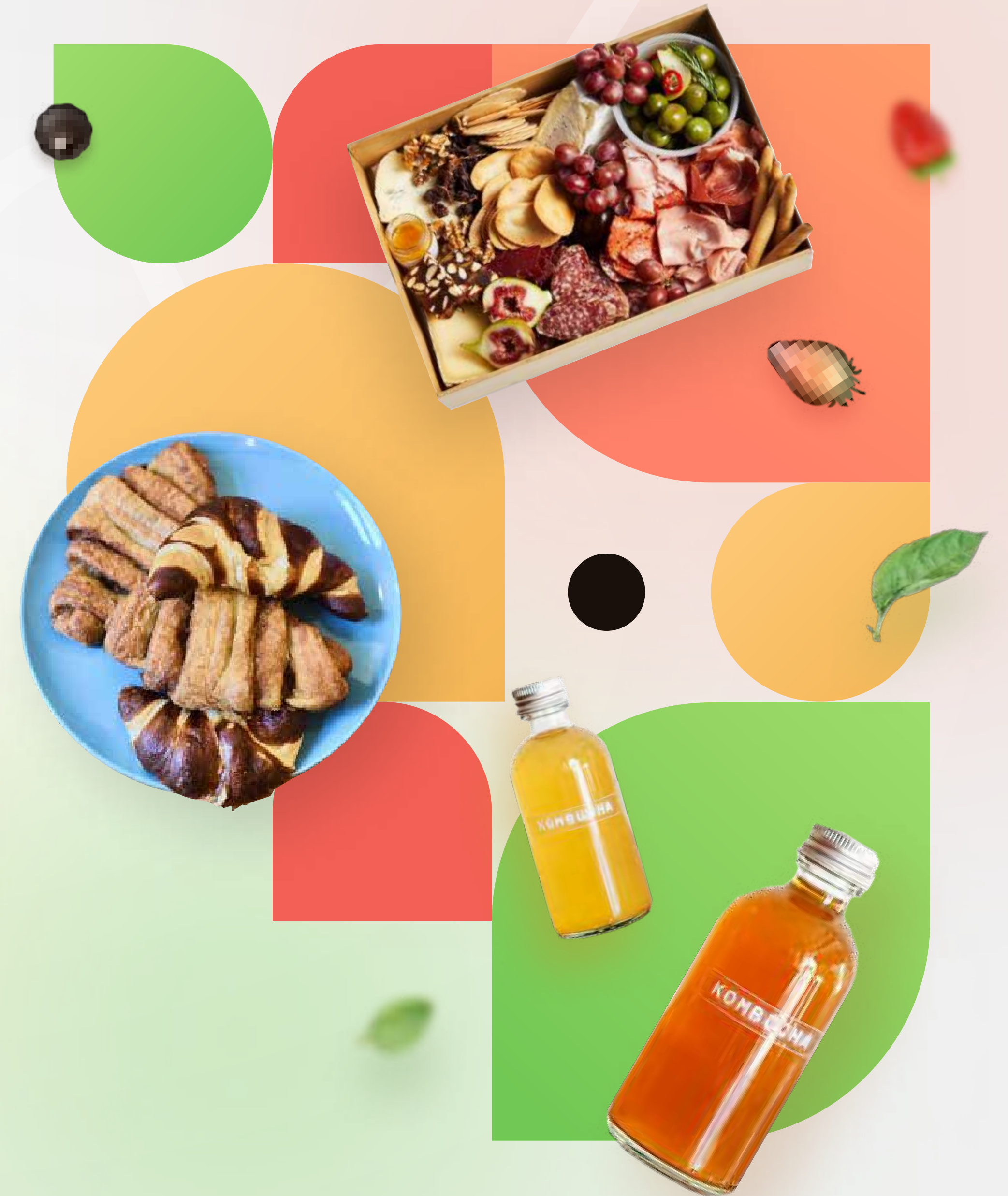
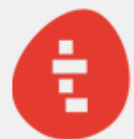




# Lifecycle of a Trend

Tastewise fuels product innovation, sales, and marketing by predicting how consumers cook, order, and eat.





# We bring the power of data to the art of food and beverage intelligence.

Capturing the earliest signals of food innovation, Tastewise offers unparalleled ability to capture trends at the root.

Every day, we analyze billions of food data points across social media, restaurant menus, and home recipes. We then apply our cutting-edge AI to translate human eating and drinking into analytics and insights.



