# THE NEW HEALTHY

a SNAP! keynote

- consumer & operator perspectives
- the evolution of health & diets
- how consumers value food in their pursuit of a healthy lifestyle
- operator opinions of health trends
- top-ranked healthful attributes for foods and beverages
- opportunities for healthful initiatives on menus

**Healthy is always a moving target, for consumers and for operators, but the latest trends help give the definition shape.** Even if only few people follow a strict, specific eating regimen, many of them do take a considered approach to the foods and drinks they put in their bodies. The functional, personalized benefits they seek are different from what the last decade's diets pointed them toward. Consumers' complex needs raise the bar on what they require from operators and, in turn, their suppliers. **Make The New Healthy part of your balanced business strategy.**

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# THE NEW HEALTHY: a SNAP! keynote

## Topics covered

**how food fits in healthy lifestyles**

- measure the importance of diet in consumer perceptions of what's healthy, compared with exercise, stress management and many other lifestyle factors
- track the foods and allergens they avoid or limit most

**the attributes that ensure a health halo**

- discern nutrition from production method attributes, and learn which ones matter more
- see how consumers rank certain foods and beverages on their perceived healthfulness

**operator attitudes toward health**

- learn the attributes, both of foods' nutritional makeup and of how they're produced, that operators would put on their menus — and pay a premium for
- keep abreast of where operators turn for learning about new diets and healthfulness claims
- gauge expectations for healthful menu development

**the evolution of health**

- see the progression from weight loss diets to today's move toward personalized health
- catch up with the health startups pioneering DNA diets and genome-specific regimens

**areas of need for healthful menus**

- determine the size of the market for certain eating styles
- compare where operators align their menus with health trends and where suppliers could help fill white space

## From the report

### CONSUMERS

**90%** rank "what I eat and drink" as important to their overall sense of well-being

**9%** follow a strict, specific diet

**15%** use some kind of fitness or diet tracker app, including one in five Millennials

**48%** avoid sugar in their diets

### OPERATORS

**40%** currently don't serve any plant-based menu items, despite their hype

**44%** are open to suppliers providing healthful menu ideas, recipes, and nutrition info

**67%** currently offer vegetarian items

1,101 consumers

314 operators

report

x-tab tool

webinar

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KR | KEYNOTE REPORT

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# THE NEW HEALTHY

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## USE INTERNALLY, BUT DO NOT DISTRIBUTE

This report cannot be distributed in full to outside companies. That said, we encourage you to apply the insights internally with full force, and to incorporate specific select exhibits into your other presentations.

If you have questions regarding usage, please contact Brian Darr at 312-655-0594 or brian@datassential.com.

# TABLE OF CONTENTS


| | |
|---|---|
| Methodology & Objectives | 4 |
| The Takeaways | 6 |
| Key Findings | 17 |
| Thought Starters | 23 |
| Data Dive: At a Glance | 25 |
| The Health Landscape | 32 |
| Healthy Terms and Descriptors | 41 |
| Consumer Perspectives | 47 |
| Consumers' Most Recent Meal | 82 |
| Operator Perspectives | 93 |
| Consumer Brand Ratings | 117 |
| Healthy 1.0 to 4.0 on Menus | 123 |
| Data Dive: Health & Wellness Megatrends | 150 |
| Appendix: Demographics | 161 |
| Appendix: Exhibit Guide | 164 |


# METHODOLOGY

fielded online May 2019

1,101 consumers were surveyed overall

314 operators via the Datassential panel
- 163 restaurant operators
- 111 on-site operators
- 40 retail foodservice operators

*full demographic info is available in the appendix*

# OBJECTIVES

- identify consumer health attitudes and eating behaviors
- understand consumer perceptions and awareness of healthy food terms
- gauge barriers and drivers for healthy choices at home and away from home
- determine healthy food attributes consumers and operators value at a premium
- in-depth menu analysis of new health and wellness
- operator motivators and perceptions about healthy menuing

# 9 in 10

consumers say their diet influences their well-being


n=1,101

**A1:** How important are the following to you personally in creating an overall sense of well-being? Select one per row.

