

# Healthy Dining Trends - US - 2022

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:

- How healthy dining participation has trended from pre-pandemic to present time
- The pandemic's impact on healthy dining past, present and future
- The menu claims and menu options that are most appealing to consumers
- What types of restaurants are most visited and part of the consideration set for healthy dining

Looking at the concept of health through a wider lens and considering diners' physical and mental wellbeing alongside the wellbeing of society and the planet will resonate on multiple levels.

The market for healthy dining is intricate, multi-layered and has an abundance of opportunities. From food halls setting an example with their mix of food diversity and convenience, to the rallying call for high protein everything.



"While healthy eating and restaurant dining both took a backseat throughout much of the pandemic, consumers are now primed and ready to reengage on both fronts."

- Amanda Topper, Director –US Research

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
- · This Report looks at the following areas
- Definition
- Market context
- COVID-19: US context
- Economic and other assumptions

#### **EXECUTIVE SUMMARY**

- Top takeaways
- Market overview

Figure 1: Total US revenues and forecast of full-service restaurants and limited-service eating places\*, at current prices, 2016-26

Figure 2: Category outlook, 2022-27

Opportunities and challenges

Figure 3: Healthy dining segmentation, 2019-2022

· Healthy dining nearly at pre-pandemic levels

Figure 4: Changes in healthy dining, 2022

A wider variety of BFY claims is needed across segments

Figure 5: Interest in healthy menu options, by location, 2022

Emphasize protein content

Figure 6: Interest in healthy menu claims, 2022

### **MARKET FACTORS**

 Pandemic continues to impact foodservice industry yet sees improvement

Figure 7: Total US revenues and forecast of full-service restaurants and limited-service eating places\*, at current prices, 2016-26

Figure 8: Total US revenues and forecast of full-service restaurants and limited-service eating places\*, at current prices, 2016-26

 Food costs overall will cause consumers to cut back on restaurant spending

Figure 9: Changes in consumer price indexes for food, 2019-22

Restaurant choices impacted by plummeting consumer confidence

Figure 10: Consumer Sentiment Index, 2010-22

Physical health issues on the rise

### 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.

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 11: Age-adjusted prevalence of overweight and obesity among people aged 20 or older, 2001-02 to 2017-18

#### COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- Healthy dining needs to be available and accessible
- Convenience is a key driver
- LSRs' broad net brings greater attention to plant-based offerings

Figure 12: KFC Beyond Fried Chicken and Panda Express + Beyond Meat, 2022

Experiential healthy dining delivers on taste and visuals

Figure 13: Eleven Madison Park and Elizabeth Chicago, 2022 Figure 14: Castalia cocktails, 2022

- Room for expansion of healthy dining in global cuisines
  Figure 15: Guelaguetza Restaurant Tlayuda, 2022
- Broadening the concept of healthy dining beyond "diet"
- · Lean into the health of alcohol-free beverages

#### THE HEALTHY DINING CONSUMER: FAST FACTS

- Healthy dining is on the rebound
- Diners are choosing to eat healthier more often
- Restaurant ordering is on the rise
- Protein content is the most desirable

#### **HEALTHY DINING SEGMENTATION**

- Pandemic-related indulgence wanes
  Figure 16: Healthy dining segmentation, 2022
- Men have less-restrictive definitions of health
  Figure 17: Healthy dining segmentation, by gender, 2022
- Millennials and Gen X are the healthiest diners
  Figure 18: Healthy dining segmentation, by generation, 2022
- Adventure Eaters more likely to be Healthy Diners
  Figure 19: Healthy dining segmentation, by food and drink segmentation, 2022

### **CHANGES IN HEALTHY DINING**

- Healthy diners emerge from the haze of indulgence
  Figure 20: Changes in healthy dining, 2022
- Millennials are eating healthier as options increase
  Figure 21: Changes in healthy dining, by generation, 2022
- If you provide it, they will come
  Figure 22: Reasons for eating healthfully more often, 2022
- Food halls provide lessons in how to get it right

### 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.

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 23: Reasons for eating healthfully more often, by restaurant ordering, 2022

• Those who eat healthfully less often are not core diners Figure 24: Reasons for eating healthfully less often, 2022

#### **RESTAURANT ORDERING LOCATIONS**

LSRs ease into healthy options

Figure 25: Restaurant ordering locations, 2022

 Healthy menu options warranted across foodservice industry

Figure 26: Restaurant ordering locations, by household income, 2022

· Healthier options will attract Hispanic diners

Figure 27: Restaurant ordering locations, by Hispanic origin,

 Off-premise options the key to increased FSR ordering among Black diners

Figure 28: Restaurant ordering locations, by race, 2022

### **INTEREST IN HEALTHY MENU CLAIMS**

High protein muscles its way to the top

Figure 29: Meati chicken x Chef Tom Colicchio, 2022 Figure 30: Interest in healthy menu claims, 2022

 Consumer interest and current menu offerings not in total alignment

Figure 31: Growth/decline of select healthy menu claims, Q3 2018-21

· Promote ingredient functionality claims

Figure 32: Interest in healthy menu claims, by generation, 2022

· Hispanics vested in healthy dining for overall health

Figure 33: Interest in healthy menu claims, by Hispanic origin, 2022

### HEALTHY DINING OPTIONS BY LOCATION

• **Highlight nutritional claims with plant-based menu options**Figure 34: Interest in healthy menu options, 2022

Sit down restaurants are the go-to for healthy dining claims
 Figure 35: Interest in healthy menu options, by location, 2022

Parents most vested in healthy dining claims across foodservice industry

Figure 36: Interest in healthy menu options, by parental status, 2022

### 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.

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.



### **APPENDIX – DATA SOURCES AND ABBREVIATIONS**

- Data sources
- Consumer survey data
- Abbreviations and terms
- Abbreviations

### 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.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300



# **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.