

## Healthy Dining Trends - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“In June 2013, the American Medical Association recognized obesity as a disease, a change that makes the need for healthful restaurant options more vital than ever. Diners still see dining out as time to indulge, which means the foodservice industry needs to do more to hit both menu marks to create appealing “craveable” foods that also better-for-you.”

– Kathy Hayden, Foodservice Analyst

### In this report we answer the key questions:

- What is the restaurant industry’s role in helping to reverse the U.S. obesity epidemic?
- How do customers define healthy dining?
- What are more ways restaurants present better “better-for-you” ideas?
- How does the consumer rank taste compared to health?

Many – especially media and industry watchdog groups – point the finger at foodservice as a culprit in the obesity epidemic. Some restaurants have responded with better-for-you (BFY) options, from slimmed down breakfast sandwiches to Greek frozen yogurt desserts. On the consumer side: people still believe they are capable of making healthful choices when presented with better restaurant options, yet Mintel’s recent surveys show that consumers admit they often let cravings guide their menu choices. Part of the healthy dining disconnect comes from differing opinions and definitions about healthy eating habits, and this report collects the latest consumer opinion and dietary expertise on what defines BFY dining options. This report explores how food suppliers and operators can provide options and also share the responsibility of providing consumers with better choices and get the nation’s menus in line with what people choose in terms of healthy dining.

Earlier attempts at healthful dining showed that heart-healthy symbols and “no” or “low” menu descriptors inadvertently sent messages that BFY foods were less tasty than regular menu options. While the industry has still not found the “magic formula” for offering the types of BFY items that could change the industry, many operators have made strides in offering highly appealing and healthful menu options that are good enough for customers to order again and again. To examine the progress in healthy restaurant dining, this report explores:

- Current consumer ideas about how to make healthy dining choices
- Current consumer attitudes toward healthier dining options at restaurants
- Current consumer attitudes about how restaurants are succeeding in helping them make smarter eating choices
- How changing eating patterns (snacking, changing meal times) influence BFY menu development and marketing efforts
- How different restaurant segments have succeeded in making healthier dining options a successful part of menu development
- How emerging restaurant chains have the potential to change the landscape for healthful dining

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[oxygen@mintel.com](mailto:oxygen@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Healthy Dining Trends - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Scope and Themes

What you need to know  
Definition  
Data sources  
Consumer survey data  
Abbreviations and terms  
Abbreviations  
Terms

### Executive Summary

The healthy dining consumer  
Figure 1: Calorie perceptions for healthy meals, April 2013  
Figure 2: Defining healthy dining, April 2013  
Figure 3: Drivers for unhealthy meal selection, April 2013  
Nutritional claims on restaurant menus are increasing  
Figure 4: Number of nutritional ingredient claims, by restaurant segment, June 2013  
Competitive context  
What we think

### Issues and Insights

What is the restaurant industry's role in helping to reverse the U.S. obesity epidemic?  
Analyst insights  
How do customers define healthy dining?  
Analyst insights  
What are more ways restaurants present better "better-for-you" ideas?  
Analyst insights  
How does the consumer rank taste compared to health?  
Analyst insights

### Market Drivers

Consumer confidence  
Figure 5: University of Michigan's index of consumer sentiment (ICS), 2007-13  
Unemployment  
Figure 6: U.S. Unemployment Rate, by month, 2002-13  
Figure 7: U.S. Unemployment and underemployment rates, 2007-13  
Figure 8: Number of employed civilians in U.S., in thousands, 2007-13  
Food cost pressures  
Figure 9: Changes in USDA Food Price Indexes, 2011 through May 24, 2013  
The restaurant industry outlook

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Healthy Dining Trends - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Health Is an Additional Market Concern

### Obesity rates

Figure 10: U.S. Obesity, by age group, 2008 and 2012

### Childhood and teen obesity – highest in decades

Figure 11: Prevalence of obesity among children and adolescents aged 2–19, 1971–2010

### Pending calorie counts on menus

### Other legislative pressures

## Inspire Insights

### Inspire Trend: Guiding Choice

### Inspire Trend: Moral Brands

### Inspire Future Trend: Brand Intervention

## Competitive Context

### Grocery, retail competition

### Competition from within: “Under XXX” calories menus

### A new breed of health food restaurants

## The QSR Sandwich Restaurant Segment

### Key points

### QSR sandwich segment gets competition from traditional fast food

Figure 12: Top Ingredient nutritional claims in QSR sandwich segment, June 2013

Figure 13: Desired improvements for quick service restaurants, May 2013

## Casual Dining

### Key points

### Casual restaurants lead in the “Under XXX” calories strategy

Figure 14: Top Ingredient nutritional claims in casual dining segment, June 2013

Figure 15: Attitudes toward casual dining restaurants, by gender, April 2012

## Fast Casual

### Key points

### Fast casual sees a wave of emerging brands

Figure 16: Top Ingredient nutritional claims in fast casual dining segment, June 2013

