

FLAVOR

& THE MENU

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FLAVOR TRENDS, STRATEGIES *and* SOLUTIONS
for Menu Development

FLAVOR CUES *from the* BIG THREE

New opportunities await operators whose menus take global flavors beyond basic Mediterranean, Latin and Asian fare

BY KATHY HAYDEN

Could it be that the world is made of two kinds of people: those who are eager to cross culinary borders in their dining choices and others who are more comfortable sticking to familiar foods? At first glance, some new consumer data confirms this dichotomy, but a closer look shows there's a lot of gray area between these two eating extremes.

Released in late August, a Culinary Visions panel survey conducted by Olson Communications of Chicago found that more than 50 percent of patrons in a casual-dining establishment are ready to try global flavors and new dishes. Another 40 percent like to try new dishes, even though they mostly stick to what is familiar (see Figure 1).

The panel comprised food-industry professionals and consumers exploring a vast range of culinary topics, from gender acceptance of global flavors to which types of ethnic-influenced foods consumers are more willing to try.

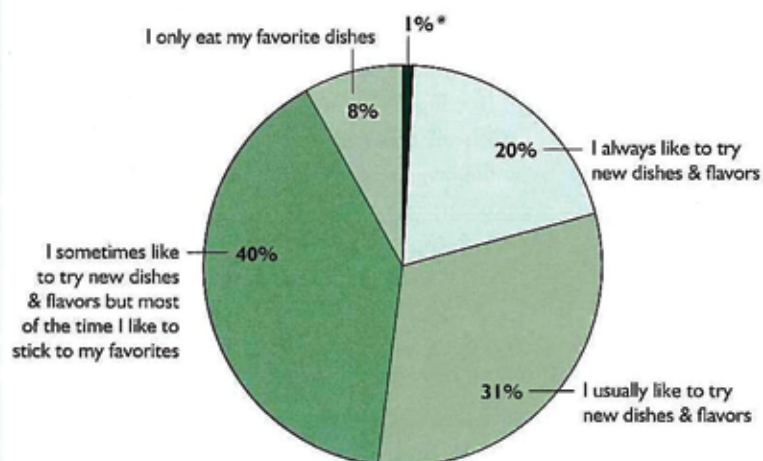
Recent Technomic research finds even more diners interested in new flavors; according to this Chicago-based research and consulting firm, 66 percent of consumers are willing to try

new flavors. Spanish, Greek and Mediterranean lead the ethnic flavors they are most interested in trying, and these flavors have greater appeal among women. Next in appeal are Moroccan, Lebanese, Turkish, Persian and Ethiopian

FIGURE 1

HALF OF DINERS WANT ADVENTURE

Percent of respondents polled in casual dining



* I am interested in food only as fuel.

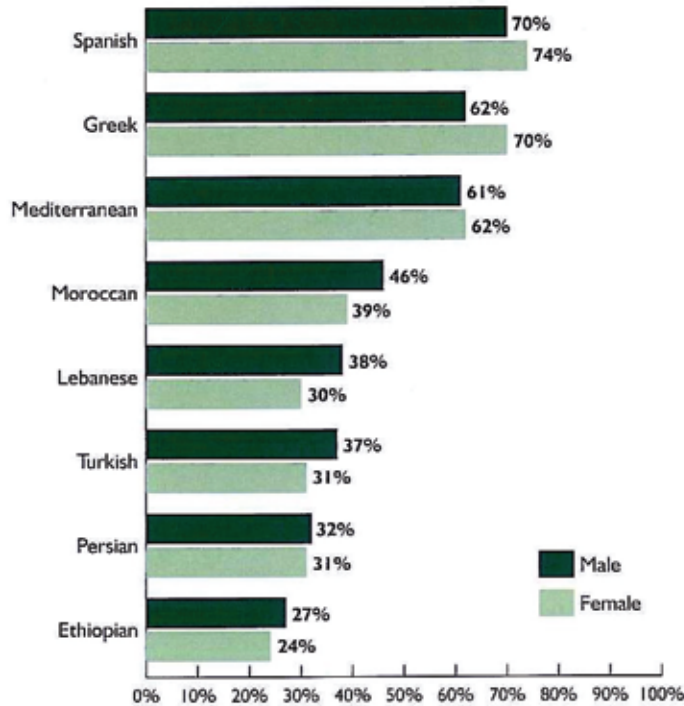
Note: Respondents also had the option to select "What I eat is primarily determined by my concern for health and wellness," but the response rate was so low it is not included here.

