

THE MENU ADOPTION CYCLE

a framework for predicting food trends

DATASSENTIAL



LET'S GET STARTED

By the end of this whitepaper, you'll be a Menu Adoption Cycle expert. From the newest users, to seasoned pros, there's something in here to level up your MAC knowledge that will drive innovation and inform your strategies.

MEET THE MAC

Dive into a MAC from the over 100 topics that live on SNAP. Find the perfect flavor or ingredient to fit your needs.

MAKE THE MAC WORK FOR YOU

Determine the MAC stage for each ingredient in your latest idea. Does it work in the MAC stage that works for you?

PEAK MAC MASTER

Develop a new concept in Food Studio based on MAC stages. Switch out ingredients and see how your item measures up as you flex the MAC to elevate your innovation game.



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Learn the ins-and-outs of what makes up the Menu Adoption Cycle. Understand the foundation of trend predictability and the components you'll spot on every MAC.

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Explore the evolution of a trend throughout the MAC and why the time it takes for trends to evolve is shrinking. Understand the role artificial intelligence will play in activating key trends that are identified through the process.



TRENDS ARE PREDICTABLE

Avocado toast, sumac, turmeric, fried pickles, shishito peppers—you probably knew them as trends in 2019, but were they already on your radar 10 years ago?

Society teaches us to spot trends by examining what's happening today. What's the latest fashion craze? What's the coolest new gadget? What foods and flavors are growing in popularity? But rather than just looking at what's already happening today, imagine if you could predict the food trends that will define the landscape for the next several years. How helpful would it be to have a new product pipeline that always keeps you several steps ahead of the competition?

The good news is that this capability exists, used by manufacturers, operators, and retailers to build key market advantages. But while the tools are already available today, keep in mind that an organization-wide commitment is required to get the most out of them.



PREDICTABILITY & THE MAC

Food trends follow a common life cycle, a predictable journey spanning four distinct stages. We call it the Menu Adoption Cycle, or MAC for short, and it's proven to be a remarkably accurate tool for predicting the next big thing.

WHY IS IT CALLED THE MENU ADOPTION CYCLE?

Because trends start at restaurants. 70% of US consumers indicate that their food preferences are driven primarily by what they encounter on restaurant menus—more so than what they find on grocery store shelves or in a recipe book. Despite the fact that most meals are consumed at home, trends are generally catalyzed by consumers' away-from-home experiences.

Over the past decade, the MAC has enabled us to predict hundreds of food trends early in their life cycle. Here are a few examples:

2013

Chef Casual
Tzatziki
Non-Alc. Craft Bevs.
Habanero

2014

Artisanal Toast
Food Halls
Nut Butters
Bao Buns

2015

Matcha
Panzanella
Piri Piri
Cold Brew Coffee

2016

Modern Vegetarian
Pulses
Aleppo Peppers
Freekah

2017

Poké
Turmeric
Activated Charcoal
Ghost Pepper

2018

Avocado Toast
Gose Beer
Gochujang
Furikake



STAGES OF THE MAC

A trend's life cycle is defined by where that trend shows up—starting at fine dining restaurants and then eventually finding its way to mainstream supermarket shelves and beyond. Knowing where a trend is along the Menu Adoption Cycle is the first step to predicting its future.

INCEPTION



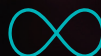
Trends start here. Inception-stage trends exemplify originality in flavor, preparation, and presentation. At this stage, they are difficult to find on many menus.

ADOPTION



Adoption-stage trends grow their base via lower price points and simpler prep methods. Still differentiated, these trends often feature premium and/or authentic ingredients.

UBIQUITY



Ubiquity-stage trends have reached maturity and can be found across all sectors of the food industry. Though often diluted by this point, their roots are still recognizable.

