

Healthy Dining Trends - US - March 2021

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and healthy dining
- Recessionary and recessionary recovery impacts on healthy dining behaviors
- Customization is key for pleasing healthy diners with a wide array of preferences
- Sustainable practices increasingly important for consumers conscious of both physical and environmental health

The number of consumers who make healthy choices when dining out has been growing in recent years, but the COVID-19 pandemic has caused a shift in ordering habits. The desire for comforting meals in uncertain times is driving down rates of both healthy and balanced dining while indulgent orders are on the rise. Additionally, lockdown orders and social distancing measures have led to more frequent ordering from QSRs, where consumers are least likely to seek healthy options. Still, consumer interest in healthy swaps, from plant-based proteins to low-carb veggie options, has held steady throughout 2020, and increased demand for better-for-you options is likely to continue moving forward.



“In recent years the percentage of diners making healthy choices has grown, and the majority of consumers who order from restaurants continue to select healthy menu items at least some of the time. However, the COVID-19 pandemic has caused a decline in balanced dining, with more consumers going the direction of both stricter and more indulgent eating habits.”

– Karen Formanski, Health

and Nutrition Analyst
Buy this report now

Visit store.mintel.com

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

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**
- **Key issues covered in this Report**
- **Definition**
- **COVID-19: foodservice industry market context**
- **Economic and other assumptions**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Total US sales and forecast of restaurants and limited service eating places*, at current prices, 2015-25
- **Impact of COVID-19 on healthy dining**
Figure 2: Short, medium and long term impact of COVID-19 on healthy dining, March 2021
- **Opportunities and challenges**
- **Balanced dining takes a hit**
Figure 3: Healthy dining segmentation, December 2018, January 2020 and January 2021
- **Fast food operators have the biggest opportunity to reach healthy diners**
Figure 4: Likelihood of choosing healthy options by locations where food/meals purchased, January 2021
- **Appealing to parents with healthy choices for the whole family can lead to brand loyalty**
Figure 5: Changes in healthy dining, by parental status, January 2021
- **Plant-based options are no longer optional**
Figure 6: Interest in plant-based menu items, January 2021
- **Sustainable practices don a health halo**
Figure 7: Interest in sustainability claims, January 2021

THE MARKET – KEY TAKEAWAYS

- **Balanced dining falls by the wayside**
- **Price point remains an obstacle**
- **Operators finding new paths to diners' plates**

IMPACT OF COVID-19 ON HEALTHY DINING

Figure 8: Short, medium and long term impact of COVID-19 on healthy dining, July 2020

- **Lockdown**
- **Re-emergence**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

- **Recovery**
- **COVID-19: US context**
- **Learnings from the last recession**

MARKET FACTORS

- **Policies mandate healthier options for kids**
- **Financial troubles lead to decreased healthy choices**
Figure 9: Changes in healthy eating, by financial situation, January 2021
- **Personal and environmental health go hand in hand**

MARKET OPPORTUNITIES

- **Fast casual chains pivot to find healthy diners in new places**
Figure 10: Just Salad Housemade Meal Kit promotion
- **Develop healthy relationships**
Figure 11: Farmer's Fridge/Dunkin' promotion

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Meal kits exemplify freshness, healthy choices**
- **Give people more ways to eat their veggies**

COMPETITIVE STRATEGIES

- **Meal kits keep it fresh**
Figure 12: Likelihood of choosing healthy options by locations where food/meals purchased, January 2021
- **Healthy options for every lifestyle**
- **Offer more plants to the people**
Figure 13: Ads for menu items featuring plant-based meat alternatives
Figure 14: Ads for vegetable-focused menu items

THE CONSUMER – KEY TAKEAWAYS

- **Most diners want healthy options...at least some of the time**
- **COVID-19 causes some diners to lose balance**
- **Fast food venues have potential to influence ordering habits**
- **Say yes to substitutions**
- **Plant-based options are no longer niche**
- **Better for you, better for the planet**

HEALTHY DINING SEGMENTATION

- **COVID-19 leads to decline in balanced dining**
Figure 15: Healthy dining segmentation, December 2018, January 2020 and January 2021
- **Perception of healthy choices varies by gender**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 16: Healthy dining segmentation, by gender, January 2021

- **Millennials, parents represent healthiest diners**

Figure 17: Healthy dining segmentation, by generation, January 2021

Figure 18: Healthy dining segmentation, by parental status, January 2021

- **Price, accessibility are major barriers to healthy dining**

Figure 19: Healthy dining segmentation, by household income, January 2021

Figure 20: Healthy dining segmentation, by area, January 2021

CHANGES IN HEALTHY DINING

- **Pandemic influences a shift away from healthy dining**

Figure 21: Changes in healthy eating, January 2020-21

- **Focus on parents now for loyalty later**

Figure 22: Changes in healthy eating, by parental status, January 2021

Figure 23: Healthy foods for kids

- **Shift in dining choices varies by gender**

Figure 24: Changes in healthy eating, by gender, January 2021

CHANGES IN RESTAURANT ORDERING HABITS BY MENU ITEM

- **Healthy diners more focused on main meals**

Figure 25: Changes in restaurant ordering habits by menu item, January 2021

Figure 26: Ads for healthy snacks and cocktails

PURCHASE LOCATIONS

- **Fast food restaurants visited by majority of consumers**

Figure 27: Locations where food/meals purchased, January 2021

- **Likelihood of making healthy choices shifts depending on location**

Figure 28: Likelihood of choosing healthy options by locations where food/meals purchased, any likely NET, January 2021

INTEREST IN HEALTHY MENU OPTIONS

- **Offering customizable menu items can put diners in control of their health**

Figure 29: Interest in healthy menu options, January 2021

- **Flexible options needed to please a variety of preferences**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 30: Interest in healthy menu options, by gender and age, January 2021

- **Offer easy swaps to please the masses**

Figure 31: TURF analysis – Interest in healthy menu options, January 2021

INTEREST IN PLANT-BASED MENU ITEMS

- **Broaden the scope of plant-based offerings**

Figure 32: Interest in plant-based menu items, January 2021

Figure 33: Interest in plant-based menu items, by healthy dining segmentation, January 2021

- **Variety is key for drawing in plant-seeking consumers**

Figure 34: TURF analysis – Interest in plant-based menu items, January 2021

INTEREST IN SUSTAINABILITY CLAIMS

- **Ramp up locally sourced ingredients**

Figure 35: Interest in sustainability claims, January 2021

- **Connect the dots between sustainable and healthy**

Figure 36: Interest in sustainability claims, by healthy dining segmentation, January 2021

Figure 37: Interest in sustainability claims, by age, January 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**
- **Terms**

APPENDIX – THE MARKET

Figure 38: Total US sales and forecast of restaurants and limited service eating places*, at current prices, 2015–25

Figure 39: Total US sales and forecast of restaurants and limited service eating places*, at inflation-adjusted prices, 2015–25

APPENDIX – THE CONSUMER

- **TURF methodology**

Figure 40: Table – TURF analysis – Interest in healthy menu options, January 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 41: Table – TURF analysis – Interest in plant-based menu items, January 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.