



Santa Maria

Grill Report

TRADITION VS
innovation

GREENS ARE
THE NEW RED

YOUR GUESTS WANT
international TASTES

THE CRAVING FOR GREAT TASTE, TEXTURE AND MOUTHFEEL IS A PRIMITIVE WONDER. GRILLED FOOD EVOKES EUPHORIA. THIS IS A REPORT ABOUT OUR UNIVERSAL LOVE FOR THE TASTE OF FIRE. WE HAVE LOOKED INTO WHY GRILLED FOOD IS POPULAR, WHAT GUESTS PREFER, TRENDS, TRADITIONS AND WHAT FITS IN THE WORLD OF INTERNATIONAL GRILL FLAVOURS.



The universal longing for the Taste of fire

THE DEFINITION OF GRILLED

Seared meat and veggies, toasted marshmallows and crispy pan-fried dumplings have a common denominator; they are all results of the grill effect known as the Maillard reaction.

When cooking over fire was first discovered we found that it was easier for our bodies to absorb the nutrition in the food. Ever since then the scent of grilled food has sent signals to our brain that makes us both hungry and happy.

INTO THE SCIENCE:

Where does the taste come from?

Digging into the flavour profile of grilled food with the experienced sensory experts at Santa Maria. We all love the grilled taste but what exactly is it that has kept us spellbound ever since cooking over fire was first invented?

GET THE MAILLARD REACTION

It is everywhere and it makes everything taste delicious. It is the reason why bread tastes so good and why coffee tastes roasted. It can even take credit for the hoppy taste in beer and of course it is behind everything we caramelize.

The Maillard reaction is so complex that scientists have barely figured out what it actually is. But they do understand this: The Maillard reaction is many small, simultaneous chemical reactions that occur when proteins and sugars in and on your food are transformed by heat, producing new flavours, aromas and colours.

The flavour from grilling is all about temperature.

GET THE TEMPERATURE

The Maillard reaction and the desirable caramelisation will not happen unless the temperature is just right. The impact of the flavour hinges on three reactions - direct contact between two materials such as the food and the pan, the heated air and radiation, such as infrared radiation from charcoal.

It all depends on how many of these three flavour enhancing reactions you use and how quickly they are transferred through the food. You also need to consider the breaking down of proteins when cooking. This starts above 50 °C and also affects texture and flavour. In a piece of red meat you want lots of flavour reaction on the surface while keeping the middle from overheating. On the other hand, when cooking at low temperatures you want to develop more flavour inside. Hence the inner and outer temperatures are key.

FLAVOUR NOTES THAT MAKE UP GRILLED FLAVOUR

TOASTED

SMOKY

CARAMELISED

BITTER

COALY

SWEET



Trends & PREFERENCES

➔ WE WANT MORE GRILLED FOOD

Grilled food is on the rise and the bbq category in general is evolving. People are starting to put a greater variety of foods on the grill and explore new and interesting flavourings.

58%

of Swedes believe that grilled food **taste better.**

BBQ

Bbq/ hamburger/ grilled meat is the **second biggest** eating out dinner category in the UK.

➔ WE WANT INTERNATIONAL FLAVOURS

Guests expect and crave international flavours. They request exotic dishes at home as well as abroad. International flavours rather than classic bbq tastes offer the variation and excitement that they seek. Both UK consumers and Swedes are heavy on international dishes when eating out. South American, South East Asian, Mexican and North American cuisines are ranked as significant and growth cuisines.

➔ TRADITIONAL COOKING WITH A TWIST

Consumers tend to choose what they're used to, both for lunch and dinner. In order to stay interesting, restaurants continuously tweak their menus and refine their offer. Although consumers often act on routine, they have a longing for variation and "the new". **Finding the right balance between excitement and recognition is key.**

**MORE THAN
70%**

of Swedes and UK consumers choose traditional dishes when eating out for lunch.