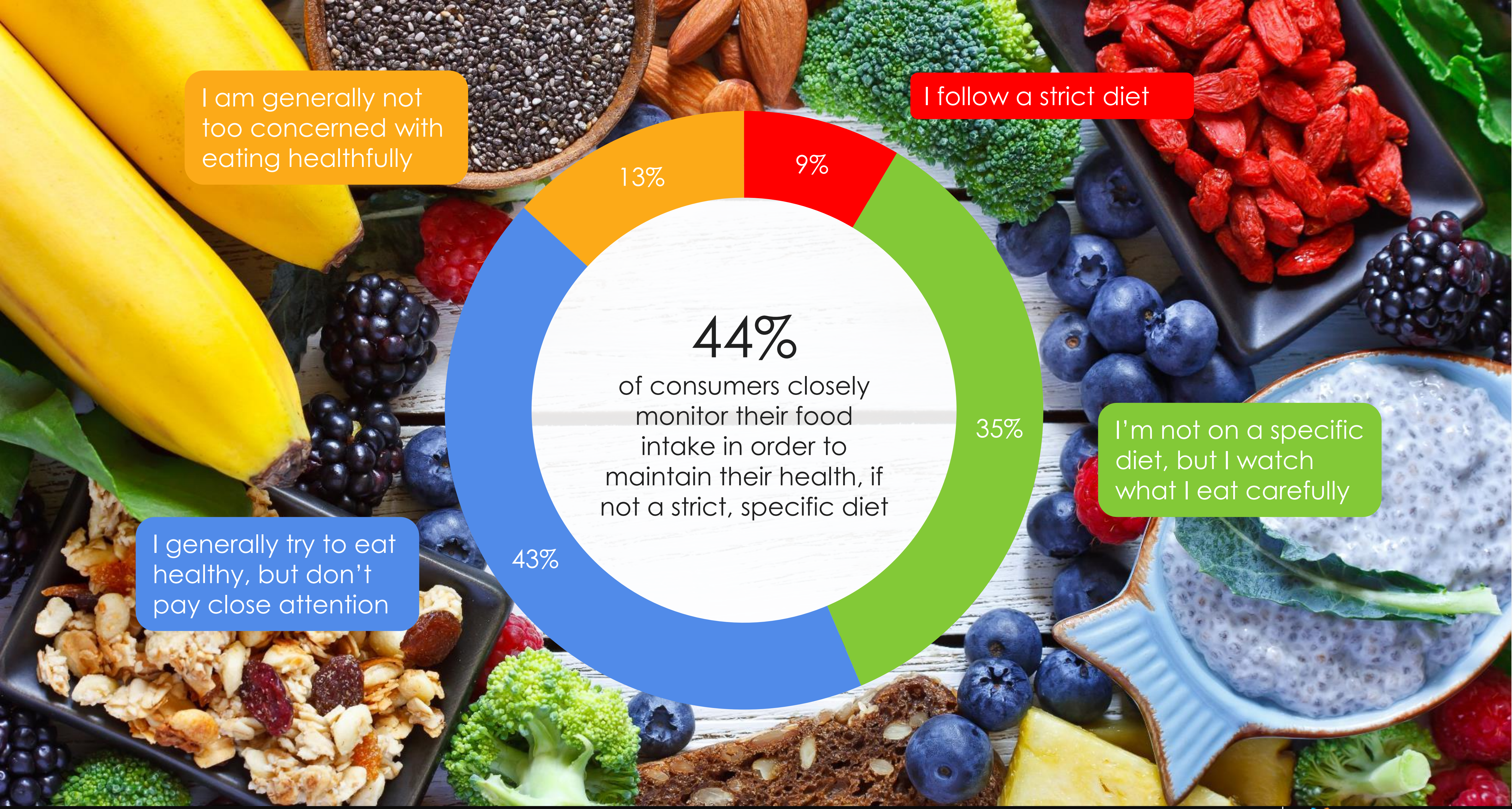
# Top Ranked Attributes for a Healthy Lifestyle

% of consumers identifying attribute as No. 1 factor

| | |
|---|---|
| Eating right | 31% |
| Exercising / staying physically active | 23% |
| Getting enough sleep | 22% |
| Managing stress | 16% |
| Taking vitamins / supplements | 7% |

n=1,101

**A12:** Which of the following do you consider MOST important to a healthy lifestyle? Please rank your choices in order, with 1 being the most important on this list and 5 being the least important.




n=1,101

**A2:** Which of the following best describes your attitude toward food? Select one.
**A3:** In the past year, have you? Select one.

