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## FOOD AND DINING TRENDS IN

## RESTAURANTS AND HOTELS FOR 2011

FORECAST BY JOSEPH BAUM & MICHAEL WHITEMAN CO.

INTERNATIONAL RESTAURANT CONSULTANTS

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**1 Old Italian is Newly Respectable:** All those old Italian chestnuts, from meatballs to eggplant parm, are getting new focus. The Meatball Shop in New York (five kinds, four gravies) has endless lines and will generate lookalike startups in 2011. Disney opened a Meatball and Beer Bar (also four kinds). Totonno's in Georgia is trying to franchise a meatball shop.

Fancy sandwich shops are nostalgically menuing them, along with eggplant parm, as hero sandwiches with social aspirations. Lincoln, Jonathan Benno's (ex Per Se) new restaurant, has a rarified lasagna – in a \$20 million facility. Meatball Mondays and all-you-can-eat spaghetti nights are on the rise.

The Negroni is being rediscovered by bartenders and while it won't be the drink of 2011, it bears examining. Also growing: Consumer recognition of ancient and regional Italian grapes: bonarda, aglianico, vermentino, negroamaro.

Artisan pizza boutiques are spreading everywhere, many adding mozzarella bars to their menus, making the stuff in-house and serving it still warm. Unfamiliar but authentic regional Italian ingredients are jazzing up old favorites: lardo, mostarda (mustard fruit), burrata (this one's important), salsa verde (not the Mexican kind), speck (smoked prosciutto), tongue, oxtail, pigs' feet, head cheese, guanciale (pork cheeks), tripe (*I'm getting that offal feeling again!*). Look for more inventive pesto recipes, too.

Olive Garden, Carraba, Macaroni Grill and their competitors aren't playing in this ball field, which will widen the gap between Italian for the masses and Italian for the classes who, by the way, appear not to have been humbled by the great recession and possess serious risk money to try these unfamiliar items (see last sentence of Trend #2).

**#2 Good News at the Top:** With financial sector employees not feeling the rest of the country's economic pain, business will return to upscale restaurants, especially contemporary ones. Average spend may not rebound fully, and lunches will still be weak, but at least seats will be filled at dinner – and not necessarily with coupon-bearing bargain hunters who are something of a plague among recession-battered mid-priced casual restaurants (see Trend #15).

**#3 Stealth Competitors Creeping Up:** The restaurant industry's being blind-sided by new forms of *non-restaurant competition*. Drug stores and convenience stores are ramping up their food departments with newly conceived *fresh* “grab-and-go” departments. Look for Walgreen's to copy big displays of branded items from its Duane Reade chain in New York, with other drug chains already loading up their front-of-store reach-in refrigerators with packaged salads, sandwiches and sweets. Convenience stores are doing the same as both try taking a bite out of supermarket expenditures and – more important to us – out of restaurant revenue.

Most vulnerable are fast feeders, fast-casual operators and dinnerhouses that promote curbside pickup – because they’re facing lower-priced alternatives for consumers in a hurry. If C-stores increase their appeal to women, the damage will get worse. Stores-within-stores: Watch fast food chains opening *inside* C-stores and in supermarkets, chasing after their own customers; more upscale chains and chef-branded ventures within department stores can’t be far behind.

Meanwhile food trucks are multiplying like crazy, bringing food to where customers are and restaurants aren’t (see below) or even right outside existing restaurants.

**#4 Bricks-and-Mortar vs. Meals-on-Wheels:** Food trucks, trawling for customers across the country, are driving restaurant owners nuts. They have big competitive advantages: low investment, no rent, no air conditioning, no utilities hookups, no real estate taxes, no dining rooms or waitstaff, no reservationists -- and marketing costs reduced to Twitter and an iPhone. In a replay of bricks-and-mortar vs. e-businesses (think Amazon, a winner; think Blockbuster, a loser), established restaurateurs are pushing for local laws restricting these caravans, probably a no-win game; LA’s recent regulations will slow them down but not stop the spread.

Catching on around the country: Food truck “rodeos” where a dozen or more vendors turn an empty field or parking lot into a food fair on wheels. If you can’t beat ‘em: Look for more restaurant operators and big-name chefs to supplement their businesses by chasing after customers with their own trucks.