GREEN, GREEN, GREEN & Healthy

1 **HEALTHY IS HOT**

Healthy, light and green are important drivers especially at lunch. Vegetarian dishes are seen as healthy options. 4 out of 10 Swedes eat vegetarian once or several times a week. Their own personal health is a big driver, but concerns for the planet, the animals and the effect of the meat industry on our climate plays a big role too.

2 **FOOD THAT FEELS FRESH**

Food that feels fresh is a main driver behind both lunch and dinner choices in restaurants. There is a strong underlying trend where consumers desire to eat lighter, healthier and greener.

Consumers want healthier options but without compromising on taste. It is important to still feel that you're treating yourself even when choosing a healthier alternative!

3 **VEGGIE FLEXING**

A lot of people still like their meat, but they are keen on eating more vegetarian for the sake of their health and the environment. These are guests who make up an important size of both the lunch and dinner scene.

46% of Swedish consumers and 32% of the UK consumers consider themselves flexitarians when it comes to eating out for dinner.

4 **GREEN AS A MAIN**

54% of Swedes wants to grill more veggies.

In 2015 37% of the Swedes stated that they like to use veggies as a main ingredient when they grill at home. In 2018 that figure increased to 50%.

SWEDES ON ORIGIN & ORGANIC

52% of the Swedes **thinks origin is important**

40% of the Swedes **wants to eat more organic**

43% of the Swedes **wants to grill more organic**

LUNCH & DINNER HABITS

Santa Maria asked 500 UK consumers and 500 Swedes about their eating out habits. Here are the results.



UK consumers claim to eat BBQ, Hamburger/ grilled meat 50 times a year when going out for dinner.

THE GUESTS

More men than women eat out.

Young people in the UK eat out more often than the age group over 40. Swedes eat lunch out more frequently than UK consumers. UK consumers eat dinner out more frequently than Swedes.

The number of flexitarians is high in Sweden.



Guests 35 years and younger prove to be the most enthusiastic about global flavours.

MOTIVES FOR EATING OUT?

Spending time with family/ friends/ colleagues is the most important motive for dining out in both UK and Sweden.

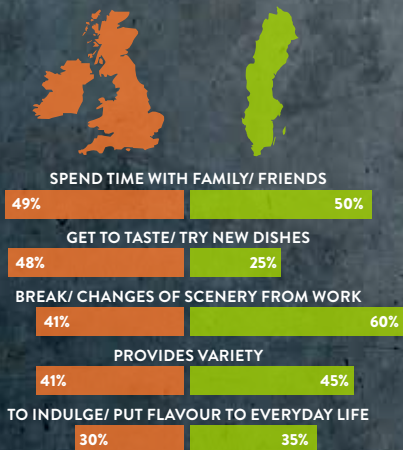
Variety, a break and change of scenery are important motives for lunching out in both the UK and Sweden.

The second most common motive for Swedes is that they don't have the time or means to bring a lunch box.

The UK has a high share of guests who like to **lunch out to taste and try out new dishes.**

Swedes **want indulgence and added flavour** to everyday life when eating dinner out.

WHY DO YOU EAT LUNCH OUT?



WHY DO YOU EAT DINNER OUT?