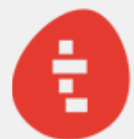
Givaudan

Nestlé®

Coca-Cola

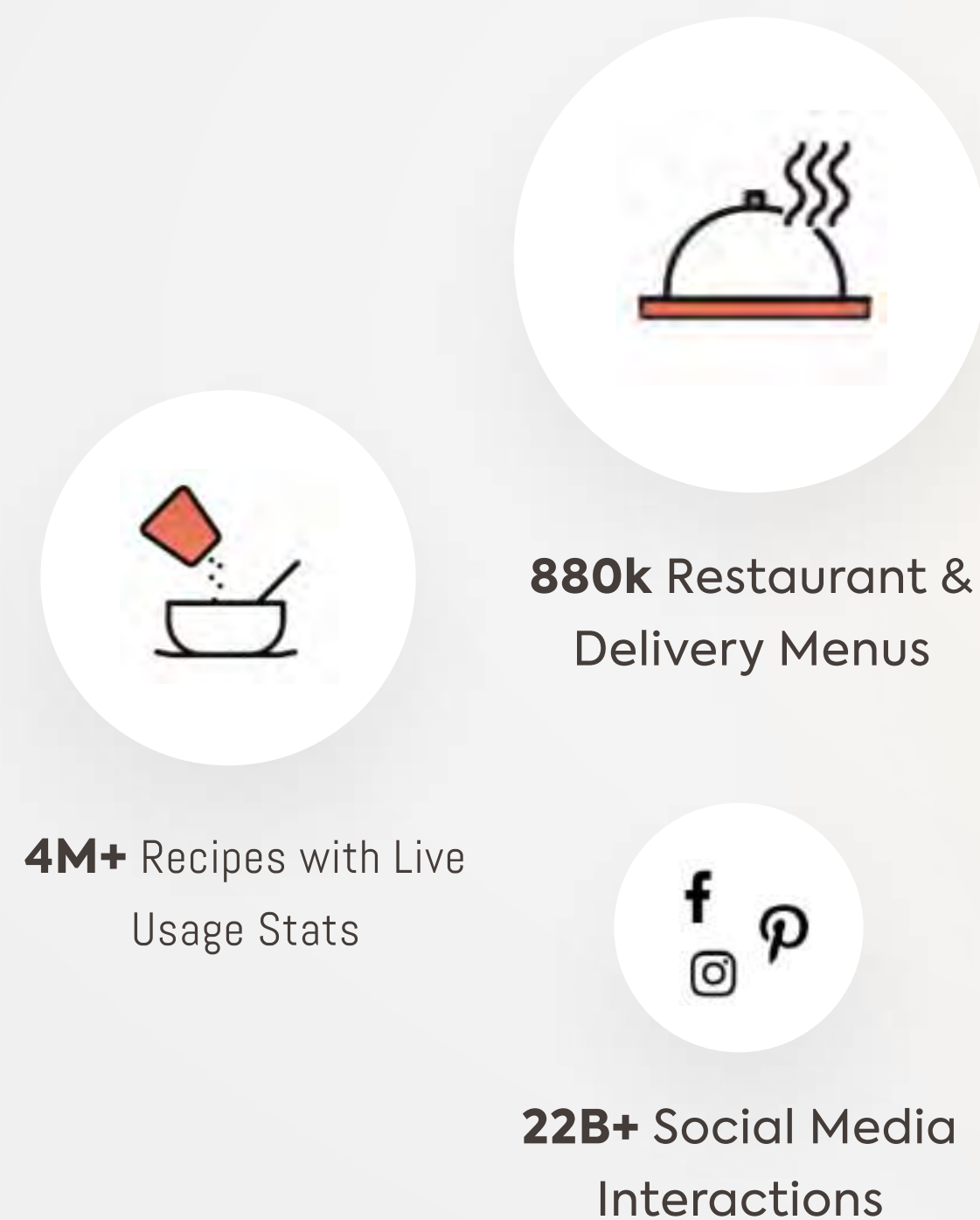






# Tastewise: an End-to-End Food Intelligence Platform

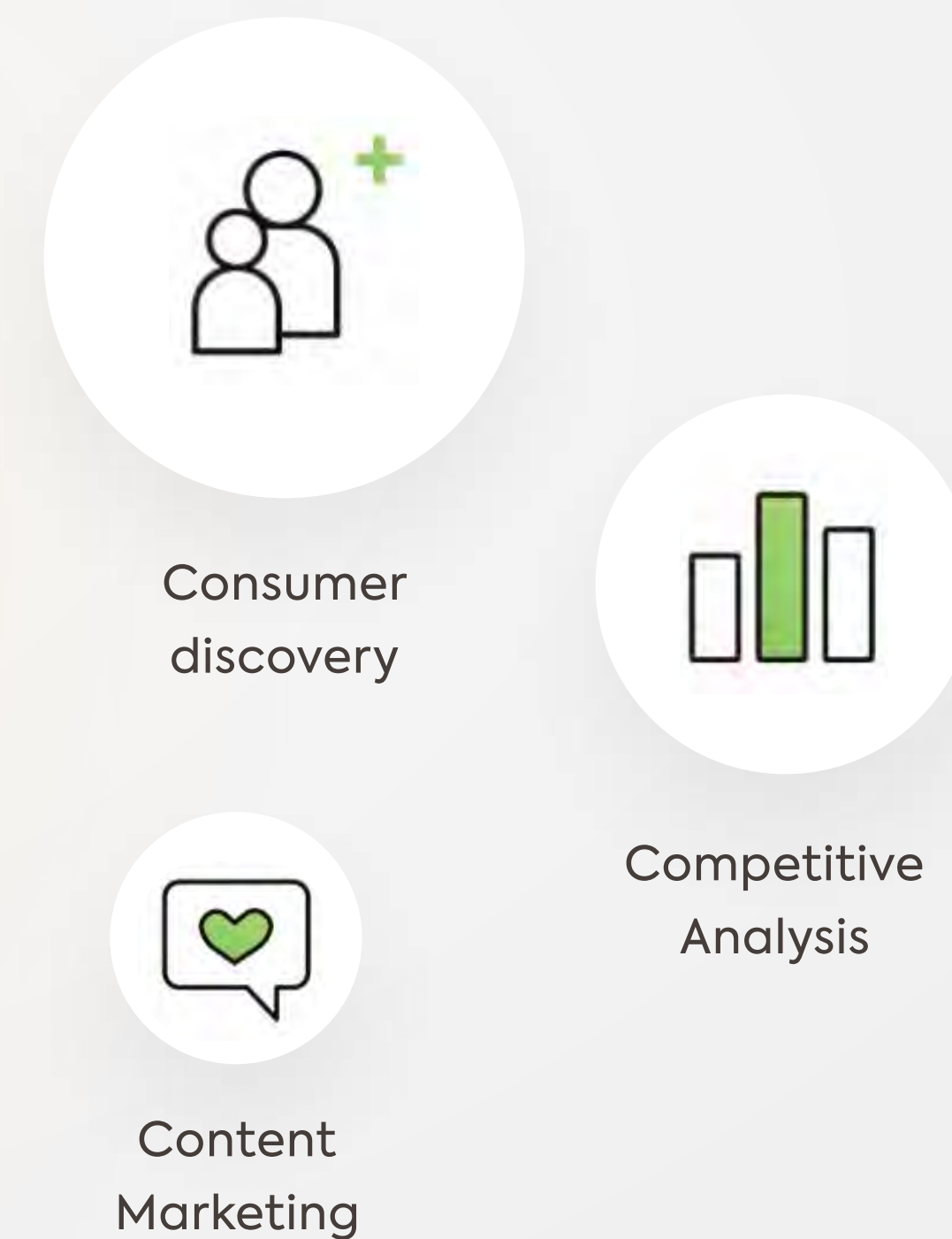
## DATA

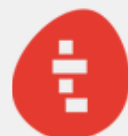


## INSIGHTS

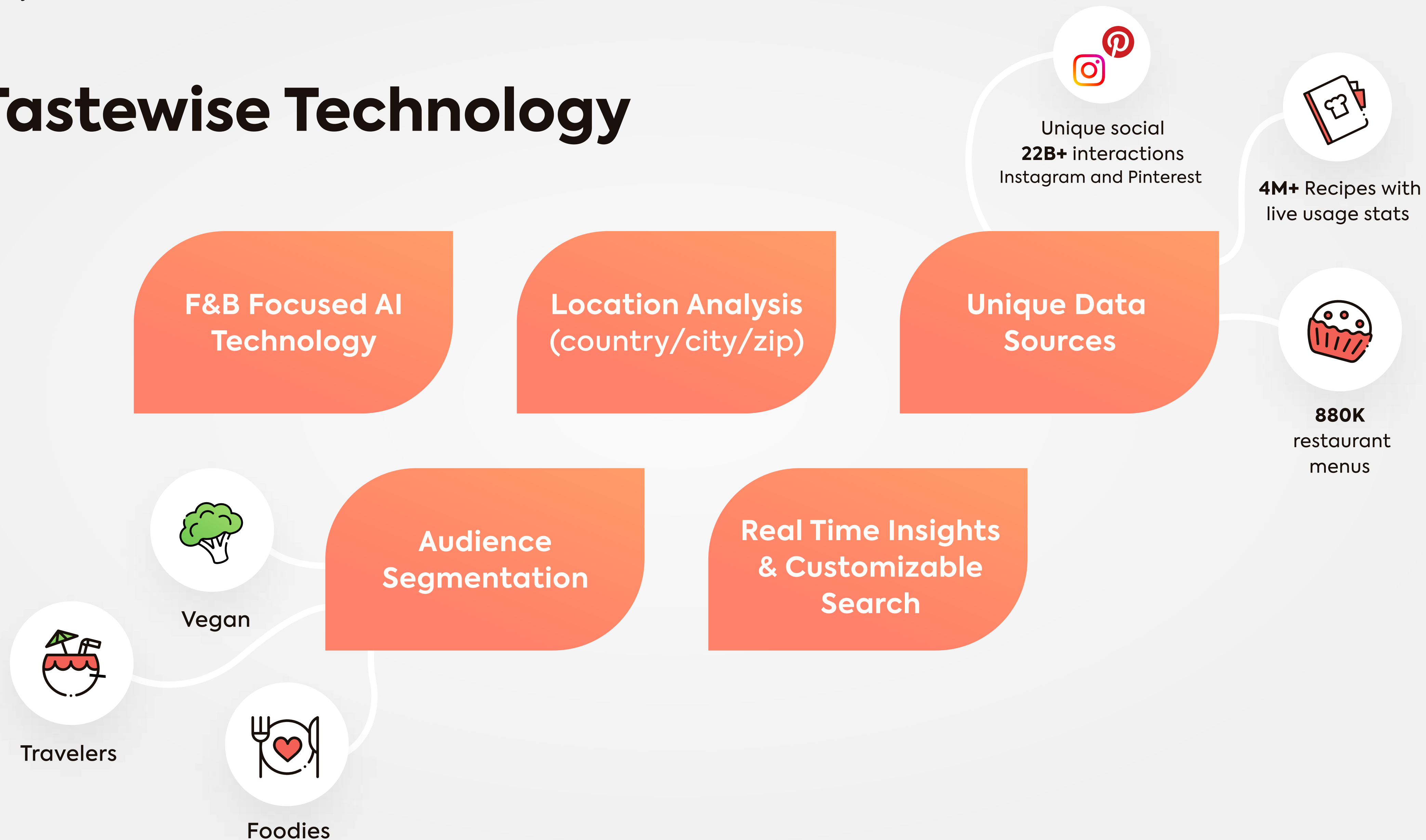
- Consumer Motivations
- Market Gaps & Opportunities
- Product Innovation
- Marketing Strategy

## ACTIONS





# Tastewise Technology





# Trend Analysis Objective

In the following report, we explore **how**, **why**, and **when** some of the most influential food and beverage trends of the last two years began, behaved, and (in some cases) matured.

Today's trends develop from a range of angles, often originating from within foodservice, from the behavior of an audience group, or as a result of rising consumer needs. Monitoring the interaction of a trend across these categories gives a holistic view into the trend's past – and its future. The following case studies track trend lifecycles across a variety of contexts.

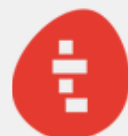
This analysis was based on data sourced from US social media interactions, restaurant menus, and global recipes. Data ranges from February, 2019 to December, 2020.





# Birth of a Trend: Grazing Boxes

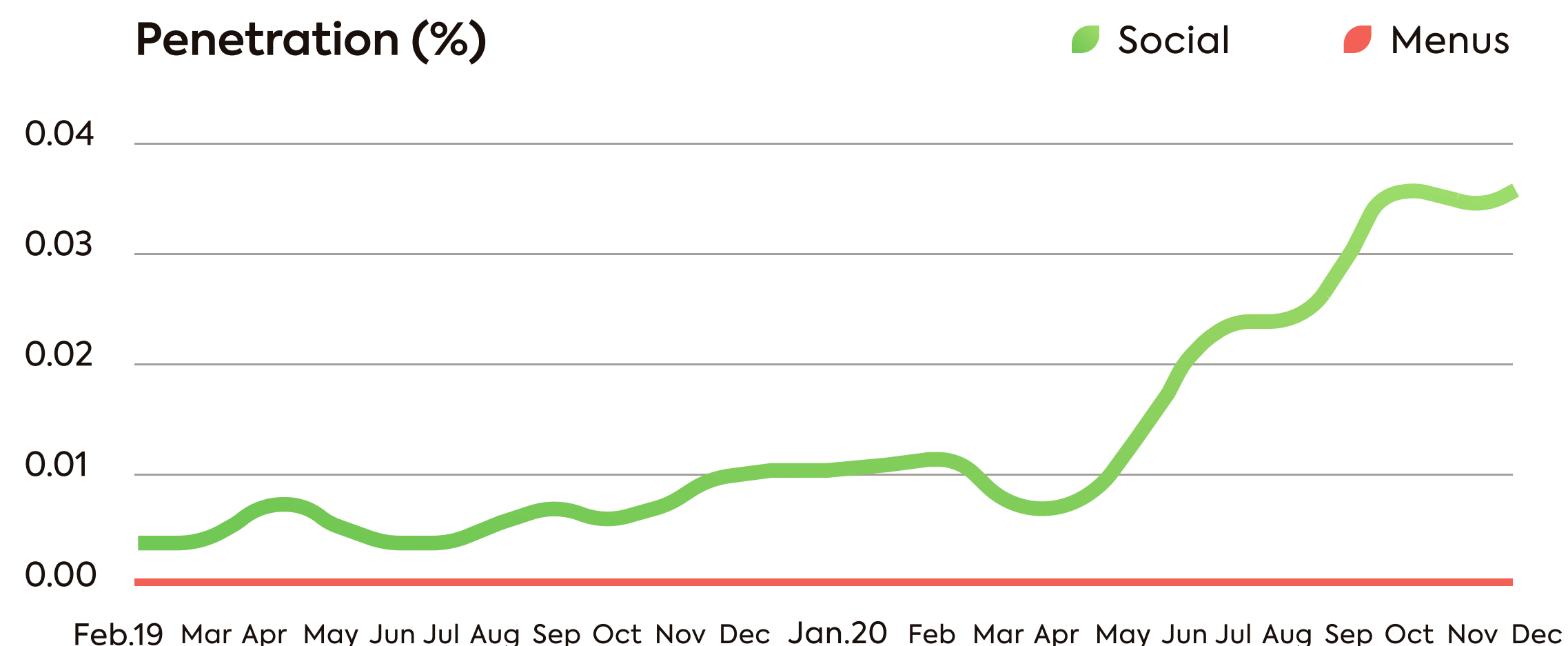




# Trend: Grazing Boxes

A fast-growing trend in the home space, driven by social media.

