

BAUM + WHITEMAN

INTERNATIONAL FOOD + RESTAURANT CONSULTANTS

11 HOTTEST FOOD & BEVERAGE TRENDS IN RESTAURANTS AND HOTEL DINING FOR 2015 + 22 BUZZWORDS: THE WHITEMAN REPORT

Three main threads work their way through consultants Baum+Whiteman's 2015 Food & Beverage Forecast: (1) How technology is profoundly changing the way restaurants ... at all price ranges ... will work in the near future; (2) How basic flavors of food and drink are being manipulated by chefs' and manufacturers' mashups; and (3) Because of this, why despite what other pundits claim, "authenticity" is no longer relevant.

Baum+Whiteman creates high-profile restaurants around the world for hotels, restaurant companies, museums and other consumer destinations. Based in New York, their projects include the late Windows on the World and the magical Rainbow Room, and the world's first food courts. Their annual hospitality predictions follow ...

1. TECH IS THE TREND OF THE YEAR, AND NEXT YEAR, TOO

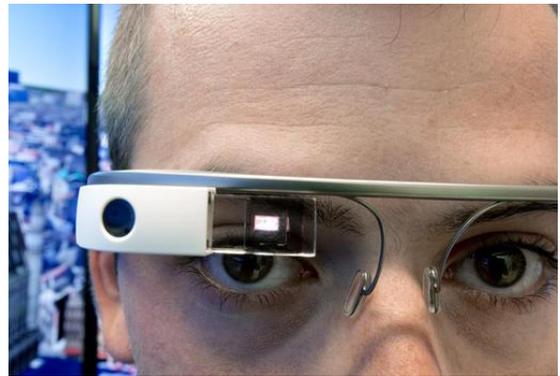
Forget cronuts and negronis. Forget quinoa and kale. Short of putting food into our mouths, technology is upending the way dining out works. Electronic wizardry once hummed quietly in the background ... but now we're immersed in "front-facing technology" or "guest-facing technology": all sorts of devices and programs that interface directly with the consumer. More restaurant companies experiment with tablets ... letting guests order food and drink from their tables; play games while they're waiting; then pay with smartphones ... meeting a waiter when an order is delivered, or when it's time for a refill from the bar, or for upselling desserts. Tables turn faster by eliminating downtime during which little happens and customers start fidgeting.

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Even that's not efficient enough: Skip the tablet and let people reserve a table *and preorder dinner* from a mobile device that also tracks how long it'll take to get to a restaurant ... and then clues the host and the kitchen to prepare for liftoff. Think of a chef's joy in knowing that 20 minutes hence a party of six will want three ravioli orders (one gluten-free, one high-fiber), two orders of calamari (one fried, one grilled) and one plate of locally sourced root vegetables.

Got people standing five-deep at the bar? Why push through the crowd when you can order from your mobile (that's the easy part) and location-based technology or face-recognition software can tell a waiter exactly where you're standing (Big Brother's always watching).



Two years ago we told you about McD's kiosks in Madrid that allowed customers to order express meals without getting tangled at the counter ... but that's already from the dark ages. Pizza Hut is fiddling with touchscreens so guests can customize orders by dragging icons of various toppings onto their virtual pies ... accelerating the entire dining process, cutting down errors, turning ordering into a game the entire family can play. Meanwhile McD ... and other burger-meisters ... under competitive pressure from fast-causal upstarts, is testing apps for customizing hamburgers in real time ... offering 22 premium options, never mind tanglefoot in the kitchen.

Convenience and speed are obvious benefits. But the real drivers are: (1) Millennials, who want to customize everything in sight; and (2) Galloping labor costs tied to health care and living-wage advocacy. And as labor gets too expensive (see "The Death of Tipping?" below), once-unaffordable technology starts making sense.

Coming: Amazing new uses for wearables like Google Glass. With face-recognition software, a server can know the names of everyone at a table ... "nice to see you again Mr Jones; your usual Hendricks martini?" Hotel concierges can send you on a virtual gastro-tour rather than thumbing through dog-eared Zagat guides. And wait for the avalanche of data that will emerge from ApplePay and other electronic wallets.

