

HEALTHY DINING TRENDS – US – 2023

As definitions of healthy eating continually expand and shift, restaurants are tasked with making this generally restrictive task feel inviting and enjoyable.



Varchasvi, Research Analyst



Healthy Dining Trends - US - 2023

This report looks at the following areas:

- How consumers approach healthy dining at restaurants
- How consumers perceive health menu items
- Features consumers desire in healthy menu items
- Attitudes towards eating healthy at-home and away-from-home

Overview

Consumers want to make healthy choices at restaurants, but don't find them accessible or exciting: merely 14% of them think of healthy menu items as craveable, and nearly 8 in 10 consumers find it easier to eat healthy at home. The definitions of healthy eating change continually, and with access to more knowledge, more aspects of health emerge that consumers want to be aware of and address.

Evolved from simple goals like eating fresh, natural ingredients, the current healthy eating landscape demands that consumers pay attention to both the physical and emotional impact of what they eat. The longer this checklist gets, the more difficult it can be to keep up for both restaurants and consumers. Amidst this noise, consumers will be more attuned to how food makes them feel: they want to feel satisfied, comforted, and like they have enjoyed a treat while still meeting their health needs. Specific health benefits and functionalities may attract a niche, but great taste at good value appeals to all.

Consumers are divided on whether they can trust restaurants to help them stay on track with their goals. Restaurants are tasked with rebuilding that trust, assuring consumers that they can



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not only satisfy fundamentally personal and flexible definitions of health, but also do so in a way that is exciting, not restrictive.

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Report Content

EXECUTIVE SUMMARY

- Market predictions
- What you need to know
- Consumer trends: key takeaways
- Opportunities

CONSUMER INSIGHTS

Consumer Fast Facts

Healthy dining segmentation

- Healthy dining segments
 - Graph 1: diner segments, 2023
- Healthy dining segments (contd)
 - Graph 2: diner segments, 2023

Dining habits

- Let consumers make the call on healthy dining
 - Graph 3: Dining out habits, 2023
- Consider the "healthy diner" as an identity
 - Graph 4: dining habit groups, 2023

Approach to healthy dining

- Use menu information to expand, not restrict choices
 - Graph 5: Approach to healthy choices at restaurants, 2023

Healthy dining perception

- The health menu can be more inviting
 - Graph 6: attributes associated with healthy menu options, 2023
- For women, healthy items are perfectly adequate, but not exciting
 - Graph 7: attributes associated with healthy menu options, by gender, 2023

Desired menu features

- Health benefits alone will not suffice
 - Graph 8: desired features in healthy menu options, 2023
- For younger consumers, comfort guides consumption
 - Graph 9: desired features in healthy menu options, 2023

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- Accessibility defines perspectives on healthy dining
 - Graph 10: desired features in healthy menu options, by area, 2023

Dining considerations

- Size matters, and less isn't more
 - Graph 11: considerations when dining out, 2023
- Affordability and healthy dining currently don't mix
 - Graph 12: considerations when dining out, by financial situation, 2023
- Nutritional priorities change, yet some aspects are timeless
 - Graph 13: considerations when dining out, by generation, 2023

Desired health benefits

- Traditional health benefits outweigh trendy ones in foodservice
 - Graph 14: desired health benefits in restaurant meals, 2023
- Easy, accessible personalization will win with busy parents
 - Graph 15: desired health benefits in restaurant meals, by parental status, 2023
- Navigate emerging health trends with personalization
 - Graph 16: desired health benefits in restaurant meals, by area, 2023

Healthy dining attitudes

- Healthy dining is a predominantly at-home activity
 - Graph 17: attitudes towards healthy dining, 2023
- Health menus aren't meeting women's needs
 - Graph 18: healthy dining attitudes, by gender, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Launching a healthy kids' menu will open up a new demographic
- Sweetgreen expands into the dinner occasion with protein-forward entrées
- Shake Shack, Sweetgreen opt for better cooking oils
- Lessons from the Charged Lemonade at Panera

THE MARKET

- Market context

Market drivers

- Weight loss drug development and its impact on foodservice
- Premium prices can deter healthy eating

- Graph 19: select inflation behaviors, 2023

APPENDIX

- Consumer research methodology
- Generations
- Abbreviations and terms

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