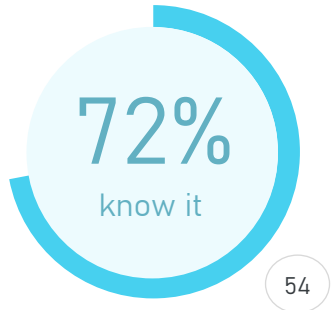
Powered by Menucast™  
Datassential's AI-based prediction engine

current year = annual data for YE Q3 2023	2023 (current)	2024 (projected)	2027 (projected)
QSR	2.5%	3.3%	5.5%
Fast Casual	5.9%	6.4%	7.9%
Midscale	4.2%	4.9%	7.7%
Casual Dining	8.2%	9.3%	12.6%
Fine Dining	6.7%	7.3%	9.4%
<b>Total</b>	<b>5.6%</b>	<b>6.5%</b>	<b>9.6%</b>

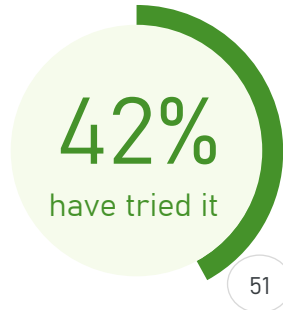
## EXPERIENCE

How often do you have...

normative indices in grey circles



- 72% of consumers are aware of this
- This has greater awareness than 54% of ALL FOOD & BEV



- 42% of consumers have tried this
- This has greater trial than 51% of ALL FOOD & BEV tested

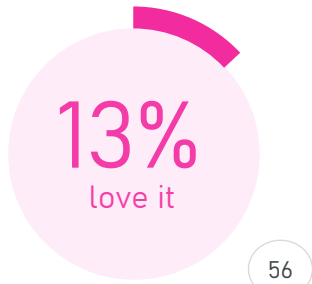


- 6% of consumers have had this many times
- This has greater regular consumption than 60% of ALL FOOD & BEV

## AFFINITY

How do you feel about...

normative indices in grey circles



23% like it

15% neutral

5% dislike

2% hate it

\*42% have no opinion

- Top Box**
- 13% of all consumers love this
  - Consumers love this more than 56% of ALL FOOD & BEV tested