2. PRE-PAYING FOR YOUR NON-CANCELLABLE DINNER

Restaurants with reservations backlogs are inching toward tech-enabled pay-for-tables systems ... with people buying "tickets" for dinner like seats on an airplane. Often non-refundable. Restaurants get paid *before* dinner; even before buying food ... enhancing cash flow and cutting out excessive inventory because they've always got a guaranteed house-count.

Even more: Using yield-management or revenue-maximizing software common in hotels and airlines, restaurateurs can introduce "surge pricing" ... with menus varying by levels of demand. Would it be possible that the fellow sitting next to you paid only \$34 for your \$56 steak ... because he reserved earlier? Did he get a booth while you got a miserable table because he cashed in some frequent diner points than you don't have? Might restaurants auction off their seats to the highest bidders? Prep just six high-priced specials a night and auction them on their websites? Jes' askin'.

The downside of this? Customers loathing restaurants the way they detest airlines.

3. OYSTERS R EVERYWHERE

We've rediscovered oysters. They're cheap because bays, inlets and tidal basins are being detoxed ... so farmers are reseeded old oyster beds and discovering new ones. Not a few here and there, but dozens around the country.

Chips and pretzels are disappearing as happy hours on the coasts keep booze flowing with dollar-a-piece oysters ... sometimes happy hour lasts all day. Mixologists and sommeliers scramble for steely white wines and new cocktails to match the bivalves. Locavores and farm-to-tableniks love the notion of plucking these critters from nearby



waters ... while sophisticates guess by brine, acidity and shape where an oyster's from, giving rise to the term "merroir" as a parallel to wine-related "terroir." (There's even a shellfish place in Virginia called Merroir, which must be hell to pronounce down there.) At Waterbar in San Fran, oyster descriptors include: tropical fruit finish; clean lettuce finish; touch of bitter herb; honeydew melon, and sweet grass.

Traditionalists stick to cocktails sauces ... but for modernizing upstarts the world is their oyster and they're provoking palates of the young and moneyed. We've seen oysters with lemongrass cocktail sauce or yuzu koshu dressing; The Girl & The Goat in Chicago has a muscatel mignonette with tarragon. Eventide in Portland ME assaults it oysters with kimchee or horseradish granita. Marshall Store & Oyster Bar in Marshall CA cooks its oysters with chorizo butter. For five bucks, Island Creek Oyster Bar in Boston lets you add fried oysters and horseradish mayonnaise to burgers, steaks and roast chicken.

Need numbers? Chesapeake Bay's harvest grew eightfold between 2006 and 2012; in Connecticut the harvest about doubled between 2007 and 2010 and is still growing.

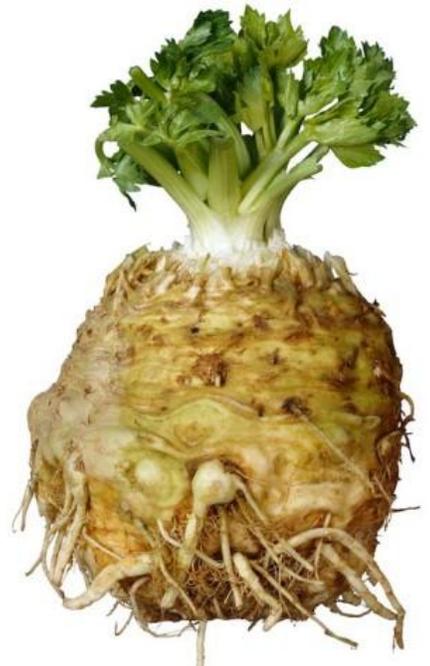
Trending: Tiny kusshi oysters from British Columbia. Absinthe cocktails to go with shellfish.

Danger: Global warming.

4. OUR RESTLESS PALATE SYNDROME

Can't let well-enough alone. New flavors, new products, radical mashups pour out of restaurants and food labs ... and "authenticity" goes out the window. Here's how we're feeding the country's restless palate syndrome:

Beyond kale: Ugly root vegetables. Celery root, parsnips and kohlrabi are grabbing attention in restaurant kitchens ... fried, mashed, pureed, gratineed; flavored with cured pork or smoked honey ... humble themselves, they replace humble potatoes with lots



more inherent flavor. Better yet, consumers have no notion of how to cook them ... so they're becoming cheffy ingredients.

