



# future FOOD TRENDS

*Assessing Consumer Trends  
Impacting the Food Industry*

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## Consumers & Their Needs

### Polishing the Halo: The New Focus on Social Responsibility

*By Rita Negrete, Editor*

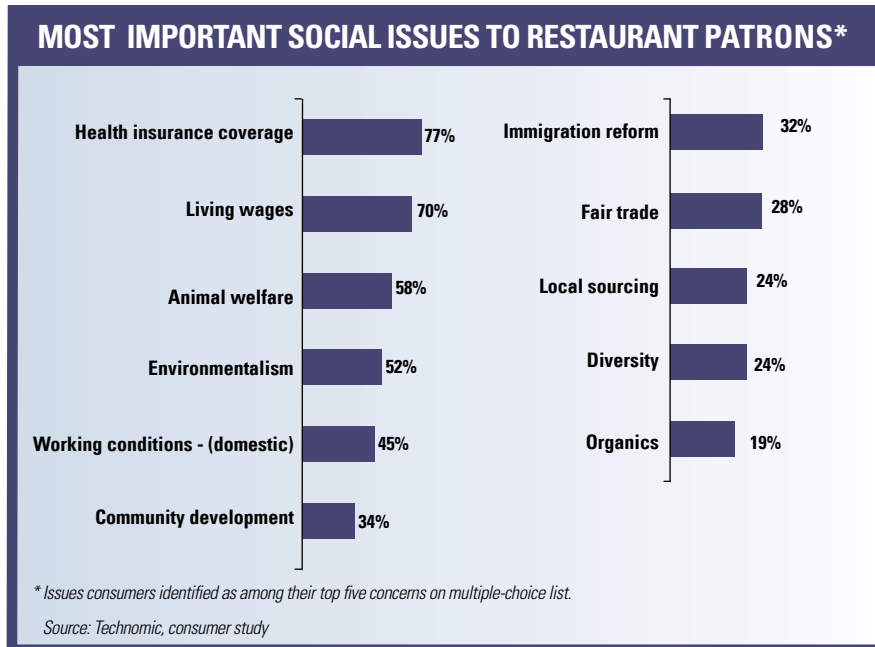
It might be unsurprising that **Burgerville**, with 39 units in the hip, eco-conscious Pacific Northwest, has built its reputation not only on its fresh, juicy burgers (made with grass-fed, additive- and hormone-free, locally raised and processed beef) but also on its socially virtuous practices: sourcing foods locally, offsetting energy use with wind power, recycling fryer oil for biodiesel and offering employees generous health benefits. It's a point of differentiation that plays well with the local audience.

But the fact that another burger chain—**McDonald's**—is paying increasing attention is a sure sign that the idea of corporate social responsibility has gone mainstream. Just in the past year, McDonald's has agreed to pay Florida tomato workers the penny-a-pound surcharge demanded by a farmworker organization; finally made the switch to trans-fat-free frying oil; added exercise bikes to new kids' play areas; overhauled its kids' advertising to focus on healthy foods; and issued U.S. and worldwide corporate responsibility reports. McDonald's sponsors an extensive "Good Works" section on its corporate website as well as a blog by Bob Langert, its vice president for corporate social responsibility, on issues ranging from fair wages to energy-efficient construction techniques.

Of course, neither Burgerville nor McDonald's would be interested in corporate social responsibility if consumers weren't interested. A number of recent developments have brought many of these once-obscure issues to the forefront of public awareness. These include high gas prices and the uncertainty of petroleum supplies, global climate issues, food-safety challenges, the obesity crisis and a new level of anxiety about workers' issues, from fair trade to wage equity to health insurance coverage.

And who is responsible for solving these problems? More and more consumers would say that the companies that serve them have an important role to play. That attitude is partly due to public interest groups, from the Center for Science in the Public Interest to Mothers Against Drunk Driving to the Rainforest Alliance, that have spent years demanding more from corporations; ordinary consumers are beginning to agree with them.

In response to this shift in levels of awareness and concern, Technomic this spring undertook a new study of U.S. consumers' attitudes toward corporate social responsibility in foodservice. The results: Consumers feel that corporate social responsibility issues are important, but they give restaurants only middling marks for their performance to date.



Restaurant users rated health insurance coverage, living wages and animal welfare as their top three concerns. More than three-quarters identified health insurance as a key issue, and seven out of 10 said living wages were important. (Most of this concern about working conditions was limited to U.S. workers; concern about fair trade and overseas working conditions was far less.) Majorities also named animal welfare and environmentalism as key issues.

