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THE END OF THE THREE-COURSE MEAL?

HOW SHOULD YOUR MENUS RESPOND TO NEW CUSTOMER DINING BEHAVIOR?

MIX-AND-MATCH DINING, SMALL PLATES AND 'PARTICIPATORY SHOPPING' ARE OVERTURNING TRADITIONAL MENU CATEGORIES

A consultant's advice on what to do now.

24 July 2006 -- In this analysis we discuss a powerful new restaurant trend: The deconstruction of traditional menu formats.

Before you write your next menu, we have a quirky suggestion: First go online and try buying a new car. Or better still, a laptop from Dell. In both cases, you'll encounter an array of choices so vast that you can custom-build these devices to suit your ego or your needs.

Smart manufacturers – and a growing batch of savvy menu developers – are responding to a new consumer behavior that we call "**Participatory Shopping.**" Participatory shopping means that people today resent being mute consumers; they demand *creative engagement* when buying a computer or compiling the specs for their next Nissan – or any other activity in which buying things can be divided into components. Like ordering a meal.

An easy example is the nearly infinite combinations on the menu board of Starbucks. This concept of participatory component-shopping is now spilling over into traditional restaurants -- with enormous impact. Menus are being deconstructed. New categories are being invented. The

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language is changing. Extra courses are being inserted. In extreme cases, all differentiation of courses simply is discarded.

It appears that several trends are intersecting here:

- The country has gone small-plates crazy. It doesn't matter whether restaurants specialize in Greek, Chinese, Malaysian, Mexican or Singaporean roadkill, if they can downsize main courses or dress up street food, they're doing the "tapas dance." People will spend as much for a dinky plate of three meatballs as for a bountiful bowl of meatballs and spaghetti because: They don't have 90 minutes to chew over a traditional meal; They're avoiding starchy food; They're seeking lots of contrasting, intense flavors; They think they're saving money ... or simply because it's fashionable.
- Canny restaurateurs are slipping new temptations (middle courses for the table, snacks, platters of vegetables) in between traditional menu categories. Many now offer first course *and* second course appetizers and small plates before the main course. Some are inserting "dishes for the table" either as openers or before the main course. Cheese courses are popping up as *events* rather than as afterthoughts or alternatives to dessert -- and watch next for *pre-desserts* before the real sweets.
- Some operators are entirely deconstructing their menus, leaving it to customers to play around and build their own meals.
- Along with all this there's been an outbreak of "chef's tasting menus" in three, four, or five courses (or more), sometimes forming the basis of a restaurant's entire offering (one thinks of Per Se in New York), sometimes as adjuncts to a regular menu. You'll find interesting variations of these on at **Michael Mina** in San Francisco, and **Oceana** in New York (worth a visit for its two separate desserts tastings for \$8 supplements) – usually with wines to match.

To us as consultants, the most interesting of these are: the breakdown of formal menu structures into extra courses, and new mix-and-match component menus. They are equivalent to the iPod Generation telling big record companies where to stick their overpriced albums; instead,

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people download song-by-song playlists – which is yet another example of participatory shopping.

Here are just a few examples:

Fuse, a mixed-metaphor Tex-Asian restaurant in Dallas (salmon, asparagus, soy onions, pickled lime, chorizo), adds a cluster of “Snacks” after appetizers – ensuring that if they can’t sell you Braised Brisket Potstickers for \$9, they get another crack at you with \$4 chili-scented edamame. **Dish** in Atlanta starts with Tastes (including local cheeses) before Appetizers. The idea, one surmises, is to dangle so many temptations in front of customers that they’ll bite on at least one, and maybe two, courses before tucking into their entrees.

Dragonfly, at Hotel Zaza in Dallas, headlines its menu with creative crudos (pineapple-ponzu oyster shooters with tobiko and sriracha) even before you get to the appetizers. Boston’s **Vox Populi** begins with Small Plates, then deflects your attention with an array of Appetizers before letting you read the entrees.

Let us call these “mid-course corrections.”

The objective is similar at **The Living Room W1**, part of a London chain, whose menu goes ever further: Their one-pager features *Breads* (bruschettas, actually); *Small Plates* (snacks, really); *Starters*; *Home Comforts* (an array of golden oldies), and *Mains* – plus a children’s menu.

This menu deconstruction trend is about *engaging the customer*.

Therefore, you need to understand the psychological difference between a dinner of small plates and a chef’s tasting menu. In a chef’s tasting dinner, you eat what the chef wants to serve, in the order that he wants it served, and everyone gets the same food; while in a small plates dinner, customers order what *they* want – from all over the menu – get it in the order they prescribe, and then share the goodies.

The small plates customers are practicing *participatory shopping*. The chefs menu customers are being *dictated to*.

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Furthermore, you need to understand why menus today are being “fractured” into as many components as can fit on a page with typographical coherence: It is because we’ve become a nation of restless eaters and attention-deficit shoppers who demand more options and more distractions.

For example, how many presets are there on *your* digital camera?

People gain status these days by (A) exercising control of the purchasing process, (B) ordering things that give them new knowledge and (C) ordering things that provide a sense of adventure – because when you only buy the components, you’ve minimized the risk. A small plate of fresh sardines on a parmesan flan (which we recently ate in Spain) may sound chancy, but hey! – for only eight bucks lets have a go.

Some more examples:

Before you get to main courses at **Lulu**, in San Francisco, you wade through Antipasti (three for \$14.50), then Small Plates, then Pizzas (want one for sharing?) and Pastas. There’s a high degree of seduction going on here, so even if you never order a main course you might spend as much for dinner as anyone ordering a traditional meal.