Seaweed Beyond Sushi: Seaweed may not be the next kale but it's on the upslope of the trendline. Consumers recognize it as a packaged snack and as a California roll's wrapper. But chefs are adding it (often silently) to poaching broths, seafood sauces, even risotto, for its punch of umami and evanescent background flavor and dash of salinity. They're inspired by a sustainable sea-to-table ethos ... and also by new-Nordic cooks searching for food under tree stumps and boulders. More than a dozen varieties tickle the fancy of locavore chefs.

Beyond Sriracha: Look for lots more sweet-spicy sauces and condiments. Chefs and big restaurant chains are experimenting with piquant honey: habanero honey, jalapeno honey and ghost chili honey, ginger-citrus honey ... going on chicken-and-waffles, whipped into butter, mixed into salad dressings, snuck into sauces. Same thing with jams and jellies. Revered Paulie Gee's in Brooklyn spreads its already hot sopressata pizza with chili honey, getting lots of press for its efforts.

Beyond Sweetened Yogurt: Health-crazed consumers gorge on fruit-flavored, yogurt ... not knowing they're buying candy-level calories. Now comes vegetable yogurt ... pioneered by ultra-green restaurant Blue Hill at Stone Barns where, with a mountain of Rockefeller money, they can experiment endlessly. After launching flavors such as butternut squash, beet, carrot, and tomato, the Barber brothers, Dan and David, are being scrutinized by big yogurt manufacturers. A yogurt bar in Murray's Cheese store in New York offers tomato yogurt and kimchee yogurt.

Chobani, the biz's big gorilla, has a cafe in SoHo ... offering yogurt topped with hummus (see below), chickpeas, zaatar and olive oil; with spinach and garlic dip; and cucumber, olive oil and mint

leaves. Such combos are standard in the Middle East; in the US this is a New York phenom since most of the country's thickened yogurt is made there ... but it'll spread. Meanwhile in



Japan Haagen-Dazs has two vegetable ice creams ... tomato-cherry and carrot orange. In Rome you now find artisanal gelati made with gorgonzola, with mortadella and pistachio, with artichokes, even with anchovies and smoked salmon. One gelateria serves these with beer pairings.

Beyond Salsa: Hummus without Borders

You've watched the rise of Greek yogurt, yes? Now hummus ... once a niche product here eaten primarily by Arab and Israeli immigrants ... is following the same trajectory. Google says that hummus has out-trended salsa, no small thing since salsa dethroned ketchup. The chick pea dip has become so Americanized ... which means piled with flavorings ... that the Subway is testing it as a no-meat option for its sandwiches. Hummus is high in protein and fiber and low in fat, so it touches lots of dietary bases. Eight years ago perhaps 12% of US households had it in



the fridge; today 20% and rising ... largely because the Sabra brand (co-owned by Pepsi) did enormous missionary work, even running a popup store in Georgetown. Upscale supermarkets display two dozen variations ... beet, pumpkin, Thai chili, spinach-artichoke, guacamole, edamame, cilantro-chimichurri, lemongrass-chili ... even (oh, dear) chocolate mousse. Ottolenghi makes one with lentils, and food provocateur Rozanne Gold's is made with white beans and roasted sesame tahini topped with an Asian mix of roasted sesame seeds, seaweed and shiso. Mexican-inflected hummus is on the way and there's no reason not to create teriyaki chicken or curried cauliflower hummus. Another example of why "authenticity" is on the downslope.

Because it's usable as a dip or a spread or a condiment, it might in theory challenge mayonnaise. Sit-down restaurants increasingly use it as a popular starter. Restaurant Bustan in NY tops it with lamb, mushrooms, beef cheeks, tandoori chicken, falafel or chicken liver (\$15-\$18) ... California-based Oren's Hummus tops theirs with Moroccan beef and pine nuts ... and someone's fashioned a pizza (above) with hummus and zucchini.

Beyond Bacon: After despoiling ice cream sundaes and whisky cocktails with bacon, the bizarre fixation on everything-bacon seems to have abated (except for triumphant Slater's 50/50 burger -- better look that up). But not for all things pork, though. More guanciale, more pancetta, more fried ears, more cheeks ... and then there's 'ndjua (not a typo), a light-up-your-mouth spreadable sausage from Calabria made, originally, from unmentionable parts of the pigs ... now finding its way onto pasta, melting over pork chops, spiking mushrooms over focaccia, even blended into vinaigrettes as sauces for fish. If bold flavors are a trend, *this* eye-stinging, red-peppered mushy salami is next year's bold flavor.