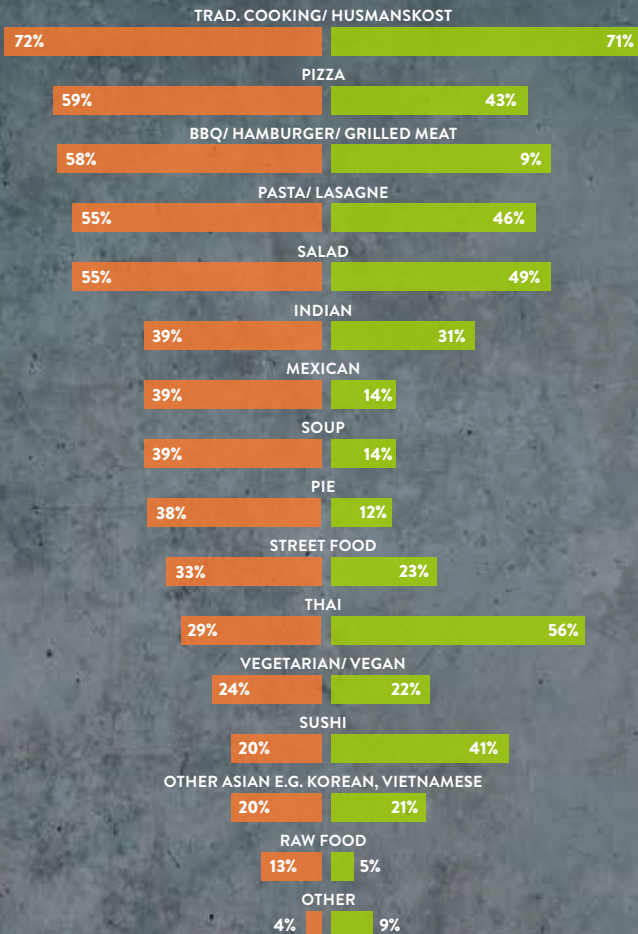
WHAT DO THEY EAT?

Traditional national cooking is the most common type of food.

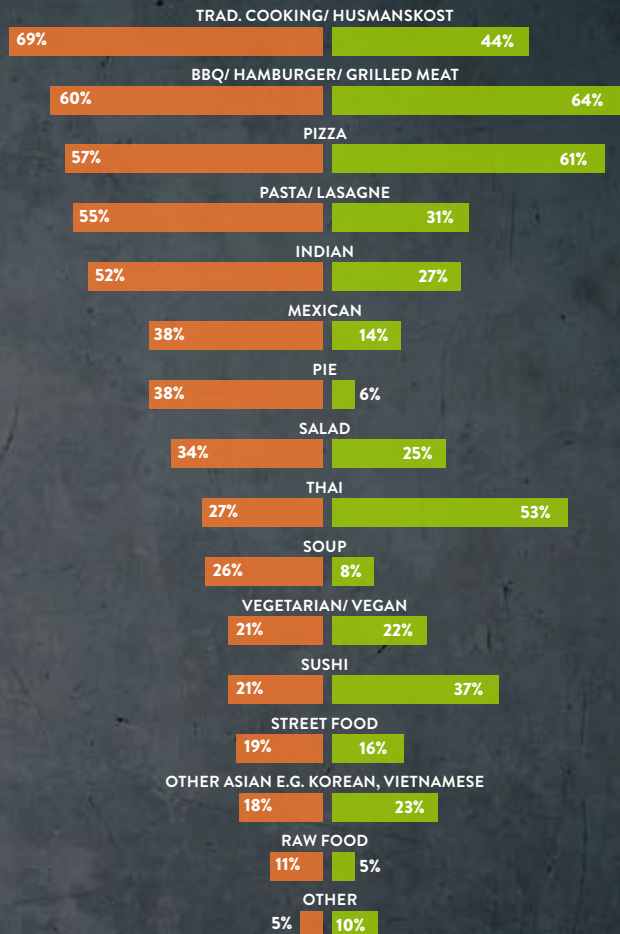
Bbq/ hamburger/ grilled meat is the third most popular type of lunch when eating out.

Bbq/ hamburger/ grilled meat is the **most popular category in Sweden** and second most popular category in the UK when **eating dinner** in restaurants and pubs.

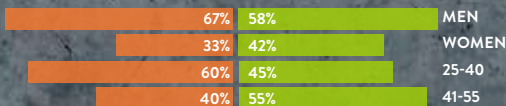
What do you have for LUNCH?



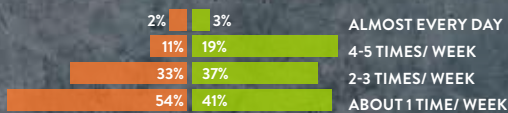
What do you have for DINNER?