- Top 2 Box**
- 36% of all consumers love or like this

## MAC™ Stage

inception

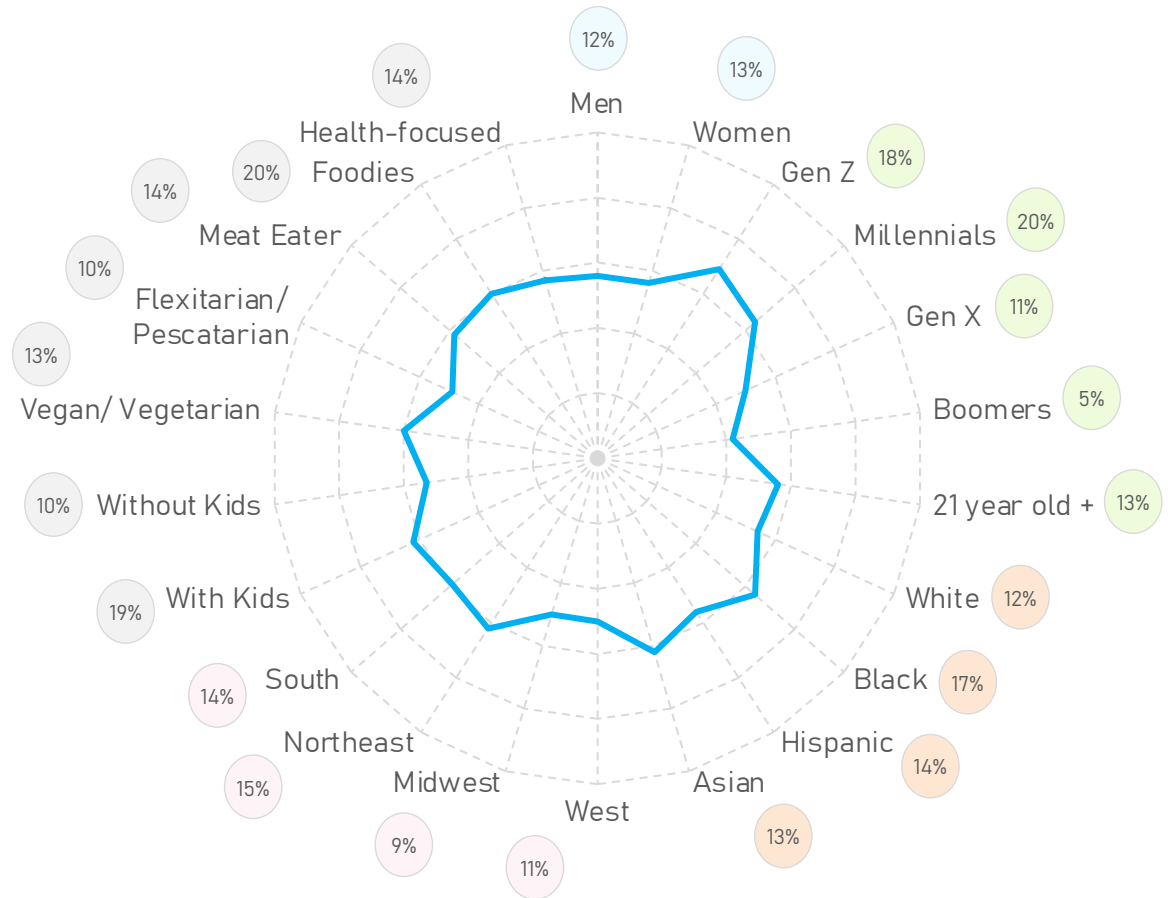
adoption

proliferation

ubiquity

## WHO REALLY LOVES IT?

Raw percentages shown in circles  
Chart is based on normative indices to show skews



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Nov 2023 \$14.99

**Black Bear Diner**

**HOT HONEY CRISPY CHICKEN BISCUIT**



Crispy chicken strips tossed in Mike's Hot Honey on a buttery biscuit, drizzled with more Mike's Hot Honey! Served with choice of side.

Unbranded PI: 56% ★★☆☆

Branded PI: 59% ★★☆☆

Uniqueness: 46% ★★★★★

Frequency: 18% ★★☆☆

Draw: 52% ★★★★★

Value: 27% ★

Consider  
**SCORE**  
**54**

Oct 2023 \$18.29

**TGI Fridays**

**MAC & CHEESE WAFFLE WITH HOT HONEY CHICKEN**



Crispy chicken, 4 Cheese Mac 'n Cheese Waffle, cajun butter and Nashville hot honey drizzle.

Unbranded PI: 39% ★

Branded PI: 37% ★★

Uniqueness: 50% ★★★★★

Frequency: 22% ★★★★★

Draw: 55% ★★★★★

Value: 20% ★

Consider  
**SCORE**  
**28**

Oct 2023 \$10.99

**Marco's Pizza**

**HOT HONEY MAGNIFICO PIZZA**



Pizza topped with traditional pepperoni and crispy Old World Pepperoni, Romano and Parmesan cheese seasoning, pizza sauce, grated cheese and Mike's Hot Honey.

Unbranded PI: 41% ★★

Branded PI: 44% ★

Uniqueness: 55% ★★★★★

Frequency: 19% ★★☆☆

Draw: 55% ★★★★★

Value: 52% ★★★★★

Specialty Appeal  
**SCORE**  
**55**

Sep 2023 \$5.29

**Arby's**

**HOT HONEY BBQ BONELESS WINGS**



Bite-sized pieces of all-white meat chicken in a crispy, seasoned breading tossed in hot honey BBQ sauce.

Unbranded PI: 63% ★★★★★

Branded PI: 48% ★★☆☆

Uniqueness: 29% ★★

Frequency: 24% ★★★★★

Draw: 48% ★★☆☆

Value: 53% ★★★★★

Volume Driver  
**SCORE**  
**65**

Sep 2023 \$0.00

**Shoney's**

**SWEET HEAT CRISPY CHICKEN BISCUIT**



Spicy chicken biscuit with our Hot Honey sauce —a perfect combo!