## Diets Consumers Practice Now

| | Currently practice | Have practiced in the past | Interested in practicing | Not interested |
|---|---|---|---|---|
| Omnivore | 48% | 15% | 9% | 28% |
| Flexitarian | 13% | 16% | 20% | 51% |
| Vegan | 4% | 10% | 15% | 70% |
| Vegetarian | 4% | 15% | 17% | 64% |
| Pescatarian | 4% | 12% | 15% | 69% |
| Pollotarian | 4% | 10% | 15% | 72% |

A majority of consumers say they're not interested in practicing specific diets, including a "flexitarian" diet in which followers cut back on their consumption of meat, rather than eliminate it entirely.

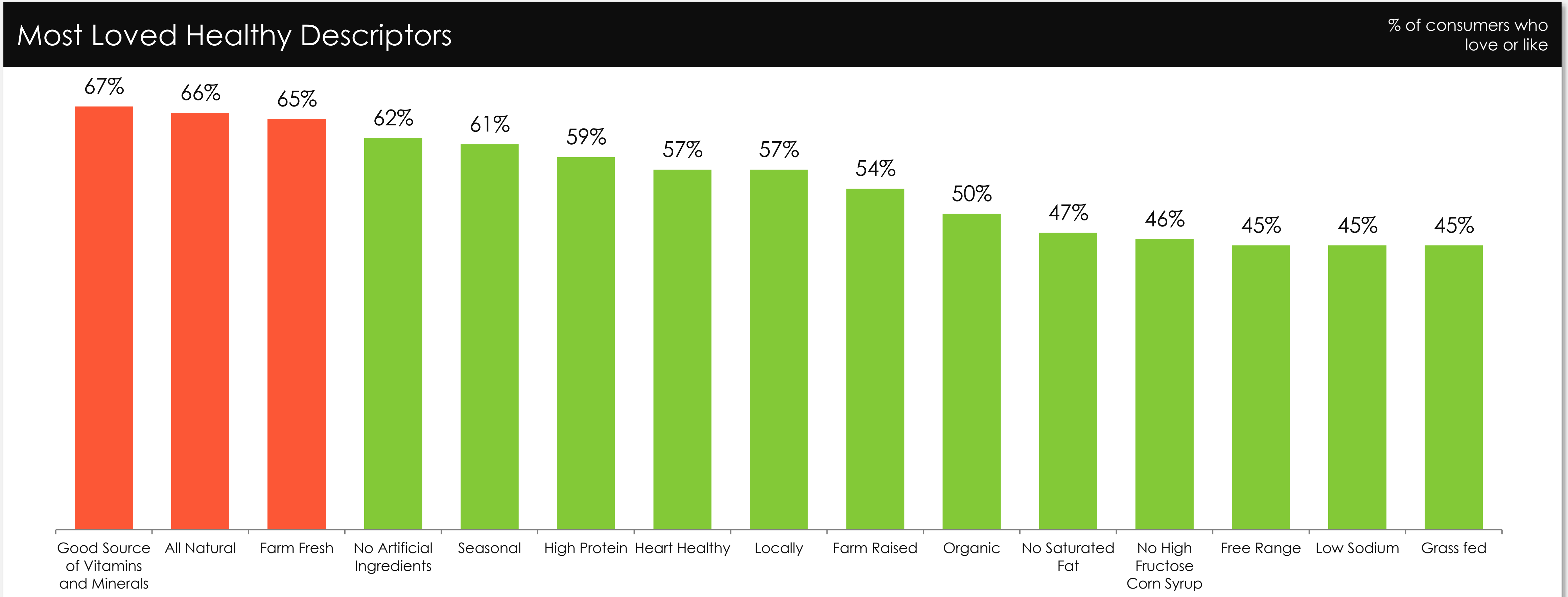
Only 28% of consumers said they have no interest in practicing an omnivore diet.

n=1,101

**B1:** For each of the following diets, please indicate if you currently practice, have practiced in the past, have not practiced but are interested in practicing, or have no interest in practicing. Select one per row.