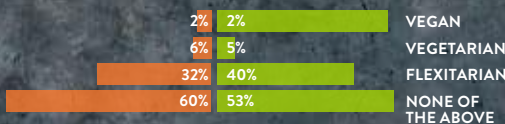
LUNCH DEMOGRAPHICS



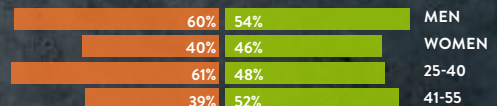
HOW OFTEN DO YOU EAT LUNCH OUT?



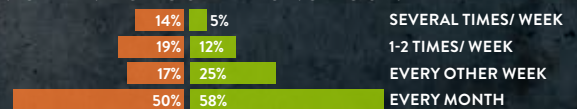
I WOULD DESCRIBE MYSELF AS:



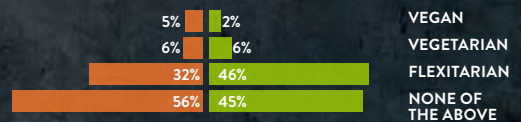
DINNER DEMOGRAPHICS



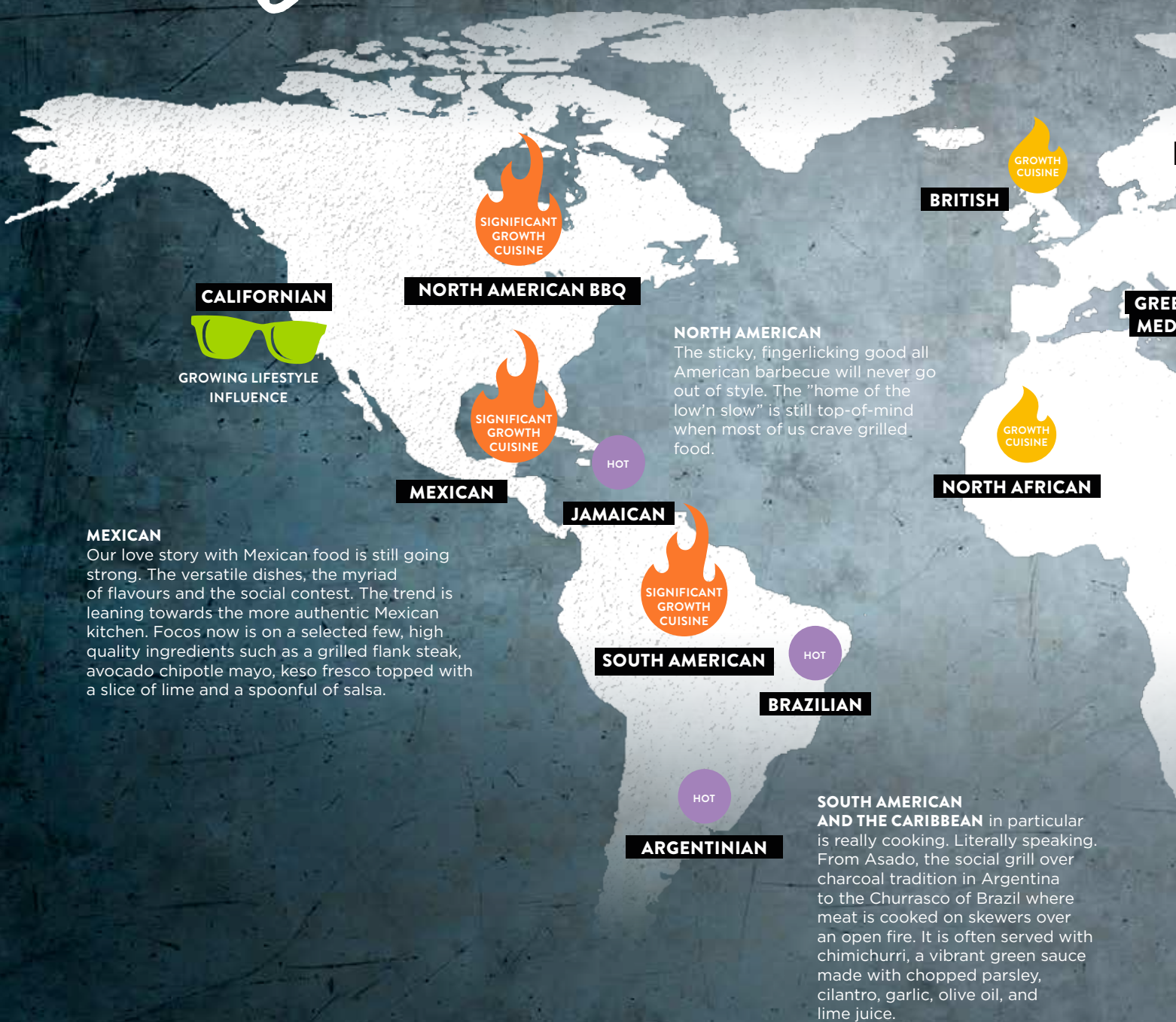
HOW OFTEN DO YOU EAT LUNCH OUT?



