



consumer FOOD TRENDS

**Assessing Consumer Trends
Impacting the Food Industry**

IN THIS ISSUE:

| | | |
|----------------------------------|--|----|
| Consumer Research... | <i>Data Briefs Impacting Away-from-Home Dining</i> | 4 |
| Foodservice Happenings... | <i>Hot Trends in Hispanic Cuisine</i> | 7 |
| Horizon Scan... | <i>Trend or Aberration?</i> | 10 |

Consumers & Their Needs

Decoding the Satisfied Customer

*By Sara Monnette,
Director, Consumer Research*

One of the biggest questions for operators today is this: What could drive my customers to visit my restaurant over my number one competitor? The answer to this all-too-important question is neither necessarily straightforward nor easy to decipher. Operators who know the answer for their brand hold the key to creating a successful and sustainable restaurant.

To support chain operators in their quest for answers surrounding this vital topic, Technomic developed Consumer Brand Metrics, a landmark program that assesses the performance of the leading 100 chains through the eyes of their customers. Through this program, more than 12,000 consumers rate the performance of the leading chains on roughly 50 restaurant touchpoints, based on the customer's most recent experience with the brand. An initial comparison of ratings across chains within a competitive set allows operators to discover how they stack up against the competition on each measure. Taking our analysis a step further and utilizing a multivariate regression approach, the ratings provide a unique platform to understand the main categories that drive customer satisfaction and the importance of specific factors within each category.

Metrics that Drive Satisfaction

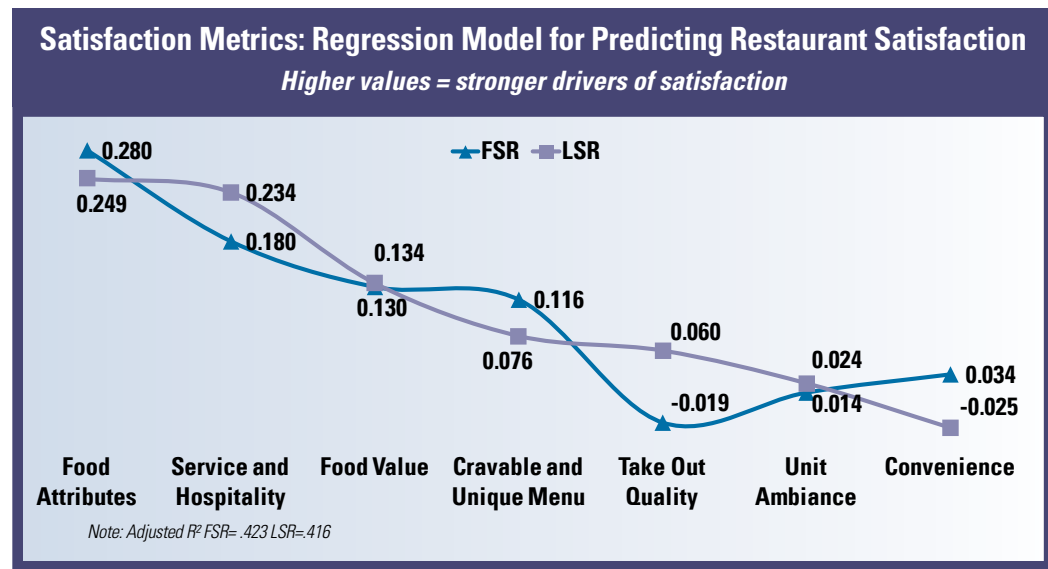
If you ask consumers what is important to them when they choose a restaurant, they will likely give a straightforward answer. But if you query the same consumers after their meal about what influenced their overall satisfaction with their visit, the answers are not always easy to come by. Consumers can more easily tell you what they *expect* from an experience than play back in their minds the multitude of elements that factored into their ultimate satisfaction with that experience. In other words, the heuristics of decision-making are not always transparent to the decision-maker. No restaurant touchpoint touches consumers in an isolated manner.

By tallying performance ratings for nearly 50 restaurant experience touchpoints and using regression modeling, Technomic's Consumer Brand Metrics program derives satisfaction metrics for individual restaurant chains. Interestingly, what most prominently drives satisfaction at one restaurant operation may be much less important in driving satisfaction at another, even if these brands operate within the same competitive set.

Aggregating ratings from all 100 brands tracked by the Consumer Brand Metrics program, we can derive overall satisfaction metrics for limited-service and full-service chains using the same regression

methodology. A glimpse at the two major restaurant segments as a whole uncovers characteristics that impact the degree to which consumers are satisfied with their LSR and FSR experiences. Just as drivers of satisfaction vary from chain to chain, there are differences between limited-service and full-service restaurants.