Unbranded PI: 61% ★★★★★

Branded PI: 53% ★★☆☆

Uniqueness: 35% ★★

Frequency: 19% ★★☆☆

Draw: 49% ★★☆☆

Value: -

Consider  
**SCORE**  
**58**

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Aug 2023 \$13.79  
**First Watch**  
**MILLION DOLLAR HARVEST HASH**



Freshly seasoned potatoes with Million Dollar Bacon, house-roasted sweet potatoes and Crimini mushrooms, kale and Monterey Jack topped with two cage-free eggs cooked any style, herbed Goat cheese, lemon-dressed arugula and drizzled with Mike's Hot Honey.

Unbranded PI: 47% ★★★ Specialty Appeal  
 Branded PI: 54% ★★  
 Uniqueness: 57% ★★★★★ **SCORE**  
 Frequency: 20% ★★★ **60**  
 Draw: 56% ★★★★★  
 Value: 32% ★★★

Jul 2023 \$5.99  
**Pizza Hut**  
**HOT HONEY WINGS**



Whether you prefer bone-in or boneless, these wings are coated in new Hot Honey and double-dipped in sweet heat flavors.

Unbranded PI: 54% ★★★ Volume Driver  
 Branded PI: 46% ★★  
 Uniqueness: 28% ★ **SCORE**  
 Frequency: 22% ★★★★★ **57**  
 Draw: 52% ★★★★★  
 Value: 62% ★★★★★

Jul 2023 \$11.99  
**Pizza Hut**  
**HOT HONEY PIZZA**



The new Hot Honey Pizza features our signature crust smothered in marinara sauce, topped with a generous layer of cheese, classic pepperonis, and crispy cupped pepperonis, all topped with a drizzle of our signature Hot Honey, made with real honey infused with chili peppers.

Unbranded PI: 48% ★★★ Consider  
 Branded PI: 41% ★ **SCORE**  
 Uniqueness: 53% ★★★★★ **54**  
 Frequency: 18% ★★★  
 Draw: 57% ★★★★★  
 Value: 46% ★★★

Jul 2023 \$10.99  
**Huddle House**  
**HOT HONEY CHICKEN AND WAFFLE**



Waffle topped with three fried chicken tenders, hot honey sauce and powdered sugar, served with two eggs.

Unbranded PI: 49% ★★★ Consider  
 Branded PI: 48% ★ **SCORE**  
 Uniqueness: 34% ★★ **32**  
 Frequency: 16% ★★  
 Draw: 48% ★★★  
 Value: 35% ★★★

Jul 2023 \$10.99  
**Huddle House**  
**HOT HONEY FRIED CHICKEN BISCUIT**



Fried chicken breast with hot honey sauce, a fried egg, bacon, and pepper Jack cheese on a biscuit, served with fries or potato tots.

Unbranded PI: 56% ★★★★★ Consider  
 Branded PI: 55% ★★ **SCORE**  
 Uniqueness: 49% ★★★★★ **64**  
 Frequency: 20% ★★★  
 Draw: 58% ★★★★★  
 Value: 30% ★

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Jul 2023 \$10.99

**Huddle House**  
SOUTHERN FRIED CHICKEN  
COLESLAW SANDWICH



Fried chicken breast on dill pickle chips with hot honey sauce, bacon, and coleslaw on a toasted brioche bun, served with fries or potato tots.

Unbranded PI: 51% ★★★  
 Branded PI: 48% ★  
 Uniqueness: 37% ★★★  
 Frequency: 17% ★★  
 Draw: 46% ★★  
 Value: 30% ★★

Consider  
**SCORE 30**

Jul 2023 \$10.99

**Huddle House**  
SWEET HEAT FRIED CHICKEN  
SANDWICH



Fried chicken breast on dill pickle chips with hot honey on a toasted brioche bun, served with fries or potato tots.