Yet perhaps surprisingly, given all the attention currently being paid to organic foods and local sourcing, food-related issues (other than animal welfare) were far down the list of concerns. Fewer

than a quarter of respondents said they cared about local sourcing of foods, and fewer than one out of five said it was important for restaurants to offer organic foods. These issues, it seems, are still minority passions.

Technomic's finding about the importance of environmental issues to consumers is confirmed by a recent Hartman Group study, probing consumer attitudes toward sustainability issues. While only 54% of those surveyed said they were familiar with the term "sustainability"—and most of those couldn't come up with a clear definition when asked—the vast majority of consumers (93%) do make decisions in everyday life with a certain level of "sustainability consciousness."

## What Consumers Want from Chains

If consumers are changing their expectations of corporate behavior, what exactly are they demanding from the companies that serve them?

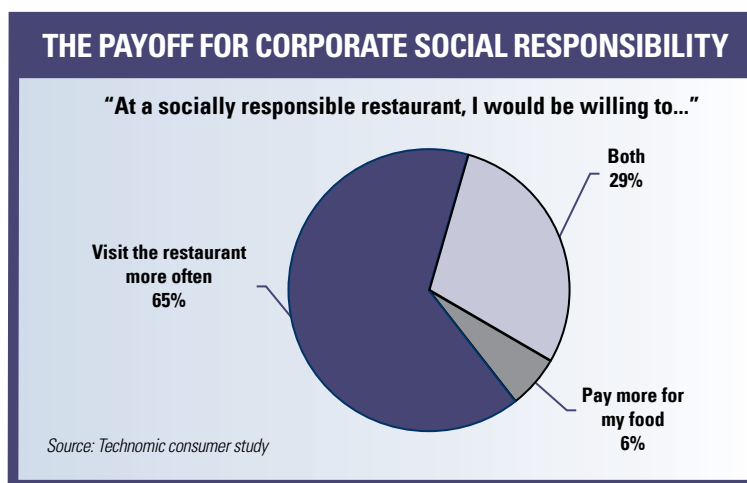
Almost nine out of 10 consumers surveyed said they would like the restaurant industry to more proactively address corporate social responsibility issues. Consumers in the survey didn't think restaurants were doing a particularly good job of this (although the restaurant industry scored slightly better than business in general). They gave independents a better score than chains, probably because independents are perceived to be more closely involved in their communities.

Yet some chains are perceived as doing better than the norm on social issues. These include not only **McDonald's**, but also **Applebee's** and **Subway**. These chains have often paid almost as much attention

to publicizing their good works (through blogs, annual reports, in-store signage and other forms of visibility) as they have to doing them. Additionally, all of them have publicized their emphasis on healthy fare as part of their menu positioning.

Some of the best publicized initiatives of recent months have been in the realm of animal welfare:

- **Burger King** announced it would purchase pork from pigs that are not raised in crates and give preference to chicken suppliers that kill the chickens humanely.
- **Wolfgang Puck's restaurants** will use sustainable seafood, veal from roaming calves and lobsters that have been removed from their ocean traps quickly to avoid crowded holding tanks; foie gras will be removed from menus.
- **Burger King, Burgerville, Wolfgang Puck, Bon Appetit Management, Ben & Jerry's and Trader Joe's** all announced they would use eggs from cage-free hens.



### But All This Costs Money . . .

None of these social responsibility initiatives amounts to free goodwill for restaurant chains. Being particular about sourcing animal products means that they will cost more. Offering employees higher wages or health benefits entails significant costs that will have to be absorbed or passed on to consumers. Energy-efficient units are more expensive to construct. So the first question for skeptical restaurateurs is: Who will pay?

Unfortunately, the answer is: Not the majority of consumers. Just over a third said that they would be willing to pay more for menu items at restaurants that follow socially responsible practices. However, a whopping 94% of consumers agreed they would consider visiting that restaurant more often. Since unit sales can be boosted by building traffic just as well as by notching up menu prices, that's very good news indeed.

Corporate social responsibility is becoming increasingly important for consumers in general and restaurant users specifically. Consumers are happy with chains that have taken the lead in addressing social responsibility issues, yet they believe restaurant companies could do much more.