Will there be too many trucks chasing too few customers? Wait till 2012.

**#5 Korean Food and the Nothing-Is-Sacred Taco:** Big irony: We’ve long been predicting Korean dishes as the next big cuisine, but they

haven't gained much traction outside of Korean neighborhoods – except in food trucks where they've been mashed together with Mexican tacos. Kogi, the seminal Los Angeles food truck that launched a thousand wheels, features Latino tacos filled with Korean ingredients, now being copycatted profusely. This will lend legitimacy to Korean flavors, and *bulgogi*, *bibimbap* and *kimchee* will enter America's gastronomic lexicon. In Philadelphia, the world-food restaurant Meritage has been serving Korean short rib tacos at the bar, and Wednesday nights this summer featured Korean fried chicken for two, so word is getting around. Publicity surrounding the Momofuko chain also will give Korean a push.

*But the wrapper will become more important than its contents:* Look for an outburst of outrageously creative multi-culti tacos, soft and hard, from fast food to haute cuisineries.

Watch for American chefs on reconnaissance patrols to LA and New York Koreatowns. And wait for a big breakout: A “big deal” Korean restaurant that is marketed to non-Koreans.

**#6 Popsicles going global and artisan -- and what it means:** In our 2008 Trend Forecast we urged our readers and clients to investigate “paletas” – chunky, fruit-filled Mexican ice pops with awesome flavors such as mango- chile or jicama-orange. Three years later, these niche items are becoming trendy. Gourmet ice pops are popping up filled with all sorts of exotica – mostly small batch products riding the wave of “fresh” and “locally made.” In New York, La Newyorkina sells flavors like tamarind and passionfruit, and People's Pops (so seasonal-artisanal it shuts down after summer) creates treats-on-a-stick like roasted red plum, blackberry-black tea, and pear-ginger. In Raleigh and surrounding towns, Locopops hawks pomegranate-tangerine, Mexican chocolate and orange-mango-ancho. For real

excitement, explore *paletérias* in California's Mexican enclaves, where intensely flavored ice pops are filled with chunks of vibrant ingredients – so you get deep texture, too.

Our point isn't about the ice pop trend, which may be co-opted by larger manufacturers, but *about the flavors*. Keep an eye out for ingredient combos like these in new wave cocktails, house-made sodas (another small trend), house-made salad dressings, even sauces for savory main courses (orange-mango-ancho ribs anyone?).

**#7 Making Customers Unwelcome:** Economically gun-shy consumers increasingly will face an unwelcome mat rolled out by restaurateurs trying to save a buck here and there. Look for more restaurants putting no credit card signs in their windows; eliminating reservations; upping the price of wines-by-the-glass while these wines appear nowhere on the list; no tablecloths; trying to ration the time people can occupy a table. These tactics might generate an operator's total profit in lean times but they do nothing for hearts and minds of customers.

**#8 How Does Your Garden Grow, Mrs. Obama?:** The president's point person in the war on waistlines assembled 500 chefs on the White House lawn this past summer, many themselves large-waisted, to help school kids get better food. The restaurant industry responded by cranking up the fat and calories. Denny's stuffed its grilled cheese sandwich with fried mozzarella sticks. Friendly's wrapped its hamburgers with a pair of grilled cheese sandwiches, one on top, the other on the bottom. Burger King's Whopper Bar in New York opened with an undertaker's delight containing four whopper patties, pepperoni, mozzarella and two sauces in a pizza-size bun -- cut so, in theory, it can be shared.

Once again, gross is good – so look for chains to concoct more calorie bombs in 2011 – even while attempting to show that they're greening their businesses

(without any system of verification). People will gobble them up because they're feeling lousy about losing their jobs and their houses, and gobs of fat are neurotically comforting.

Watch for restaurant "snacks" to swell up, burritos almost as big as your head, one-pound meatballs, whoopee pies looking like Frisbees, maybe even monster donuts, all with calorie-count labels that we predict will largely be ignored – except at the margins. People buying multiple snacks during the day will actually skip a traditional meal, knocking their nutritional intake seriously off-kilter.