SOURCE: CULINARY VISIONS PANEL, OLSON COMMUNICATIONS, 2010

FIGURE 2

SPANISH, GREEK, MEDITERRANEAN REIGN IN POPULARITY

Consumers who “definitely” or “probably” would order menu items made with typical flavors and ingredients used in the following ethnic cuisines



Spanish, Greek and Mediterranean have greater appeal among females; Moroccan, Lebanese, Turkish, Persian and Ethiopian have greater appeal among men

SOURCE: TECHNOMIC INC., FLAVOR CONSUMER TREND REPORT, 2009

flavors, which have greater appeal among men (see Figure 2).

With all this consumer interest in trying new flavors, there are clear opportunities to incorporate more global elements into menus, but these studies also show that it's important to be careful when it comes to changing old favorites.

FAVORITES FIRST

Even though more than half of those surveyed by Olson would try Asian, Mediterranean or Latin dishes, they are unlikely to prefer ethnic pizza or burgers over standard American versions.

“I think we’ve probably always known this, but the survey brought it home in a startling way,” said Sharon Olson, company president.

“People like the classic American burger and pizza, and while they might eagerly try new ethnic versions of them, they most likely won’t replace their old standbys.”

So where are global influences most appreciated? To examine consumers’ level of acceptability for new flavors and dishes, Olson created written descriptions of globally flavored versions of classic American fare, such as banh-mi-inspired burgers, Brazilian shrimp pizza or a side dish of Sicilian chickpeas and spinach.

Surveys asked more than 200 casual diners what their preferences would be; these diners were classified by age, sex, household income and eating habits. Ages of respondents were fairly evenly spread between 18 and 55 and older; income levels ranged from zero to \$100,000. More than half of respondents earned between \$25,000 and \$75,000. They could describe themselves as “always,” “usually,” “sometimes” or “never” wanting to try new flavors (see Figure 1).

Respondents who “always” and “usually” want to try new tastes totaled 51 percent of those surveyed. Those describing themselves as “sometimes” wanting new flavors totaled 39 percent, and those who “never” try new menu items made up only 8 percent. One percent of the respondents are disinterested in food for anything other than fuel.

In Olson’s surveys, respondents who labeled themselves foodies who “always” or “usually” like trying new flavors were most likely to choose ethnic dishes. Of all respondents, men were 10 percent more adventurous than women, a finding Technomic data also supports (see Figure 2).

PROCEED WITH CAUTION

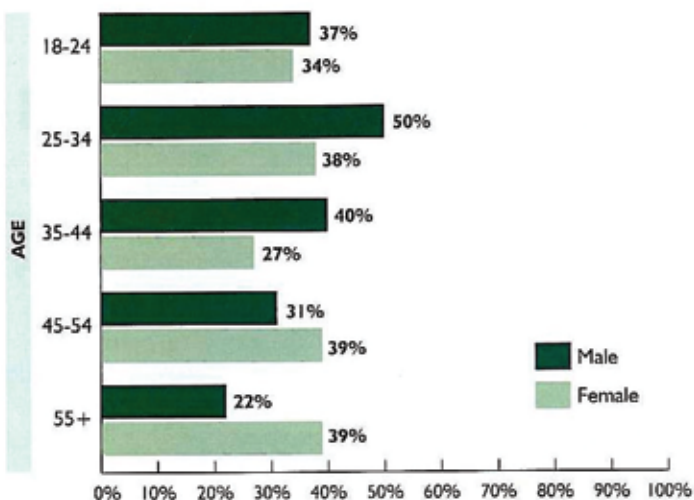
The survey findings underscore the importance of another strategy many in the industry use: adding new specialties to the menu without subtracting old favorites. Technomic’s research reveals that, while a majority of consumers would like to try new flavors, and are even willing to pay more for new and unique flavors (see Figure 3), they don’t seek them out.

“Operators may want to consider offering several traditional menu items made with established flavors as a way to draw traffic in

FIGURE 3

DINERS WILL PAY A PREMIUM FOR FLAVOR

Percent of respondents saying, "I am willing to spend more on a restaurant meal that features new or unique flavors"



SOURCE: TECHNOMIC INC., FLAVOR CONSUMER TREND REPORT, 2009

and build trust with customers," says Technomic Vice President David Henkes. "It is likely that consumers will be more open to trying other menu items featuring unique flavors offered at the same restaurants."