# Consumers feel just as good about descriptors that confirm foods are nutrient-dense as they do about "feel-good" terms like all natural and farm fresh. They also respond to terms like heart healthy and no saturated fat.

## Most Loved Healthy Descriptors




| | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 90 | 88 | 87 | 84 | 83 | 81 | 79 | 79 | 76 | 71 | 68 | 67 | 67 | 67 | 66 |

Percentile Ranking Among All Foods, Beverages, and Brands

## Despite their different price points, limited-service and full-service menus share many fast-growing ingredients, including kombucha, chia, and turmeric. Sourcing terms like wild caught and grass fed also appear on both.

### Fastest-Growing Health and Wellness Terms & Ingredients
### Limited Service vs. Full Service

ranked by 4-year growth

**LIMITED-SERVICE RESTAURANTS**

| | | | |
|---|---|---|---|
| Turmeric | +++% | Green Smoothie | +198% |
| Kombucha | +++% | Grass-Fed | +191% |
| Poké | +++% | Wild-Caught | +186% |
| Cage-Free | +++% | Fermented | +170% |
| Chia | +++% | Bee Pollen | +155% |
| Almond Milk | +++% | Kale | +154% |
| Dragon Fruit | +297% | Pickled Carrot | +145% |
| Almond Butter | +283% | Matcha | +144% |
| Pepita | +272% | Superfood | +144% |
| Brussels Sprouts | +217% | Goji | +143% |
| Pickled Red Onion | +208% | Coconut Water | +135% |
| Farro | +198% | Hemp | +134% |

**FULL-SERVICE RESTAURANTS**

| | | | |
|---|---|---|---|
| Avocado Toast | +++% | Heirloom Tomato | +109% |
| Kombucha | +++% | Turmeric | +109% |
| Heirloom Carrot | +287% | Kale | +99% |
| Almond Milk | +286% | Sumac | +94% |
| Matcha | +219% | Millet | +90% |
| Cage-Free | +173% | Bone Marrow | +88% |
| Black Garlic | +161% | Hemp | +85% |
| Coconut Water | +157% | Sustainable | +84% |
| Chia | +151% | Vegan | +82% |
| Poké | +144% | Golden Beet | +81% |
| Pickled Red Onion | +121% | Gluten-Free | +81% |
| Quinoa | +115% | Grass-Fed | +77% |

+++% indicates growth over 300%

**PENETRATION:** Of LSR & FSR restaurants, % that offer…


n=1,101

**A5:** Do you have any allergies or sensitivities? If so, please describe.

Operator Finding

# How do plant-based items fit into operators' menus?


n=314

**Operator A6a:** How would you say plant-based alternatives (e.g. almond milk, the Impossible Burger) fit into the healthy offerings in your operation? Select all that apply.