The line graph displayed here shows the standardized beta coefficients from the Consumer Brand Metrics analysis. Basically, the higher the number, the more important the factor is for customer satisfaction. Each of the six major categories displayed is comprised of two to five touchpoints.



Food attributes above all others drive consumer satisfaction at both full-service and limited-service restaurants. Within this category, food quality, followed by taste and flavor and then by the visual appeal of the food, will determine the extent to which customers are satisfied. Restaurants that do not have food perceived as high in quality will be unable to win customers by compensating in other areas such as service and hospitality.

Service and hospitality touchpoints, if executed well, have a greater ability to drive satisfaction at LSRs than at FSRs. Why? It's likely because consumers are more pressed for time during a typical limited-service visit and may be less forgiving of poor service that creates hassles and wastes their time. Within the service and hospitality category, customer satisfaction is most strongly correlated with staff attention to the fundamentals (providing correct utensils, drink refills, etc.), followed by friendly service and a quick transaction. In cases where satisfaction is strongly driven by service and hospitality, restaurants should focus on their operational processes to ensure seamless, hassle-free transactions for their customers.

Value drives satisfaction in a number of ways, but primarily through high-quality service—which, interestingly, is slightly more important to consumers than high-quality menu items. Just as consumers likely place a high level of value on time considerations when visiting limited-service restaurants, they tend to value elements of great service for away-from-home dining occasions at full-service restaurants. Less important to customer satisfaction are value imparted through atmosphere and ambiance or value in the form of competitive prices.

Craveable and unique menu items are a bigger driver of satisfaction at FSRs than at LSRs. Within this category, satisfaction is most correlated with craveable items, and less strongly correlated with unique

items. For operators and chefs, this means that creating a craveable menu item is more important than creating one that is uniquely differentiated.

Quality of the takeout experience drives satisfaction at LSRs much more than at FSRs. Within this category, consumers express greatest satisfaction primarily when the takeout process is executed smoothly. Secondly, they derive satisfaction by receiving quality takeout packaging.

Unit ambiance satisfaction is driven most of all by the restaurant's overall atmosphere, followed by its décor. Ambiance drives satisfaction at limited-service and full-service restaurants to an almost equal degree, perhaps in part because stylish fast-casual restaurants are included among the limited-service chains analyzed.

Convenience, perhaps surprisingly, drives satisfaction with full-service restaurants more than it does with limited-service restaurants. Convenience of location plays a role; that form of convenience may be less of a consideration for consumers when they visit limited-service restaurants, since outlets are ubiquitous and easily accessible.

Perception Matters

Consumers form opinions about products and services whether they have had first-hand experiences with them or not. Restaurants need to be aware not only of how their customers perceive the experience offered within their four walls, but also of how the general public sees them. A strong, positive brand image is even more critical in today's digital world—where consumers convey their perceptions at lightning speed through the media and social networks.

Looking beyond consumers' satisfaction with their direct experiences, we asked our 12,000+ consumers about their perceptions of the top 100 restaurant brands, whether they have visited the restaurant or not. We then analyzed brand image across metrics related to operator values, initiatives and reputation.

| <i>Brand Perception Metrics</i> | |
|---------------------------------|--|
| Values | <ul style="list-style-type: none"> • Customer comes first • Restaurant I can trust • Socially responsible • Values similar to my own |
| Reputation | <ul style="list-style-type: none"> • Likeable personality • Excellent reputation • Innovative • Unique |
| Initiatives | <ul style="list-style-type: none"> • Memorable advertising • Relatable advertising • Introduces new and exciting products |

Once again, we can derive brand image ratings for each of the 100 brands analyzed. Grouping brands by sub-segments (quick service, fast casual, midscale and casual dining) reveals interesting patterns in consumer perceptions.

Across most brand perception attributes, consumers have about the same attitudes toward fast-casual restaurants and casual-dining restaurants. Perceptions of the brand's trustworthiness and likeable brand personality are stronger, on average, for casual-dining and fast-casual chains than for quick-service and midscale chains.

Midscale restaurants suffered from lower perception ratings across the board, compared to either fast-casual or casual-dining brands. Midscale concepts did receive higher average ratings than quick-service chains for personality, reputation and values.

Responsiveness—the Key to Success

Highly satisfied consumers return to a restaurant to repeat their satisfying experience. For this reason alone, it is critical for operators to understand what makes their satisfied customers satisfied. No restaurant has perfect execution, but it's important for operators to know which touchpoints have the greatest impact on their customers' satisfaction and thus deserve the most attention. While customers' rankings of what's important differ from segment to segment and from restaurant to restaurant, it's important to focus on the factors with the highest numbers—starting with food attributes, then service and hospitality.