Beyond Beer: Cocktails with beer are finding favor in trendy bars. But watch out for Micheladas ... or *cerveza preparada* ... a beer-based drink enlivened with a bevy of sauces and spices. Originally Mexico where they began adding hot sauce to beer, Micheladas now are a focus of elaboration. You can douse your beer with bloody mary spices or with clamato juice and soy sauce, or practically anything else. At the new Empellon al Pastor in New York, there are chef-driven micheladas ... with corn powder, malta Goya and ponzu concocted by Wylie Dufresne, and Chambovaca by Andrew Zimmern, erupting with chipotle tomato juice, beef broth and tequila.

Beyond Beyond: Explore Japanese snack foods; they're so flavor-crazy that what sticks there might make it here. Shrimp-and-Mayonnaise or Avocado-Cheese Doritos; Lay's Hot & Sour



Fish Soup Potato Chips; KFC's salty ginger-chicken chips; Pepsi-flavored Cheetos. Someone's making anchovy-garlic chips ... which gets you halfway to Caesar salad. Kirin is selling Salt & Fruit beverages, a combination of rock salt and fruit juices. (Korea, too. Left, KFC's bunless Doubledown: burger, bacon, cheese, two pieces of fried chicken). The principal is clear: There's a restless palate syndrome affecting young people ... millennials especially.

And One Dishonorable Mention ... Toast Should Be Toast: Free us from \$4-and-up slices of "artisan toast!" For example ... "hand-crafted 12-grain bread sliced to order and bronzed over an oak fire, then spread with organic beach plum jelly harvested by genuine



hipsters and topped with pink Himalayan sea salt ground *a la minute*" ... despite all those words it still is just toast and jelly. Toast used to come with your eggs and cost ... nothing. Now toast claims its own space on menus of coffee houses, cafes and bruncherias. Some have sprawling toast menus ... Toast Ballard in Seattle has 13 offerings; Sqirl in LA gets \$7 for Burnt Brioche Toast with house ricotta and seasonal jam. Perhaps the most

Instagrammable is mashed avocado toast ... NYC Cafe Gitane's version with avocado, lemon juice, olive oil, chili flakes on a slice of seven grain toast is \$7.25. Someone please smear smoked kale jelly on toast and put an end to this pestilence.

5. BIG SHIFTS IN BOOZING

Sharable punches: Your parents' preference for communal boozing is back. Now liberated mixologists in fancy places are concocting large-format punches that serve from multitudes of guests ... with no limits on pricing or ingredients. At Rickhouse in San Fran, fifty bucks get you a punchbowl of 8-year-old rum, lemon juice, Peychaud's bitters, ginger beer and amaro CioCiaro (see Herbal Liqueurs, below). At Montreal's bar called Big in Japan you get seasonally changing punch for \$65 ... like one with gin, Pimm's, mint, lemon and pomegranate. The ultimate, at NY's NoMad Bar, comes in a spigot jar with a



Bobby Daugherty, NY Magazine

cup of top-shelf cognac, an equal amount of Royal Combier liqueur, lemon juice, demerara syrup, bitters, half a dozen lemons, a fistful of mint and lots and lots of ice. It costs \$110. Sugar

Factory in various locations boasts a big list of 60-ounce sharables, including a watermelon vodka punch with a Red Bull floater. All eminently festive and communal. But they don't have to be so complex ... after all, what's sangria if not a punch?

Herbal Liqueurs: Mysterious ancient blends of botanicals ... flowers, spices, citrus peels, herbs, tree barks ... are new again to new generations of drinkers. What once were stand-alone



before or after dinner drinks ... chartreuse, maraschino, Benedictine, and, especially, absinthe ... are now adding body and depth to inventive cocktails. Amari, those bitter medicinal liqueurs from Italy ... Fernet Branca, Averna, CioCiaro, liquoricey Ramazzotti, Cynar, Punt e Mes and various red vermouths ... are filling bartenders' shelves. All giving rise to multiplying variations on the classic Negroni. Clyde Common in Portland has them barrel aged. Jasper's Corner in San Fran (left) has them on tap. Ultra-upscale Lincoln Ristoranti in New York lets you mix-and-match

Negronis from among 18 head-spinning spirits, bitters and vermouths. New G&T variations include tonic *plus* bitters for added flavor.