# Would You Pay More for These Healthful Attributes?

% of operators selecting

Operator Finding

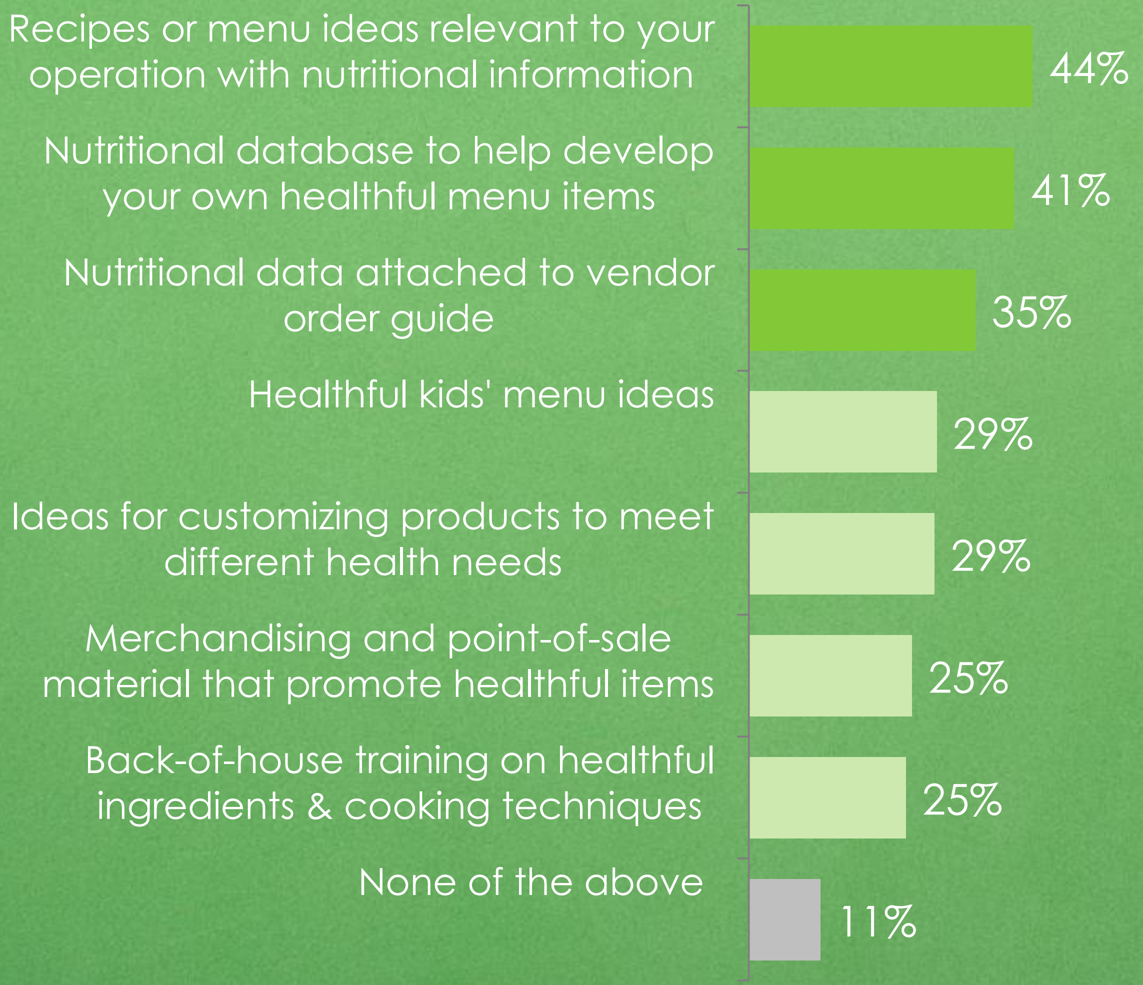
| | Would Pay More For | Would Likely Buy, not Pay More | Makes No Difference |
|---|---|---|---|
| Free-range/pasture-raised | 63% | 34% | 3% |
| Artisanal/craft | 61% | 32% | 7% |
| Local | 59% | 35% | 7% |
| Organic | 51% | 40% | 9% |
| Gluten free | 47% | 45% | 8% |
| Seasonal | 42% | 55% | 3% |
| Lactose free | 38% | 46% | 15% |
| Hormone free | 38% | 48% | 14% |
| Antibiotic free | 35% | 57% | 8% |
| Allergen free | 35% | 53% | 12% |
| Non-GMO | 33% | 61% | 7% |
| High protein | 32% | 61% | 7% |
| All natural | 31% | 61% | 8% |
| No nitrates/nitrites | 30% | 61% | 9% |
| Minimally processed | 29% | 61% | 10% |

n=varies

**Operator A6:** For each of the following, please indicate if you would pay more for this attribute, Be more likely to buy an item with this attribute, but not pay more, or it makes no difference.