Consumer Research

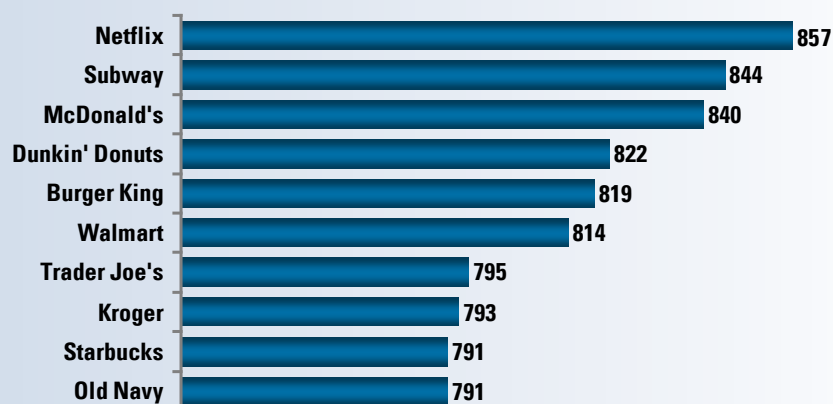
Data Briefs Impacting Away- from-Home Dining

By Anne Mills, Research Analyst

'Tis a gift to be simple: QSRs rank high for ease, transparency, innovation and communication.

Quick-service restaurants are commonly associated with fast service and convenience, so it's not surprising that many of the brands that consumers rate tops for simple, hassle-free interactions are QSRs. U.S. consumers polled for Siegel+Gale's first Global Brand Simplicity Index rated Subway as one of the simplest brands they deal with. Also ranked among the Top 10 were McDonald's, Dunkin' Donuts, Burger King and Starbucks. Globally, the Top 10 included McDonald's, KFC, Burger King, Pizza Hut, Starbucks and Subway. Research and brand development firm Siegel+Gale polled more than 6,000 consumers in China, Germany, India, the Middle East, the U.K. and the U.S. to determine the rankings. Siegel+Gale defines simplicity as ease of understanding, transparency, caring, innovation, usefulness of communications, and how easy the interactions with the brand are in comparison to the brand's competitive set.

Top 10 Brands on the U.S. Global Brand Simplicity Index



Source: Siegel+Gale Global Brand Simplicity Index

Youth and coffee: buzz up. The National Coffee Association's 2011 National Coffee Drinking Trends study found that 40% of consumers in the 18–24 age group report drinking coffee daily—a return to 2009 consumption levels from a daily consumption rate of 31% in 2010. Among consumers aged 25 to 39, more than half (54%) say they drink coffee daily, up from 44% in 2010 and about even with 2009's 53%. Technomic's 2010 *Beverage Consumer Trend Report* found that recent increases in purchases of coffee, and specialty coffee in particular, are being driven by younger consumers. Of consumers aged 18–34, 16% reported that they are purchasing regular coffee at restaurants and foodservice operations more often today than they were two years ago; 14% are purchasing more cold or iced coffee, and 13% are purchasing more specialty coffee. Among those 35 and older, in contrast, 14% said they are drinking more regular coffee, only 6% are purchasing more iced or blended coffee and just 5% are seeking out more specialty coffee.

Technomic Insight

Consumer demand for more information on nutrition content of restaurant meals appears to be worldwide.

An organic future? Almost six out of 10 consumers (57%) say they would be more likely to visit a restaurant that offered food grown or raised organically or in an environmentally friendly manner, according to the National Restaurant Association's 2011 Restaurant Industry Forecast. The attraction is even greater among younger consumers, perhaps signaling that trends to organic and sustainable foods will grow in coming years. Fully 65% of consumers aged 18–34 say they would be more likely to visit a restaurant if it featured organic or environmentally friendly fare. Findings from Technomic's *Healthy Eating Consumer Trend Report* show a similar youth skew regarding sustainably sourced foods: three-fifths of consumers aged 18–34, compared to just half of consumers aged 35 and older, consider food described as sustainable to be more healthful.