Whackadoodle Hybrids: Spirits manufacturers ... pandering to millennials and women ... accelerate sweetening name-brand brown whiskies with honey or maple syrup or flavoring them with cinnamon, apples, ginger, vanilla, cherries, even pumpkin pie spices (inspired, one guesses, by Starbucks' PSL). They're also trying to lure drinkers away from flavored vodkas, which are hitting a wall of boredom these days. About 40% of all spirits here have added flavorings. Equally deviant are shotgun marriages like Malibu Red (rum-tequila), Vodquila (vodka-tequila), Grey Goose's VX (vodka-cognac), Jinzu (gin-sake), Courvoisier Rose (rosé wine-cognac), Kahlua Midnight (Kahlua-rum), and Absolut Tune (Sauvignon Blanc-vodka-carbonation in a champagne bottle). These mashups are evidence that the case for

"authenticity" in the world of F&B continues weakening year after year. In France, flavored wines ... peach, grapefruit, even Coke ... are popular with 18- 34-year-olds, which means the world may indeed be coming to an end.

Soda Fountain Crashes the Bar: Diet-be-damned adults are splashing booze into ice cream favorites. Belmont House of Smoke in Norfolk is semi-famous for its Guinness Float. Punch Bowl Social in Denver features Milk-Xologist (coffee liqueur, bianca menta, vanilla ice cream, nutmeg); a new 300-seat diner in New York will have a slew of "adult shakes"; Del Frisco in Atlanta offers walnut liqueur, creme de cacao and vanilla ice cream; Red Robin recently unleashed a bevy of shakes spiked with the likes of Blue Moon, Irish Cream, and a beer shake with stout and Irish whiskey. On a health food kick? Freestyle Cuisine in Lake Placid will sell you a shake blending avocado, vanilla ice cream, tequila and fresh lime.

Vodka Cedes the Throne: Brown whiskey at long last outstripped vodka in sales dollars. Bourbon, rye, blends and Scotch are enjoying a renaissance because drinkers want more body. No one really believes vodka is "crafted" ... but an explosion in local distilleries around the country specializing in small-batch whiskies is riding trends regarding natural, local and authentic ... sort of a grain-to-bottle movement. Besides, bourbon and rye are traditional American boozes, and they're more distinctive with lots of variation from brand to brand. And there's the ruboff from wine culture ... these products get better (or at least more costly) with barrel age. Much of the growth is at the luxury end -- Pappy Van Winkle, Woodford Reserve, Bulleit's rye and bourbon, for example.

6. SOFT DRINKS LOSE SOME FIZZ and OTHER NON-ALCOHOL TRENDS

ABC: Anything but Cola

Spooked by sugar, by dubious reputations of alternative sweeteners, by greenies waving placards about harmful chemicals, consumers are abandoning colas ... in the US and Europe, too. Aging boomers and skeptical millennials alike are seeking drinks with healthful halos ... never mind whether they're truthfully good for you.

Anything that stood next to a coconut sells readily. "Enhanced" in ways Mother Nature never intended, "premium hydration" ready-to-drink (!) waters fly off food market shelves ... proving that H₂O on its own is not a soda replacement. But barely sweetened, lightly flavored (frequently artificially) waters attract consumer interest everywhere ... even when carbonated.

Cucumber and coconut waters are so hot that they're being overlaid (or adulterated ... take your pick) with flavors like coffee and mango and with energy-boosting ingredients. Now they're talking about maple water and even birch sap. Flavor enhancers could move to other beverages ... milk, for example, and more booze products. Little packets of flavor enhancers that fit in your purse now allow you to make everything edible taste like an exaggerated raspberry or a peach bellini.

House-made soft drinks are hot among indie restaurants, slower elsewhere. Chilled specialty teas hot at fast-casual chains, slower most other places.

You see branded beverages in convenience stores and fast-casual restaurants with trendier customers ... but you rarely find them among fast-feeders (where drinks comprise maybe 35%-40% of gross revenue) or casual chain restaurants because soda fountain drinks are infinitely more profitable. Suggest you look at Mexican roadside joints in the southwest making oodles of money selling "aguas fresca" ... basically DIY water and ice drinks with a large doses of fresh fruit and flowers. And watch Taco Bell as it tries to do to, or for, beverages what it did with Doritos.