## US Grazing Boxes Social Over Time

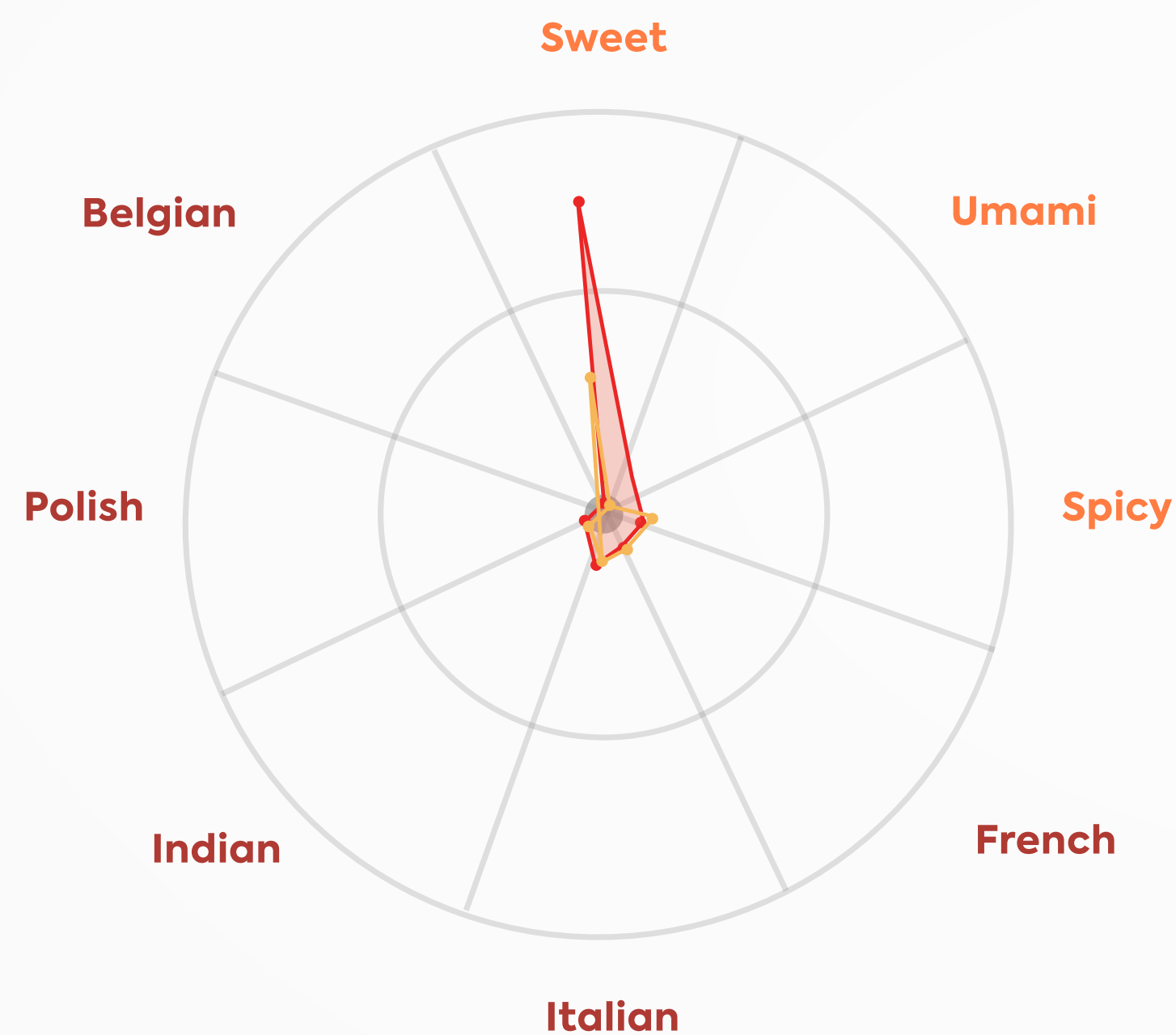


**Grazing boxes**, a type of delivered box featuring a pre-packed (often sweet!) picnic is one of the fastest growing trends at the start of 2021 (**+800% YoY**).

Consumer interest in grazing boxes far outpaces menu mentions of the trend, marking it as a firmly **“at home” trend driven by social media**.



# Trend: Grazing Boxes



Top Motivations

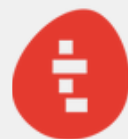


Discussion Highlights

Associations with **events**, **friends**, & **celebrations** all feature heavily for grazing boxes as people turn to **experiential eating** to approximate moments that are hard to come by during COVID.

**So, what spawned this indulgent, social trend?**

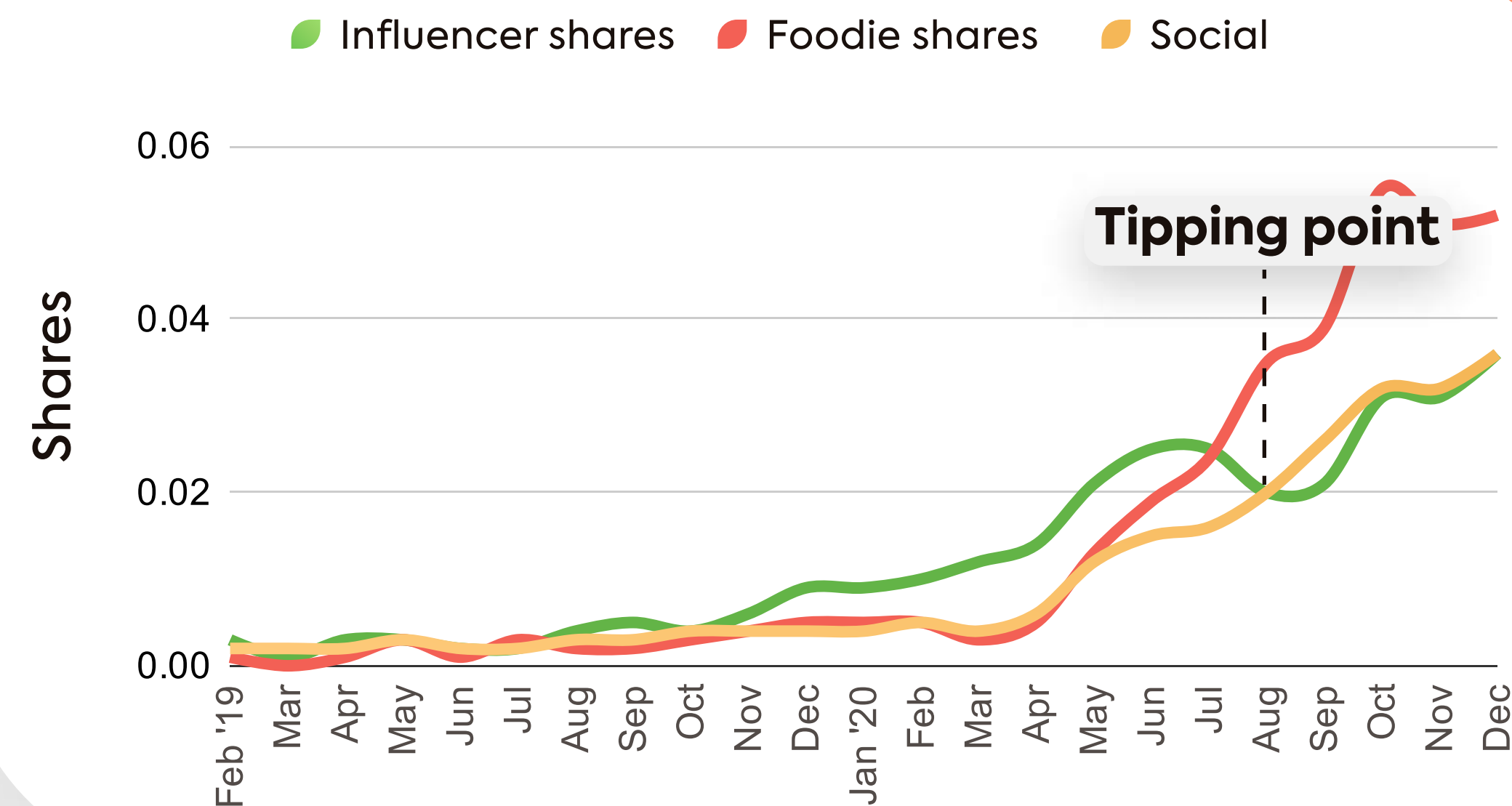




# Trend: Grazing Boxes

Influencer-led trend gained consumer interest during the early pandemic – especially foodies.

## Grazing Boxes: Audience Comparison



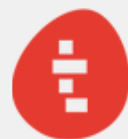
Note: “**Tipping point**” refers to the moment when mainstream consumer interest passes that of the audience that initiated the trend. Here, mainstream consumers became more interested in grazing boxes than social media influencers in August, 2020, indicating a new chapter of the trend’s lifecycle.