Consumers worldwide want to know what's in their food. As national menu labeling requirements for restaurant chains take effect this year in the U.S., consumer demand for information about food ingredients in restaurants appears to be widespread across many nations. For its new World Menu Report, Unilever surveyed 3,500 diners in the U.S., U.K., Germany, China, Russia, Brazil, and Turkey who eat out at least once a week. Consumers in all of the countries surveyed said they wanted to know more about fat, calories, preservatives and food additives in restaurant food. Chinese consumers also said they'd like to know more about vitamins and protein; diners in the U.K. and U.S. were more interested in information about sodium content. About two-thirds of U.S. consumers said they'd like to see menu labeling, including fat and calorie content, and almost as many said they would choose more healthful meals if they had more nutrition information. Of consumers surveyed for Technomic's *Generational Consumer Trend Report*, about half said it was very important to have access to information about overall fat content, trans fat, calories and sodium in the foods they eat.

Rising food prices worry low-income Americans. Food prices are on the rise, and a new national survey by Hart Research Associates reveals that a quarter of all Americans are worried about having enough money for food in the coming year. Fully three-fourths of low-income families surveyed reported difficulty affording protein, fruits and vegetables. A quarter of those polled—and almost four out of 10 Hispanics—said they are very or fairly concerned about being able to afford food at some point in the coming year. The survey of 1,500 adults was commissioned by the Food Research and Action Center and Tyson Foods. Technomic polling also indicates that many consumers, particularly those with limited incomes, consider price a deterrent to purchasing healthful foods. About a third of consumers with

annual household incomes under \$50,000 strongly agreed that it costs too much to purchase healthy options at stores, compared to a quarter of consumers with incomes over \$50,000.

With just getting enough food a priority, it may not be a surprise that another recent study found that families dining at fast-food restaurants in low-income neighborhoods are little affected by calorie labeling in the restaurants. The study, led by Brian Elbel, assistant professor of medicine and health policy at New York University School of Medicine, surveyed with children, teens and adults dining at four major fast-food chains in low-income areas of New York City before and after implementation of a menu labeling mandate. More than half of teens and adults said they noticed calorie labels in the restaurants, but only 9% of teens and 16% of adults said the information made any difference to their behavior. Receipt analysis confirmed that the number of calories purchased did not change.

Greenest of the green. Greenopia, which compiles lists of eco-friendly companies, has released a list of those it considers the most sustainable restaurant chains, based on green building design, supply chain practices, recycling/take-back programs and sustainability reporting. Receiving top marks—four green leaves—were fast-casual chains EVOS, offering “better for you” burgers; Le Pain Quotidien, a European-style bakery café; and Pizza Fusion, a mostly-organic pizza concept. Receiving three green leaves were Burgerville, Chipotle Mexican Grill, Peets Coffee & Tea and Starbucks. McDonald’s received two leaves, beating out one-leaf chains Panera Bread, Sharky’s Woodfired Mexican Grill, Subway and The Coffee Bean & Tea Leaf.

Technomic Insight

Technology is a third force complicating the relationships between consumers and the restaurants they patronize.

Social media deals and technology are altering restaurant behaviors.

Consumers are turning to technology as part of their restaurant decision-making process, according to an online survey of U.S. and Canadian consumers conducted by ParTech. Real-time order influence works; more than six out of 10 of those polled said they would consider changing their order based on a specific discount, combo or promotional offer made during the creation of a restaurant order, via either POS terminal or server. A very successful shift to targeted restaurant promotions is under way; more than half report that they have chosen a restaurant based solely on an online advertisement or email offer. Social networks are changing restaurant marketing forever; more than four out of 10 say that user-generated reviews sites such as Epinions, OpenTable, Yelp or Zagat have encouraged them to try a new restaurant. Younger consumers respond to different influences. For instance, they like to interact with restaurants via their cell phones; fully 72% of 16- to 24-year-olds were interested in receiving location-based restaurant offers on their mobile phones.

Technology creates proportionally more opportunities with frequent diners, the study found. For instance, two-thirds of those who dine away from home at least five times a week say they would like to see servers using mobile ordering technology.

Social Media and Technology Opportunities for Restaurants



Source: 1,277 consumers in the U.S. and Canada

Source: ParTech, Inc., *The Dining Customer's View on Emerging Technologies & Restaurant Operations, 2011 Benchmark Study*

Foodservice Happenings

Hot Trends in Hispanic Cuisine

By Aimee Harvey, Editor

Technomic's new *Hispanic Consumer Trend Report* reveals the shifts in consumer preferences and behaviors among the growing Hispanic population, and how Mexican, Cuban and other Hispanic flavors continue to influence and enrich the food culture in the U.S. This informative study on Hispanic consumers discusses how U.S. restaurant menus are showcasing regional Hispanic fare, in order to reveal new flavor applications—and to highlight the Hispanic ingredients that are becoming more mainstream and those that are currently emerging.

