

DECEMBER 2014

**FoodBytes**

**10**

**FOOD  
TRENDS**

**TO WATCH IN**

**2015**

A TOPICAL TREND REPORT FROM

 **DATA**SENTIAL



*New York's The Cecil showcases a global, "cuisine-less" menu.*

# THE FUTURE OF FOOD

Current trends evolve as the future of food comes into focus in 2015.

When looking at the year ahead and determining which food and industry trends to watch for in 2015, it helps to think big. Major changes are disrupting the entire industry, whether it's segments continuing to combine – fast casual, chef casual, and now casual fine – or melding to incorporate features from other operators – artisan coffee bars at c-stores, cocktail bars at Denny's. And technological advances, funded by rapidly-increasing investments in the food industry, promise to turn science fiction into reality, from 3D printed foods to drinks that can replace food and meals all together.

In the year ahead we'll also see the evolution of current trends, from Fast Casual 2.0, featuring more progressive flavors and healthier ingredients, to Healthy 3.0, moving the focus beyond terms like low fat and high fiber (Healthy 1.0) or local and farm fresh (Healthy 2.0) to an emphasis on functional foods – protein bowls and super foods. Meanwhile, the craft beer and artisan cocktail movement will continue growing, with drink menus placing a greater emphasis on flavors and alcohol levels.

Of course, we also used Datassential's powerful suite of innovation and trendspotting tools to find examples of actionable trends and specific flavors to watch in 2015. In the pages ahead we look at both single-focused restaurants promising a craveable version of favorites like biscuits or ramen and cuisine-less restaurants that are simultaneously creative and authentic. We look at how the dinner menu is transforming breakfast and brunch menus and which flavors and dishes score well with Millennials. And finally, we look at ten ingredients and flavors to watch for in the year ahead.

But the story doesn't end here. At Datassential, we'll work with you to not only determine how these trends impact your business, but how you can respond and evolve with them. Call us today at 312-655-0596 to schedule a presentation of Datassential's 2015 Trends, complete with our industry-leading combination of data and insight.

*Pictured on cover: 3D Systems' ChefJet 3D food printer can create edible sugar candies or chocolates.*

A new Denny's location in New York blends the chain's traditional breakfast menu with chef casual staples like exposed brick walls and artisan cocktails.



# 1

## SEGMENT MELDING

Across the industry, the lines between traditional segments continue to blur as restaurants adapt to the evolving landscape,

creating new concepts that meld characteristics from multiple operator types. Elements from multiple segments continue to combine and evolve, **creating segments** like fast casual (which is now evolving into Fast Casual 2.0; see below), combining the speed of fast food with options traditionally reserved for casual or midscale concepts, like alcoholic beverages and a focus on healthier, quality-driven dishes and ingredients. Innovative chefs are also carving their own niche at **chef casual restaurants**, where fine dining techniques and authentic flavors are showcased in more affordable and approachable ways.

At the highest end of the spectrum, fine dining is splitting into two distinctive halves. While both share the same premium ingredients and creative execution, traditional fine dining continues to showcase classic fine dining elements – white tablecloths, quiet dining rooms, and formal servers. But **casual fine dining** is lively and energetic, with a social atmosphere that often includes communal seating and a menu composed entirely of shared plates.

The effects of segment melding are being felt throughout the industry, in every segment, and we expect to see more operators react to this **new normal**. Casual dining operators are already offering more deals and discounts, often putting them on par with midscale pricing, while midscale operators are becoming more progressive and even **adding alcohol** – earlier this year Denny's opened a rustic urban location in New York that features a craft cocktail bar. Beyond restaurants, convenience stores, supermarket delis, and retail stores are **elevating their own foodservice programs**, becoming dining destinations in their own right. Now you'll find burrito bars at the supermarket and coffee counters and artisan beer at c-stores.