I WOULD DESCRIBE MYSELF AS:



Enter a world of grill flavours!

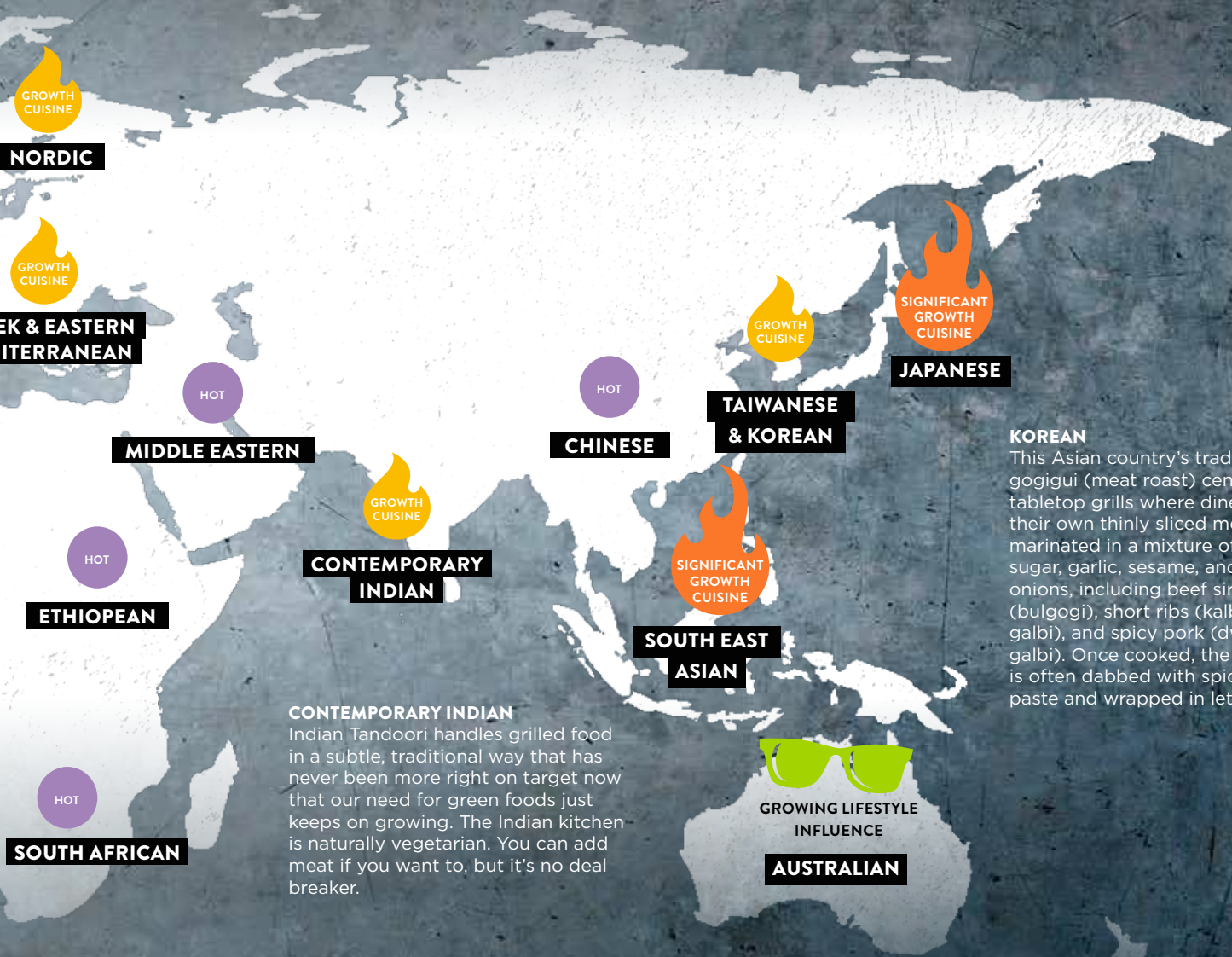


MIDDLE EASTERN

Skewered meats called kebabs, grilled over a charcoal fire, are a specialty of the entire region, but may have originated in Turkey. The most common meat is lamb, either in bite-size pieces or ground and formed into lozenges (kofta or seekh kebab). They are often served with a tart salad or an accompaniment of pita, crisp vegetables, and a yogurt-based sauce.

JAPANESE

Bite-sized dishes served in izakayas, which are Japanese gastropubs, typically include miso glazed glossy, tangy, sweet and savory chicken and seafood skewers. Yakiniku is the name for grilled meat and vegetables, cooked on skewers and served with various sauces (tare) including soy mixed with sake, mirin, sugar, garlic, fruit juice, and sesame. The most familiar include yakitori (charcoal-grilled chicken) and teriyaki (meat, fish, or vegetables glazed with soy sauce, mirin, and sugar).



CONTEMPORARY INDIAN

Indian Tandoori handles grilled food in a subtle, traditional way that has never been more right on target now that our need for green foods just keeps on growing. The Indian kitchen is naturally vegetarian. You can add meat if you want to, but it's no deal breaker.

KOREAN