The grazing box trend started off in the realm of social media **influencers** in 2019; already in September, influencer interest in grazing boxes outpaced that of general consumers.

**Foodies** also demonstrate significant interest in the trend, quickly outpacing influencer and general social interest.

Mainstream consumers joined the trend last as the conditions of their food & beverage consumption changed; as **new needs** became top-of-mind for consumers, the grazing-box trend expanded beyond influencer interest and into the mainstream.

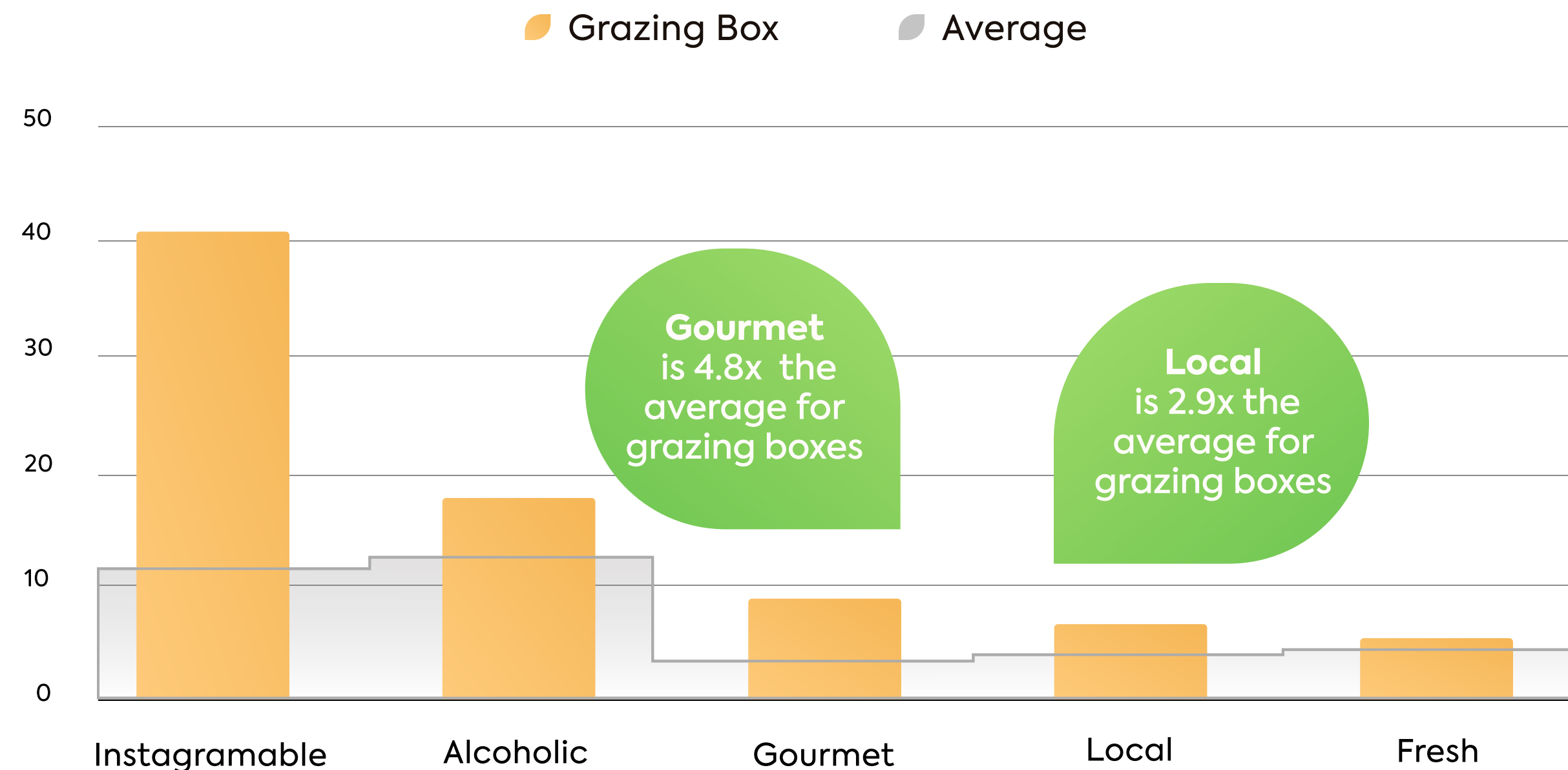
**What consumer claims shifted the trend?**



# Trend: Grazing Boxes

Grazing boxes fill a pandemic need for social indulgence.

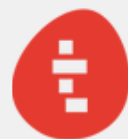
## Top Consumer Claims for Grazing Boxes



**Experiential eating** during the pandemic revolves around dishes that offer unique opportunities to socially connect with others.

As such, the grazing box trend is well suited for this moment. Absent the opportunities to Instagram a picture of their brunch at a trendy restaurant, many consumers have turned toward aesthetically-pleasing grazing boxes to fill the need - the item's **'instagrammability'** is 261% higher than average food and beverage! 18% of all grazing boxes feature **alcohol**, another form of social indulgence.

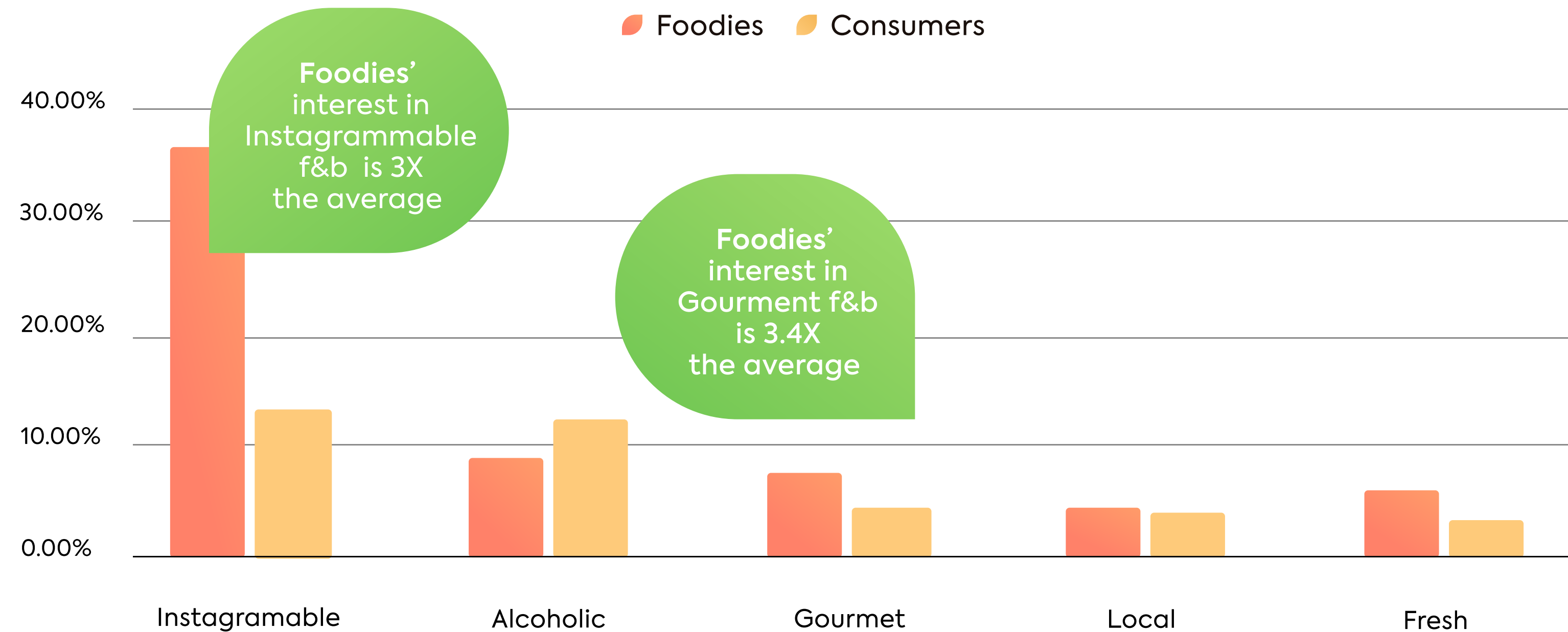
Finally, interest in **local** grazing boxes is currently ~3x the national average, offering a trendy way for people to support local restaurants and brands during the pandemic.



# Trend: Grazing Boxes

Foodies are a natural audience for the grazing box trend.

## US Foodies vs. Consumer Interest in Selected Claims



The biggest consumer claims for grazing boxes are also the most established for the **foodie** audience.

**Instagrammable** and **gourmet** meals hold particular interest for foodies; the audience is often drawn to aesthetically and culinarily appealing dishes.