Clearly, restaurant chains should identify and proactively address those social issues most important to their own customer base, whether that means switching egg suppliers, offering higher wages or looking into wind power (or all three). Companies that are able to polish their halos as champions of social responsibility can reap big rewards in increased visibility, traffic and customer loyalty. Those that fail to do so risk being perceived by their customers as out of date and out of touch.

Consumer Research

# Data Briefs Impacting Away-from-Home Consumer Dining

**CR1: Almost 20% of all consumer households have moved to their current residence during the past 15 months**, according to a newly released U.S. Census Bureau study. However, this ratio was down from 22.2% in 1960. Renters, not surprisingly, are more mobile, with some 38% moving during the prior 15 months. Also, as might be expected, younger Americans are more likely to change residence. More than two-thirds of all those under age 25 were found to be recent movers, the ratio dropping to a mere 5.8% for those aged 75-94. Geographic breakdowns show Nevada leading in percentage of residents who have moved recently, with Texas the leader in absolute numbers of households making a move.

**CR2: A new look at demographic change** beyond the oversimplification of “moving from the Rust Belt to the Sun Belt.” America’s major cities may now be divided into four new categories based on a combination of their geographic nature and demographic shifts. They are: 1) Coastal Megalopolises, with big domestic outflow and big immigrant inflow, including Chicago (on the coast of Lake

Michigan); 2) Interior Boomtowns, with big domestic inflow and smaller but significant immigrant inflow, including Atlanta, Las Vegas, and Dallas and Austin, TX; 3) Rust Belt Cities, with some domestic outflow and negligible immigrant inflow; and 4) Static Cities, with little domestic inflow or outflow and small immigrant inflow. Primarily intended for political analysis, the differing way to look at the shifts offers promise for marketing applications also. Source: *Wall Street Journal* analysis by *U.S. News & World Report* writer and blogger Michael Barone, which summarizes new findings about the fluidity of domestic population change. A more complete set of data is given at the Barone Blog on the *U.S. News* website.

## CURRENT POPULATION REALIGNMENT MOVES

Net population change 2000-2006

	Immigration	Domestic Inflow/Outflow	Total
Coastal Megalopolises	4.4%	(6.3%)	5.7%
Interior Boomtowns	18.5	8.1	4.0
Older Rust Belt Cities	(0.8)	(3.7)	1.4
Static Cities	5.4	0.0	1.9
Rest of the U.S.	5.2	0.8	1.3

Source: The Barone Blog ([www.usnews.com/usnews/opinion/baroneblog/](http://www.usnews.com/usnews/opinion/baroneblog/))

## RESTAURANTS OR SUPERMARKET HOT FOOD STATIONS?

Percent of consumers selecting:

FAVOR RESTAURANTS	Restaurants	Delis
Greater variety of food choices	76%	24%
More interesting flavors & ingredients	75	25
More new & innovative items	67	33
Better tasting food	78	22
More flavorful food	77	23
<b>FAVOR DELIS</b>		
More convenient to visit	29	71
Better (less expensive) pricing	23	77
<b>NO STRONG DIFFERENCE</b>		
Healthier options	45	55
More customizable	53	47
Fresher food/ingredients	47%	53%

Source: IDDBA Foodservice Opportunities Report

**CR3: Which to choose**—restaurant food or deli hot food section? The Foodservice Opportunities Report by the International Dairy-Deli-Bakery Association (IDDBA) explores various issues of consumer decisions and preferences between deli hot foods and restaurant meals. The deli option ranked high on favorable pricing and consumer convenience. Consumers, however, prefer restaurants when considering variety and flavor.

**CR4: A majority of Americans remain confident in the safety of the U.S. food supply** and express little to no concern about agricultural biotechnology. Nearly three-fourths (72%) of consumers polled by the International Food Information Council (IFIC) said they are confident in the safety of the U.S. food supply. When asked an open-ended question—“What, if anything, are you concerned about when it comes to food safety?”—most consumers mentioned microbial foodborne illness (36%) or improper handling (35%), while only 3% of all consumers cited food biotechnology. With multiple responses allowed, replies were:

• <b>Disease/contamination</b>	<b>36%</b>
• <b>Handling/preparation</b>	<b>35%</b>
• <b>Source/agricultural production</b>	<b>18%</b>
• <b>Chemicals</b>	<b>16%</b>
• <b>Packaging/labeling</b>	<b>15%</b>
• <b>Health/nutrition</b>	<b>6%</b>
• <b>Biotechnology</b>	<b>3%</b>
• <b>All other (combined)</b>	<b>4%</b>