Operator Finding

# Nine in 10 industry operators want supplier support for healthful menu development




n=314

**Operator C2:** What supplier initiatives would you be most interested in seeing regarding healthier menu ingredients and menu items? Please select all that apply.

# exhibit guide


| | | | | | |
|---|---|---|---|---|---|
| **The Takeaways** | 6 | Consumer: Dietary Practices | 60 | Consumer: For What Types of Food and Beverages are Healthy Options Most Important to You? | 77 |
| Key Findings | 17-22 | Consumer: Food and Beverage Consumption Limitation | 61 | Consumer: Why Would You Order Something Unhealthful at a Restaurant? | 78 |
| Thought Starters | 23-24 | Consumer: Contemporary Dietary Practices | 62 | Consumer: What Would Motivate You to Choose Healthful Options? | 79 |
| Data Dive: at a Glance | 25-31 | Consumer: Changes in Specific Food and Beverage Consumption | 63 | Consumer: Top Categories of Food in Which Healthful Options are Important at Restaurants | 80 |
| The Health Landscape | 32-35 | Consumer Verbatims: Why are You Eating More of these Foods? | 64 | Consumer: Interest in Health and Wellness Food Trends | 81 |
| Healthy 4.0 Examples | 36-40 | Consumer Verbatims: What is Preventing You from Eating More of these Foods? | 65 | **Consumers' Most Recent Meal** | 82 |
| Healthy Terms and Descriptors | 41-46 | Consumer Verbatims: Why are You Eating Less of these Foods? | 66 | Consumer: When was the Last Time You Ate? | 83 |
| **Consumer Perspectives** | 47 | Consumer: Attitudes Towards Healthful Eating | 67 | Consumer Verbatims: Why have You not Eaten in the Past 24 Hours? | 84 |
| Consumer: Top Factors Contributing to Overall Well-Being | 48 | Consumer: Top Ranked Healthful-Food Attributes | 68 | Consumer: What was the Last Thing You Ate? | 85 |
| Consumer: Attitudes Toward Food; Weight Management in the Last Year | 49 | Consumer Top Ranked Attributes Defining a Food as Healthful | 69-71 | Consumer: Most Recent Food or Beverage Consumed | 86-88 |
| Consumer: Alcohol Consumption Frequency | 50 | Consumer: Importance of Attributes in Defining a Food as Healthful | 72 | Consumer: Origin of Most Recent Food or Beverage Consumed | 89 |
| Consumer: Allergy Prevalence | 51 | Consumer: Food and Beverages Healthful & Unhealthful | 73 | Consumer: Healthfulness of Most Recent Food or Beverage Consumed | 90 |
| Consumer: Health Issue Prevalence | 52 | Consumer: Where do You Mostly Go for Healthful Foods?; Change in Perception of Healthfulness over the Last 3 Years | 74 | Consumer Verbatims: Why do You Consider these Foods or Beverages Healthful or Unhealthful? | 91 |
| Consumer Verbatims: What are your Health Issues and are You Taking Medication? | 53 | Consumer: Top Concerns Related to Food and Beverage Healthfulness | 75 | | |
| Consumer: Doctor Visitation Frequency | 54 | Consumer: Why Would You Choose Something Unhealthful at Home? | 76 | | |
| Consumer: Exercise Frequency | 55 | | | | |
| Consumer: Fitness or Diet Tracker or App Usage | 56 | | | | |
| Consumer: Specific Fitness or Diet Tracker or App Usage | 57 | | | | |
| Consumer: Top Sources of Health, Wellness, & Nutritional Information | 58 | | | | |
| Consumer: Top Ranked Aspects of a Healthy Lifestyle | 59 | | | | |