## Trend: Grazing Boxes

## Experience Example: Foodies



## “Gourmet” Example



## Experience Example: General Consumers



# “Local” Example

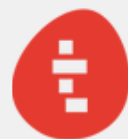




**Pandemic-to-Established Trend:**

**Sourdough**

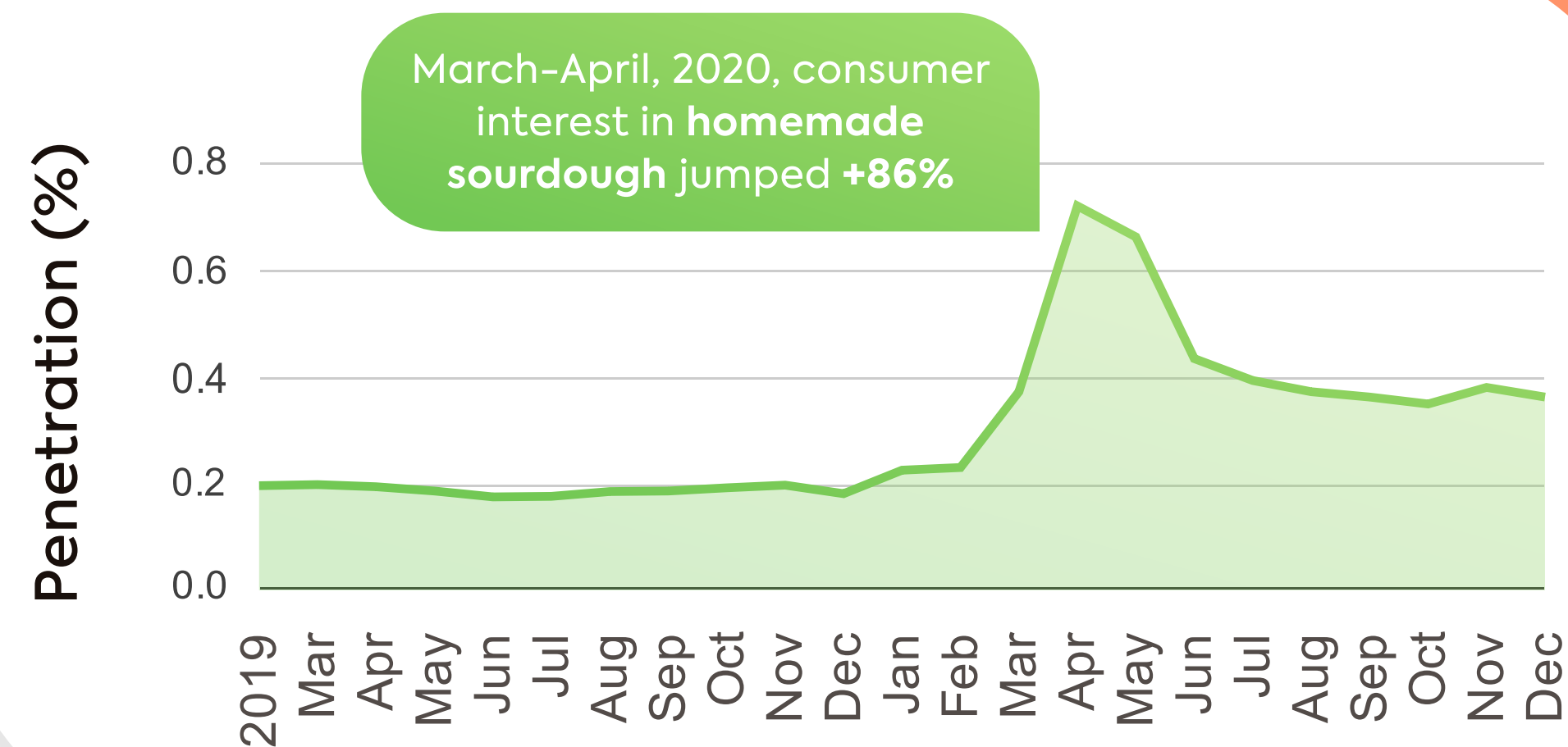




# Trend: Sourdough

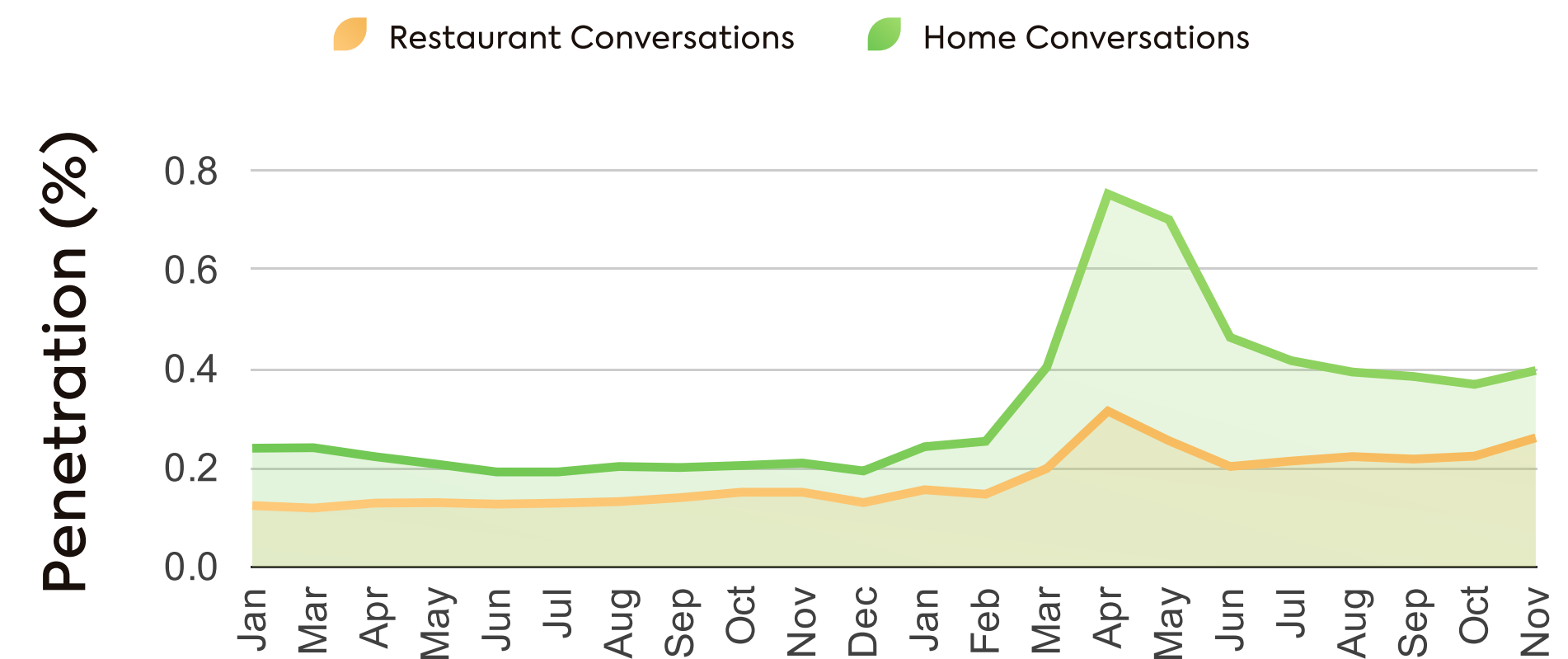
The sourdough trend peaked in the early pandemic, then stabilized at a higher rate as an at-home trend.

## Sourdough Social Over Time



A pandemic food trend darling, **sourdough** began as (and remains) a firmly 'at home' trend. Interest in the bread jumped to new heights during the first peak of the pandemic, and has since stabilized at a higher rate than ever before.

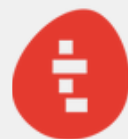
## Sourdough Conversation Spread



Home discussions of sourdough have always outpaced restaurant discussions, and this was made even more stark at the height of the trend in spring, 2020.

**Why did sourdough capture so much consumer interest at the start of COVID 19?**

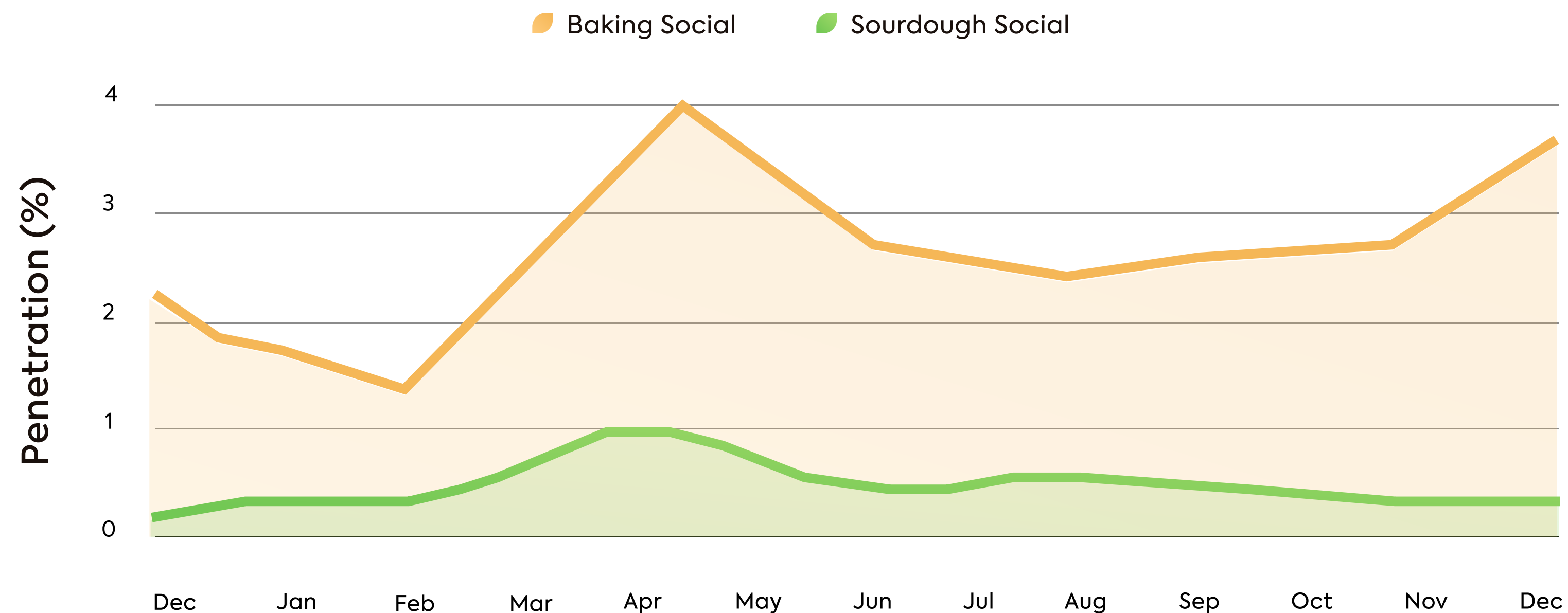




# Trend: Sourdough

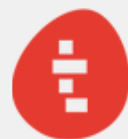
Increased popular interest in pandemic baking boosted the sourdough trend.