**CR5: “The average Joe is greener than you think,”** says *Media/Post Marketing Daily*, reporting on a survey of 2,500 Wal-Mart customers. Buying patterns were examined for five “green” indicator products: compact fluorescent light bulbs, organic milk, concentrated or reduced-packaging liquid laundry detergents, extended-life paper products and organic baby food. New Hampshire Wal-Mart customers had the highest average adoption rate for these products, at more than 20% of customers. While 57% of respondents now say they are “extremely concerned” about the environment, only 11% say they are “extremely green” in their practices today; 43% of those in the Wal-Mart survey think they will be “extremely green” in the next five years. Overall, 62% of those in the Wal-Mart survey said they would buy more eco-friendly products if there were no price difference. Nearly half (47%) said they completely agree that buying environmentally friendly products makes them feel like a smart consumer, and 68% agreed that “even the small act of recycling at home has an impact on the environment.”

***Boomers are not planning on kicking back in their retirement years.***

**CR6: Vacation home sales rise again**, countering a general real-estate sales slump. The National Association of Realtors reports vacation home sales rose by 4.7% in 2006, to a record of 1.07 million units. Vacation homes purchased last year equaled 14% of the total market for new and existing homes, up from a 12% share for the prior year.

**CR7: Maturing Boomers seek active lifestyles.** A recent survey by Michigan-based developer Pulte Homes finds Boomers are not planning on kicking back in their retirement years. Researching more than 5,000 Boomer-age current and prospective customers, the survey found an interest in having everything, from strength training and cardio workouts to hang gliding and parachuting. Interest

in swimming ranked highest at more than 50% of respondents; golfing came a close second. Bowling ranked third at 34%. Team sports, including softball and soccer, accounted for 20% of votes. Interest in more sedentary activities was also in evidence, with 45% saying computers and the Internet were extremely important.

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**CR8: Boomers' priorities are changing.** That was the premise of a recent web seminar sponsored by the Food Institute, based on Hartman Group research. Among the findings:

- **Baby Boomers may say one thing but often do another.**
- **Mobility will continue to be in demand for all eating occasions.**
- **Demand for customized portion control will increase.**
- **Look for a declining reliance on external sources of authority.**
- **Vitality will increase in importance as a measure of overall health and wellness.**

Hartman Group consumer research also shows that Baby Boomers continue to be at the edge of many important health and wellness trends, as they are driven to learn more and change their behavior by issues of aging—ranging from creeping weight gain or the discovery that they have high blood pressure or high cholesterol, to learning of the premature death of a friend or family member. When making food choices, Boomers automatically presume that fresh foods are healthier and packaged or pre-made foods are less healthy. Yet even as they begin to limit what they eat, Boomers are seeking new flavor sensations and new cuisines.

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**Families seem to have a better chance of winning the lottery than of planning a vacation in advance and making it stick.**

**CR9: Grab-it-when-you-can vacations trend up.** Lifestyle rather than economic pressures are the top-ranking reason consumers wait until the last minute to book travel, a Priceline.com consumer trends survey finds. It seems that many couples and families stand a better chance of hitting the lottery than of planning a vacation weeks or months in advance and making it stick. Many short-notice travelers are just too busy to book their vacations far in advance. Of the 1,000-consumer sample, 30% said they were overscheduled as it is and can't plan more than seven days in advance, while only 13% cited personal finances as the reason for delaying their vacation plans. And 27% also believed they could find better travel deals by waiting to make their purchases. Separately, a *Wall Street Journal* report cites overscheduling by parents and children, combined with conflicting school vacation dates, as limiting factors in vacation planning.

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**CR10: Retirees and ethnic populations bring both new challenges and benefits to small-town America.** Non-metropolitan America is less ethnically diverse and older than the rest of the country, though demographic trends indicate changes lie ahead, reports the Economic Research Service of the U.S. Department of Agriculture. Rural and non-metro populations will continue to be older than



## TOP 10 HOT GROWTH MARKETS 2000–2006

St. George, UT	39.8%
Greeley, CO	31.0%
Cape Coral-Fort Myers, FL	29.6%
Bend, OR	29.3%
Las Vegas-Paradise, NV	29.2%
Provo-Orem, UT	25.9%
Naples-Marco Island, FL	25.2%
Raleigh-Cary, NC	24.8%
Gainesville, GA	24.4%
Phoenix-Mesa-Scottsdale, AZ	24.2%

Source: U.S. Bureau of the Census Estimates

metropolitan-area populations because a greater proportion of retirees are moving to non-metro counties, as well as because older people already account for a larger share of the population in the counties that are losing residents. Hispanic population growth has counteracted otherwise persistent population decline in many rural counties, especially in Midwestern and Great Plains states.

