

TRICKLE-DOWN EFFECT: KEY TREND LEARNING FROM FINE DINING MENUS AND CONSUMERS

Traditionally, food trends start at the most creative fine dining restaurants, work their way through the restaurant segments and finally land on grocery store shelves. While this is not true of all trends, it is important to monitor

Traditional Food Trend Movement



fine dining menus and their approach to changing consumer food attitudes and purchasing behavior to spot the next trickle-down trend. In this report, Mintel examines key fine dining menu trends along with consumer behavior and attitudes toward fine dining that highlight menu development opportunities for the broader restaurant industry.

A Reflection on the Times: Consumers are driving trends more than ever

In order to understand fine dining, or any trend, it is important to understand current consumer behavior. The economic downturn has caused consumers to shift their eating behavior, including dining out less and spending less when dining out. Mintel Inspire describes these behavioral shifts as Resilience; the ability to recover from misfortune or change and with a spirit of prevailing optimism. However, resilient consumers still have concern for the future. As a result, people will continue to do things, like dining out, in different ways.

Fine dining has taken a big hit and has had to adjust to new consumer dining out needs probably more-so than other segments. While quality is still the most important attribute to fine dining, consumers want to see more old-fashioned/comfort foods and these menu items have been observed through Mintel Menu Insights.

Therefore, it seems that menu trends are now driven more by consumer needs and desires than ever before.

Starting Your Meal

Despite spending less at restaurants, consumers are still ordering appetizers. Seventy-seven percent of consumers order appetizers in fine dining restaurants. Appetizers are a great way to introduce consumers to the quality of your food and inventiveness of your menu while boosting the average check. Appetizers are also an excellent place to introduce consumers to new or exotic ingredients that they may be wary of when committing to in an entrée. Appetizer portions in fine dining restaurants are typically smaller (compared to other segments), but still big enough for sharing, so the risk involved in trying something new is limited but the experience is limitless.

Salad Starters

When it comes to top appetizers ordered in fine dining restaurants, salad tops the list; 43% of consumers who order appetizers in fine dining restaurants will order a salad. Salads are a light, attractive starter that stimulate one's appetite. They may also be popular because they are positioned as an individual appetizer. Salads in other segments are often limited to large entrées or side dishes.

Raising the Bar (Menu)

Fine dining is also appealing to more consumers through bar menus. Bar menus, usually available either at the bar for those who do not sit down to a meal or available after the key dinner time-frame, often mimic heartier appetizers found on casual dining menus, like mini burgers, flatbreads and fried appetizers. Bar menus can be a vital source of revenue for fine dining restaurants and casual dining. Bar menus that boast approachable prices and interesting foods not found on the dining room menu are key for bringing in after-work customers. These menus can also be positioned as late-night or snack menus for restaurants that serve alcohol. Innovative food and beverage choices, at superior quality, are still crucial in attracting new customers.

Variety is key. Bar menus should have both hearty and lighter options to appeal to different types of consumers. A sampler plate should be included. If possible, let the customer select which appetizers to include in the sampler to optimize customization.

Entrées: The heart of the restaurant experience

One way to truly tell consumers attitudes toward food have changed is to look at what consumers would like to see more of on fine dining menus. According to Mintel, the majority of consumers are looking for old-fashioned/comfort food on fine dining menus. It almost seems an oxymoron; restaurants that are known for their creative menus are being asked to produce more recognizable food. However, it shows that guests may

What diners say is important at fine dining restaurants

What's Important	%
Quality of the food	91
Food presentation	70
Fixed-price menu	47
A specific cuisine	44
Innovativeness of the menu	41
Extensive wine list	18

Type of Appetizer Ordered

Appetizer	%
Appetizer, salad	43
Appetizer, fried	29
Appetizer, soup	24
No appetizer	23
Other appetizer	17

Top 10 New Dishes Featured on Fine Dining Bar Menus

- | | |
|-----------------|------------------|
| 1. Oysters | 6. Salmon |
| 2. Cheese | 7. Chicken Tacos |
| 3. Taco | 8. Burger |
| 4. Steak | 9. Sashimi |
| 5. French Fries | 10. Mini Burger |



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want dishes they know are going to taste good and that invite a relaxing experience rather than one that requires a refined palate to appreciate. To put it simply, people want to be sure that they like what they order. What still draws the line between comfort food in fine dining restaurants and other restaurant segments is the quality, signature flavor and unique touch the restaurant infuses to make it their own.