## Baking Social vs. Sourdough Social



As people spent more time at home at the start of the pandemic, baking began to rise significantly in consumer interest in February 2020; sourdough followed suit in March.

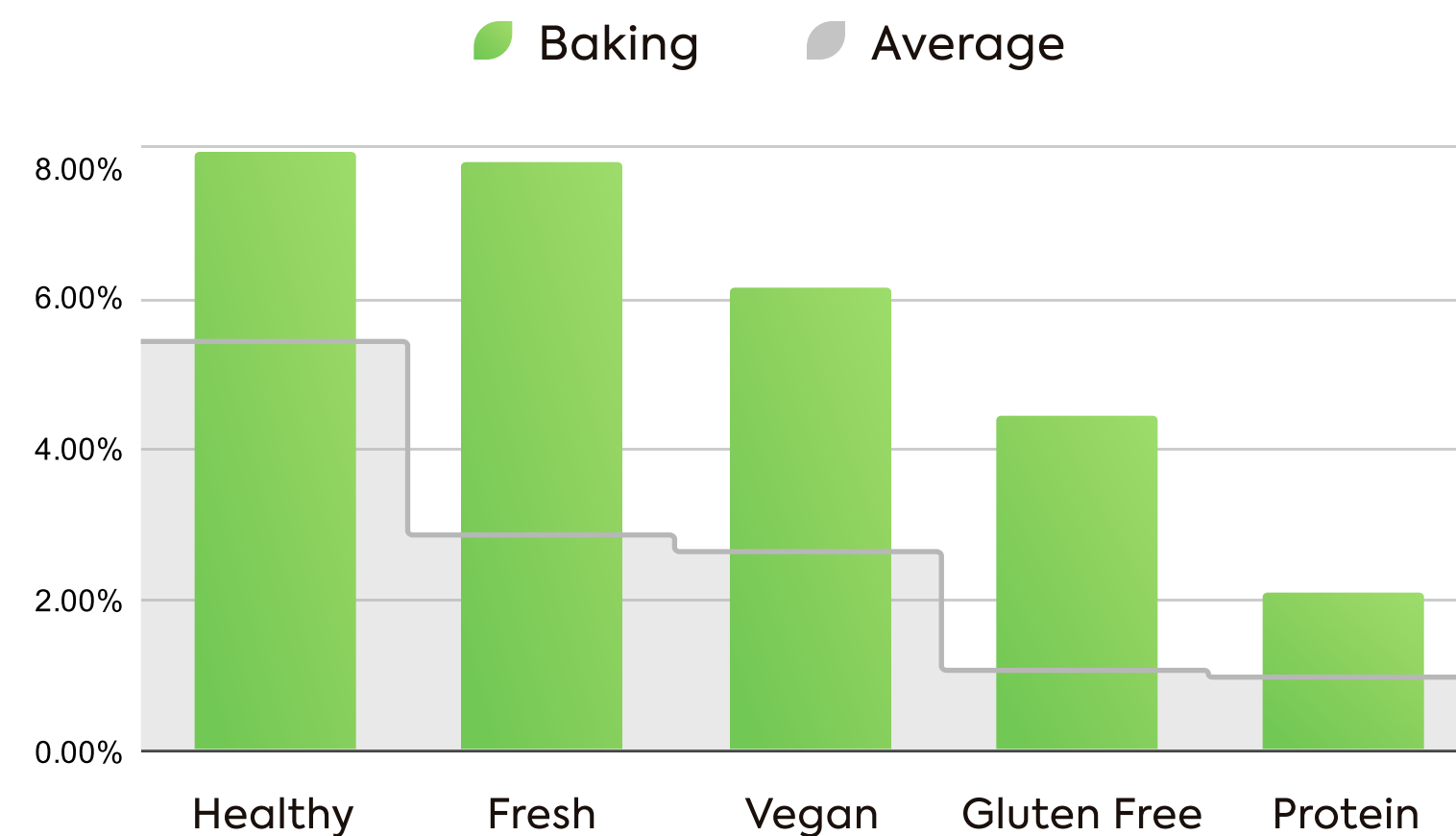
**Out of all the possible baking trends, why did sourdough shine?**



# Trend: Sourdough

Sourdough meets the top consumer demands for the baking category, particularly health.

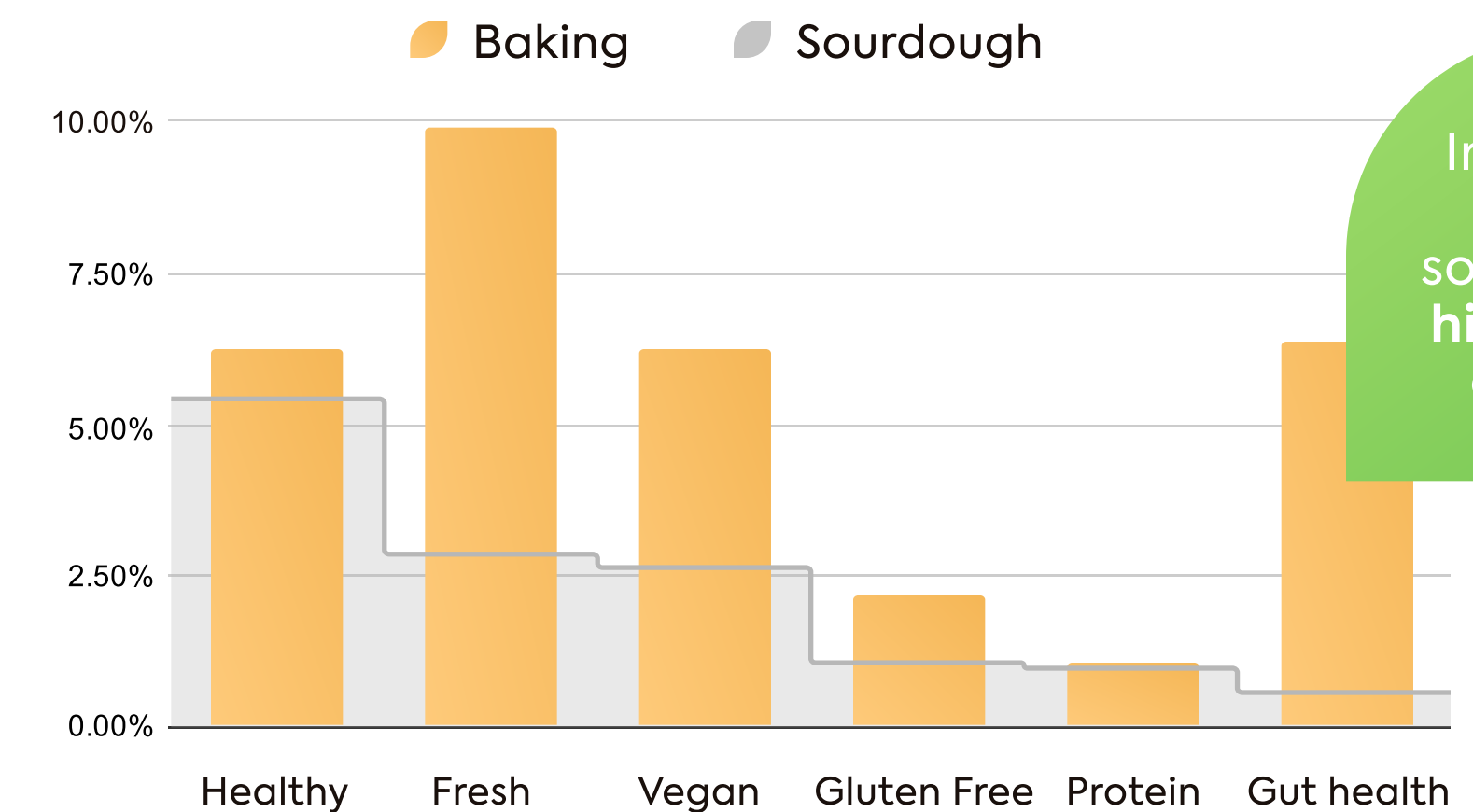
## Needs that Baking Meets



Top consumer claims for **baking** are health, fresh, vegan, and gluten-free. Sourdough meets those needs by exceeding the national average for interest in those categories.

Sourdough also offers a claim overlooked by baking generally – gut health.

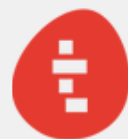
## Needs that Sourdough Meets



Interest in **gut health** for sourdough is **11x higher** than for general F&B

Interest in gut health is 11x higher for sourdough than general food and beverage.