**CR11: St. George, Utah, tops hot-growth metros.** Newly released U.S. Census Bureau estimates highlight fastest growing urban areas. Urban areas, collectively, account for 82% of the total population. Each of these 10 metro areas grew 24% or more during the six-year period, marking focal points of growth in population—and restaurant business potential. Metro areas with the largest total numerical (rather than percentage) growth were: Atlanta-Sandy Springs Marietta, GA; Dallas-Fort Worth-Arlington, TX; Houston-Sugar Land-Baytown, TX; and Phoenix-Mesa-Scottsdale, AZ.

**CR12: Quality-of-life issues draw the creative class to exurbia and beyond.** In 2000 as in 1990, about 11% of rural/non-metropolitan counties ranked as “creative-class” counties, drawing artists, architects, writers and other creative types. Population data consistently shows that growth in “creative-class” population is an indicator of future job and economic growth. Pitkin County, CO (which encompasses Aspen) had the largest creative-class proportion of all non-metro counties in both 1990 and 2000.

Regional differences are more pronounced in non-metropolitan counties than in metropolitan creative-class counties. New England and the mountain areas of the West have higher shares of rural creative-class counties than the Midwest and South. Consistent with the thesis that quality-of-life considerations strongly motivate the creative class, counties high in natural beauty and outdoor activities are most likely to be creative-class magnets. (Sources: U.S. Census Bureau and USDA ERS).

**CR13: We are experiencing a cycle of disruptive innovation.** So says author Mary O’Hara-Devereaux, who spoke at the recent WorldatWork 2007 Conference in Orlando. “This is the most disruptive era since the Middle Ages and Renaissance,” she said. “Traditional ideas about work have become antiquated, yet companies have not yet been able to place new ideas in a workable framework.” O’Hara-Devereaux’s guidelines to the future include these maxims: If something is unsustainable in the long run, it will come to an end; If something big is going to happen, it has to start somewhere; People overreact to short-term ramifications of innovation, but underestimate its long-term effects; Beware of conventional wisdom because it is usually wrong. Taking conference attendees on a mental journey to the year 2020, O’Hara-Devereaux highlighted the impact of demographic changes already under way and predicted an acceleration of innovation.

## Foodservice Happenings

## Counter Revolutionaries

By John Hofer, Program Director

The sushi bars springing up in American cities are only one manifestation of a hot restaurant trend: counter seating.

The upscale counter-seating trend is much broader than just sushi bars. And it's not just that everything old is new again; counter seating is no longer just for coffee shops. On the contrary, trendy counter seating formats tend to be upscale, even haute cuisine, and they're targeted to a younger and more affluent demographic. Intensified restaurant competition has brought celebrity chefs to national attention; moving the chef "out front" from the kitchen is a logical progression for that new visibility. Chef's tables represent another step toward counter seating, showcasing restaurant staff for customer viewing and entertainment.

**The timing is right: Consumer trends favor the re-emergence of counter seating formats.** At home, lifestyle trends include casual entertaining and "great room" living, with areas for home entertainment, cooking and eating closely connected. Indeed, the living room may be divided from the kitchen only by a counter, often with barstools. In restaurants, exhibition kitchens, chef's tables and "made for you" service formats all break down the wall between front of the house and back of the house. And of course, counter service (with customers picking up their food order at the restaurant's counter, then taking it to a nearby table or off-premise to eat) is the hallmark of the modern quick-service format that has dominated the chain restaurant industry for decades.

Meanwhile, more and more people are dining out alone, whether at haute-cuisine dining emporiums, neighborhood cafés or quick-service places. Attractions of counter seating for those dining solo go beyond not feeling lonely or out of place at a two-top or four-top. Counter seating seems to promote casual sociability, even fleeting friendships, since it's usually socially acceptable to strike up a conversation with a nearby stranger. And for those who are single rather than merely solo, the restaurant counter can be a great place to meet potential dates.