Next-gen coffee shops

Pressured by rising real estate, by Starbuck's relentless evolution, and by Dunkin Donuts fixation on its beverage business, coffee shops will rethink their business models; they've got to fill in downtimes ... meaning most of the day. They can't rely on 'cinos, forty variations of pumpkin spices and soy milk lattes.

Beer and wine sometimes helps ... but then you need the proper go-withs, so along come limited menus that often don't augment the alcohol experience. "Ahh ... maybe we need charcuterie boards" ... and then the slippery slope into exploding menus: Artisan sodas; cold-pressed juices; boozy juice-based cocktails; patisserie-quality desserts; salads; shakeratos with tea and coffee in infinite flavors; cold brewed coffee and pourover coffee; ultra-local craft beer; even live entertainment if space is available. Does it work, or are we over-supplied with "joe?" The coffee business is moving from the "third place" to maybe a "fourth place."

The future of juicing: Remember the croissant?

About 35 years ago, an intrepid entrepreneur imported from France to New York the concept of filled croissants. Within a year, croissant restaurants and croissant restaurant *chains* were everywhere ... until Burger King in 1983 co-opted the idea by selling a gummy (but popular) Croissan'wich ... demonstrating that anyone could sell a degraded French pastry. Almost immediately, the specialist restaurants began closing their doors ... because they were one-trick ponies.



We raise this bit of history because the same thing's happening with juices. Last year we talked about hot investor money moving into the juice biz ... and now everyone knows a healthfoodista who's opening a juice bar. Google "How to Open a Fresh Juice Shop" and you get 14,000,000 links in 0.48 seconds.

So competition's getting fierce. Hotels are adding lifestyle juice bars with good-for-you vegetables (kale, beets, celery, peppers, spinach and other greenery you don't normally encounter at breakfast) made palatable by sweet doses of OJ, honey or agave (you make lots of money selling them for four or five bucks more than orange juice, and even more with at happy hour with a shot of vodka or rum). Frozen yogurt chains are adding juices ... as are upscale supermarkets. You find juice bars in airports and in bicycle stores. And juice bars are sprouting menus (see Next-gen coffee shops, above). What began as a vitamin-rich way to clear your intestines has become the new darling of IPO-fixated franchisors ... perhaps too many of them.

7. MORE BIG OUTSIDERS CROWDING THE RESTAURANT SPACE

Last year this report laid out how retail stores were putting shoppers in their aisles by grabbing restaurant traffic. Now we're looking at boldface fashion names doing the same. The objective? To increase what we call "dwell time" ... the amount of time a shopper spends on the premises ... because, statistically, the longer they stay the more they spend.

Ralph Lauren will have a coffee shop in its new flagship store on Fifth Avenue ... plus a restaurant in the old La Cote Basque space. Roberto Cavalli has restaurants in nine stores, Armani lots more.

And then there are their hotels ... Tommy Hilfiger restoring the classic Raleigh in South Beach; Bulgari with luxury eateries on its (Marriott-run) hotels; Missioni with a hotel in Edinburgh, and Versace opening in Shanghai and Dubai in the next few years. These hotels' restaurants are geared to keep guests on the premises by integrating them into the properties' overall experience ... instead of turning them loose, as most hotels do, to feast at local hotspots.

Urban Outfitters "Lifestyle Center" in Brooklyn imported from LA top-chef Ilan Hall's The Gorbals and plopped it next to menswear ... and their megastore in Herald Square will house New York's second Intelligentsia Coffee. Meanwhile Conde Nast (Vogue, Vanity Fair, GQ) operates restaurants and bars overseas and plans putting GQ Bars ... like one at the Marriott Maquis in Dubai ... into London, Paris and New York.

Next big challenge to restaurants: Order-it-today/get-it-today meal kits for easy home cooking ... and branded meal delivery services from Google, Amazon and new startups.

8. CHEFS ABANDONING FOUR-STAR DINING?

Chefs and restaurateurs are rethinking backbreaking, high-risk commitments to multi-star dining as customers in droves pledge allegiance to the fast-casualization of America. Why worry

about critics and bloggers when, like Danny Meyer, you can strike gold with an IPO (pending) for 56-unit-and-growing Shake Shack?

