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Game Changers and Shapers Inspiring Product Development and Innovation

Think of where you look for inspiration. Is it the news that comes across your desk each morning or the chatter around the water cooler? Are you the type of person who has to leave your desk and step outside—attend a conference or just walk through a market maybe?

Now think about what makes the process stall for you. And more importantly, how do you regain your balance and inspiration? In the world of product development, one must live spherically—in many directions. Innovation is born from enduring inspiration.

Inspiration and Trends

Before deciding what new product to put in the pipeline or on the menu, food developers must understand where consumers' heads are at and where their interests are likely to move next. If these are not known, then it is easy to launch a product at the wrong time or in the wrong direction. When moving into an economic recovery, the behavior and desires of consumers change. Health, economy, control and safety, sustainability, and pure motivation are all drivers of economic recovery. The drivers identified in a survey suggest a shift back toward brands that for consumers equal value. However, cost must coexist with value, and deal-chic (obtaining the best deal) appears to be where it's at for consumers for the time being. Instead of fear, optimism, resilience, and recession rejection all better describe how U.S. consumers are beginning to view the economy. Sustainable and "green" product buying numbers are rebounding and are intimately tied to how optimistic consumers are feeling about the economy, because these types of items are often abandoned during a recession. U.S. consumers still have concerns born of the continuing economic recession, however, so they are particularly attracted to companies that have a legacy, demonstrate stability, and offer reassurance and accountability for their actions. Health itself is also a driver and includes a focus on children's health, snacking, and wellness, which is tied to quality, "pure," and portion options.

When talking about motivation, the terms that are now uppermost on the minds of U.S. consumers include simple, value, authentic, playful, escapist, invigorating, and risk taking. The latter descriptors do not appear in a recession scenario, only in an economic recovery scenario. When enjoying an economic recovery, consumers' senses are open, and they want to explore, take risks, and become more adventurous because they are generally less fearful.

Health drivers also include prevention, trust, control, obesity, and cognitive function. During an economic recession consumers focus on fixing what is broken, while during recovery their focus shifts to prevention (e.g., vision, muscle, joint, and bone health; digestion; mood; and obesity). U.S. consumers are seeking naturally healthy options and minimally processed products but are concerned with convenience and clear messages about health benefits as well. They also are striving for more control over children's products, calorie intake, digestion, and cholesterol, salt, fat, and sugar intake. New apps for smartphones and other mobile devices, seasonal and local products, and items that provide satiety are giving many consumers an increased sense of control.

Growing concerns about the increasing incidence of obesity, particularly childhood obesity, have led to numerous studies. Findings indicate obesity is linked to satiety, snacking, dining out, and portion control. Research exploring cognitive function includes studies on stress, sleep, memory, depression, relaxation, focus, and energy—all major concerns for U.S. consumers. At the same time, consumers often have trust issues that impair their relationships with the food industry. Research shows that however much they desire them, consumers do not fully trust organic, natural, free from, sustainability, food safety, and health claims.

Wine and travel trends often act as couriers as trends born in these industries make their way to the food industry. When moving into an economic recovery, both arenas mirror consumer behavior, with more exciting directions becoming visible. In the world of wine, smaller regions and producers, less well-known regions, lesser known grapes and varieties, and more expensive wines are once again desired by consumers. This is a classic economic recovery pattern.

Travel destinations also expand, with more exotic, remote, expensive, and isolated locations drawing more travelers. Travel in Asia, for example, is showcased by increasing visitors to Nepal, Laos, and the Maldives. Travel in the Caribbean and Pacific also is on the rise. These regions in particular represent luxury, and visits to locations such as Bora Bora, Fiji, etc. decrease during an economic recession. The poster child for economic recovery is travel to arctic regions, featuring Iceland, Finland, Scandinavia, Alaska, Newfoundland, Labrador, and the North Pole, as well as travel to Antarctica and the South Pole. Travel in these regions represents risk taking, isolation, and money.

Translation into New Products

Consumers' inspirations translate to new expectations for the foods on their plates. During an economic recovery, meal type

and setting, food and flavor, and beverage trends all experience their own shifts to match shifting consumer desires.

With economic recovery in the United States, meal preparation has shifted toward scratch prep and wild crafting (foraging for ingredients) as consumers seek adventure and discovery and incorporate seasonal, regional, and authentic foods and ingredients. These trends are expressed in the minimally processed items, meatless dishes, open-flame cooked options, foraged ingredients, and house-smoked, herb-infused, pickled, fermented, and peppered items that are showing up on menus. It is too early yet for the return of “fusion” cuisine and molecular gastronomy.

Settings, too, have shifted. Approachable, family friendly dining is being sought as part of the economic recovery; U.S. consumers are searching for vibrant, inspired, authentic, and rustic dining opportunities. These desires are being translated into fast, casual copy cats; approachable fine dining; rock star butchers, millers, and bar chefs; communal tables; street food; pop-up food vendors; and retro speakeasies.