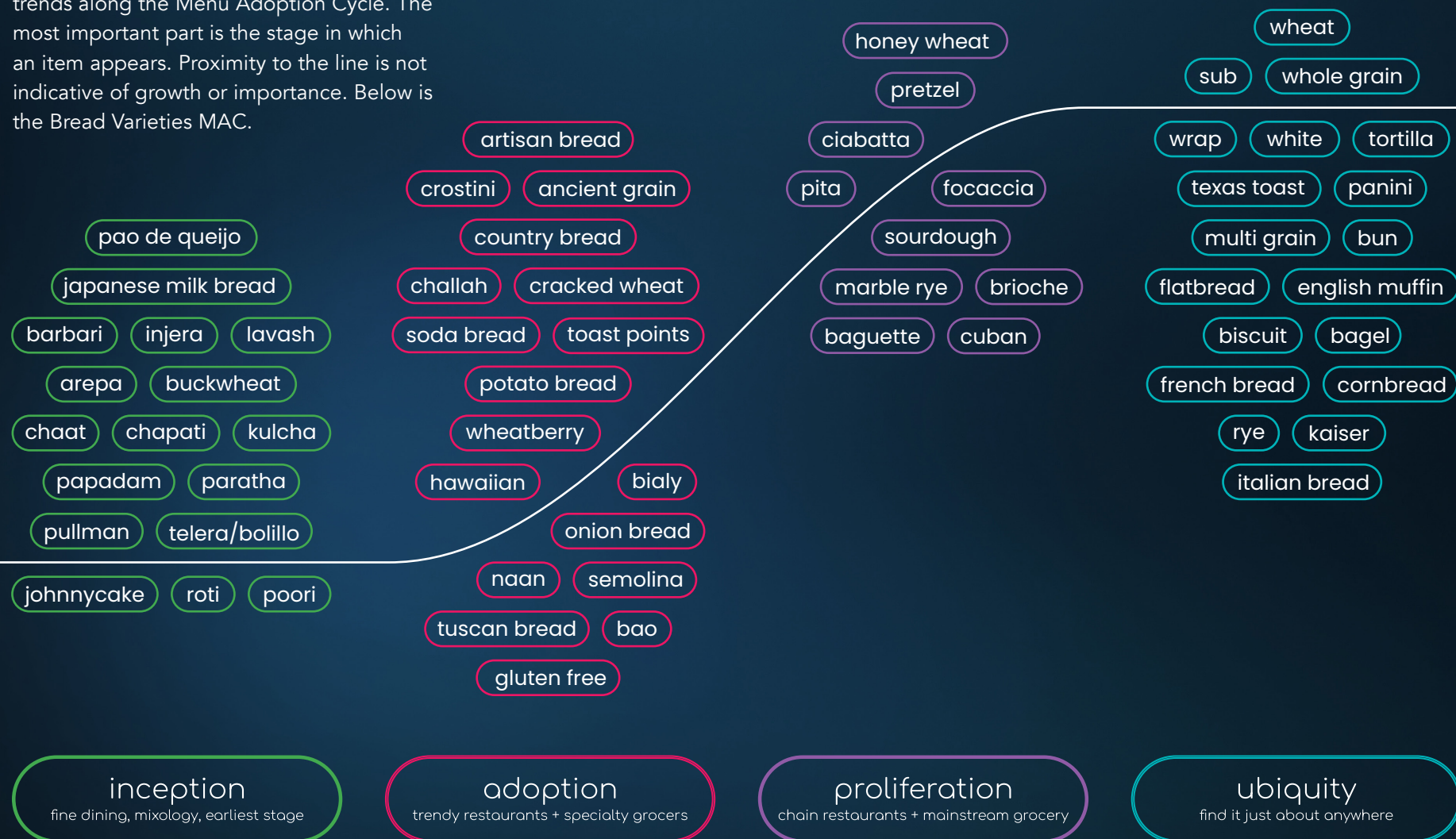
PROLIFERATION



Proliferation-stage trends are adjusted for mainstream appeal. Often combined with popular applications (on a burger, pasta, etc.), these trends have become familiar to many.

THE MAC IN ACTION

Below is an example of how we visualize trends along the Menu Adoption Cycle. The most important part is the stage in which an item appears. Proximity to the line is not indicative of growth or importance. Below is the Bread Varieties MAC.



KEY SEGMENTS & VENUES

Here's a look at the food industry segments and venues where trends typically appear as they move through each stage of the MAC.



INCEPTION

IN FOODSERVICE

Global Independents,
Fine Dining

AT RETAIL

Ethnic Markets, Ethnic Aisle

ADOPTION

IN FOODSERVICE

Gastropubs, Chef-Casual,
Food Trucks, Upper Casual,
Casual Independents,
Progressive Convenience

AT RETAIL

Farmers Markets, Specialty
Grocers, Gourmet Food Stores

UBIQUITY

IN FOODSERVICE

Traditional Convenience,
Corporate Cafeteria,
Family Restaurants,
Healthcare, K-12 Schools

AT RETAIL

Drug Stores, Dollar Stores

PROLIFERATION

IN FOODSERVICE

Lodging, Casual Chains,
Colleges, Grocery Deli,
Quick Service Restaurants

AT RETAIL

Traditional Grocery,
Mass Merch, Club Stores

RESTAURANT & RETAIL BRANDS

You can also think about the MAC in terms of specific restaurants and stores. Certain places cater to earlier stage trends, while others tend to favor those that are already well-established in the mainstream.



WHAT'S TRENDING?

Here are just a few examples of trends that appeared in 2019.

INCEPTION

BONE MARROW

ELOTE

GOSE

MATCHA

SHISHITO PEPPERS

SUMAC

ADOPTION

AVOCADO TOAST

GOCHUJANG

GREEN GODDESS DRESSING

MEZCAL

POUTINE

TURMERIC

UBIQUITY

FRIED CHICKEN SANDWICH

MIMOSA

PAPRIKA

RADISH

SAUSAGE GRAVY

SHORTBREAD

PROLIFERATION

BREAKFAST TACOS

BRISKET

FRIED PICKLES

SALTED CARAMEL

BUTTERMILK RANCH

TATER TOTS

THE SCIENCE: MENUTRENDS

Applying the MAC is both a science and an art—that is, it requires a combination of reliable, objective data and an informed, human perspective.

While formulas do play a crucial role in assigning each trend to its appropriate MAC stage, there's no universal formula that does the job entirely; human intelligence is a critical part of the equation.

PENETRATION ANALYSIS

Statistical menu data provides the science; quantitative information about what restaurants offer on their menu is the foundation of the MAC. This starts with penetration analysis—the percentage of restaurants that offer a specific food, flavor, or ingredient—which is tabulated by key restaurant types that represent different stages of the cycle.