A look at Hispanic cuisine on chain menus reveals trends around rustic street foods, authentic, regional Mexican preparations, interesting new “pan-Latin” sandwiches and healthful menu offerings.

The Appeal of Street Food

Mexican-style “street” foods—especially small, simply assembled tacos—have gained traction at the chain level. Part of their popularity is due to the trends around smaller-portioned foods and flavorful ethnic snacks. Street foods are also an extension of food-truck movement, which is itself an evolution of neighborhood taco/tamale carts and other globally inspired foods sold curbside in big cities.

Recent Hispanic street-food additions to the menu include Taco Cabana's Street Tacos, a fall 2010 limited-time offering. The tacos featured grilled, marinated steak, fresh-cut cilantro and diced onion, served open-faced inside two corn tortillas. Other recent examples of street food on chain menus include:

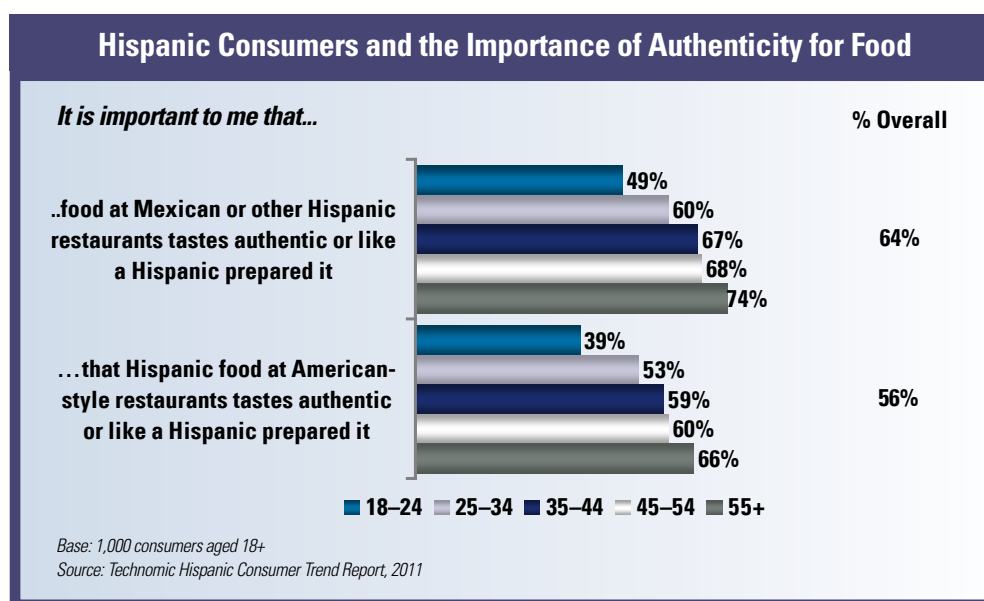
- **Mexico City Street Corn**—a side-item accompaniment to steak, chicken or pork tacos (*Dos Caminos*)
- **Street-Style Mini Tacos**—seasoned steak, chicken or roasted pork served open-faced on three mini corn tortillas with grilled onions and Jack cheese (*On the Border Mexican Grill & Cantina*)

- **Street Taco**—carnitas, chicken or steak mini taco with guacamole and cilantro on a corn tortilla (*Rubio's Fresh Mexican Grill*)
- **Pork Carnitas Street Tacos**—also available in chicken (*TacoTime*)
- **Leo's Street Tacos**—seared beef tenderloin, diced cucumbers, avocado, cotija cheese and a drizzle of chipotle cream sauce (*Z'Tejas Southwestern Grill*)

Authentic Regional Mexican Fare

Americanized versions of Mexican foods have catapulted the country's cuisine into widespread popularity. Most Americans are very familiar with this style of Mexican or Tex-Mex food, and many have claimed it as a favorite. But as more consumers become food-savvy, they are increasingly seeking authentic global preparations and ingredient combinations that not only are out of the ordinary, but truly reflect Mexico's culinary traditions.

Having been exposed to Mexico's regional cuisines via the Food Network and celebrity chefs like Rick Bayless, many of today's consumers may be more interested in regional Mexican foods. The regional Mexican preparations of Baja California, Jalisco, Oaxaca, Sonora, Veracruz and the Yucatan peninsula may resonate with consumers who enjoy standard Mexican or Tex-Mex food, but want to try something new. As the chart shows, Hispanic Americans are leading the way in demanding authentic regional fare.