Time pressures on consumers are intensifying, so the counter-seating option is attractive to those who want to make a more limited time commitment. Seating is immediate (or at least faster than at tables in the dining room), service is fast and direct, and the waitstaff brings the check quickly. For consumers on the run, counter seating renews the appeal of "eating out."

### WHAT COMMENTATORS SAY ABOUT TODAY'S COUNTER SEATING

*"The counter is where innovative dishes are served, top-tier prices are charged and in-the-know diners willingly sit elbow-to-elbow-to-elbow."*

*"Is there anything more fun than eating at the kitchen counter?"*

*"Who pays big bucks to eat lunch on a swivel stool, knee to knee with a fellow diner? Eating at restaurant kitchen counters has been a longstanding tradition here (San Francisco), even at gourmet places with expensive menus. But the idea is catching on."*

*"Restaurant consultant Clark Wolf says it's a combination of voyeurism, an obsession with food and a desire for theatrics that lures people to the counter."*

**There are also sound operational reasons for counter seating.** Target numbers for "turns" at counter seats can be quite high compared to those in the dining room; the "footprint" for each seat may be smaller; and there are no "wasted" seats, as there are whenever a party of two is seated at a four-top table. Counter seating also offers restaurants flexibility in seating different types of parties. **Masraff's**, an elegant "Euro-American" restaurant on Houston's Post Oak Lane, touts its Chef's Counter, an alternative to a traditional chef's table that can seat parties as small as two or as large as 18 guests.



**For some consumers, counter seating may represent a way to ease into upscale dining** in a more casual (and perhaps less expensive) way as they move up from quick service. Food served at the bar of many casual and upscale dining places represents a related trend; the food menu at the bar may be limited to appetizers, yet more and more consumers are choosing lighter repasts, or choosing to share items, from the appetizer menu.

“Look who’s behind the counter now,” marvels *New York Times* food writer Florence Fabricant. “The lunch counter, a familiar, workaday part of the American scene since the 1920s, has a hip new cousin. At restaurants in New York and a few other cities, the counter is where innovative dishes are served, top-tier prices are charged and in-the-know diners willingly sit elbow-to-elbow-to-elbow. In fact, in a few new sliver-slim restaurants, the counter is the only place to sit.”

Perhaps the highest profile haute cuisine dining at counter seats may be found at L’Atelier de Joël Robuchon locations in New York, Las Vegas, London and Paris. The New York L’Atelier in the Four Seasons Hotel was lauded by the *New York Times* for its “mostly exhilarating food: a layered cake of smoked foie gras and caramelized eel that’s the stuff of dreams; a mélange of sea urchin roe, lobster and cauliflower cream that’s pure rapture; a pair of precocious sliders—made with Kobe beef, foie gras, caramelized peppers and the most perfect little brioche buns imaginable.”

## COUNTER NOSTALGIA

### Some of the more memorable counter-service experiences:

- *Watching the cooks shimmy in front of their stoves at the 157-year-old Tadish Grill in San Francisco from your seat at its 80-foot-long wooden counter.*
- *Cozying up to the bar and listening to your steak sizzle on the grill at Original Joe’s, another San Francisco institution, credited by some as the spark for today’s counter revolution.*
- *Wonderful aromas at the Oyster Bar in New York’s Grand Central Terminal, where seafood delicacies are prepared as you watch.*
- *Soaking up the atmosphere and savoring the legendary old-time neighborhood food New Orleans-style at the counters of the Camellia Grill, founded in 1840 (so they say) and only recently reborn post-Katrina.*

**Yet “downscale” counter service provides just as socially enveloping an experience** as the upscale kind. A stop at the deli, donut shop or IHOP for a quick cup of coffee and a bagel, a pancake stack or eggs over easy brings warm, friendly greetings from the waitstaff and perhaps a nod from an acquaintance or two among fellow customers. Yet customers need not interact with others if they don’t feel like it; observing the action over the morning paper may provide an equally satisfying beginning to the day.

**Counter dining, a popular restaurant format over the decades, never disappeared.** It’s waxed and waned in popularity, but has remained widespread in some segments.

Older Americans recall fondly the historic drugstore and dimestore soda fountains with counter seating that they once used as places to relax and meet friends. As late as 1968, the Woolworth dimestore chain alone boasted almost 2,000 lunch counters in its units. The demographic of lunch-counter customers cut across American life: shoppers and shop workers, office employees on coffee break, teens congregating after school.