THE SCIENCE: TREND GROWTH

Consider the four trends below, all of which have grown significantly on menus over the past four years. Each, however, is at a different stage of its life cycle.

Black Garlic, although up dramatically, is still found predominately in fine dining restaurants. It is a clear example of an INCEPTION trend.

Kale, meanwhile, has trickled from Fine Dining to Fast Casual and progressive QSR chains. It easily transforms from comfort food to LSR chains' proof of healthy menu options moving it from ADOPTION to PROLIFERATION.

UBIQUITOUS Mac & Cheese conjures up memories of childhood, and continues to grow on menus where it morphs from comfort food to upscale with creative inclusions. It is firmly established and familiar to consumers, a dish that is less risky but can be made unique.

		4-year Growth	Fine Dining	Casual Dining	Midscale	Fast Casual	QSR
Black Garlic	INCEPTION	121%	11%	2%	1%	1%	0%
Turmeric	ADOPTION	195%	6%	5%	3%	8%	2%
Kale	PROLIFERATION	56%	45%	25%	13%	34%	10%
Mac & Cheese	UBIQUITY	13%	30%	38%	33%	22%	21%

THE SCIENCE: A CASE STUDY

An aspect of the science of understanding the potential of a trend lies in tracking points of sustained growth.

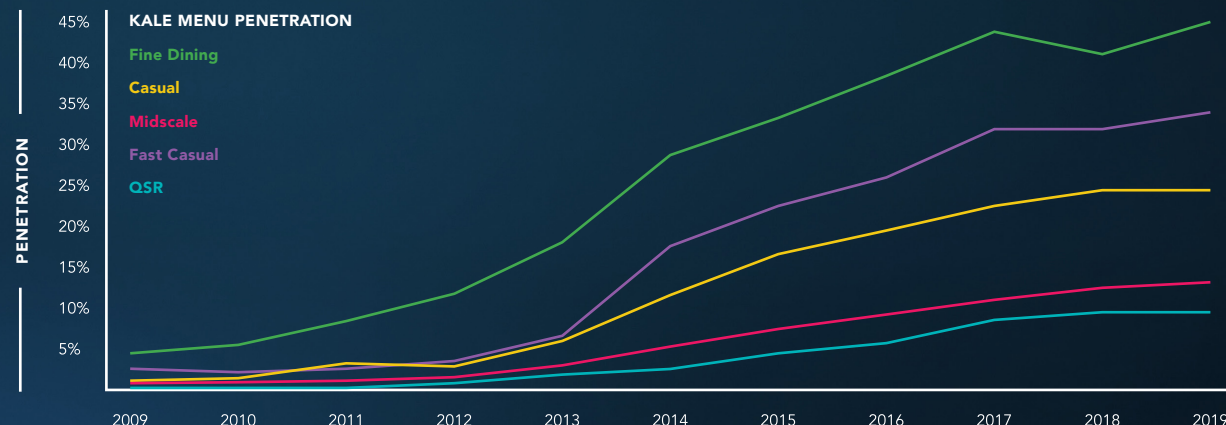
KALE

Kale's ascendancy began in 2009, kicking off at fine dining in the INCEPTION stage. Casual dining and Fast casual jumped in a few years later, and by 2013 all segments began to contribute to its rapid growth, pushing kale into the PROLIFERATION stage.

THE LTO FACTOR

Limited Time Offers have the unique ability to inject growth through cyclical appearances on menus that in turn start impacting growth across the calendar.

Popular for its naturally healthy halo, kale's rapid growth is in part due to its cyclical popularity as an LTO during January. Eventually, kale's annual push began to bleed into other months, and by 2015, kale's LTO usage peaked and has since become a mainstay on menus around the year.



THE ART: TREND TRAITS

Expert trend practitioners are instrumental in bringing the MAC to life.

Having an understanding of what separates fads from trends, the history of specific trends, and the underlying need states driving those trends is enormously helpful in predicting their future course.

FAD OR TREND?

Consider the general characteristics of fads versus trends below. How would you classify the Keto Diet, plant-based menus, or rainbow foods? Fad or trend?

FADS

- Media-driven
- Hyper growth
- Retail catalyst
- Limited true need

TRENDS

- Restaurant-driven
- Organic growth
- Democratize-able
- Greater underlying need



THE ART: TREND BARRIERS

Just as important is understanding external influences that can either stop a trend in its tracks or supercharge it to the next stage. Here are a few TREND BARRIERS:

ARE THERE SOURCING CONSTRAINTS?

While venison and Yuzu are both increasing rapidly on menus, there simply may not be enough of either to go around if their popularity continues to grow.

Later stages of the MAC rely on large chains to propel the trend forward. Is there enough potential supply to satisfy a McDonald's or a Walmart? As operators like Chipotle move to GMO free foods, will there be enough supply to satisfy its needs?

CAN IT BE OFFERED IN AN EASILY RELATABLE FORMAT?

Certain trends, by virtue of what they are, will be inherently challenged to make it out of the INCEPTION stage. Bone Marrow is a great example; although up dramatically over the past few years in fine dining restaurants and gastro pubs, many consumers will dismiss it as being just "too weird".