What's more, even timid diners are likely to venture into global flavor territories when tied to familiar platforms. Olson research found burgers, sides and salads to be good starting places for venturing into new flavor territory.

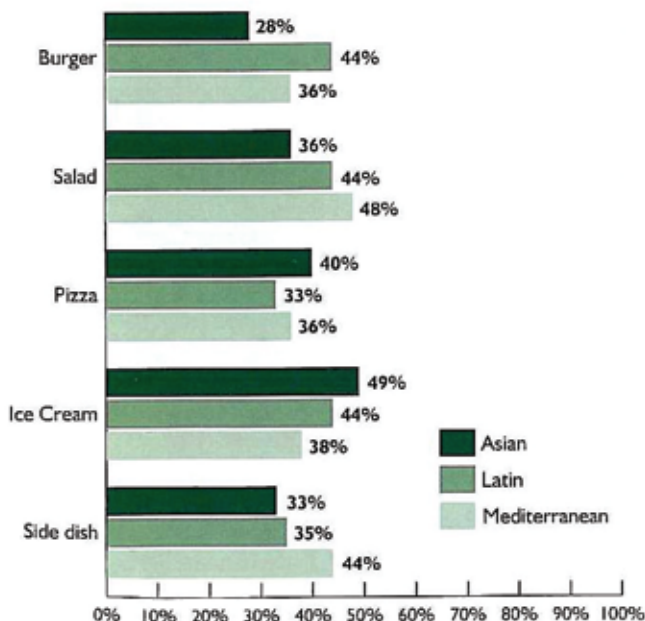
"Consumers seem more willing to take a chance ordering something unfamiliar if it is not the main focus of the meal," says Olson. Her company's research found salads and sides are where diners feel fairly comfortable branching out into Latin and Mediterranean flavor influences (see Figure 4).

Starters are another great place to introduce global flavor profiles. Henkes, speaking at the August 2010 Flavor Experience in Newport Beach, Calif., pointed to The Cheesecake Factory as a multi-unit menuing global flavors in small plates, appetizers and sides with great success. He cited its chicken samosas with cilantro dipping sauce, sweet tamale corn cakes and ahi tuna with soy-ginger-sesame sauce as small plates that hit big global hot spots.

FIGURE 4

CONSUMERS' COMFORT ZONES

Latin- and Mediterranean-concept dishes that capture diners' attention (Overall preferences of each ethnic menu concept)



SOURCE: CULINARY VISIONS PANEL, OLSON COMMUNICATIONS, 2010

LATIN LEADS

Olson's surveys found that people are most familiar with Latin dishes, at 22 percent, followed very closely by Mediterranean, at 19 percent. Asian dishes and ingredients come in third, at 12 percent.

For a sense of what diners might be looking for if they could name their own dishes in their favorite casual-dining restaurants, Olson's Culinary Visions panel included open-ended questions: "If I could add another Asian dish to the menu of my favorite casual-dining restaurant, it would be (please describe)." The question was repeated for Latin and Mediterranean dishes.

Diners named Latin dishes like carnitas, ceviche, mole, mofongo, carne guisada and chiles rellenos. A full 5 percent named Cuban pork sandwiches, and some respondents named very specific Latin menu items, such as "coconut shrimp with pineapple-curry rice and plantain chips."

BURGERS TAKE A GLOBAL SPIN

"Building A Better Burger," a June 2010 report from Chicago-based Mintel Menu Insights, confirms the burger category as a likely place for trying out international flavor influences. Asian and Mediterranean lead the way here.

EAST MEETS WEST

Ingredients like soy and teriyaki are making burgers even more savory.

Teriyaki Bacon Burger: Juicy burger basted with sweet soy-teriyaki glaze and topped with five-spice bacon, melted cheddar, grilled pineapple, fresh lettuce, crisp noodles and peanut sauce — *T.G.I. Friday's*

Teriyaki Chicken Burger: A tender, juicy charbroiled chicken breast with sweet teriyaki sauce, grilled pineapple, Swiss cheese, lettuce, tomatoes and mayo — *Red Robin Gourmet Burgers*

MEDITERRANEAN MEDLEY

Mintel notes Mediterranean is the latest culture to lend its flavors to the burger. As these flavors develop, Mintel predicts new proteins, such as lamb, will be added to burger lineups.