This Asian country's tradition of gogigui (meat roast) centers on tabletop grills where diners grill their own thinly sliced meats, marinated in a mixture of soy, sugar, garlic, sesame, and sliced onions, including beef sirloin (bulgogi), short ribs (kalbi or galbi), and spicy pork (dwaeji galbi). Once cooked, the meat is often dabbed with spicy bean paste and wrapped in lettuce.



GROWING LIFESTYLE INFLUENCE

AUSTRALIAN

TREND: SMALL GRILLS & HIGH HEAT.

Direct heat, from a small heat-source is on the rise. Traditionally in Korea and Japan, the meat is cooked on small table grills. But it is not far from how veggies and meat is cooked in the Middle East on skewers. The result is a crispy and caramelised outside and juicy insides.

Make sure you cut everything up in small sizes before it goes on the grill.

TREND: AN 11- YEAR- LONG TREND



Menu items involving "Korean barbecue" has grown more than 775% in the US over an 11-year-long time span (2005-2016). Many of these offerings were in the form of excitement-generating and limited-time-only menu items, such as the Korean BBQ Burgers.

GRILL TRADITION: COOKING IN A PIT IN THE GROUND.

A 5000+ year old tradition is still hot. To dig a firepit, put in meat or veggies and cover with hot stones. In Argentina it is called asado, in Sweden it is called krogrop. But the idea is the same. Low heat, long time, and don't let any juice get away.