THE ART: TREND ENABLERS

On the flipside, there are also several things that can help accelerate a trend forward, such as these key **TREND ENABLERS**:

CAN IT FIND NEW LIFE LATE IN THE CYCLE?

Have you noticed America's renewed love affair with bacon? Although already ubiquitous for decades, bacon somehow has become quite cool again. But take a look at what's driving this—the trend-worthy part isn't so much traditional applications such as bacon on a burger; it's all of the new uses, such as bacon sundaes, bacon cookies, or bacon jam, as well as emerging ultra-premium cuts of bacon that go beyond standard grocery store fare. An old trend can be reinvigorated when applied in new ways.

IS IT VERSATILE ACROSS DAY PARTS & APPLICATIONS?

The explosion of Sriracha over the past decade was made possibly by not only people's love of its flavor, but more specifically their love of its flavor on an astonishingly broad cross-section of foods. Sriracha is right at home with everything from sandwiches to breakfast dishes, and it's this versatility that has helped transform it from a niche condiment to one of the fastest growing flavor profiles over the past 10 years.



TREND EVOLUTION

The journey from **INCEPTION** to **UBIQUITY** is not static. Trends morph significantly during their lifecycle.

The **INCEPTION** stage is a stumbling block for many trends; although well-suited for higher-end restaurants, they may prove challenging to adapt for a broader audience. On average, only 30 to 40% of trends make it out of inception.

But once a trend hits **ADOPTION**, there's an excellent chance it will continue to grow. Most such trends progress into **PROLIFERATION**, and the vast majority of those will ultimately march on toward **UBIQUITY**.

Again, consider the case of Mac & Cheese; what started as a kid's dish and Southern side has since transformed into an adult favorite, now often center of plate and paired with premium ingredients.

INCEPTION

AUTHENTIC

Largely authentic, generally adhering to traditional preparations (even if the applications are unique).

**30-40%
CONTINUE TO
THE NEXT STAGE**

ADOPTION

CREATIVELY ADAPTED

What is lost in authenticity is often made up for in other forms of culinary creativity.

**60-70%
CONTINUE TO
THE NEXT STAGE**

UBIQUITY

DILUTED

Now fully mature, the trend is often heavily diluted and likely bears little resemblance to what it once was in inception.

PROLIFERATION

FOR THE MASSES

The dilution process begins as restaurants and food suppliers focus on familiar notes in order to satisfy the masses.