Little Italy: Fresh mozzarella, arugula, basil pesto and balsamic-marinated Roma tomatoes on grilled Italian bread — *Rock Bottom Restaurant & Brewery*

The Greek: Topped with melted feta cheese, crisp iceberg lettuce, thickly sliced tomato, shaved red onion, cucumber tzatziki sauce and garlic mayo — *Ruby's Diner*

Respondents also requested Americanized versions of Mexican foods, with tacos topping the list. In an interesting note, Cuban pork sandwiches were mentioned more than all other Latin dishes, except tacos and enchiladas.

MED IN THE MIDDLE

In Mediterranean fare, Olson respondents are well acquainted with gyros, which placed higher than Greek salad and hummus with a number of survey-takers. More-obscure dishes like dolmades, shawarma, falafel, tabouleh, spanakopita and braised lamb were all mentioned.

Salads came on strong in the Mediterranean category, with diners requesting orzo, olive, Greek and a number of others. Of the three ethnic dessert categories surveyed, Mediterranean got the most responses; those surveyed requested ricotta cheesecake, pistachio gelato and baklava.

Mintel Menu Insights finds a steady stream of Mediterranean flavors in general, and Greek in particular, filtering onto menus. In 2009, approximately 2,800 new menu items associated with Mediterranean cuisines were added to menus, representing 2 percent growth (see Figure 5).

Menu items included Italian, French, Greek, Spanish, Mediterranean (unspecified), Middle Eastern, Moroccan and African dishes. Many use the term "Mediterranean" by name or in menu descriptions, keeping the term front and center.

While tried-and-true Italian preparations like pasta and pizza help keep the Mediterranean category strong, Mintel notes that this cuisine has potential for bringing more healthful and vegetarian menu items into the mainstream because of its authentic incorporation of healthy grains, fruits and vegetables and dishes such as hummus and veggie-topped flatbreads.

Mintel Menu Insights data shows that Greek cuisine was the third-most-popular Mediterranean cuisine in 2009, behind Italian and French; Greek is becoming more prominent in varied menus, with newly styled Greek salads, wraps and pizzas appearing in operations such as Paradise Bakery & Café, Bear Rock Café and Jamba Juice.

FIGURE 5

NEW MED ON THE MENU

Percentage, by segment, of Mediterranean-influenced items added to menus

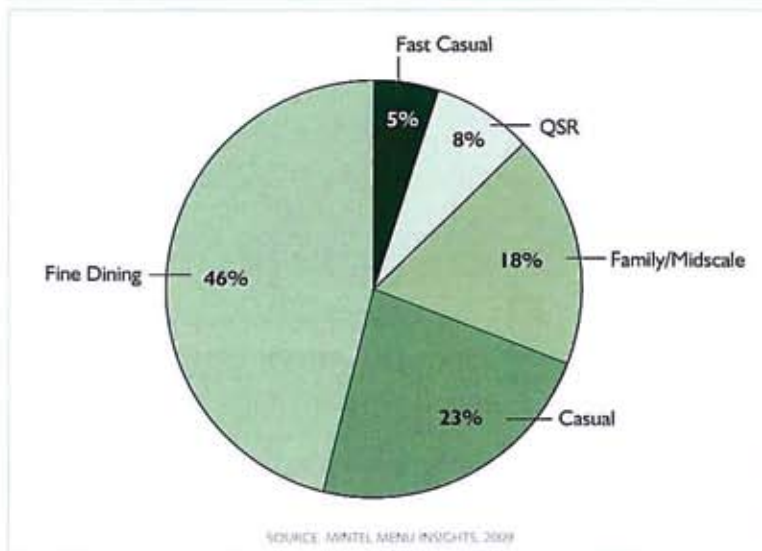
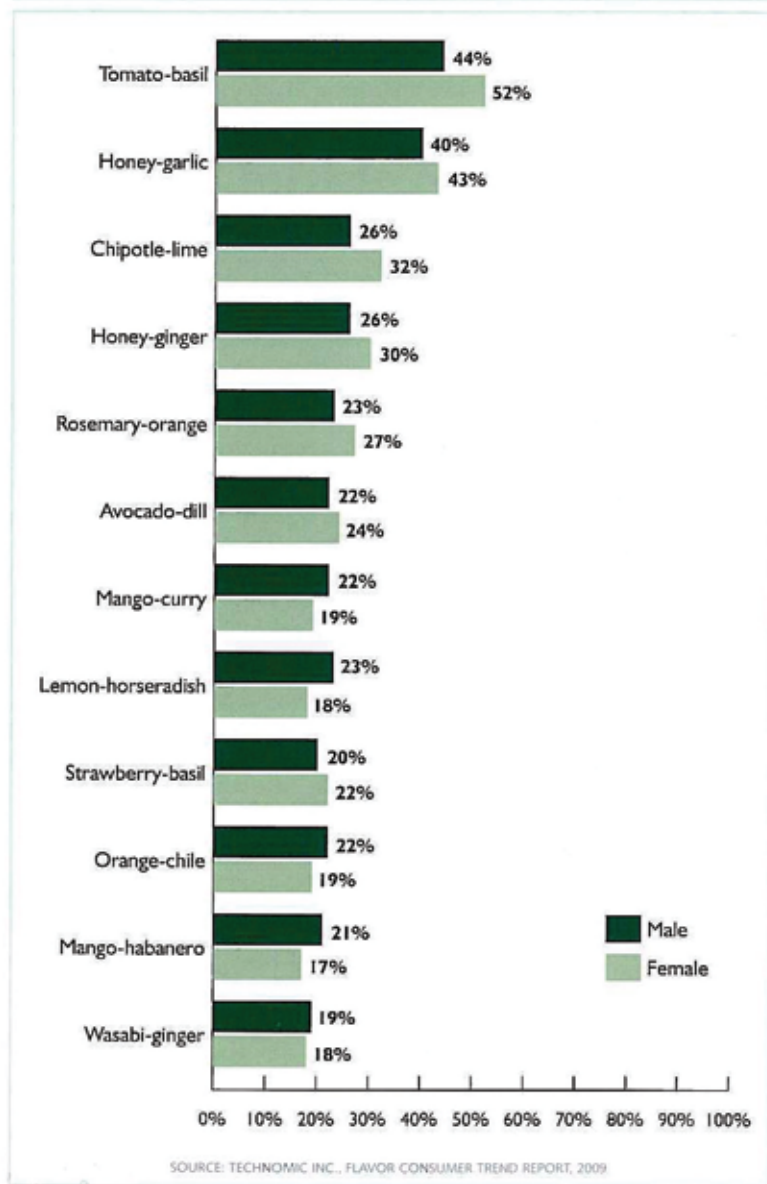