# 2

## FAST CASUAL 2.0

The fast casual segment has exploded in both popularity and number – according to Datassential's Firefly universal operator database, every year the percentage of limited service restaurants that can be classified as fast casual has expanded, from 18% in 2009 to 30% today. And now the segment has begun to **evolve into a new phase** as independents and smaller chains enter the fast casual space, forcing established chains to react.

The menu items at these emerging concepts are much more **progressive**: ethnic flavors, cruciferous greens, and ancient grains are among the fastest growing items on fast casual menus over the past year. At the moment fast casual pizza chains like Blaze Pizza and The Pizza Studio and healthy concepts like Modmarket and Bean Sprouts are driving fast casual growth and evolution, followed by Asian concepts like Houston's Fat Bao and New York's Koso Fresh in the upcoming years.

Colorado-based, farm-fresh **Modmarket** aims to “change the expectation of what a \$10 meal can be.”

New York is home to a number of restaurants that focus on single dishes, including rice pudding (1.

Rice to Riches), pudding (2. Pudin'), meatballs (3. Meatball Shop), and Greek yogurt (4. Chobani SoHo).



## RETURN TO AN IDENTITY

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Today's landscape is not about pleasing everyone with one all-encompassing menu – it's about a **singular focus** and executing it at a higher level than anyone else. Now menus are focused on a **particular dish or region**, conveying a **stronger identity**. Today you'll find operators who focus their menu on a single, craveable dish – Texas BBQ, biscuits, ramen – or a specific cuisine, like Sicilian or Asian street food. In fact, newly opened restaurants have a menu that is, on average, 37% smaller than menus found at existing operators.

## EAT THE WORLD

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While some chefs focus on a single ingredient or dish, others are cooking without constraints. As fusion cuisine evolved into the ethnic mashup movement, today's chefs are further transforming the meaning of authenticity, creating "**cuisine-less**" restaurants that defy traditional definitions. Today's modern, innovative chefs are expected to travel the world, incorporating the flavors and inspirations they discover into their cooking. At The Cecil, in Harlem, New York, the menu "traces the global migration of African-descendent people through the influence of African spices, textures, and cooking techniques on traditional American, Latin, and Asian dishes." You'll find oxtail dumplings, barbeque brisket egg rolls, Brazilian feijoada, and coconut grits on the menu. And restaurants like Acme Feed & Seed in Nashville and G Street Food in Washington D.C. are combining street foods from around the world into a **multicultural menu**.

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## AM FOLLOWS PM

The focus on breakfast in recent years has led to a number of innovations, with many chefs and operators taking inspiration from the dinner menu. **Small and shared plates**, for instance, can now be found on breakfast and brunch menus at independent operators across the country. At Tasty n Sons, in Portland, OR, diners can choose "Smaller" plates and shareable boards on the breakfast menu, while at Absinthe Brasserie & Bar, in San Francisco, both small plates and **PM flavors/ingredients** show up on the breakfast menu, including fried chickpeas and brussels sprouts. Sriracha, garlic aioli, and quinoa have all grown over 100% on breakfast menus, according to Datassential's MenuTrends, and you can expect to see breakfast pizzas, flatbreads, and tortas showing up on more breakfast menus in 2015.

At San Francisco's **Absinthe Brasserie & Bar**, the brunch small plates menu features deviled eggs, house-made granola, flatbreads, spicy fried chickpeas, and Brussels sprouts and delicate squash with barrel-aged feta.



“...Dimes represents a seismic shift away from the meat protein paradigm and toward vegetables, fruits, and grains, treated so flavorfully that no one misses the meat,” restaurant critic Robert Sietsema said of New York’s **Dimes**, which features dishes like Acai Bowls and Chia Pudding.



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## HEALTHY 3.0

The definition of “healthy” continues to evolve on restaurant menus. At first, “healthy” was focused on nutrition – low calorie, low fat, high fiber content, cutting out trans fats, etc. Then the discussion shifted to “feel good” terms like natural, organic, sustainable, local, and fresh. And now the concept of “healthy” is evolving once again, now focusing on **functional foods and ingredients** – energy, protein, superfoods.