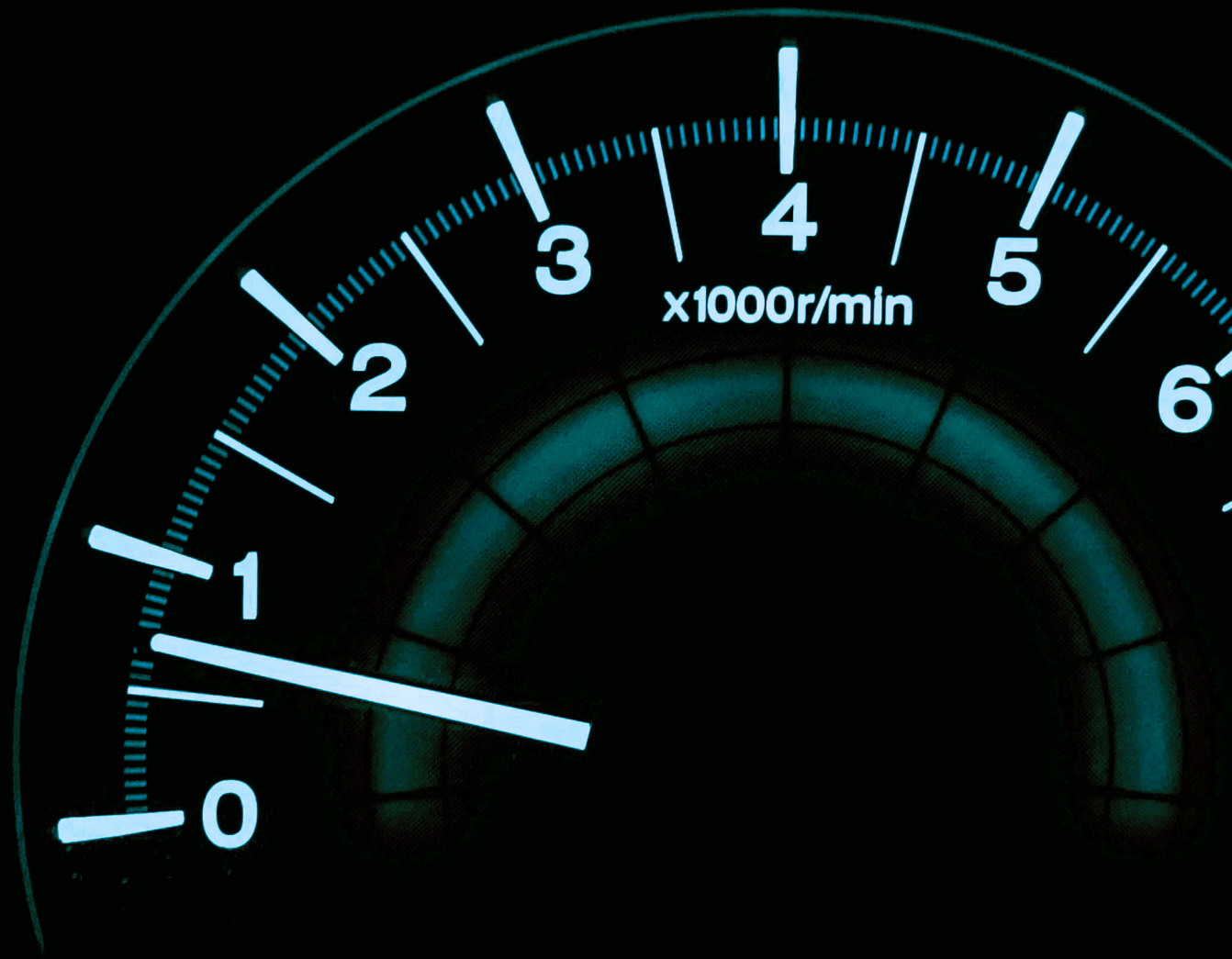
**80-90%
CONTINUE TO
THE NEXT STAGE**

TREND ACCELERATION

Historically, trends took around 12 years to move through the Menu Adoption Cycle. In recent years, however, that horizon has compressed significantly—we believe the cycle time will be trimmed in half to 6 years.

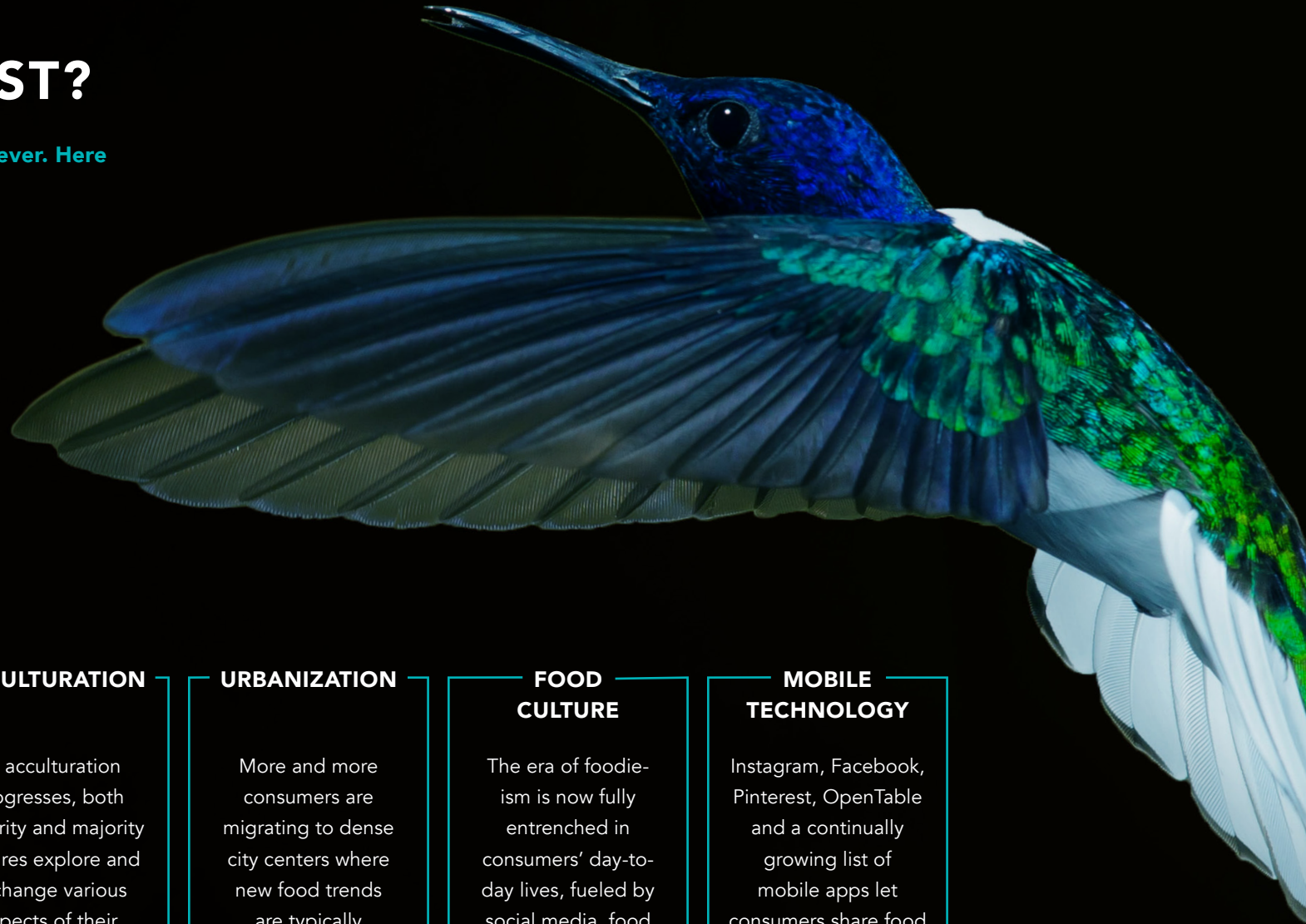
More than ever, speed matters. Food companies used to be able to wait for trends to mature before making their move, but today that's no longer a smart course of action. As trends continue to accelerate, speed has emerged as a potent competitive advantage.