FIGURE 6

FLAVOR-PAIRING FAVORITES

"Thinking about all the types of food you eat, how appealing are the following flavor combinations?" (Percent of respondents, by gender)



TAKE-AWAY TIPS

ENHANCE THE EXTRAS: Experiment with bolder flavors and global tastes in condiments, dipping sauces and salad dressings

DO SOME PIGGY-BACKING: Offer both basic versions and ethnically influenced options in strong-selling categories like burgers, salads and pizza

START AT THE TOP: Starters, snacks, apps and other top-of-the-menu options offer guests low-risk ways to try new tastes

LOOK TO THE EAST

Olson's research found diners are looking for many of the well-known flavors associated with Asian fare. Americanized Asian dishes like sweet-and-sour chicken, General Tso's chicken and stir-fry hold mainstream appeal, with sushi catching up and garnering as many mentions as sweet-and-sour chicken. Curry, ginger, sesame, garlic, basil, lime, hot pepper and teriyaki are some flavors and ingredients ranking high.

Some of the more-obscure dishes asked for by name among the more-adventurous diners in Olson's survey include pad see ew, tom kha soup and mochi ice cream. Olson notes that dishes similar to pad Thai and Japanese yakisoba are starting to emerge as trends in casual dining.

Technomic's flavor-combination research shows Asian-influenced pairings like honey-ginger, mango-curry, orange-chile and wasabi-ginger all rating in the top 12 of those high in appeal (see Figure 6). Henkes suggests incorporating these flavors in dressings, dipping sauces and other low-risk, high-impact applications.

A separate Technomic survey of basic flavor combinations gives more support for venturing into Asian flavor terrain. Sweet-and-sour, sweet-and-savory, sweet-and-spicy and sweet-and-tangy all garner high marks and support introducing more Southeast Asian influences — sweet-chile sauces, ponzu, curry — onto menus.

This new bundle of data proves the "big three" culinary influences — Mediterranean, Latin and Asian — are still going strong. A closer look at the ingredients, flavor combinations and preparations tells a more-exciting story of the chances consumers are ready to take with their menu choices.

The challenge to operators is striking a menu balance that includes far-flung flavors to cater to foodies, adventuresome extras to capture those ready to take a few chances and some comfortable standards — with a few tasty tweaks — for the more traditional among your guests. ☺

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Shayna Snyder contributed to this feature.