Ditch the flowers, linens, reservation systems, truffles, expensive china, and no-shows ... and instead feed masses of people with less risk. It's not curtains for ultra-fine dining (it never is, despite doom-sayers), but look at who's aiming to be the next Chipotle: Jose Andres is opening Beefsteak (after the tomato), a veggie-focused fastcas place in Washington. Top Chef Spike Mendelsohn is franchising his fastcas Good Stuff Eatery. Chris Jaeckle (A Fiori, All'onda) just opened a fastcas Brazilian-Japanese sushi joint. Josh Skenes of Saison ... where you can drop \$1000 for dinner for two ... is opening Fat Noodle, a Chinese hand-pulled noodle fastcas with Adam Fleischman (Umami Burger, 800 Degrees). Bob Kinkead in Washington opened Campono fastcas pizza. Beard Award-winner Brad Ogden is rolling the dice in Houston with fastcas Funky Chicken. There are lots of others.

Why fastcas? Listen to the sucking sound ... revenue is flowing from casual restaurants and fast feeders into the mushrooming fastcas sector, probably the only area of food service showing meaningful growth. The place to be right now, fastcas may turn out to be no turkey shoot. Hoping for unique media attention, these chefs put their high-end names on the line; the fastcas arena is overcrowded with new entrants, and no one really knows if everyone can deliver a Skenes-Ogden-Andres-Meyer experience in a profitable manner. Let's remember that Chipotle got off the ground with the help of ... McDonald's.



9. SAY HELLO TO NEUROGASTRONOMY

Last year we talked about far-thinking restaurants are heightening dining experiences by assaulting all the senses ... diffusers oozing aromas of caramel or woodsy mushrooms, hi-def imagery altering the walls of dining spaces (see "I Lost My Dinner in the Funhouse" <http://www.baumwhiteman.com/2014Forecast.pdf>). Shanghai chef Paul Pairet called it "psychotasting." Turns out there's a more scientific word ... "neurogastronomy" ... and its guru

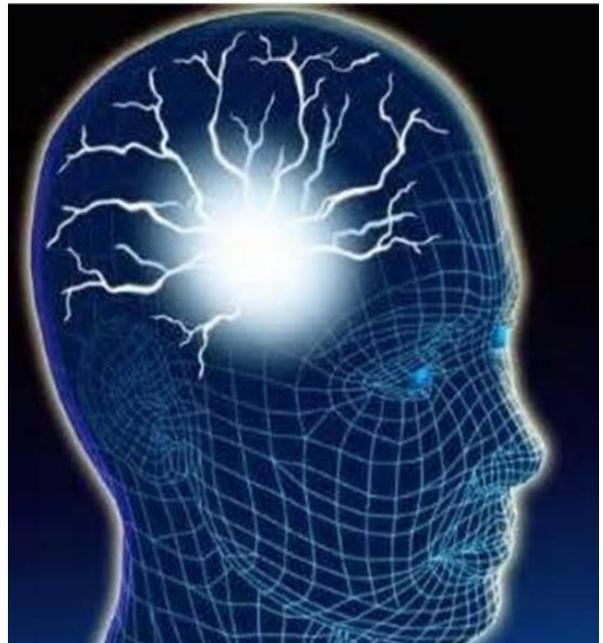
is Charles Spence of Oxford University. Have fun searching the term ... it's all about how our senses *cumulatively* react to food, and how to profitably manipulate those senses. Example: Drinks company Diageo learned that a room with real grass and sounds of birds makes single-malts taste grassier; substitute red lighting and curved furnishings and the drink tastes sweeter; creaking floorboards, a crackling fire and a double bass provide the most pleasurable experience (maybe explains why most bars are darks and woody). With ever-curious Ferran Adria, Spence demonstrated that a pink strawberry dessert tastes 10% sweeter on a white plate than a black one ... and even sweeter on a round plate than a square one.

Nestle's labs discovered that the shape of chocolate affects its flavor ... curved rather than angular chocolate bits melt better and release different flavors. You can make cheese taste saltier by adding aromas of other salty foods ... useful if you want to promote low-salt dishes.

Someone's invented an "aroma fork" ... you slip a desired scent into the handle and if you hate cilantro you can make it taste like candy corn or maybe make brussels sprouts taste like Twinkies.