Organizations that adopt trends earlier are far better able to capitalize; those that wait too long risk not only having those trends pass them by, but also allowing their brands to be perceived as tired and old.



WHY SO FAST?

Trends are moving faster than ever. Here are a few reasons why:



DIVERSITY GROWTH

The non-white population in the U.S. is projected to grow by 50 million by 2050, bringing with it a greater interest in foods and flavors that are reflective of diverse cultures.

ACCULTURATION

As acculturation progresses, both minority and majority cultures explore and exchange various aspects of their cultures, especially foods and flavors.

URBANIZATION

More and more consumers are migrating to dense city centers where new food trends are typically adopted at a much faster rate.

FOOD CULTURE

The era of foodie-ism is now fully entrenched in consumers' day-to-day lives, fueled by social media, food blogs and shows, and the elevation of food as a social driver.

MOBILE TECHNOLOGY

Instagram, Facebook, Pinterest, OpenTable and a continually growing list of mobile apps let consumers share food experiences faster than ever before.

THE NEW SWEET SPOT

For the past 30 years, the sweet spot of the American consumer's appetite has fallen squarely in the **PROLIFERATION** stage—safe, mainstream foods that are, at most, only slightly progressive.

We believe that's changing, with a new sweet spot embracing two key avenues of innovation. If you want to play in the sweet spot, you should move your brand towards **ADOPTION**-driven innovation and Fusebiquity.

ADOPTION-DRIVEN INNOVATION

As evidenced by America's growing appetite for globally facing foods and passion for more adventurous dining, innovation focused on pulling from the **ADOPTION** stage offers an updated, relevant experience for consumers.

FUSEBIQUITY

Fusebiquity takes approachable ingredients in **UBIQUITY** or **PROLIFERATION** and pairs them with exploratory flavors from **INCEPTION** or early stage **ADOPTION**. In this way, mainstream ingredients become novel experiences. The humble french fry is elevated to an experiential moment when sprinkled with furikake.



PREDICTING THE FUTURE

We know that trends tend to follow predictable patterns, but what comes after you've worked through the MAC process and are ready to activate the trends you're tracking?

