

Menu Flavours - UK - February 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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“The interest in trying new dishes as hobby further signals the importance of unique dishes in driving interest particularly among those who see themselves as ‘foodies’ and underlines the role of dining out as a leisure activity, competing with other experiences.”

– Helena Childe, Senior Foodservice Analyst

This report looks at the following areas:

- Tasting plates offer operators a way to create standout and add interest to pork dishes
- Standout dishes offer a means for brands to drive buzz and drive up spend per head
- Cocktail innovation is high on the agenda as operators look to offer something different

Despite momentum in the economy in 2014 and rising consumer confidence, noticeably fewer people are using foodservice outlets at least once a fortnight. As such, menu innovation is needed to re-ignite consumers’ willingness to spend on this category.

Whilst the rise of the ‘foodie’ is nothing new, in recent years, the concept has developed from the previous exclusive image of foodies as food critics or snobs to a more inclusive concept that pitches everyday diners as food enthusiasts. Social media has played a key role in this democratisation of the foodie as consumers have used platforms such as Facebook and Twitter to share, and often boast, about their restaurant experiences. ‘Stunt’ food creations such as doughnut burgers and unusual drinks serves looking to create the ‘wow’ factors such as cocktails in miniature bathtubs, top hats and milk bottles are playing into this.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Standout dishes offer a means for brands to drive buzz and drive up spend per head

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Cocktail innovation is high on the agenda as operators look to offer something different

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Trend Application

Return to the Experts

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Prove It

Brand Intervention

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Key points

Squeezed incomes have continued to affect spending behaviour

Consumers' incomes should rise and stretch further in 2015

Figure 7: Consumer spending priorities (after bills), January 2011-January 2015

Using 'fun' to distract from frugal considerations

Flavour Trends

Key points

From single-focus venues to ingredient champions

Other trends

Smoked meat

Smoky flavours feature across the menu

Flavoured salts and butters

Meat jams and spreads

Bacon jam

Nduja

Healthy Eating Trends

Key points

Healthy dining trends

Lunch

Vegetables as carb alternatives

Vegetable and fruit juices

Cold pressed and made in-house should boost quality perceptions

Smaller size can cater to trial

Coconut as an ingredient

Cow's milk alternatives

Alternative grains (eg quinoa)

US trends suggest potential for wider use of quinoa

From protein to paleo diets

High-protein labels on the rise particularly in the snacking segment

Palaeolithic dining

Paleo snacks on the rise

Paleo restaurants and food stalls

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Vegetable trends

Kale and cauliflower

Kale

Cauliflower

Beetroot

US influences

Corn on the cob

Pickled and fermented vegetables

Pickled vegetables gain from the BBQ trend

Ethnic cuisines boost fermented vegetables

In-house pickling can offer a USP

Sour drinks

Fish and Seafood Trends

Key points

Fish

Figure 8: Consumer perceptions of fish, November 2014

Ethnic pairings can show fish as exciting

Interest in ethnic flavours may help raise the profile of seafood further

A modern take on seafood

Lobster

Lobster specialists

Lobster subs

Crab

Drinks Trends

Key points

Long-term decline in out-of-home drinking is pushing operators to create more dynamic beverage ranges

Figure 9: Menu enticements related to cocktails, November 2014

Play Ethic extends to drinks

Drinks presentation trends continue unabated

Sense of the Intense

Wild cocktails/hedgerow cocktails have fresh appeal

Freshness and in-house infusing should lend longevity to hedgerow cocktails

Shandy cocktails benefiting from the growth in craft ales and sodas

Mix-your-own cocktail – Big-ticket options

Classics with ever more dramatic twists

Pre-made cocktails look to shake off their inferior image

Aged cocktails and vintage spirits

Craft and canned beer

Craft beer can play to a venue's themes

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Handcrafted sodas

The Consumer – Frequency of Eating Out

Key points

Nearly a third of diners eat out once a week or more

Figure 10: Frequency of eating out, November 2014

Figure 11: Frequency of eating out, November 2013 and November 2014

The role of small plates on flexible dining menus

The Consumer – Perceptions of Ingredients

Key points

Perceptions of ingredients

Figure 12: Consumer perceptions of selected ingredients, November 2014

Chicken enjoys strong links to value for money

Demonstrating the versatility of pork

Using tasting dishes to introduce less familiar ingredients and cooking techniques

Beef still has to work to prove its added value

Figure 13: Consumer perceptions of ingredients, November 2014

The Consumer – Willingness to Pay More for Dishes

Key points

Ethical ingredients

Figure 14: Willingness to pay more for ethical ingredients, November 2014

Local sourcing can be used to build brand trust as well as increase the appeal of individual dishes

Has globalisation killed off the notion of seasonal ingredients?

Organic labels resonate with younger consumers, whilst local products appeal to over-55s

Creating standout dishes to drive buzz and/or drive up spend per head

Figure 15: Willingness to order and pay more for dishes based on selected qualities, November 2014

Younger consumers are particularly drawn to menu innovation

Media-worthy dishes appeal to more than half of diners

'Stunt' food

In-home NPD is increasingly novel too

US examples

Secret menus/'hack the menu' items

The Consumer – Interest in Food and Drink Menu Enticements

Key points

World cuisine opportunities

Figure 16: Menu enticements, November 2014

Bunny chow

Asian steamed bread buns

Arepas

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Next steps for Americana Mania

Pulled pork/chicken is now an established mainstream food trend

There is an increasing focus on American regional styles

Chicken & waffles can help to create standout

Aligning chicken & waffle with other 'brinner' dishes

There's more to American side dishes than just mac 'n cheese

Mac 'n cheese

Cornbread

Canadian Poutine

The Consumer – Attitudes towards Eating Out

Key points

Menu innovation and social media developments have helped to cultivate everyday 'foodies'

Figure 17: Attitudes towards eating out, November 2014

Blurring the lines between everyday and special-occasion dining

'Safe adventure' is a key driver for younger diners

Looking to customisation for 'safe adventure'

Older diners hold true to more traditional dining constructs

Localism is a key selling point for older diners

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