Unbranded PI: 53% ★★★  
 Branded PI: 55% ★★  
 Uniqueness: 34% ★★  
 Frequency: 20% ★★★  
 Draw: 47% ★★★  
 Value: 30% ★★

Consider  
**SCORE 37**

Jul 2023 \$16.99

**Outback**  
GRILLED CHICKEN AND HOT  
HONEY FRIED SHRIMP



Seasoned and grilled chicken breast with signature BBQ sauce paired with new Hot Honey Fried Shrimp. The dish comes served with a choice of two freshly made sides.

Unbranded PI: 59% ★★★★★  
 Branded PI: 48% ★★★  
 Uniqueness: 47% ★★★  
 Frequency: 22% ★★★★★  
 Draw: 54% ★★★★★  
 Value: 45% ★★★★★

Volume Driver  
**SCORE 76**

Jul 2023 \$7.00

**Outback**  
HOT HONEY 'RITA



Sauza Gold Tequila, Cointreau, hot honey and a trio of citrus juices garnished with a cinnamon sugar rim.

Unbranded PI: 44% ★★★★★  
 Branded PI: 39% ★  
 Uniqueness: 53% ★★★★★  
 Frequency: 19% ★★★  
 Draw: 43% ★★★  
 Value: 41% ★★★

Specialty Appeal  
**SCORE 61**

Jul 2023 \$13.99

**Outback**  
HOT HONEY FRIED SHRIMP



Tender, bite-sized shrimp hand-breaded with our signature Bloomin' Onion spices and cooked until golden brown. The dish is drizzled with house-made hot honey and spicy signature bloom sauce and topped with Fresno chilies and served with hot honey.

Unbranded PI: 56% ★★★★★  
 Branded PI: 53% ★★★  
 Uniqueness: 52% ★★★★★  
 Frequency: 26% ★★★★★  
 Draw: 65% ★★★★★  
 Value: 46% ★★★

Superstar  
**SCORE 91**

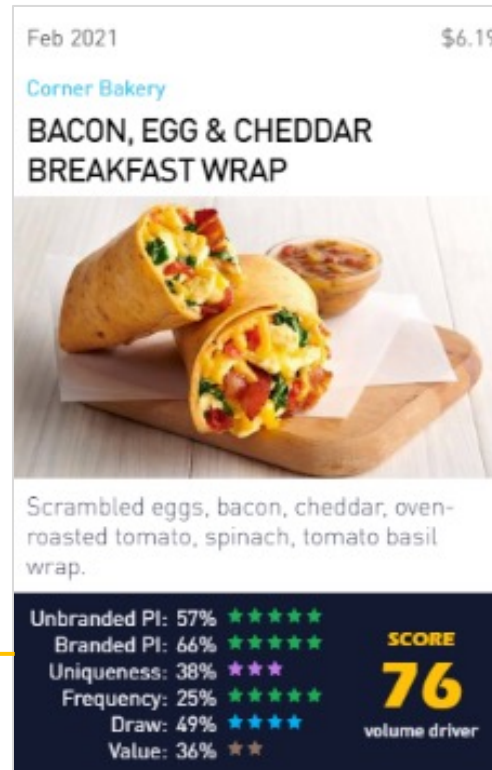
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# LAUNCHES & RATINGS METRICS

Each month, Datassential tests every new menu item and LTO from major chains with consumers. Hundreds of items from all sections of the menu are tested for **six key metrics**:

## KEY METRICS:

- UNBRANDED PURCHASE INTENT – would you order this item?
- BRANDED PURCHASE INTENT – would you order it at this place?
- UNIQUENESS – is it new and different?
- FREQUENCY – how often would you have it?
- DRAW – would you go there just for this item?
- VALUE – Is it a good value at this price?



**COMPOSITE SCORE:** a single number to assess overall performance across all key metrics; higher SCORES are better

**STAR RATINGS:** provide an at-a-glance summary of an item's performance in each key area

- ★★★★★ Top Performer (>90<sup>th</sup> percentile)
- ★★★★ Above Average (70 to 90<sup>th</sup> percentile)
- ★★★ Average (30 to 70<sup>th</sup> percentile)
- ★★ Below Average (10 to 30<sup>th</sup> percentile)
- ★ Weak Performer (<10<sup>th</sup> percentile)