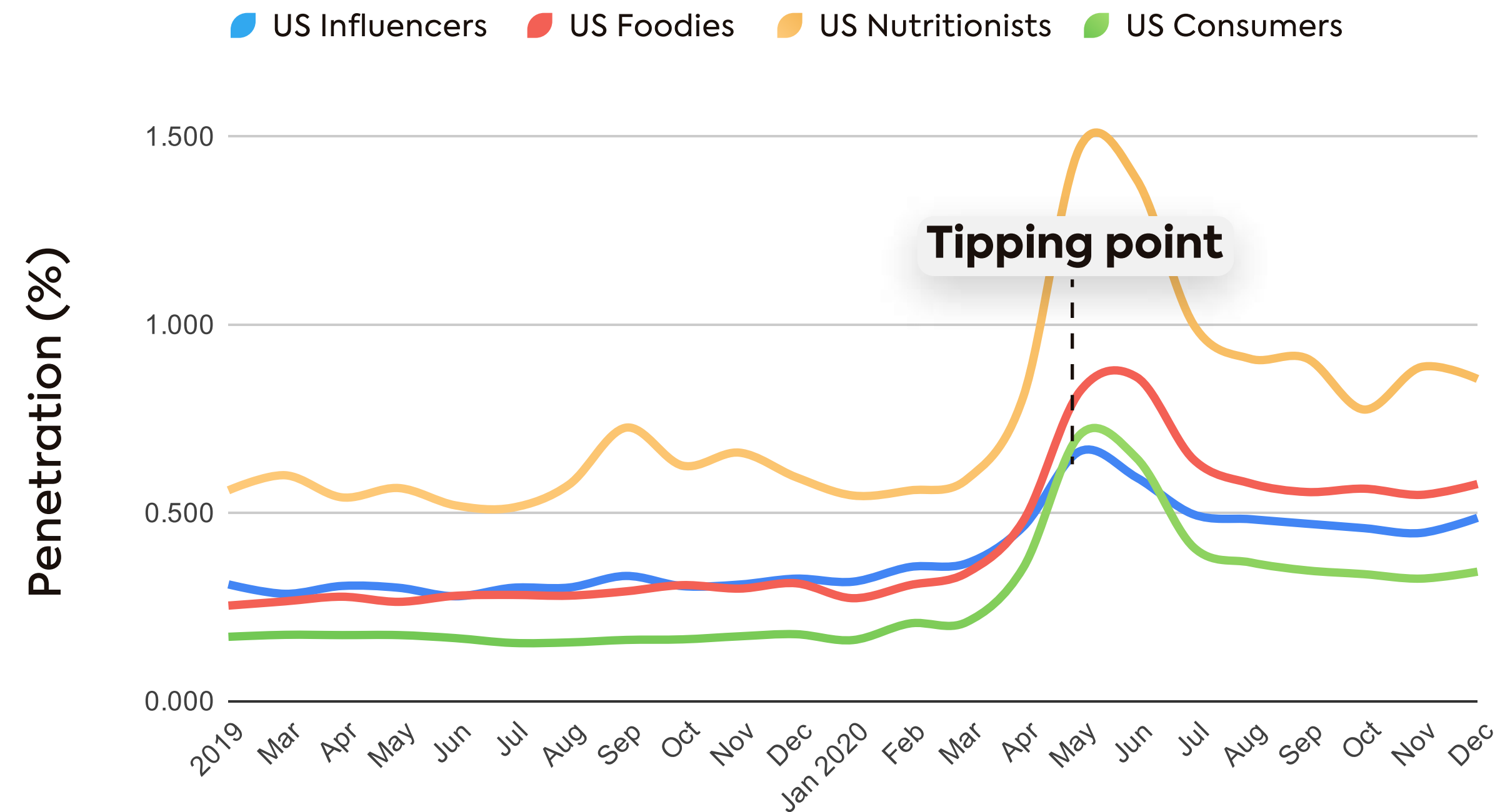
With more time at home to invest in the kitchen, **sourdough** gives people an opportunity to create a dish that meets their specific needs – in a tasty, rewarding way.



# Trend: Sourdough

Nutritional motivations capture nutritionists' attention and drive the trend.

## Sourdough Social Over Time

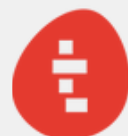


Given the **nutritional** interests driving the sourdough trend, let's check in with how nutritionists have interacted with the trend.

**Nutritionists** drove the birth of mainstream interest in sourdough, building on pre-established engagement throughout 2019 that skyrocketed in March, 2020.

Interest from **foodies** – a group drawn to labor-intensive, skill-based dishes like sourdough – continued to increase in the summer, even when other audiences lost interest. All audience growth was followed by **plateau** at a higher rate than pre pandemic, indicating that the trend is stabilizing across the board.





# Trend: Sourdough

Trending recipes highlight nutritional benefits of sourdough, while targeting novice bakers

## Healthy Whole Wheat Morning Glory Sourdough Muffins

17,391 Saves  
(172 in the past 30 days)



*“Taste, convenience, and **nutrition** all in one little package.*

*Aside from being so convenient, sourdough starter offers **health benefits** by making the wheat easier to digest and making the nutrients more bioavailable.”*

## Simple Homemade Sourdough Bagels

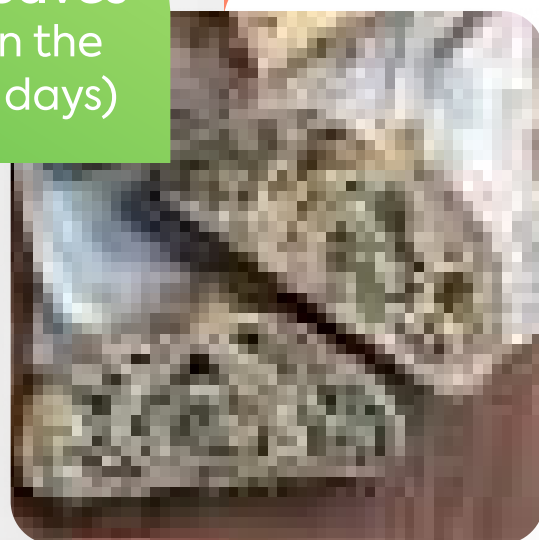
69,803 Saves  
(1,200 in the past 30 days)



*“Congratulations! You now have incredibly **delicious**, better-than-store-bought, **healthier** than store bought bagels for you and your family!”*

## Overnight Sourdough Bread recipe

69,803 Saves  
(1,400 in the past 30 days)



*“The fermentation that occurs from using a starter has been shown to **lower blood sugar**, be easier to **digest** and can even be tolerated by **gluten resistant** individuals.”*

## The Best Beginner Sourdough Bread

13,462 Saves  
(2,000 in the past 30 days)



*“This is a homestead-version of sourdough bread, which is a **non-fussy technique** that will not require complicated measurements or instructions.”*



Lifecycle of a Trend

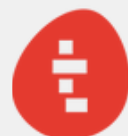


**Foodservice Trend:**

# Hard Kombucha



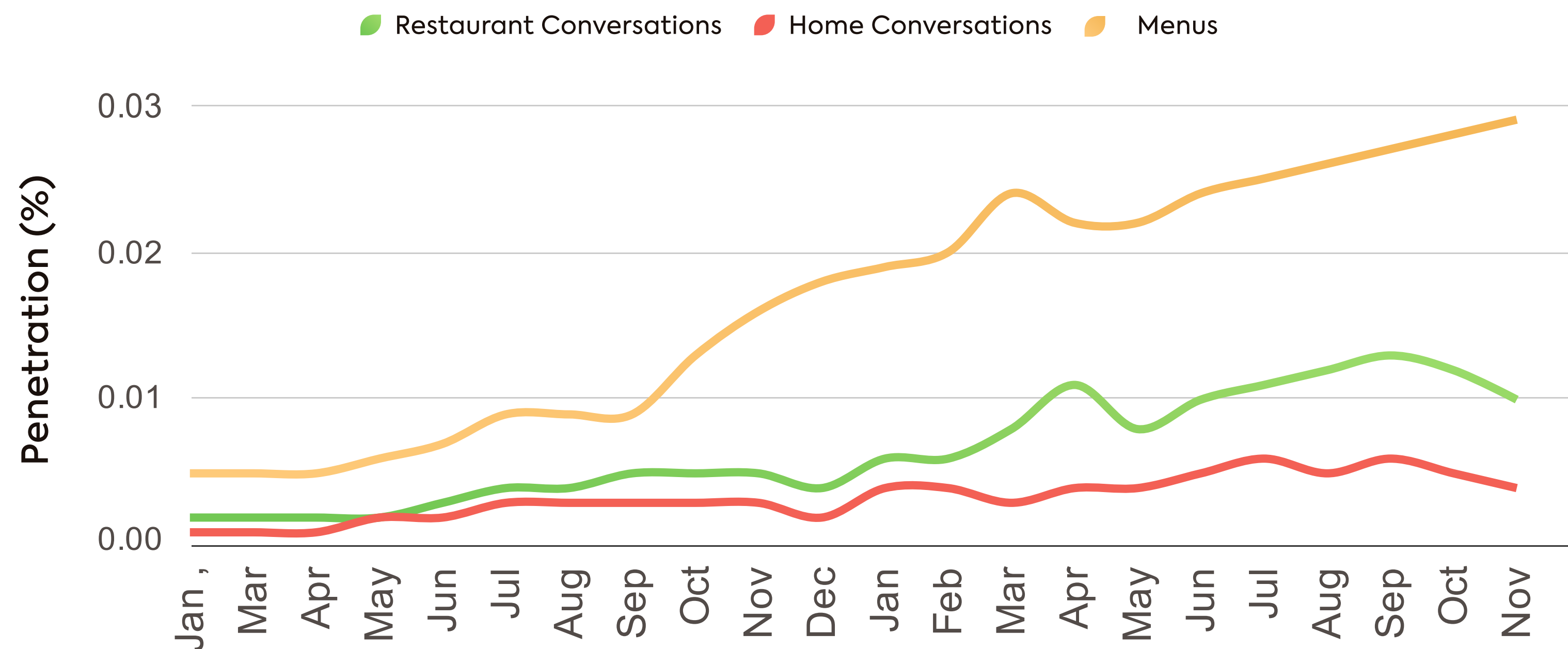




# Trend: Hard Kombucha

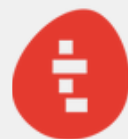
Consumer interest in hard kombucha rises faster in foodservice than at home; restaurant owners respond by updating their menus.