At the other extreme, **Myth**, in San Francisco, does away with titles and categories altogether. Its menu has a single list containing both large and small plates – so that if you look at what appear to be main courses, you can assemble a small portion menus of black cod for \$14 (or a large portion for \$22) with asparagus, maitake mushrooms and bacon jus after first nibbling on sweetbreads for \$12 with shiitakes and sherry vinegar, and then on to a small order of black trumpet mushroom risotto with truffle oil for \$15. Poof! You’ve just spent \$41 on small plates of food plus (I’m guessing) two \$12 glasses of wine for an average dinner check of \$53; and you’ve had an exciting time with a meal that *you’ve invented!*

Is this a good thing? Does it slow down table turns? Confuse customers? Drive the kitchen nuts? Ethan Stowell of **Union**, in Seattle, reports that “about half the customers have three courses. Some have three or more appetizers, but lots of people do the firsts, seconds and then entrées. Some order only apps but it is not uncommon for people to have four or

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five courses each. I divided the menu into three categories primarily to get people in Seattle to try more foodstuffs.”

Bill Telepan, at New York’s new **Telepan**, says, “I set the menu up this way is because I love Italian menu structure, with antipasti, primi and secondi. From a business standpoint it allows people to have two apps, two mids and the option to share a main or to have two apps, split a mid and have two mains.” Do multiple courses slow service? “People sit a little longer, but we do pre-theater tasting menus and get them out. New Yorkers eat at different times so on Friday and Saturday we will do three turns” even with extra courses.

Townsend Wentz, executive chef at **Twenty21** in Philadelphia says: “Offering the guest more options will be the main driver of guest satisfaction. They can experience more tastes, more interaction with the staff, and ultimately an establishment’s ability to provide those options seamlessly.”

Where did it all begin? When it comes to the explosion of tapas-like food, three seminal events come to mind: The original international grazing menu that Barbara Kafka devised for our own Hors d’Oeuvrerie at **Windows on the World** in 1976; the Little Meals menus, presented on tiered silver servers, that Rozanne Gold invented for our **Rainbow Room’s** bar in 1987; and Antony Worrall Thompson’s ahead-of-its-time restaurant, **Ménage a Troi**, in London in the early ‘80s that served nothing but eclectic small plates from a kitchen the size of a four-top.

More recently, we have to cite the mix-and-match deconstructed menu at Alain Ducass’s **Spoon** (Paris, London, Hong Kong), where you choose a protein from column A, a sauce from Column B, and a go-with from Column C, then hope for the best (which usually you get).

Two contemporary mix-and-match experts in New York take opposite approaches to component shopping. **Café Boulud** offers four separate menus: *La Tradition*, *La Saison*, *Le Potager*, and *Le Voyage*, each with multiple first and main courses. But ... each menu is priced a la carte so you can hop and skip around the world at your will. The irony is that if you mash them all together, the cumulative choices add up what you’d get on a traditional menu, but the fractured format is much more exciting.

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And then there's **Craftsteak** in New York, where Tom Colicchio has taken fractured complexity to new heights. In what may be the ultimate expression of a steakhouse, Craftsteak's opening menu (since cut back a bit) offered corn-fed Angus, Hawaiian grass-fed Angus, corn-fed Hereford, corn-fed Black Angus "natural" and Wagyu. But that's just the beginning, because New York strips started at \$42 for 28-day aged and moved up in seven-day increments at the rate of \$5.95 more per week – so a 56-day aged strip whacks \$66 from your wallet. At opening, you could choose five different cuts of wagyu beef, from \$49 for an 8 oz. flatiron to \$220 for a 32-ounce porterhouse. There were three separate wagyu tasting menus. And 12 vegetables were categorized as roasted, sautéed, braised or fried preparations (not counting four different mushroom options, six potatoes, polenta and a risotto). You should know this description hardly scratches the menu's surface!

Is all this genuinely revolutionary? Is it merely cyclical – like the width of men's ties or women's hemlines? Is it a sea change? Are we living with the unintended legacy of Burger King's "have it your way?"

To some extent it is cyclical – because people these days are spending freely (some might say *overspending!*) and ordering extra courses without regard for the impact on their wallets. A major economic downturn will make that attitude disappear.

On the other hand, the notion of restructuring menus that respond to consumers' demand for participatory shopping is not a fad – it'll be here for quite some time. And in our opinion, an economic downturn (if it comes) only will provoke more customers to shop around the menu for enticing and seductive choices.

Does this mean the end of the traditional three-course menu? Decidedly not. Tradition is rarely obliterated, and standard restaurants with standard menus of course will carry on.

But even they should be seeking ways to increase the *dynamism* of their menus and begin emphasizing what they're great at.

So here's our advice:

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- Use these trends to introduce new flavors and presentations.
- Use “participatory shopping” by consumers as a way to *increase interactions* between them and your waitstaff – because waiters will be making more trips to the table and explaining more of your dishes.
- Examine where you can slip in extra courses: side dishes “for the table” would be an example. Give your waitstaff more to talk about.
- Pay particular attention to wines-by-the-glass because mix-and-match customers are less prone to order full bottles. This is good.
- Rethink your attitude toward menu design. We’ll bet that right now your menu is composed on a word processor and the copy is neatly centered down the page with everything is the same size typeface. This is bad! look at **Bennigan’s** or **Denny’s** or **Olive Garden’s** menus and ask yourself: What doesn’t *my* menu do a better selling job?
- Invest in a consultation with a graphics designer. And think of your menu as a magazine layout. Or a web layout.

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