Food and flavor profiles have experienced more extreme shifts as well. All of the categories are showing two faces right now—one more familiar and traditional, and the other more experimental and extreme. For example, popular seasonings on the familiar side include ginger, citrus, pickling, salts, smoke, and vanilla, while the more extreme side includes *haucatay* (a Peruvian herb), Nordic flavors, flowers, exotic garlicks, flavored heat, pollen, sumac, curry, and hyssop. Fruits and vegetables may be familiar, e.g., grapefruit, coconut, citrus, berries, pumpkin, roots, chilies, and heirloom varieties, or exotic, e.g., *cupuacu* (a South American super fruit), *lucuma* (a tropical fruit native to Peru), hibiscus, *yuzu* (an East Asian citrus fruit), green papaya, sunchokes (Jerusalem artichoke), wild greens, nopales (a vegetable made from prickly pear), and seaweed.

Popular dairy products include Greek yogurt, farmstead cheese, ricotta, and goat cheese on the familiar side and Lebanese yogurt, paneer (a fresh cheese common in South Asia), plant-based dairy, and *burrata* (a fresh Italian cheese) on the experimental side. As a category, protein also is bipolar, with familiar forms such as sardines, oysters, offal, beans, nut butters, and meatballs countered by goat and lamb bellies, bone marrow, blood, fins, tails, insects, invasivors, and anything that can kill you being considered cool on the other side.

Grains often act as the interpreters between the extremes, with familiar foods including steel-cut oats, quinoa, lentils, tortillas, and waffles and the experimental side containing *bao* (a Chinese steamed, filled bun or bread-like item), German breads, *chia* seeds (a flowering plant native to Mexico and Guatemala), exotic noodle products, faro, grits, and arepas (Latin American grilled cornmeal cakes). Finally, familiar beverages include culinary cocktails, microdistilled items, coconut milk, lemonade, ancient teas, and handcrafted sodas. The experimental face of beverages is represented by barrel-aged cocktails, grower champagnes, Vietnamese coffee, aloe, sipping vinegar, kefir (a Russian beverage made from fermented cow’s milk), grain-based beverages, and aqua frescas.

Regarding cuisines, there are rock stars and rising stars. The rock stars are cuisines that already have strong momentum and include American soul food and foods from the deep South, common Asian regional foods such as Korean and Vietnamese, Mexican foods, regional South American foods (Peruvian being a standout), and Middle Eastern foods. The rising stars encompass North African foods, including Egyptian and Moroccan; Caribbean and Pacific foods; and less familiar regional Asian

foods, such as Nepalese and Indian, and Central American foods other than Mexican. The pathways to enter and navigate each type of cuisine differ, however. When considering U.S. cuisines, think regional favorites or specialty foods. For more familiar international cuisines (e.g., Mexican), regional favorites or comfort foods may be the better path. For less familiar international cuisines (e.g., Middle Eastern), it is better to showcase national favorites or comfort foods. The more familiar the cuisine, the more hyper regional a product can be. The less familiar the cuisine, however, the more threatening a new product may be to consumers. As a result, starting the journey using comfort dishes from a region may provide a better path.

Game Changers and Trend Shapers

As you move through product development and innovation pathways, consider the following potential game changers and trend shapers and how they may affect your strategy:

- What adversaries/allies exist in the trend’s path?
- Are there any alliances that could propel the trend?
- What current or anticipated trends exist that could compete with the trend?
- What current or anticipated trends exist that could align with or support the trend?
- Are there technologies that can be taken advantage of?
- Can you cross-tie the trend to other existing trends: health, flavor, government, travel, consumer ties, etc.?
- Could government intervene in the trend (e.g., obesity, menu labeling, etc.)?

When looking ahead, watch for the following indicators, which can be viewed as forecast signals for upcoming changes in direction:

- Vegetarian/flexitarian numbers will be linked directly to sustainability and obesity: increased interest in sustainability and obesity equals an increase in vegetarian/flexitarian numbers.
- Breakfast is the meal to watch for signals of economic recovery: an increase in breakfast traffic signals that the economy is recovering.
- Higher food and gas prices will shift consumers discretionary spending, but not their optimism.
- Incorporation of new vegetables and seasonings demonstrates consumer experimentation versus caution.
- Beverage, meat, and dessert categories act as barometers of consumer mood: increased spending on cocktails, craft beers, wines, and desserts, as well as insect consumption, equals economic recovery behavior, while consumption of inexpensive domestic beer and meatloaf and decreased consumption of wines, cocktails, and desserts equal economic recession behavior.

Finally, consider the following suggestions that can help keep you mindful during any stage of a trend’s lifecycle:

- Know the birth and lifecycle of a trend prior to deciding whether to enter, so you can forecast how to navigate it.
- Neither love nor hate a trend—emotions will fog the view of a trend’s true pattern, and you may be blindsided when it shifts.
- Spend more time researching the personality and trajectory of a trend than worrying about what your competitors are doing—after all, they may not be on the right path.