Today’s restaurant customers may think first of the traditional independent delis and diners that offer a choice of carryout, counter seating or table service. Many are still going strong;

## SELECTED COUNTER-SEATING

Chain	US Units
Dunkin' Donuts	4,815
Waffle House	1,481
IHOP	1,230
Bob Evans	590
Steak 'n Shake	448
Shoney's	290

2006 figures  
Source: Technomic

for instance, a recent *Chicago Reader* article highlighted 25 local diners featuring various types of counter service. Full-service family dining chains—particularly those open morning, noon and night—are the most prevalent purveyors of counter seating today, with most if not all units offering seats at the counter. The table at left highlights leading family-dining chains that offer counter service, along with the limited-service, breakfast-oriented **Dunkin' Donuts** and the retro burger-and-shake joint **Steak 'n Shake**.

Newer concepts with counter seating also seem to be thriving. The nostalgic 1940s malt shop **Johnny Rockets** is one, now with more than 150 U.S. units and aggressive expansion plans. Smaller chains making a splash with counter seating include Florida's 12-unit **Mel's Diner**. In trendsetting California, hot new counter-

seating formats include The **Apple Pan** in Los Angeles, an award-winning burger-and-sandwich joint with only U-shaped counter seating, and **The Counter**, a Southern California build-your-own-burger chain.

And of course, sushi bars and other recently introduced Asian concepts are embracing the trend. **Raku** in Washington, D.C., which styles itself an "Asian Diner," offers counter seats that face other guests rather than a view into the kitchen. **Frying Fish**, in Los Angeles' Little Tokyo neighborhood, is among a few restaurants that offer a sushi conveyor belt; diners sit at the bar that surrounds the sushi chefs, grabbing sushi delicacies on colorful plates as they pass by on the conveyor.

Not all customers (and not all restaurateurs) like counter dining. "You run the risk of having friends sneer at you for missing the essence of the L'Atelier experience," wrote one disillusioned blogger. "Tell your friends that if they wish to sit at a counter, their local coffee shop does it almost as well for one-tenth the price." Another blogged a more general caution: "People who don't want to see the bad things shouldn't ever sit at the counter." Yet even these less-than-enthusiastic consumers may be expected to opt for counter seating when the occasion is appropriate. At any rate, counter seating gives diners another choice, and for restaurateurs it might be a desirable way of differentiating the brand from the competition.

**Counter seating is a growing trend, and one that appears to be here to stay.** It's not likely to replace tables, booths, the drive-thru or the carryout counter, but in a changing world it's an option consumers appreciate. The occasion drives the choice of counter seating, and as we've seen, many forces favor an increase in casual dining at the counter. As with other trends, the creative, innovative applications of old ideas will continue to be at the forefront of restaurant competition.

## Horizon Scan

## Trend or Aberration?

**Salty greens offer new tastes from world produce market.** The Netherlands produces greens such as samphire and sea lavender, both cultivated and wild. Directly after harvesting, the vegetables are cooled and transported at low temperatures, resulting in a long storage life. Organic sea greens are high in vitamins and minerals, and are even said to have herbal healing powers. So far, distribution of these salty greens is primarily in Europe.

***Eight cuisine-themed serving stations turn a Publix Super Market into an upscale food court.***

**“Restaurant food without the wait,”** is the way Publix Super Markets describes its new prototype in Lake Mary, FL. The bistro-deli serves freshly cooked meals ranging from Kung Pao Scallops to seared salmon. Lakeland, FL-based Publix said its new deli will feature eight cuisine-themed “serving stations” in an upscale food-court setting with table seating. The concept targets growing restaurant carryout business and rival grocers such as Whole Foods.

**Amazon introduces automatic replenishment grocery service for home delivery.** The online retailer, which got into the grocery business about a year ago when it began selling 14,000 non-perishable items on its website, has expanded its selection to 22,000 items. About 10% are available at discount using Amazon’s new Subscribe & Save program, billed as a way to help consumers save money on routine items, such as coffee, shampoo and laundry detergent, while helping to make sure they don’t run out. Shipping is automatic and free.

**Dinner by Design and Frigidaire launch a unique cooperative marketing program.** Meal assembly concepts such as Dinner by Design assume that consumers have adequate home freezer space for storing meals they have assembled at the center. Now, through a partnership with home appliance maker Frigidaire, Dinner by Design promotes freezers with a purchase cost rebate. The program echoes the direct marketing of frozen food and home freezer combos, a common practice decades ago.