# exhibit guide


| | |
|---|---|
| **Consumers' Most Recent Meal, continued** | |
| Consumer: Motivation of Most Recent Food or Beverage Consumed | 92 |
| **Operator Perspectives** | 93 |
| Operator: Top Factors in Determining What is Menued | 94 |
| Operator: Operator Approach Toward Healthfulness in the Next Year | 95 |
| Operator: Operator Attitudes Toward Health and Wellness | 96 |
| Operator: Top Operator Ranked Healthful Attributes for Customers | 97 |
| Operator: Top Operator Ranked Attributes Defining a Food as Healthful | 98-100 |
| Operator: Would You Pay More for These Healthful Attributes? | 101-102 |
| Operator: How do Plant-Based Alternatives Fit into Your Operation | 103 |
| Operator: Utilization and Awareness of Health and Wellness Trends | 104 |
| Operator: Presence of Healthful Initiatives Available at Operation | 105 |
| Operator: Daypart with Most Healthful Options Sold | 106 |
| Operator: Areas Where Operators Do or Would Offer Healthier Options | 107 |
| Operator: Consumer Demand for Healthier Items in the Last Year | 108 |
| Operator: Top Healthful Requests Made by Consumers | 109 |
| Operator Verbatims: What Healthful Requests are made by Your Customers? | 110 |
| Operator: Are Suppliers Meeting Your Needs in the Following Areas? | 111 |
| Operator: Sources for Healthful Food & Beverage Purchasing | 112 |
| Operator: Primary Source of Healthful Product Offerings | 113 |
| Operator: Difficulty in Sourcing Healthful Offerings | 114 |
| Operator: What Health Initiatives Would You be Interested in from Suppliers? | 115 |
| Operator: How Would You Like to Receive Health Information? | 116 |
| **Consumer Brand Ratings** | 117 |
| BrandFingerprints Metrics | 118 |
| BrandFingerprints: Motivations – Wanted Something Healthy | 119 |
| BrandFingerprints: Motivation for Chain Selection on Last Visit | 120 |
| BrandFingerprints: Competitive Averages | 121 |
| BrandFingerprints: Menu Appeal | 122 |
| **Healthy 1.0 to 4.0 on Menus** | 123 |
| Healthy 1.0 Weight Management | 124-125 |
| Healthy 1.0 Weight Management MAC | 126 |
| FLAVOR: Most Loved Healthy 1.0 Terms | 127 |
| SCORES: Healthy 1.0 Weight Management Examples: Safe Experimentation | 128-129 |
| MenuTrends: Most Menued & Fastest Growing Healthy 1.0 Terms | 130 |
| Healthy 2.0 Feel Good Foods | 131-132 |
| Healthy 2.0 Feel Good Foods MAC | 133 |
| MenuTrends: Most Menu & Fastest Growing Healthy 2.0 Terms | 134 |
| FLAVOR: Most Loved Healthy 2.0 Terms | 135 |
| SCORES: Healthy 2.0 Feel Good Foods Examples: Safe Experimentation | 136 |
| MenuTrends: Vegetarian & Vegan Descriptors | 137 |
| MenuTrends: Vegetarian & Vegan Pricing | 138 |
| Healthy 3.0 Functional Foods | 139-140 |
| Healthy 3.0 Functional Foods MAC | 141 |
| MenuTrends: Most Menued & Fastest Growing Healthy 3.0 Ingredients | 142 |
| FLAVOR: Most Loved Healthy 3.0 Ingredients | 143 |
| SCORES: Healthy 3.0 Functional Foods Examples: Safe Experimentation | 144 |
| Healthy 4.0 Personalized | 145-146 |
| MenuTrends: Most Menued Healthy 4.0 Terms | 147 |

# exhibit guide


**Healthy 1.0 to 4.0 on Menus, continued**

SCORES: Healthy 4.0 Personalized Examples: Safe Experimentation 148
Healthy 4.0 Personalized MAC 149

**Data Dive: Health & Wellness Megatrends** 150

Health & Wellness Megatrends MAC 151
Health & Wellness Megatrends 152-159
Megatrend Opportunities 160

**Appendices**

**Demographics** 161

Consumer Demographics 162
Operator Demographics 163

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