Ever more books will tell us how to farm, shop and eat ethically and responsibly, while indefatigable Jamie Oliver finds that changing America's eating habits is a tough row to hoe. Have Mrs. Obama's initiatives been in vain? Is the world not listening to the highly publicized advocates of better eating? Take heart: Journalists are listening. Chipotle's president did a photo op with Jamie Oliver honking at all the additives in processed food. WalMart and Target will soon buy more "local" produce. Increasing numbers of thin-waisted upper-crusters will pay \$2 for a holy tomato at burgeoning farmers markets, or a buck for an organic egg; and upscale hotel chefs will tend heirloom vegetable gardens and beehives on their rooftops to feed their fancy clientele.

**#9 Breakfast All the Time:** Morning food business grew fast when the economy went to hell; and then leveled off. But ... so many chains will jump into the business that we predict excess serving capacity before 2011 is over. Jamba Juice, TCBY, Wendy's (trying for the third time), Burger King ramping up a.m. menus, Taco Bell, pizza chains thinking about it for the second time in a decade, frozen yogurt chains testing breakfast items. Meanwhile the four big gorillas –McD, Starbucks, Dunkin' and Subway, which began morning service this year (23,000+ units!) -- will battle everyone to the last egg sandwich.

At the other end of the price spectrum, soft slow-cooked eggs are appearing all over upscale restaurant menus. They're comforting; they turn fancy dishes into homey offerings; and their oozing yolks are cheap substitutes for a sauce. Runny eggs on pasta, on pizza, on braised meats, glamorizing a bowl of tripe; on truffled toast as stand-alone first courses; breaded and fried poached eggs on salads. And on grits (see below)...

### **#10 Grits will leap from morning food to an all-purpose starch**

– part of another trendlet: down-home southern cooking. Shrimp and grits could well be the dish-of-the-year (see “Free From” below)

**#11 “Free From”:** Gluten-free menus will grow this coming year even though a minuscule portion of the population suffers from celiac disease. But allergy sufferers aren't the issue: Consumers are increasingly convinced that *anything* added to food is objectionable – and phases like gluten- and lactose-free somehow sound healthful and reassuring, and perhaps organic – even though this is irrational. It is part of a “free from” push that originated in England, applied to food products contained no “nasties.”

Years ago restaurant menus sprouted little hearts to denote healthy food, with no lasting impact – but this appears to have legs. Justifiably aggressive language from critics of school lunches could spill over first into supermarkets and then food service. And vending machines in hospitals and schools are being retooled to deliver fresh fruits and vegetables -- in which case Mrs. Obama will indeed have made some headway (see Trend #9 above).

Sodium in fast food is in the cross-hairs and could well become a bad food poster boy in dinnerhouses, too. Chain menus, already riddled with disclaimers, will resemble scholarly papers with footnotes about being gluten-free and lactose-free, and disclaiming use of MSG, high-fructose corn syrup, bisphenol-A, rBGH (bovine growth hormone), GMO (genetically modified), along with more newly discovered allergens.

Look for more gluten-replacing starches on menus: quinoa (could be a big winner in 2011), chickpeas, grits.

**#12 Wife Swapping ... but with Restaurants:** The recession created lots of empty restaurants and lots of chefs with no kitchens. So we now have popup restaurants – restaurants, like food trucks, with no location at all. Impromptu food places will pop up all over – some for a night, some for a week. Chefs, often multi-starred, get to strut their stuff, often serving food they'd never dare put on a permanent menu, then go off to the next gig. They're unburdened by long-term leases and ongoing overhead. Customers first found these popups via Twitter and word of mouth, but now popups are treated in the press alongside major restaurant openings.

Next up: Kitchen swapping. Big name chefs will trade kitchens for a night or two which, like wife swapping, keeps life lively for diners as well as chefs. Some chefs now have permanent one-night stands, taking over humble dives or diners once every week. Often with only one or two dozen seats, snagging a place at these popups will become something of a status symbol and a culinary adventure. Coming next: Rotating bartenders spreading the news about their exotic cocktails. And popups run by food and booze companies to show off their wares.