“Protein” now appears on 44% more menus since 2010, and the focus has shifted from meats and seafood to alternative sources – from hearty fruit, vegetable, grain, and nut-focused menus to **plant-based protein sources** used to create meatless products like Just Mayo and Beyond Meat. Energy is also being highlighted, from functional drinks to healthier sources of good fats and proteins to natural sources of caffeine.



Hampton Creek spent two years developing **Just Mayo**, a plant-based eggless mayonnaise substitute.

## MENU DRIVERS

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Millennials have a higher average purchase intent for new items and limited-time offerings introduced by major restaurants and c-store chains, but what are they specifically drawn towards and away from? Using SCORES, Datassential’s newest innovation tool, we analyzed consumer ratings of over 1,000 menu items introduced over the past few months. In particular, Millennials were far more interested in **sweet dishes, beverages, and mash-ups** like hybrid pastries. In fact, 17 of the top 20 items that skewed towards Millennials were beverages and **all** of them were sweet. On the other hand, Millennials skewed **against familiar and classic dishes** found in the Ubiquity stage of the Menu Adoption Cycle, and were also less interested in seafood dishes overall.



The top three items recently introduced at major chains that skewed towards Millennials were the **Sour Patch Splash** at Friendly’s, the **Hazelnut Swirl Iced Latte** at Dunkin’ Donuts, and the **Fireball Whisky Lemonade** at Applebee’s.

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## ALCOHOL CONTENT

As we mentioned in last year’s trend report, the microdistillery boom and continued craft beer experimentation are stocking menus and retail shelves with local whiskeys and vodkas, sour beers, and new varieties. Whiskey and bourbon sales are booming in the U.S., creating a market for innovative new products, and we expect to see more **flavored whiskeys** on the shelf. And distillers are also taking a page from the mashup movement, creating new **hybrid spirits** like Vodquila, Jinzu (a combination of gin and sake), and Grey Goose VX (vodka with a hint of cognac).

The focus on and popularity of craft beers and spirits is also transforming the drink menu. Now, instead of featuring the spirit base, menus are **highlighting the flavors**, while beer menus are organized by bitterness (IBU) or alcohol level (ABV), particularly as the beer industry splits into heavy, 10-15% ABV stouts and porters and more flavor-forward, light beers under 6% ABV. **Lighter flavors, lower proofs, and bitter flavors** will also be more prominent on the cocktail menu in 2015.



Bird Dog Whiskey blends Kentucky bourbon whiskey with natural flavors like maple, blackberry, and peach.

### SPIRITS TO WATCH IN 2015:

SHERRY	VERMOUTH	AMARO	APEROL
PORT	LILLET	COCCHI AMERICANO	PIMM'S

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## HACK YOUR FOOD

Advances in technology are turning science fiction into reality on the modern table. IBM’s **cognitive cooking system**, Watson, can analyze flavor compounds to develop recipes with both classic and surprising ingredient combinations – one reporter called a meal created by Watson “one of the best meals I’ve ever eaten.” Consumer Physics raised \$2.7 million from a Kickstarter campaign to develop SCIO, a handheld molecular sensor that can analyze the chemical make-up of anything that is scanned, even **determining nutritional content, ripeness, and sweetness levels**. Today’s **3D printers** can create intricate, edible foods – Natural Machines is planning to release a consumer grade Foodini food printer, which will accept pre-packaged capsules to create difficult or time consuming dishes or ingredients, like noodles or pizza dough. This month Hershey will open an exhibit showcasing their work with 3D Systems on sugar and chocolate printing, while last year a café in Japan printed 3D chocolates of customers’ faces. And technology is creating products that cater to every lifestyle and dietary need, from the aforementioned meatless proteins to Soylent, a **complete meal/food replacement drink** created by software engineer Rob Rhinehart.



SCIO puts the power to analyze food composition, ripeness, sweetness, and more in your pocket.

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# WHAT'S NEXT?