Over the past several years, operators have made room for regional Mexican fare on the menu, starting with a simple, classic Baja-style offering—fish tacos. A longtime taco-stand favorite on the West Coast, Baja-style fish tacos, which top battered fish (usually mahi-mahi) with crunch cabbage slaw and a squeeze of lime) now appear on chain restaurant menus from coast to coast. California Pizza Kitchen recently made the claim to *Nation's Restaurant News* that its customer base has grown based “just on the fish tacos.”

Technomic's MenuMonitor, our exclusive online trend-tracking resource, provided other examples of Mexican offerings that included a mention of a specific region of Mexico, either in the name of the item or in its menu description:

- **Oaxaca Camarones con Tocino**—shrimp filled with Oaxaca cheese and jalapeño, wrapped in smoked bacon (*Cantina Laredo*)
- **Tilapia Veracruz**—tilapia sautéed in a Spanish sauce, topped with mozzarella, avocado and chives, drizzled with poblano sauce and served with basmati rice and grilled asparagus (*Claim Jumper*)
- **Yucatan Shrimp Cocktail**—Gulf shrimp, mango, jicama and avocado in a tomato, orange and lime sauce (*Coastal Flats*)
- **Classic Baja Fish Tacos; Spicy Avocado Fish Tacos**—fish-taco LTOs; both varieties feature Alaskan whitefish, yogurt sauce and house salsa (*El Pollo Loco*)
- **Tacos de Jalisco**—entrée of three tacos, each basted with chili adobo and browned, all atop a banana leaf; choice of chicken or pork, made with garlic guajillo chiles, cloves and oregano (*El Torito*)
- **Sonoran Beach Tacos**—three flour tortillas stuffed with seasoned, grilled chicken, rice, pico de gallo and fresh limes (*Macayo's Mexican Kitchen*)

Technomic Insight

Latin American ethnic sandwiches like Cubanos and arepas have potential to gain favor on U.S. menus.

Pan-Latin Sandwiches

Pan-Latin-style sandwiches are a new trend in the making. For example, Cuban sandwiches—the traditional grilled, pressed staple of ham, pork, Swiss cheese, pickle and mustard long popular in Cuban communities—now appears on chain restaurant menus. Bahama Breeze, Bar Louie, Hooters, Jimmy Buffett's Margaritaville, Tony Roma's and Yard House, to name a few, all list either classic or updated versions of the Cuban.

Now that many consumers have embraced this sandwich variety, other traditional Latin sandwiches are on the forefront, including arepas—small Colombian and Venezuelan cornmeal breads that can be stuffed with just about any kind of ingredient, including eggs, meats, seafood, chicken, cheeses, salads and fruit preserves. Arepas are a trend of note not only for flavor attributes, but also because their small size, affordable price and authenticity as a rustic ethnic food are appealing, in much the same way that Spanish tapas have been in recent years. To date, street festivals and niche Hispanic neighborhood bakeries may be the only place that most big-city food lovers can find arepas in the U.S., but foodies in New York City have latched on to Caracas Arepa Bar, a two-unit chain specializing a wide variety of arepas along with Caribbean, Central American and South American rums. The success of the original unit in Manhattan's East Village led to the recent launch of a second location in Brooklyn.

Healthy Hispanic

The past year has seen a number of major Hispanic-centric restaurant chains marketing healthful menu offerings. For some operators, this means marketing the traditional health cues of low-calorie, lowfat foods. For others, locally grown, all-natural or humanely raised ingredients are a better fit.

In addition to its lighter, lowfat Fresco Menu, Taco Bell preferred to concentrate on one of the industry's most pressing nutritional concerns—sodium levels. Jumping ahead of the menu-labeling-law curve, Taco Bell began testing a reduced-sodium menu at some 150 locations in the Dallas-Fort Worth area toward the end of 2010. Taco Bell says it lowered sodium by 23% across its entire regular menu, and

added spices and other ingredients to items on the reduced-sodium menu to compensate for the taste of salt. Taco Bell says that it has not received any complaints about the test menu and that a systemwide rollout is likely in the future.

Chipotle Mexican Grill spent the past year tying local, natural and humanely raised ingredients to quality and better nutrition. In mid-2010, the chain announced two initiatives: sourcing all the beef that goes into its spicy barbacoa from naturally raised cattle, and the expansion of its use of locally grown produce. The fresh-Mex chain, which has already switched to using naturally raised beef for its steak, estimates that it sold 75 million pounds of naturally raised meats in 2010. Additionally, Chipotle secured a network of more than 50 farms supplying some of the romaine lettuce, green bell peppers, jalapeños, red onions, tomatoes and/or oregano served at its nearly 1,000 units nationwide.