**Double scoop of Chardonnay on a sugar cone!** Mercer’s Ice Cream of Boonville, NY, has cleared governmental hurdles and now markets adults-only varieties of ice cream with wine as an ingredient. The Ala Port Wine, Peachy White Zinfandel and Red Raspberry Chardonnay each contain 5% alcohol; a pint of the ice cream contains the rough equivalent of a glass of wine.

**Rate of childhood cavities turns worse, countering decades-long gains.** Snacking on sweets isn’t the only problem; the other culprit appears to be the increasingly common substitution of bottled water for fluoride-treated tap water. Bottled water is available with fluorination added, but most bottled waters do not contain enough fluoride to prevent cavities, says a Mayo Clinic report. Some bottled waters contain no fluoride, since it is removed during processing.

**These days, the most important restaurant meals may take place behind closed doors.** Whether you’re proposing marriage or planning a different sort of merger, a good table at a ritzy restaurant no longer does the trick. “Private dining rooms, the hidden hallmark of any haute eatery, are in higher demand than ever,” says a *Forbes* magazine feature. Even smaller restaurants that lack private rooms are beginning to offer “snugs” with curtained dividers, generally seating up to six. They’re not always used for business meetings or trysts; grandma and grandpa, for example, like to enjoy family in privacy without cooking and cleanup. “We credit our luxury lounge concept, with its larger bar and lounge areas, and private dining opportunities for attracting a new generation of guests,” says a Ruth’s Chris spokesperson.

**New dimension in catering: “A personal chef in a luxury kitchen”** is offered as an entertainment option by Attressi, a kitchen accessories store in Portsmouth, NH. Customers are invited to host their own “interactive, customized culinary delights” events for up to 12 people with a personal chef in Attressi’s own facilities.

**All-American favorites including burgers, fries and shakes that have 50%-70% less fat and calories compared to those of other restaurant chains.** That's the promise of **EVOS**, a four-unit, Tampa, FL-based fast-casual chain. EVOS uses healthier ingredients and alternative cooking techniques, resulting in reduced saturated fat and cholesterol and a 100% trans-fat-free menu. The company employs sustainable business practices that range from purchasing all-natural and organic ingredients to using eco-conscious and energy-saving materials in building stores. The company reports recently signing an agreement with a developer to open 207 stores in 12 states in the next 10 years.

**A step forward beyond self-service to self-cooking.** **Hot Pot City** restaurant, Portland, OR, features cooking your own foods in an Asian hot pot context. Customers prepare their own food in their own private hot pot in front of them on the counter. Patrons select their own choice of food to cook from a buffet.

**Hummus—a hot growth market?** Hummus has grown into a more than \$143 million market. Just 10 years ago, the chickpea based spread was about a \$5 million business in the U.S., powered by just a handful of processors. Today there are more than 80 companies marketing the product category and last year sales increased 25%, according to ACNielsen. Restaurant menus tout seemingly infinite varieties and mainstream supermarkets give hummus plenty of shelf space. Growth potential is illustrated by the fact that only about 5% of Americans have tried hummus. Typical uses can be for sandwich spread or a snack dip.

**Specialty meal marketers for in-home dining proliferate.** Dinewise, Farmingdale, NY, offers thousands of choices of chef-prepared meals for home delivery as far away as New England, including but not limited to diabetic and diet-control options. At Helen's Foods, Irvine, CA, consumers may order a single meal or a month's supply. "Simple Health" choices feature organic and vegetarian specialties. Meals are mostly sold through upscale supermarkets, including Whole Foods.

**When is a cocktail not a cocktail?** Operators and distillers seem to be accelerating the introduction of new drinks with lower alcohol content. "People are experimenting with new tastes, and that's what's fueling everything," says a spokesperson for Adams Beverage, a research provider to the alcoholic beverage industry. Another apparent prompt to innovation is the limited number of traditional beverage licenses in many markets. Innovations include coffee drinks with low-proof alcohol. Spirit marketers say lowering the proof allows fruit and other flavors to shine through, enhancing the taste of mixed drinks.

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**Future Food Trends** is prepared six times a year by Technomic Information Services 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 \$295. We welcome your comments.

**John C. Hofer**, Program Director

**Rita Negrete**, Editor

**Miranda Massey**, Assistant Graphic Designer, Future Food Trends

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