What are the ingredients and flavors to keep an eye out for in 2015? Chefs, manufacturers, and operators continue to seek **inspiration from around the world**, hoping to create the next sriracha, or seek out **global seasoning blends** to add new flavor combinations to dishes and products. And **rich, savory ingredients and flavors** will also dominate, adding a punch to menus in the year ahead. Here are ten ingredients to watch in 2015:



Bi Bim Bop with fried egg and gochujang at Chicago's **Sunda**.



Togarashi Spiced Ahi Tuna at **Oliver's Prime** in West Hollywood, CA.



The OMG Burger at **Bennigan's** is drizzled with a Guinness Stout glaze.

- 1 HARISSA**  
 This spicy North African chile paste is made primarily of tomatoes, hot chili peppers, and roasted peppers.
- 2 AJI**  
 Prevalent in Peruvian and Bolivian cuisine, this pepper provides a subtle fruity flavor and full bodied kick.
- 3 GOCHUJANG**  
 Savory, spicy, funky – this could follow sriracha’s path and become the next condiment to take the world by storm.
- 4 YUZU**  
 An aromatic and tart fruit from East Asia that is used to garnish sweet and savory dishes and alcoholic beverages.
- 5 TOGARASHI**  
 A Japanese spice mixture made from powdered red chile peppers, sesame seeds, ginger, nori, and orange zest.
- 6 PERI PERI**  
 A zesty sauce/marinade made from African bird’s eye chilies, garlic, red bell pepper, and other spices.
- 7 NUT BUTTERS**  
 Beyond peanut butter – a protein-rich snack made from nuts like almonds, cashews, and hazelnuts.
- 8 SAVORY JAMS**  
 More unique, concentrated flavors for sandwiches and other dishes with bacon, onion, and tomato spreads.
- 9 STOUTS**  
 Not just a trendy beverage – stouts are appearing in everything from BBQ and braises to cakes and brownies.
- 10 ZA'ATAR**  
 A Middle Eastern spice blend of dried herbs like sumac, thyme, oregano, and toasted sesame seeds.

# TOPICS COVERED IN LAST MONTH'S **TRENDSPOTTING REPORTS**



## ON THE MENU

In November's **On the Menu**, we discovered how proteins like duck and spit-roasted meats are taking on new forms with duck fat-fried foods and doner kebabs, checked in on health-focused skinny cocktails and granola, and saw how gourmet flavored ketchups and polenta are updating traditional dishes and cuisines. Plus, we looked at fall flavors, more Oktoberfest favorites, and seasonal Thanksgiving LTOs in our coverage of menu additions.

**UPCOMING:** We look at flat whites, po boys, Sichuan peppercorns, and more.



## DINE AROUND: PORTLAND, OR

In this edition of **Dine Around**, we traveled to Portland, OR, a city that defines food trends for the country. In Portland entrepreneurs aren't afraid to try new things, and we covered everything from finer diners to pastry luncheonettes, new restaurants that focus on Russian and Israeli cuisines, and even an ice cream shop that serves flavors like bone marrow and Thanksgiving turkey.

**UPCOMING:** We head to the base of the Rocky Mountains and check out Boulder, CO.



## INTERNATIONAL CONCEPTS: AUSTRALIA

In **International Concepts**, we took you to Australia, where you'll find big, bold, spicy flavors and hearty dishes at every daypart. We covered Australia's most successful bakery franchise, a pizza chain with some unusual options on the menu, a chain popularizing peri peri chicken, and a fast casual chain that exemplifies the growing popularity of Mexican fast casual concepts in Australia.

**UPCOMING:** In January, we take a look at the rapidly expanding chain market in India.



## CREATIVE CONCEPTS: MODERN STEAKHOUSES

In **Creative Concepts**, we looked at the next generation of steakhouses that are modernizing this consumer favorite. From creative takes on classic dishes like Caesar salads to local, farm-to-table proteins and updated décor, you'll see how this traditional concept is getting an update, while still embracing "everything old is new again" elements like tableside service.