**#13 A Sandwich By Any Other Name:** Last year it was gussied up hot dogs and gourmet hamburgers. Next year it'll be sandwiches over the moon but they'll be called something else. There are *cemitas* coming to where you live – Mexican sandwiches with high flavor profiles and juiciness (here's one: black bean spread, queso blanco, warm crisp-fried chicken cutlet, lots of mayo, pickled jalapenos, avocado, and iceberg lettuce). Get a *cemita* with head cheese and you're halfway to *banh mi* – Vietnamese sandwiches taking over the world with their pate and pickled vegetable fillings now mutating into other glorious flavor combinations (here's one: liver paté, head cheese, jalapeños,



pickled carrot and daikon shreds, bbq pork, sweet mayo, jalapeños and lots of cilantro in a warm banguette). There's an Asianesque meatball version making the rounds, too.

Be on the lookout for *baos*, which traditionally are yeasty steamed buns with savory fillings – but are now being formed as fluffy flatbreads to wrap around *banh mi*-like ingredients. *Tartines* have grown from a slice of bread with a simple spread to fancified open-face sandwiches with \$15 price tags.

Also look for more regional American and ethnic sandwiches. Perhaps the most outrageous – with lines out the door – is a two-unit #7 Sub Shop where they insert an oddball, taste-jangling ingredient into every item: Eggplant Parm with fontina, yellow squash, pickled jalapenos and bbq potato chips; or braised lamb with peanut butter, mint jelly and pappadam. Prochetta is a filling to watch. Traditional Cuban sandwiches started taking off but then crashed because, let's face it, they're pretty boring. Except at Ironsides in San Francisco: pork shoulder brined in orange juice and molasses, chipotle aioli, ham, gruyere, pickles. Chains like Panera are tiptoeing around the trend, but their customers – especially suburban ones -- need to be brought along slowly. Seeing success with far-out ingredients, several big-name chefs are toying with their own very upscale sandwich shops.

**#14 Past Their Sell-By Date:** *Artisan hot dogs* with inventive toppings will be on the downslide. *Gourmet hamburgers* will peak; too many players in a crowded field. *Slapping bacon* onto everything will be so-last-year. The novelty of increasingly expensive *pork belly* will wear off. *Cupcakes* will peak.

**#15 Going Collaborative:** Two trends are at work here: The tendency of younger people to work *collaboratively*, meaning they make joint decisions

about almost everything; and the linkup of various restaurant websites and apps.

Group couponing and location-based here's-where-I am sites are grabbing hold of what used to be restaurant-generated promotions, pushing recession battered restaurants to provide deep discounts. Groupon, Village Vines, Open Table all now are access points for reservations and for bargain hunters – and many will try to replicate the Zagat-Foursquare-Tastespoting on linkup smartphones, so you find recommendations, deals and even fotos of food you and your friends might like all more or less in one place. This could create irresistible pressure on restaurateurs who haven't got their own mass to push back. Conventional reservations and marketing programs will be bypassed – so will old-media critics without new platforms – and many restaurants will lose control of how they market themselves and how they price their food, providing a stream of profits for electronic middlemen.

Purely speculative: What would happened if six friends made their own reservations at a restaurant ... and demanded a discount similar to what was commanded by Groupon? Frightening!

**BUZZWORDS FOR 2011: Coconut water**, awash in a mythology of good health; **bourbon**, for people who actually like booze; **cucumbers, lavender and hibiscus**, especially in cocktails; **upscale food courts**; **umami** along with stealth use of **miso**; **sangria** with new twists; **peppadew**; **fancy poutine**, a Canadian calorie bomb, could have a US trend life of a year; **macarons**, not macaroons; **whoopee pie**; **Korean** spicing and condiments; **pesto variations**; newfangled machines **vending fresh fruit** and **vegetables**; **designer donuts** imitating froufrou cupcakes; **meatballs**; **burrata**; **tacos** with global and wacky

fillings; **convenience store cuisine**; artisan **ice pops**; “**free from**” food labels; **popup restaurants**; **fregola**, a pasta from Sardinia; **Greek yogurt**; ever-larger “**snacks**” and multiple snacks replacing meals; **meatless Mondays**; reinvented **grits** and down-home **Southern cooking**; and isn’t anyone tired yet of **black kale**?

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**They have run trends seminars for Taj Hotels, Mumbai; Starwood Asia-Pacific, Bangkok; Certified Angus Beef Convention, Scottsdale; Culinary Institute of America, Napa Valley; Les Dames d’Escoffier Convention, Philadelphia; Club Corporation of America Convention, Austin.**

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