Other researchers say food tastes better on heavier china ... that citrus flavors clear the mouth quickly and leave you ready to more ... that hard and rough foods are perceived as having fewer calories and greater health benefits (break out those taco chips) ... that high-pitched music signals sweetness and bass notes suggest bitterness ... that umami works with low-pitched sounds... that loud background noise reduces enjoyment of food (so much for your curated playlist!).

Maybe explains why KFC tastes better eaten by hand than with cutlery... do we have taste or smell receptors in our fingers?



10. THE DEATH BELL TOLLS FOR TIPPING

Social and economic trends move glacially ... and then seem to happen all-at- once. While most people pooh-poohed no-tipping restaurants as unAmerican, the movement now possess big momentum ... irreversible, perhaps. For example (see item #2 above), one consequence of selling tickets for dinner instead of taking conventional reservations is that a service charge (usually 20%) is added. Ergo, no tipping.

Local governments are passing "living wage" laws, lifting minimum wages, sometimes abolishing tip credits ... raising labor costs for operators. The disparity between earnings of tipped waiters and untipped back-of-house grunts is becoming a moral issue tinged with class



warfare. Meanwhile, waiters sue over untipped sidework (5,000 bartenders and servers sued Applebee's, demanding minimum wage for untipped hours spent folding napkins) ... and lower-down employees are inflamed by how tips are distributed. One New York restaurant company settled a class action suit over tips distribution for over 5 million dollars, and Starbucks, which got enmeshed in a suit over whether baristas could be tipped, is raising their pay.

Death-by-a-thousand-cuts: State and Federal governments, grasping for every penny, make accounting for tips, benefits, meals, etc. increasing complex and costly ... all prompting operators to think more clearly about getting rid of tipping and giving everyone an hourly wage.

Most no-tipping restaurants tend to be upscale. But the policy is trickling down .. and will continue until the deluge happens all at once.

11. WAITER! WHAT'S THAT FLY DOING IN MY SOUP?

We swat them and spray them, but a couple of billion people on the planet consume insects as a protein source ... while over-fed Americans snatch protein-rich quinoa from the mouths of Andean children. The conversation about eating bugs is just beginning but it won't go away.



We could eliminate lots of greenhouse gasses and cow poop if we found creative ways of using highly renewable creepy-crawlies that can overcome the yuk factor. Insect protein bars already are on the market. And Vij, the Indian restaurant maven in Vancouver, sells a pizza-like paratha topped with crickets. Would you really care if your chips or nachos or tacos were fortified with cricket powder? If your bread got a protein boost from ladybug flour? If your pasta (gluten-free, of course) contained low saturated-fat grasshoppers? Probably you would

care ... but soon you may find your children scoffing at the amount of non-sustainable food you eat. Today it's Andrew Zimmern (above) eating dry-roasted grasshoppers with lime and chili; tomorrow it may be scorpion granola for the rest of us.

BUZZWORDS FOR 2015

Pistachios are the nut of the year. Pimm's Cup #1 is coming back. Iced lattes, boozed or not. Upscaling ever spicier ramen noodles, Japanese or cross-cultural. Shaved ice desserts. 'Nduja. Flavored salts. Fermented (not quick-pickled) food. Savory ice creams and yogurts. More bitter, balancing richness the same way that citrus does, but in more sophisticated modes: bitter greens, bitter chocolate, bitter coffee in dishes. Clashing flavor combinations -- look at snacks aisles in food stores and virtuoso dessert menus with sweet-salty-bitter-spicy marriages. Fewer over-oaked chardonnays. Are we getting too many food halls? Night markets ... building on food truck rodeos and food halls ... are growing around the country in seasonal ethnic and



multi-ethnic festivals that bring thousands to riverfronts and public squares. Drink local: more craft gin and whiskey producers ... more soft drinks producers ... wines from unlikely states all benefit from regional chauvinism. Don't-waste-food campaigns gaining traction. More attempts at Jewish delis and Jewish mashups. More protein being sold at breakfast. Insects in your protein bar. New focus on plant-based proteins. Rapid upscaling of fastcas newcomers will test maximum price levels. Savory waffles and waffle sandwiches. Matcha.

Baum+Whiteman creates high-profile restaurants around the world for hotels, restaurant companies, museums and other consumer destinations. Based in New York, their projects include the late Windows on the World, the magical Rainbow Room, and the world's first food courts. They also run F&B trends seminars for major hotel and restaurant companies.

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