Today you can tightly wrap your ingredients in tinfoil and bake in a regular oven to get the same effect.

Trends & Traditions

GRILL TRADITION: OVER-NIGHT MARINADES

Tanzanian, Mexican and Indian all share the same marinating hack: enzyme-rich overnight marinades.

In Mexico it is done with chilli, tequila and lime, in Tanzania with green papaya, and in India with yoghurt garlic and ginger.

But the result is the same, the meat gets tenderized and juicy and can then be flavoured with dry spices before it goes on the grill.

KITCHEN HACK: CATCH THE SMOKE.

Smoky flavour is much more than hickory. The taste can come from juniper branches, avocado leaves or just some dry grass. Get creative!

The important thing to know is that smoky flavour sticks to fat very well. That is why smoked food all over the world tends to be fat fish and fat meat.

A trick is to smoke oil or butter to transfer the smoky flavour to vegetables.

ECONOMICS: PRICELY MEAT.

"For the price we are paying for brisket, we could be eating prime rib."

In Texas restaurants guests pay a high amount for cheaper cuts. This shows us that if we handle ingredients with care our guest are willing to pay a bit more.

DRIVERS & EXPECTATIONS

Tradition vs Innovation

TASTY EACH TIME

Guests want their favourite dishes to taste the same every time. UK lunch restaurants tend to stick to a set menu since they don't have as many returning guests. Swedish restaurants get a lot of guests who come back on a daily basis and need to offer both variation and set dishes. In both countries, it is important to maintain the same taste on set dishes in order to keep returning guests happy; both for the sake of sales and for the restaurant's reputation.

GRILL BEFORE BBQ

The word bbq is linked to summer and outdoor activities and American flavours. The word grill on the other hand is associated with contemporary cooking and food that can be cooked both outside and indoors. And all year around!

TWEAK THE TRADITIONAL

Consumers are keen on familiar dishes with a new twist. They long for new unique flavours and fresh ingredients. They want to play it safe but at the same time explore the new.

NAME IT RIGHT

It is the dishes themselves that attract the consumer, not just the fact that they are barbecued. So name your dishes with care.

REMEMBER THE STORYTELLING

Your guests want to hear the story behind your ideas. They want to be swept away and inspired, feel that what they're eating is genuine and prepared with care.

YOUR GUESTS PREFER THESE ATTRIBUTE WHEN DISCOVERING NEW DISHES ON A MENU:



SEASONAL FLAVOURS



FRESH INGREDIENTS



NEW/ UNIQUE FLAVOURS



NEW TWIST ON A FAMILIAR DISH



WHAT MOTIVATES YOU TO DEVELOP YOUR MENU?

*Love
Inspiration
Guests*

BARRIERS FOR UPDATING THE MENU:

*Time
Costs
Equipment*

A REPORT ON THE LATEST
bbq & grill trends and influences
WITHIN THE EATING OUT MARKET.

TAKEAWAYS:

Grilled food can give your guests a feeling of euphoria.

Guests are keen on both traditional dishes and international flavours.

Guests want more veggies.

Healthy & light are important drivers especially at lunch.

Guests love storytelling, so make sure to share the story behind your menu.

SOURCES:

Santa Maria & Augur qualitative concept research, (SE/ UK) 2017.
Santa Maria & Insight Distillery quantitative concept research, 1014 respondents, (SE/ UK) 2017.
MCA. Eating and drinking out market insight, 2018.
IGD report "Eating Well and Eating Out?", 9000 respondents, 2018.
ICAs Grillrapport 2018, 1000 respondents, 2018.
Axfood/ Kantar Sifo Vegotrenden 2017, 1177 respondents, 2017.
Food & Friends Matrapporten 2018, 1000 respondents, 2018.



SILVER

PurePrint® by KLS
Produced 100% biodegradable
by KLS PurePrint A/S



SANTAMARIAWORLD.COM