Figure 17: Important attributes for fast casual restaurants, June 2012

## Mintel Menu Insights and Analysis

### Key points

### Finding the right words: A better BFY lexicon

### Adding, not subtracting, ingredients

### Smaller portions offer more better-for-you menu ideas

### Embracing a Mediterranean approach

## Cleaning Up Kids’ Menus

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Healthy Dining Trends - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Key points

Figure 18: Top Children's Menu Items, Q1 2010 vs. Q1 2013

Restaurants provide nearly 50% of consumers' meals

Elevating the quality of kids' meals

## Innovations and Innovators

Hold the beef for big changes

A technical assist for BFY takeout

## Marketing Strategies

Overview of the brand landscape

Applebee's calorie counting

Figure 19: Applebee's "Under 550" calorie campaign, 2013

Olive Garden's "Under XXX" calories strategy

Figure 20: Olive Garden's Lighter fare menu, 2013

Subway is not fried

Figure 21: Subway's Fresh Fit Meal, 2013

Healthful and craveable: Cold Stone Creamery

Figure 22: Cold Stone Creamery's new frozen yogurt, 2013

Dunkin' Donuts' turkey sausage breakfast sandwich

Figure 23: Dunkin Donuts' turkey sausage breakfast sandwich

McDonald's egg white breakfast sandwich

Figure 24: McDonald's egg white breakfast sandwich

Burger King: very stealth health

Print ads feature aspiration, not deprivation

Social media starts BFY buzz

## Consumer Opinions About Eating Healthfully

### Key points

Figure 25: Opinions on healthy eating, by gender, October 2011-November 2012

## The Foodservice Consumer – Defining Healthy Dining

### Key points

Calorie counts remain consistent

Figure 26: Calorie perceptions for healthy meals, by gender, April 2013

Figure 27: Calorie perceptions for healthy meals, by age, April 2013

Common sense improvements create BFY appeal

Figure 28: Defining healthy dining, by gender, April 2013

Figure 29: Defining healthy dining, by age, April 2013

Figure 30: Defining healthy dining, by household income, April 2013

Industry criteria for healthy dining in restaurants

## The Foodservice Consumer – Finding Healthy Dining

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Healthy Dining Trends - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Key points

Women more likely to order healthful menu items

Figure 31: Restaurant usage and healthy menu item selection, by gender, April 2013

Age affects healthy menu usage

Figure 32: Restaurant usage and healthy menu item selection, by age, April 2013

### The Foodservice Consumer – Healthy Dining Drivers

#### Key points

Fear of frying drives restaurant choice

Figure 33: Choosing healthy dining options, by gender, April 2013

Making BFY menu choices

Common sense steps help consumers make BFY menu choices

Figure 34: Choosing healthy dining options, April 2013

### The Foodservice Consumer – Attitudes Toward Healthy Dining

#### Key points

Menu descriptions and smaller portion sizes important

Figure 35: Consumer attitudes toward healthy dining, by gender, April 2013

Figure 36: Consumer attitudes toward healthy dining, by age, April 2013

### The Foodservice Consumer – Unhealthy Meal Drivers

#### Key points

Consumers want indulgence on a smaller scale

Figure 37: Drivers for unhealthy meal selection, by gender, April 2013

Figure 38: Drivers for unhealthy meal selection, by age, April 2013

### Final Insights

Healthy = delicious

Less frying

Make healthier items attractive – both in price and presentation

### Appendix – Other Useful Consumer Tables

Figure 39: Calorie perceptions for healthy meals, by age, April 2013

Figure 40: Calorie perceptions for healthy meals, by household income, April 2013

Figure 41: Calorie perceptions for healthy meals, by household size, April 2013

Figure 42: Calorie perceptions for healthy meals, by generations, April 2013

Figure 43: Defining healthy dining, by race/Hispanic origin, April 2013

Figure 44: Drivers for unhealthy meal selection, by restaurant usage, April 2013

Figure 45: Drivers for unhealthy meal selection, by restaurant usage, April 2013

Figure 46: Choosing healthy dining options, by age, April 2013

Figure 47: Opinions about healthy eating, by gender and age, October 2011-November 2012

Figure 48: Restaurant usage and healthy menu item selection, by age, April 2013

Figure 49: Restaurant usage and healthy menu item selection, by household income, April 2013

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Healthy Dining Trends - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 50: Restaurant usage and healthy menu item selection, by marital/relationship status, April 2013

Figure 51: Restaurant usage and healthy menu item selection, by household size, April 2013

Figure 52: Restaurant usage and healthy menu item selection, by presence of children in household, April 2013

Figure 53: Opinions about healthy eating, by race/Hispanic origin, October 2011-November 2012

Figure 54: Opinions about healthy eating, by presence of children in household, October 2011-November 2012

### Appendix – Trade Associations

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)