Other chains bypassed trendy issues like sodium and took the most traditional approach to healthy Mexican fare. Pollo Campero introduced a new line of low-calorie meals that featured grilled chicken instead of the chain's signature fried chicken. The new meals contain no more than 505 calories each.

Taco Cabana has also gone the low-calorie route, recently unveiling its new line of 4 Under 400 Calorie Cabana Bowls in early 2011. The four bowls—Fajita400, Salad400, Taco400 and Veggie400—each contain 400 calories or less. Customers may choose to customize their fajita, salad or taco bowl with choice of chicken or beef.

Hispanic Isn't Just Mexican

As consumers delve deeper into Mexican fare and its regional and healthful variations, will other Latin American cuisines be far behind? There's a continent and a half out there to draw from. Grilled meats and accompanying sauces like chimichurri are appealing elements of Argentina's cuisine, and traditional barbecued meats of southern Brazil form the basis for steakhouse concepts worldwide. Red wine and seafood, particularly fresh fish, are the cornerstones of Chilean food traditions. Peru's cuisine reflects not only indigenous and Spanish influences but also Arab, African, Chinese and Japanese immigrants; the national dish, ceviche, is similar to Japanese sushi or sashimi, and Peruvian food is unique in its ability to shine with Asian ingredients. Don't be surprised if one or more of these cuisines becomes The Next Big Thing on U.S. restaurant menus.

Horizon Scan

Trend or Aberration?

By Charles Baldwin, Research Analyst

Reimagining the hot dog. In search of the next big thing, chefs from all over the country are directing their creative energy towards reinventing the noble hot dog. The latest examples of these grown-up hot dogs include the duck sausage dog served on a bed of paté with red wine-infused mustard at Brats Dogs & Weiners in New York City. At The Slaw Dogs in Pasadena, CA, a Thai-inspired dog features chicken sausage, spicy peanut-coconut satay dressing, cilantro-carrot slaw, crushed peanuts and sriracha-infused aioli. These culinary endeavors aren't isolated to coastal regions alone. Chicago restaurateurs are also getting in on the action, conjuring up a host of imaginative encased meats. Franks 'N Dawgs offers a Spicy Carnitas dog with andouille, pumpkin purée, beer-braised pork, roasted green chiles, cinnamon

crema, pumpkin seeds, orange and cilantro, and Westminster Hot Dog purveys a Steak Fromage wiener featuring a rib-eye steak sausage with a cabernet reduction and Boursin cheese.

Veggie burgers get some respect. Lately, it seems that every new burger concept has its own take on the *better* veggie burger, notes the *New York Times*. Los Angeles' Umami Burger chain offers an Earth Burger featuring a mushroom-and-edamame patty. Chicago-based burger chain Epic Burger serves a vegetarian burger with a portobello mushroom cap in the place of a meat patty. "I don't think somebody should feel like they're eating an inferior burger," says Josh Capon, owner and executive chef at Burger and Barrel in New York's SoHo. Capon's meatless burgers feature a crushed-chickpea patty between halves of a multigrain bun.

Testing...testing. According to a recent report by *Restaurant Hospitality*, D.C. Sarnies, a new casual-dining concept in Deerfield, IL, is attracting national attention because it aims to serve primarily as a research and development kitchen for bread manufacturer Highland Baking Company. With an expected check average of \$12-\$15, the restaurant could be a profit center for Highland Bread, but the company doesn't see D.C. Sarnies as its entrance into the restaurant industry; instead, the company is opening the restaurant "to be better at the baking business," says Stu Rosen, general manager and vice president. D.C. Sarnies may showcase a rotating roster of guest chefs, including some from high-profile chains.

Jet-setter cuisine. In the past, grabbing a meal at the airport meant dealing with limited options and a very basic menu mix. This is no longer the case as gourmet offerings are rolling out at large airports across the country. For instance, Chicago's O'Hare International Airport recently became the home of Tortas Frontera, a new Mexican concept from local chef and restaurateur extraordinaire Rick Bayless. On the menu are grilled torta sandwiches with fillings such as smoked pork loin, garlic shrimp, beer-braised beef short ribs and pork chorizo. Jet Blue's Terminal 5 at New York's JFK International Airport offers high-quality options such as sushi concept, Deep Blue Sushi, and a new-age Italian restaurant, Aeronuova. Customers of Deep Blue Sushi can pick from a menu that includes crispy lobster rolls, Kobe beef rolls and cooked options such as red-miso-glazed Chilean sea bass and pad thai.