Hard Kombucha Conversations vs. Menus



Surprisingly, the hard kombucha trend continues to experience increased **menu mentions** despite pandemic shutdowns, positioning this as a **foodservice** trend.

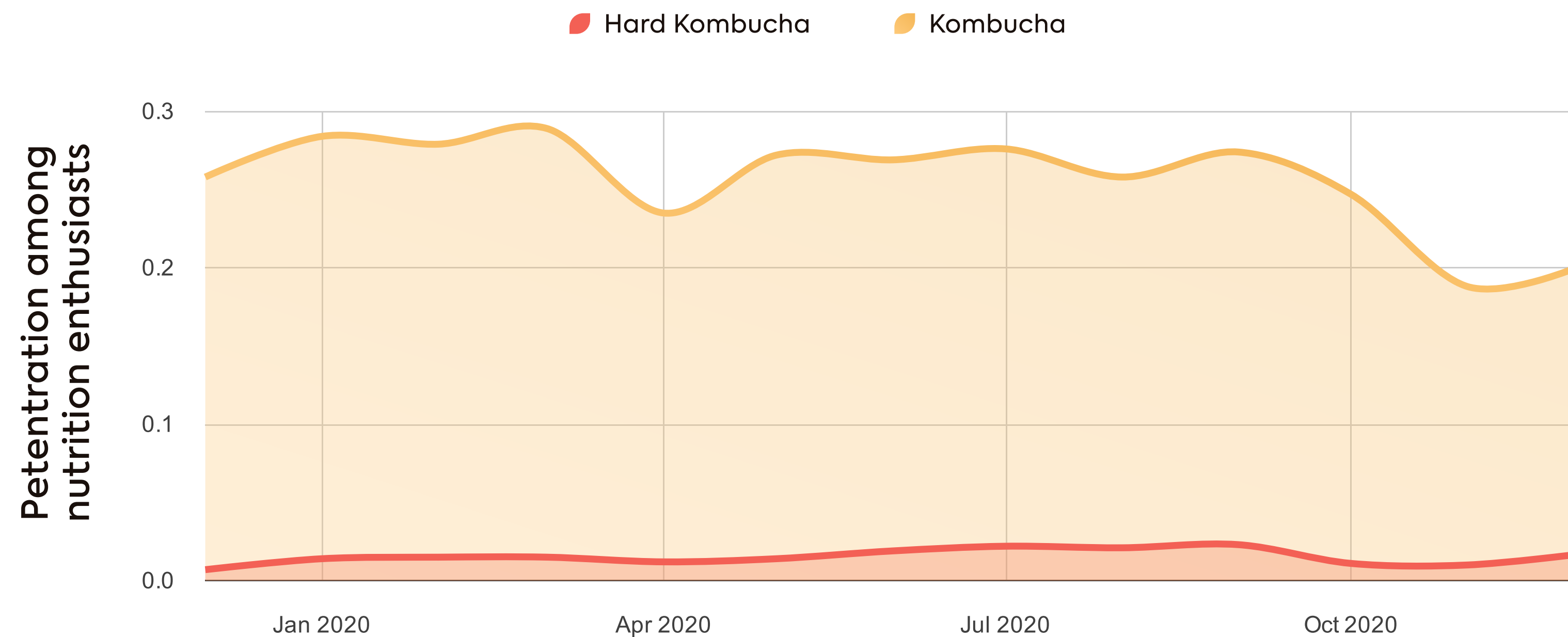




# Trend: Hard Kombucha

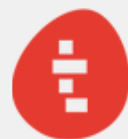
As opposed to kombucha, *hard* kombucha is not appreciated for its nutritional benefits

## Hard kombucha vs. kombucha for nutrition-focused audience



Hard kombucha is not top-of-mind for nutrition-focused consumers, while regular kombucha very much is.

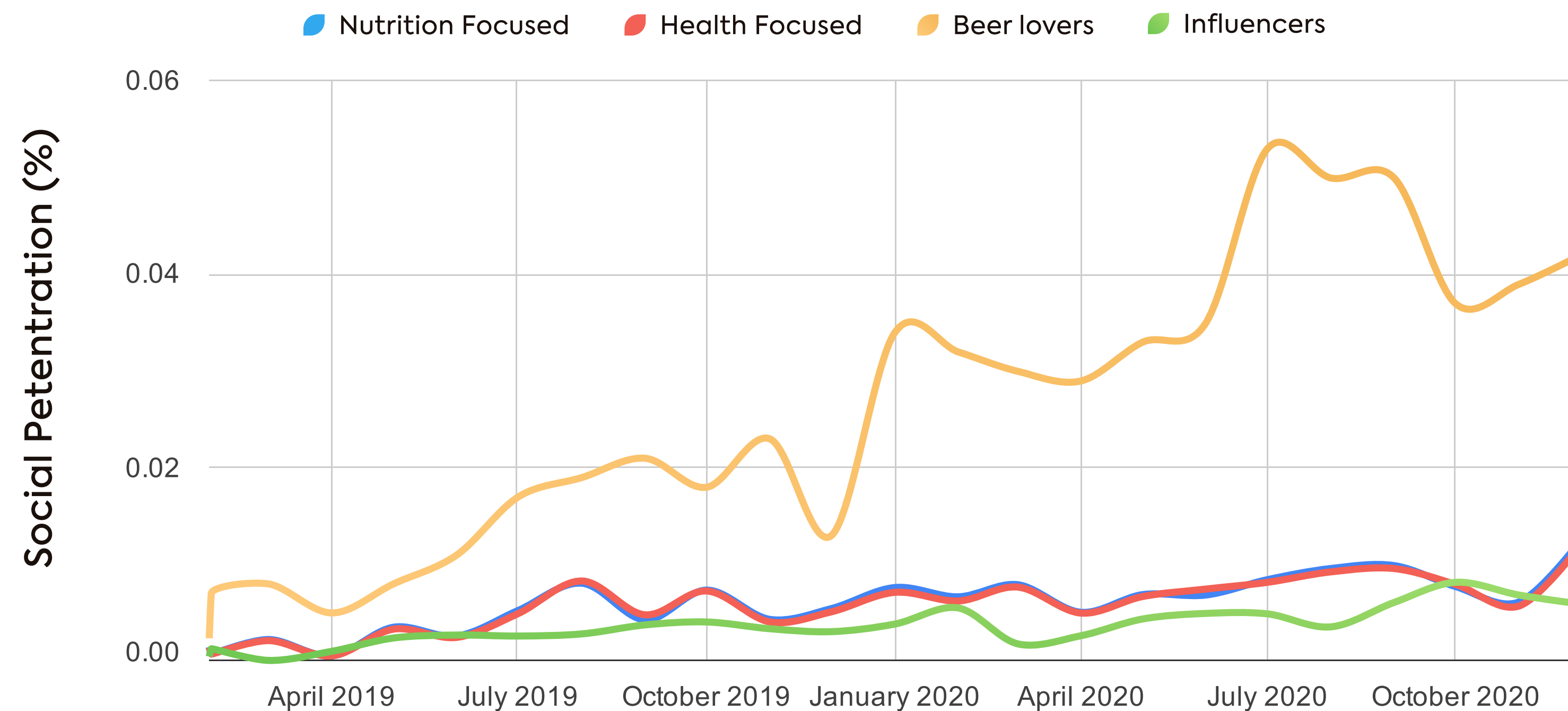
**So what does drive the hard kombucha trend?**



# Trend: Hard Kombucha

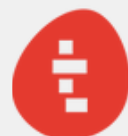
Beer lovers drive the hard kombucha trend

Hard Kombucha Social Penetration Overtime for Selected



Interest in hard kombucha is dominated by **beer lovers** who showed consistent high interest in the beverage since January, 2020.

**Why are beer lovers interested in hard kombucha?**



# Trend: Hard Kombucha

Beer lovers are focused more on health during the pandemic; hard kombucha fills both social and health needs for the audience

## Beer Lovers Top Claims Related to Hard Kombucha Audiences

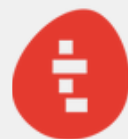
Hard kombucha is perceived as a **beer alternative**

ginger refreshing berries  
organic wine gluten free pineapple  
probiotics beer healthy orange  
lemon sweet  
hard seltzer on the go hibiscus tea delivery  
vegan celebration local honey

**Beer lovers** turn to hard kombucha to apply their new interest in healthy beverages – especially one that is gluten-free, organic, and provides probiotic benefits.

Hard kombucha is perceived as a **beer alternative** by beer lovers, elevating its profile and engagement among the audience.





# Trend: Hard Kombucha

Foodservice attracts consumers by promoting hard kombucha

Hard Kombucha Cocktail  
for Curbside Delivery



Hard Kombucha Promoted  
as a Meal Pairing



Hard Kombucha  
Promoted at Breweries



Standalone Hard  
Kombucha Promoted  
for Functional Claims



Foodservice bet on hard kombucha during the pandemic – and it seems to have worked!

Faced with closures, restaurants are pivoting to promote hard kombucha in ways that meet **consumer demands** during the pandemic – for example, promoting hard kombucha’s **functional** benefits, or its availability for **curbside** pickup.

This is particularly appealing to **beer lovers**, who have shown new interest in engaging with healthy, gluten-free beverages; this maps to their increased interest in hard kombucha.





# Ready to use real-time trend data for your business?

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