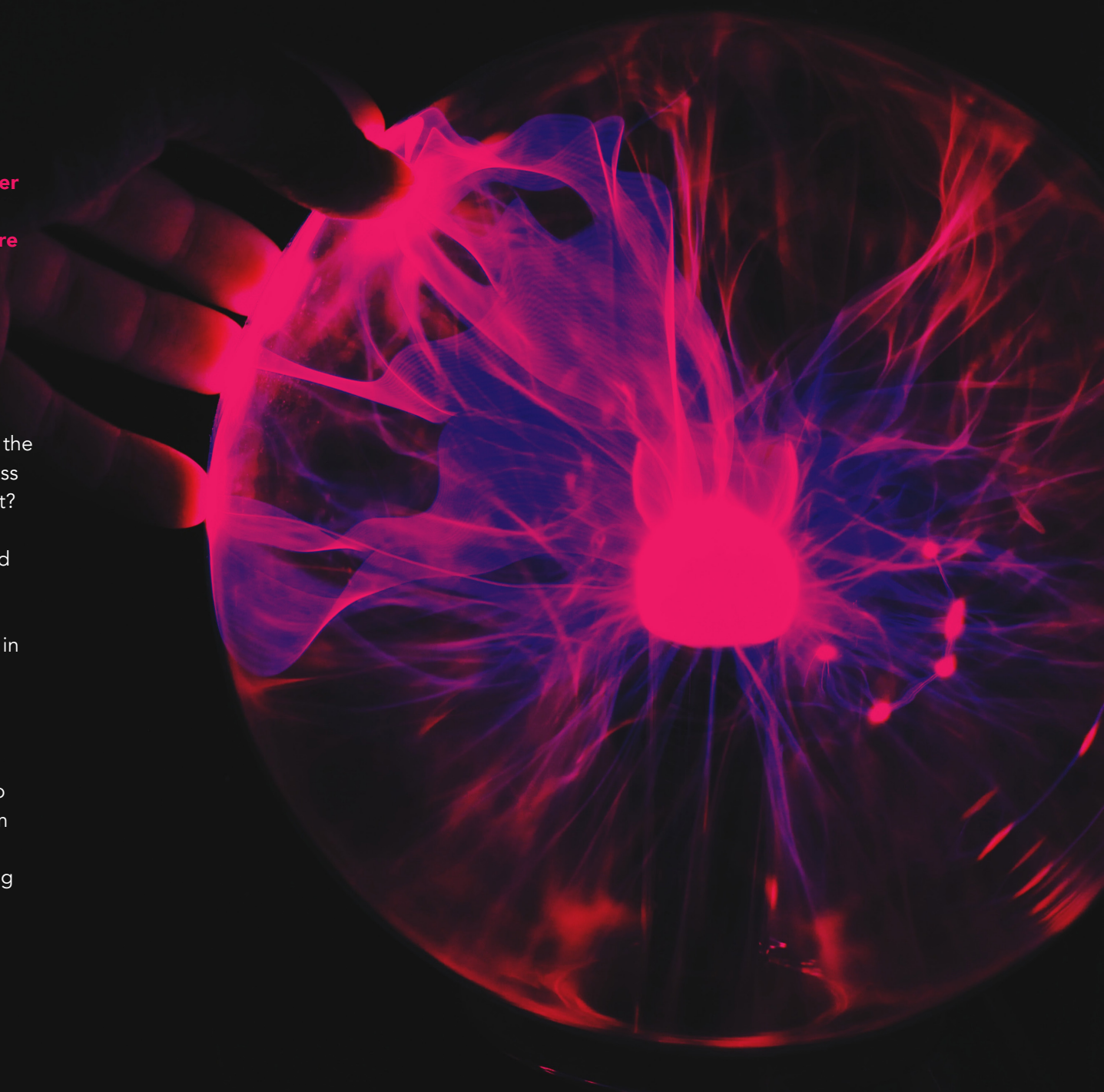
THE NEXT PHASE

How has a trend fared in the last year? How about in the last four? Can we expect that growth to be a predictor of performance for the next four? Will that trend continue to progress through the MAC cycle and I should act on it?

You can estimate where a trend will go based on where it's been, but utilizing artificial intelligence adds a fresh perspective to the future of trends and where they may appear in its lifecycle using the MAC.

THE SOLUTION

Haiku is Datassential's AI engine designed to power our tools and elevate predictions from those based on what's happening today to machine learning fueled predictions targeting up to 4 years in the future.

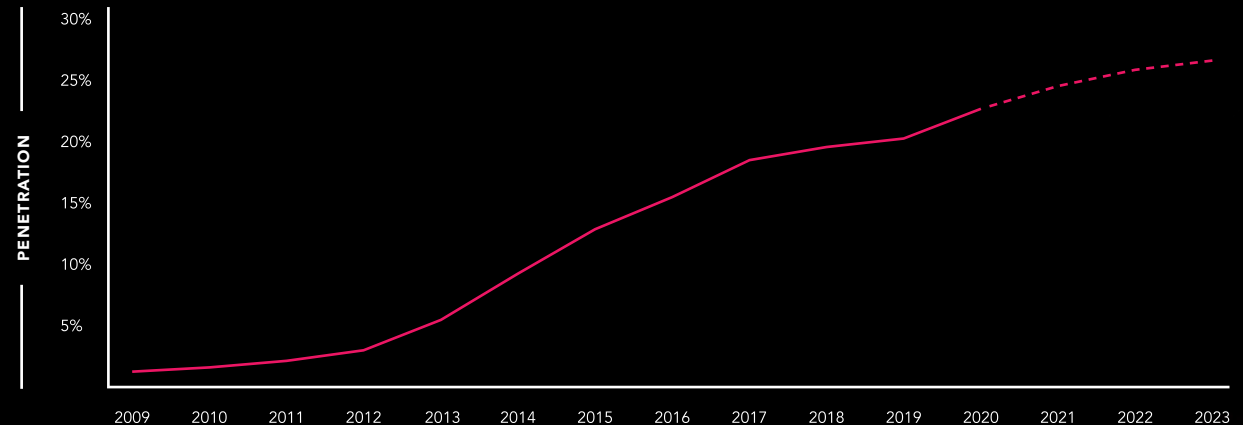


THE POWER OF HAIKU

Consider the trend graph for kale to the right. We've watched it move from ADOPTION to PROLIFERATION, but what does that mean for the future?

Haiku predicts continued growth over the next 4 years in such a way that we may see kale's move from PROLIFERATION into UBIQUITY by the mid-2020s.

Historical trend data provides the foundation for trend identification and strategy building. Predictive data provides the detail to anticipate a trend's movement. Instead of waiting for a specific trend to make a jump into a new MAC stage, anticipate the move and be ready to act at the critical point of a trend's evolution.



DATA TOOLS

DATA TOOLS

Applying the Menu Adoption Cycle requires a well-calibrated analytic framework, starting with a high-quality restaurant menu database.

15+ YEARS HISTORY

Trend prediction requires historic perspective and, in particular, the ability to track each trend's prior movement. Is it just a flash in the pan or a true trend? Historic data is essential to make that determination.

STABLE COMPOSITION

Restaurants should remain constant each period. Changing the composition of the database will cause unwanted shifts in the data that make it impossible to determine if the trend is actually up or down.

CENSUS-BALANCED SAMPLE

The menus in the database should mirror the national restaurant census. This means having a proper balance across segments, menu types and geographic regions...as well as chains vs. independent restaurants.

COMPLETE MENUS

Was the kid's menu captured for each restaurant in the database? How about the separate bar menu or dessert menu? Proper penetration tracking requires a complete menu for every location.

ADEQUATE SIZE

For U.S. restaurants, you'll need a data set of at least 4,000 distinct menus. If the database is properly balanced and maintained, this size produces reliable readability by segment and major census region. To analyze trends by individual states or metro areas, however, you'll want a far larger data set of at least 60,000 distinct menus.