Dirt won't hurt. Contemporary chefs looking for a new way to impart flavor into their culinary creations are searching beyond familiar sauces and spices. Instead many find themselves arriving at an altogether different solution: edible "dirt." While powders—such as onion or curry—and crumbles—such as cookie or bread—may be considered staples of the ingredient mix, comestible dirt is a relatively new entry into the culinary world. Examples of this emerging cuisine include the black brioche crumbs and powdered tomato that make up the dirt on the garden salad plate at Corton in New York City, and the black dirt made from chicory root and dried potatoes on a dish called Into the Vegetable Garden at fine-dining concept Manresa's in Los Gatos, CA.

Technomic Insight

Two trends that may have staying power: hot dogs with gourmet ingredients, and chefs' signature veggie burgers.

Two are better than one. Dual-branded restaurants have been a trend for some time in the limited-service arena, but now their economies of scale are leading to a boom in twins in the full-service realm as well. In a surprise move, Darden Inc., the casual-dining juggernaut behind Olive Garden and Red Lobster among other concepts, announced that it would develop dual-branded units featuring both a Red Lobster and an Olive Garden under the same roof. Plans call for an 8,000-square-foot design featuring separate entrances, separate dining rooms and a shared kitchen for the two

concepts. Visitors to both restaurants will have access to a common lobby/bar area. Independent full-service restaurants are jumping onto the same idea. Chicago chef and restaurateur Michael Kornick recently opened his second restaurant with restaurant guru David Morton. The new entrant, Fish Bar, adjoins the duo's DMK Burger Bar, with shared staffing and shared back-of-house facilities. And in the Cleveland Park area of Washington, DC, restaurateur Ashok Bajaj made the decision to knock down the wall separating his two highly regarded restaurants, Ardeo Modern American Cuisine and Bardeo Wine Bar, to form Ardeo + Bardeo.

True grits. According to the *San Francisco Chronicle*, chefs in the Bay Area are experimenting with new menu items that feature Southern-style grits. At Mission Beach Café, sous chef Ron Silverberg introduced a dinner appetizer including pork belly, pancetta grits, greens and a poached egg with maple jus. Chef Erik Larson of 900 Grayson began offering Carolina cheesy grits as an alternative to more common potato-based breakfast sides such as hash browns or home fries. The grits are also served as part of the Steak & Eggs brunch item with two eggs, a seared flank steak and a slice of toasted sourdough bread.

Sunchokes brighten up menus. The latest root vegetable to catch the attention of chefs is the sunchoke or Jerusalem artichoke. Sunchokes have been appearing on the menus of leading independent restaurants in a wide variety of applications ranging from simple garnishes to salads to puréed soups. According to chefs, sunchokes deliver a burst of flavor and a natural sweetness that enhances any dish. Fine-dining restaurants such as New York City's Gilt and SHO use them as an accompaniment to center-of-the-plate entrées such as venison and pork belly. New York's Savoy and Ford's Filling Station in Culver City, CA, put the spotlight on the tuber, serving it with a few garnishes as a soup or chowder.

Let's drink to beertails. According to a recent story in *Nation's Restaurant News*, mixologists around the country are experimenting with mixed drinks featuring craft beers as a main element. Although mixing beer is not an entirely novel idea—classics such as black and tans, shandies and others have been on the menu for years—these innovative concoctions are nothing like their well-established counterparts. The new beertails feature high-quality mix-ins such as liqueurs, bitters, spices and syrups. Alchemy in San Diego features several house beertails including The Saint, combining a smoked porter base with Earl Grey tea, gin, vermouth and St. Germain liqueur. New York City Mexican restaurant Mayahuel offers the Luna y Sol, featuring a mix of raspberry-tea-infused tequila, ginger, lime and Modelo Especial lager.

Consumer Food Trends is prepared six times a year by Technomic, Inc. to assist food industry professionals in gaining early insights from scattered and seemingly unrelated events that impact consumer perspectives on food, menu and taste trends. Reports monitor the entire food industry with special attention to restaurants and foodservice, emerging specialty channels and the periphery of the supermarket where future foods are more likely to first appear. Annual subscriptions are \$495. We welcome your comments.

Rita Negrete, Senior Editor

Sara Monnette, Director, Consumer and Market Research

Aimee Harvey, Editor

Kelly Weikel, Research Manager

Charles Baldwin, Research Analyst

Anne Mills, Research Analyst

Abigail Dean, Senior Art Director

Teri Schroeder, Production Manager

Katy Puma, Graphic Designer

Technomic, Inc. believes that its sources of information are reliable but does not assume any responsibility for the accuracy or comprehensiveness of the information published. No part of the publication may be reprinted, redistributed or put into an electronic or information retrieval system without prior permission of Technomic.