

Healthy Dining Trends - US - March 2016

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.



"The nature of health is shifting away from counting calories and moving towards a focus on holistic "wellness." New restaurants are entering the market with an emphasis on natural, nutritious, and quick meals designed to attract diners stressed for time but wanting healthful meals."

- Caleb Bryant, Foodservice Analyst

This report looks at the following areas:

- In an effort to be healthy, consumers are eating at home and ordering fewer CSDs
- While consumers are concerned with health, many dine out as a treat
- Older diners are not willing to pay more for health

This Report examines consumer attitudes, behaviors, and trends towards eating healthy at restaurants. It will explain how restaurants are menuing healthy items using Mintel's Menu Insights (MMI) database. It will also examine how restaurants provide healthful foods to consumers, how consumers feel about eating healthfully, and profile establishments that focus entirely on nutritious meals. It will also define how the very perception of health is changing in the country. While health trends in retail food (ie grocery store food) will be touched upon, retail food is not the focus of this report. To learn more about overarching trends in health and fitness please look to the Mintel's Health and Wellbeing Reports. This Report builds off of *Healthy Dining Trends – US, July 2015* including previous iterations going back to 2009.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@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 - March 2016

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

Overview

What you need to know

Definition

Executive Summary

The issues

In an effort to be healthy, consumers are eating at home and ordering fewer CSDs

Figure 1: Restaurant behavior changes compared to one year ago, December 2015

While consumers are concerned with health, many dine out as a treat

Figure 2: Healthy dining statement agreement, any agree, December 2015

Older diners are not willing to pay more for health

Figure 3: Healthful descriptor interest, would pay more, December 2015

The opportunities

Most diners are stressed for time

Figure 4: Attitudes towards health, "I don't often have time to prepare/eat healthy meals", any agree, Spring 2012-15

Opportunity for more healthful beverages

Figure 5: Restaurant beverage attitudes, December 2015

Market healthful substitutions to reach consumers

Figure 6: Healthy dining motivators, December 2015

Diners are most willing to pay for more antibiotic-free and high protein foods

Figure 7: Healthful descriptor interest, would pay more, December 2015

What it means

The Market – What You Need to Know

Americans are struggling with health issues

Government guidelines and new laws shape how consumers eat

The changing definition of "health"

Market Perspective

Foodservice Trend: Extreme Living Balance or Bust

Market Factors

Health in America by the numbers

Figure 8: Percent of adults aged 18+ who are obese*, 2011-13

Figure 9: Percent of students in grades 9-12 who are obese, 2001-12

Figure 10: Number of Americans with diagnosed diabetes, 2000-14

New health guidelines and regulations

The fluidity of health

Key Players – What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Healthy Dining Trends - US - March 2016

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.

Restaurants are highlighting what doesn't go in their food
Expect food safety to be a topic of interest throughout 2016
New health-specific restaurants enter the market

What's Working?

Free-from goes mainstream
Juice as a CSD alternative
Happy healthful kids

What's Struggling?

Healthy does not equal safe
Chicken in every pot; the decline of red meat
Sugary soda struggles

What's Next?

Vegetables become the star ingredient
Specific health-focused restaurants
Grab 'n go health
Emerging tech forces accountability

MMI Analysis

Healthy descriptors grow while healthy menus shrink
Menu descriptors reflect changing perceptions of health
Figure 11: % growth of the top 10 ingredient health descriptors, Q4 2012-Q4 2015

The Consumer – What You Need to Know

There is a desire for health but consumers are stressed
Diners are interested in making substitutions
A percentage of diners will pay more for health
Antibiotic-free and high protein are among the most profitable descriptors

Consumer Health Overview

Consumers want to be healthy but are rushed for time
Figure 12: Attitudes towards health, "I don't often have time to prepare/eat healthy meals", any agree, Spring 2012-15
Too much information leaves consumers confused
Veggies everywhere
Figure 13: Attitudes towards health, "I am a vegetarian", any agree, Spring 2012-15

Healthy Behavior Changes

What's good for diners isn't good for restaurants
Figure 14: Restaurant behavior changes compared to one year ago, December 2015
Parents tend to focus on health; Dads turn to restaurants for utility
Figure 15: Restaurant behavior changes compared to one year ago, more than last year, December 2015
Figure 16: Statement agreement, any agree, December 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Healthy Dining Trends - US - March 2016

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 17: Restaurant behavior changes compared to one year ago, more than last year, December 2015

Figure 18: Restaurant beverages attitudes, December 2015

Healthy changes by region

Figure 19: Restaurant behavior changes compared to one year ago, more than last year, December 2015

Healthy Claim Appeal

Interest high in low trans-fat, whole grains but consumers will pay for antibiotic-free and more protein

Figure 20: Healthful descriptor interest, December 2015

Figure 21: Healthful descriptor interest, would pay more for gluten-free, December 2015

Older diners want healthy foods...but are not willing to pay more for it

Figure 22: Healthful descriptor interest, would pay more, December 2015

Figure 23: Healthy dining encouragers, December 2015

Beverages – Market for Low Sugar/Natural Drinks

Entice consumers with CSD alternatives

Figure 24: Restaurant beverage attitudes, December 2015

CHAID Analysis – Flavored waters

Methodology

Market flavored waters to young parents

Figure 25: Restaurant beverage attitudes – CHAID – Tree output, December 2015

Fine dining and coffee shop/beverage visitors most interested in healthful drinks

Figure 26: Restaurant beverage attitudes, December 2015

Healthy Dining Motivators

Consumers are most interested in making healthful substitutions

Figure 27: Healthy dining motivators, December 2015

Women express more interest in healthy motivators

Figure 28: Healthy dining motivators, December 2015

Figure 29: Healthy dining motivators, December 2015

Consumers and Healthy Dining

Consumers are looking for guidance when they dine out

Figure 30: Healthy dining statement agreement, any agree, December 2015

Young men turn to exercise for health

Figure 31: Healthy dining statement agreement, any agree, December 2015

Healthy item price is a huge barrier for lower income diners

Figure 32: Healthy dining statement agreement, many healthy dishes are too expensive, any agree, December 2015

Urbanites are among the ultra-healthy

Figure 33: Healthy dining statement agreement, any agree, many healthy dishes are too expensive, December 2015

Figure 34: Healthy dining motivators, December 2015

Figure 35: Healthful descriptor interest, would pay more for, December 2015

QSR diners are noticeably less interested in health

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Healthy Dining Trends - US - March 2016

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 36: Healthy dining statement agreement, any agree, many healthy dishes are too expensive, December 2015

Key Driver Analysis

Methodology

Who is willing to pay more for healthful foods?

Figure 37: Key drivers of willingness to pay more for healthy foods when dining out, December 2015

The Healthy Diner

Certain diners will pay a premium for health

Figure 38: Healthful descriptor interest, interested in and would pay more, December 2015

Figure 39: Restaurant beverage attitudes, December 2015

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – The Consumer

Figure 40: Attitudes towards health, "I don't often have time to prepare/eat healthy meals", any agree, Spring 2012-15

Figure 41: Attitudes towards health, "I am a vegetarian", any agree, Spring 2012-15

Appendix – CHAID

Figure 42: beverages at restaurants – CHAID – Table output, December 2016

Appendix – Key Driver Analysis

Interpretation of results

Figure 43: Key drivers of willingness to pay more for healthy foods when dining out – Key driver output, December 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com