**UPCOMING:** Next month we look at how operators are using big data to make smart menu decisions.

**NEVER MISS OUT ON A TREND!**

Contact **Maeve Webster** at **312-655-0596** to subscribe to Datassential's entire TrendSpotting Report series.

Datassential Releases  
Next MenuTrends Keynote Report

# Pizza & Flatbreads

Datassential is proud to release the third report in the new MenuTrends Keynote series delving into pizza behaviors and trends. MenuTrends Keynotes combine the extensive detail of MenuTrends with the opinions and behaviors of over 1,000 sandwich consumers nationwide and insights from hundreds of operators from Datassential's OPERA panel, the industry's largest with over 30,000 restaurant, retail and on-site operators.

## DISCOVER ALL OF THE FOLLOWING INSIGHTS ON PIZZA:

- **Details on the current pizza landscape** - what pizza varieties are consumers eating and how are they eating them at-home and away-from-home (types, motivations, and frequency)
- **Pizza drivers and barriers both at-home and away-from-home** - motivations and selection criteria for locations and ingredients; frustrations with at-home and away-from-home pizzas
- **Extensive menu detail** - pizza and flatbread megatrends shaping the pizza landscape; menu adoption cycles for pizza and flatbread varieties, crusts, sauces, cheeses, toppings, and proteins; top menued pizzas and ingredients with fastest growing ingredients and flavors
- **Ingredient deep dives** - extensive detail on top trends by segment, region, generation and more for varieties, unique pizzas and flatbreads, crusts, cheeses, proteins, toppings, and sauces; spotlight on trending ingredients and flavors
- **Operator usage detail** - which products and formats operators use for cheeses, tomato sauces, doughs/crusts, and toppings
- **Pizza opportunities** - product and technology innovations for foodservice and retail pizza consumption

**Reports in the MenuTrends Keynote series are priced at \$6,500 per topic.  
Discounts are available with the purchase of multiple topics.**

## A MAJORITY OF CONSUMERS SAY THEIR TASTES ARE SHAPED BY THEIR RESTAURANT EXPERIENCES

What's happening on the menu today can be a leading indicator of tomorrow's food trends.

Datassential MenuTrends is the industry's largest menu data set with the longest historic trend record, plus the ability to search millions of dishes from over 100,000 menus. Because the database is designed to mirror the US restaurant census by segment, region, and menu type, MenuTrends is the only system that offers true projectable data. All segments and cuisine types are tracked extensively – from food trucks to fine dining.

MenuTrends INSIDER is also updated every month with Limited Time Offers (LTOs) and other new menu activity, with product photos that bring the listings to life. And with thousands of ready-to-use reports and simple trend detection tools, you can jump right into the database, identifying, measuring, and predicting the food and flavor trends that matter to your business.

Call us today to begin using the food industry's authoritative resource for flavor trends.

**Call Jana Mann at 312-655-0595 or email [jana.mann@datassential.com](mailto:jana.mann@datassential.com).**

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<b>WICHES</b>	
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MAY CONTAIN TRACES OF NUTS. CONSUMING RAW OR UNDERCOOKED MEATS, POULTRY OUR RISK OF FOODBORNE ILLNESS, ESPECIALLY IF YOU HAVE A MEDICAL CONDITION.	



# HUNGRY FOR MORE?

This is just a small taste of the research and data we have collected in order to make accurate, data-backed trend identifications. Now let Datassential take you deeper into the implications of these trends and what they mean for your company.

We can take you behind the data that shows how restaurant menus are shrinking and morphing, show you an in-depth look at the surprising demographic data on consumers (including Millennials) that informed these trends, and show you real-world examples of every trend covered.

And it's all backed by the industry's most accurate and trusted menu database, MenuTrends, and the industry's largest operator research panel, OPERA.

To start putting these trends to work for you, contact Datassential today:

**1-312-655-0596**  
**info@datassential.com**