Fine Fast Food

In 2008, Mintel observed the trend of Fine Fast Food which described celebrity chefs like, Rick Bayless, Bobby Flay, Masuharo Moritoto and Jean-Georges Vongerichten branching out with convenient, fast casual restaurants that promised to bring culinary flair to a broader audience. The movement continued and manifested itself with the burger. The list of chefs who have recently opened burger themed restaurants contains tons of culinary talent such as Daniel Boulud—DBGB; Emeril Lagasse—BAM (Burgers and More); Bobby Michael Kornick—DMK; and Michael Symon—BSpot. The expansion of renowned chefs in the burger space narrows the gap between casual dining and fine dining and pushes restaurants to upgrade their burgers.

Entrée Insight

- Operators of all segments can capitalize on the old fashioned/comfort foods.
- Instead of highly inventive dishes, look for classic dishes that can be prepared easily with a focus on quality.
- Slow-cooked dishes like fine dining's popular braised-spare ribs evoke quality because of the depth of flavor infusion, perceived care that went into the dish and tenderness of protein. Restaurants can take advantage of the lower cost of proteins that usually go into slow cooked dishes and produce a dish with an attractive price for both the consumer and operation—a win-win situation.
- Classic one-pot dishes like pot pie, macaroni and cheese, and beef and seafood stews make great comforting additions to any menu. These dishes can be entrees and also utilized as soup, appetizer and side dish options.
- Increase the quality of burgers with high-quality proteins, signature sauces creative toppings, unlikely cheeses and hearty breads. Fast food giants McDonald's and Burger King launched upscale burgers in 2009. Ruby Tuesday now has handcrafted burgers, Applebee's adopted Realburgers and Denny's introduced what they call "burger-joint inspired" burgers.
- One attribute to fine dining that is appealing is that the food can't easily be replicated by someone else. Adding a signature touch to chain menus will reflect a one-of-a-kind dining experience. This may be challenging for chain operations who strive for a consistent product across locations. The key is to work with your suppliers to produce an unique ingredient that can make your operation recognizable, like T.G.I.Friday's Jack Daniel's sauces that top entrees and burgers.

Sweet Endings

Desserts are a tough sell. It seems that many consumers are too full at the end of their meal to order dessert or don't want to spend any more money. This may be one reason why 24% consumers would like to see more bite-sized desserts on fine dining menus. Bite-sized desserts allow the customer to enjoy something sweet at the end of a meal without a big calorie or price investment.

Bite-sized or mini desserts have been noticeable for a couple of years but have not penetrated different restaurant segments as much as would be expected based on consumer interest.

Fast food and fast casual restaurant segments have always served smaller desserts in a sense. Many fast food restaurants will offer cookies, pie and ice cream in individual servings as part of their full menu and many fast casual restaurants follow suit and some contain bakery sections which are based on individually portioned desserts.

The lack of casual dining and family-midscale trend adoption may be because the desserts take up a lot of space and operations may simply not have the room on the menu to handle another SKU—because the margin may not be that great—and literally space in the restaurant to store small dessert ingredients.

Old-fashioned runs through desserts too

If there is one trend to take-away from fine dining and apply to other restaurants segments, that trend is old fashioned, comforting, nostalgic desserts. Like comforting entrees, these types of desserts fulfill an emotional need.

The top new desserts added to fine dining restaurants in 2009 include: fruit tarts (could also be called rustic handheld pies), sorbet, crème brulee, mousse, bread pudding and chocolate cake. These desserts are classically simple yet enhanced with the creativity of pastry chefs.

Menu items fine diners want to see more of

Menu Items	%
Old-fashioned favorites/comfort food	36
Locally grown produce	33
Sustainable seafood	32
Vegetables	32
Bite-size desserts	24
Grass-fed and/or free-range meat items	22
Vegetarian menu options	17
Cocktails	15
Beverage pairings	12
Craft/artisan/microbrew beer	12



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