Detect

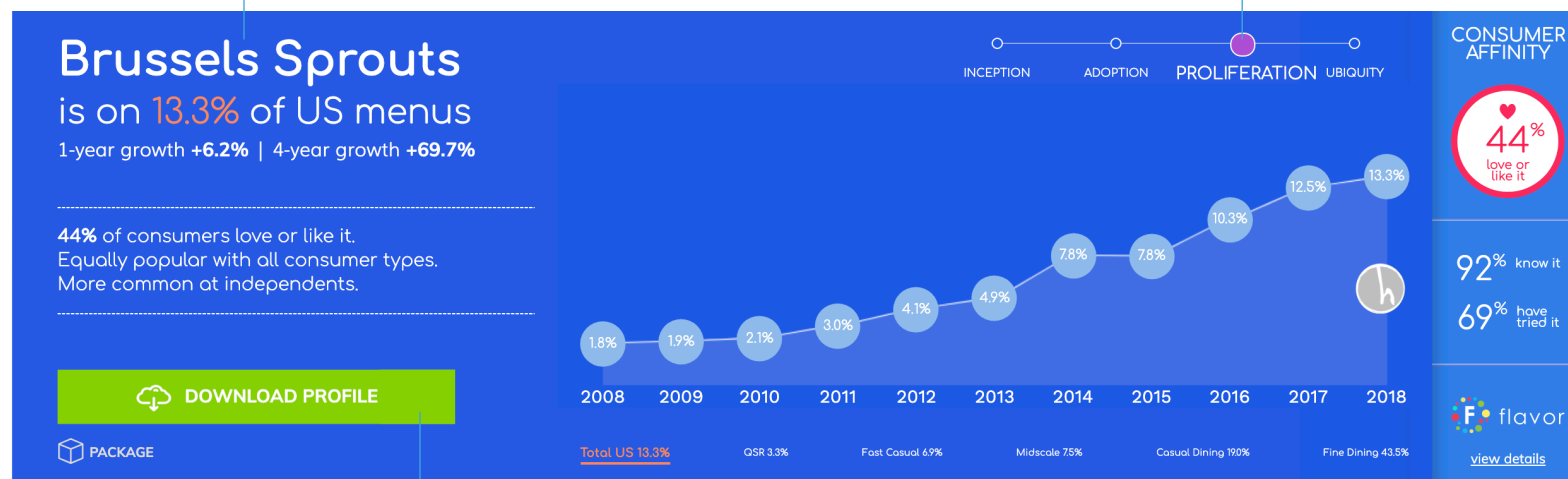
The next big thing.



The world's largest menu database. Uncover emerging flavors, monitor ongoing trends, and innovate with confidence. MenuTrends is the gold standard in tracking and analyzing today's hot food trends and forecast what's to come.

10x larger than other menu databases. Search for any food, flavor, and ingredient with the industry's most-trusted menu database. MenuTrends has it all – millions of items from over 100K menus, thousands of instant reports, and accurate historic trend spanning more than a decade.

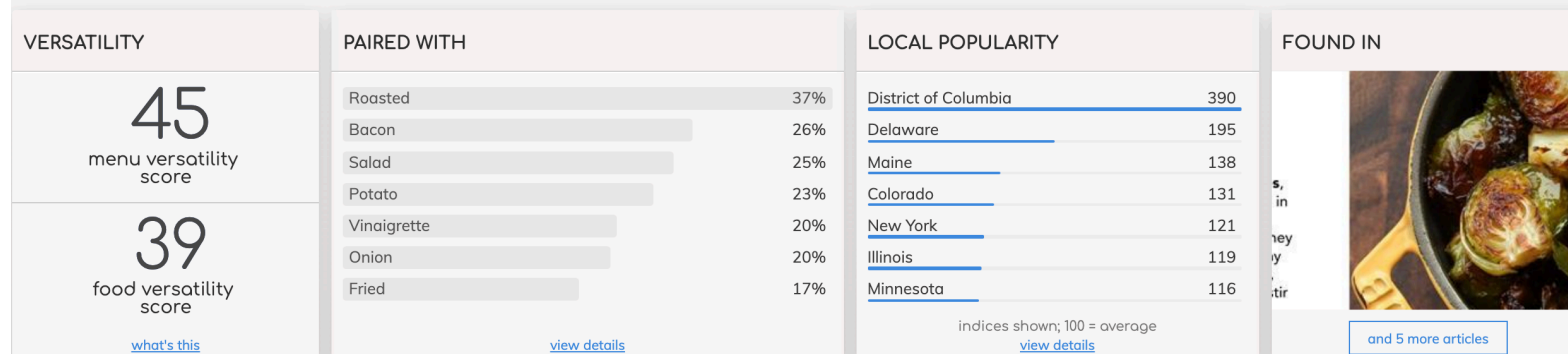
Built for innovation. Innovate with confidence – detect REAL trends early in their life cycle. Separate fads from trends across thousands of foods, beverages, flavors, and ingredients.



POWERED BY HAIKU™

MenuTrends uses machine learning trained against 10 million dishes so you can map the past and predict the future in one easy to use chart.

Know The Trend



Flexible.

Customize any report by segment, region, food item type, and more. MenuTrends offers infinite flexibility to create precisely the report you need.

Start your free trial today, please contact:

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