

# Trends in Plant-based Eating





**T**he following data was commissioned by OMD in a 2018 Datassential report. The research surveyed 1,500 consumers, 311 operators, 144 onsite operators and 31 retail operators across the country. The report was designed to identify consumer dietary lifestyles as they relate to plant-based food.

### It's about eating more plants, not necessarily less meat:

- **22% of consumers** limit their meat, poultry, or seafood consumption.
- **More than half of consumers** say they are eating more fruits and vegetables than a year ago, and at least a quarter say the same for whole grains, dairy-free milks, legumes, and seeds.
- **Plant-based alternatives are gaining traction:** Around one in three Gen Z and Millennials eat plant-based protein alternatives at least once a week (compared to one in five Gen X and one in ten Boomers).



## Health is the key driver of plant-based eating, but great taste is also important:

- **The top reason for choosing plant-based** alternatives over animal products is health. Nine in 10 consumers agree with the statement that “plant-based entrees are generally healthier than meat-based entrees.”
- **66% of consumers** say that the top reason for increasing plant-based food consumption is to improve their health.
- **Restaurants and retailers focus on taste** when promoting fruits and vegetables. When asked what works, operators point to flavor-forward marketing like “adding name appeal such as ‘smothered green beans,’” and “using vegetables in recipes for easier sales and to add appeal; bold flavors, different than expected.”





## Plant-based foods are growing quickly across menus, in many different categories:

- **Brown rice appears on 11% of menus**, an increase of 23% over the past 4 years. Black beans, chickpeas, edamame, and lentils are all up by at least 10% and hummus, on 11% of menus, has increased by 27%. Among vegetables, kale continues its meteoric rise, increasing by 242% on menus since 2014.
- **Operators say the main reason** they are offering and selling more of these foods is because customers are interested in them. Customers value plant-based foods because of their health profile and as a protein source (84% view legumes and nuts/seeds as good alternatives to animal proteins).
  - **Note:** Great taste is only a secondary reason for eating legumes: consumers primarily look to them as healthy and, relatedly, as a good source of protein.
- **For operators that sell them**, sales of grain bowls have increased by 58%.
- **85% consumers agreed** that plant-based foods can be just as satisfying as animal proteins and products.
- **Consumers love stir-fried vegetables** as much as pulled pork, according to Datassential's FLAVOR database, and rice and beans rates as highly as brisket.



## Restaurants need help navigating and taking advantage of changing consumer trends, as well as marketing new menu options to meet changing needs:

- **Plant-forward eating** appeals to the majority of consumers, but restaurant chains launching new plant-based dishes lag behind animal-based dishes not only in number but also in consumer appeal.
- **More than a third of restaurants** say they struggle to get customers excited about plant-based alternatives, and one-quarter say they have trouble selling vegetable-forward dishes.
- **The fastest growing varieties** of plant-based foods on menus are the most colorful: golden beets are up 121% over the past 4 years, pink dragon fruit more than 400%.
- **The biggest challenge** in reaching operators may just be getting their attention: 70% agree they don't put much thought into how they menu plant-based alternatives.





- **Avoid the v-word.** Unfairly or not, labeling foods as vegetarian or vegan on menus tinges plant-based foods as less indulgent or flavorful than they actually are. A better approach is to let quality ingredients and prep methods speak for themselves.
- **Gen Z and Millennials** are especially likely to say they truly enjoy eating plant-based foods and exploring new dishes.
- **Consumers are looking for food** that will make them look and feel better, whether that means losing weight, lowering cholesterol, or simply avoiding a mid-afternoon carb crash. Use words like energy, nutrition, fresh, and natural to emphasize the benefits of plant-based foods without suggesting that they come at the expense of appetite, satisfaction, or flavor.
- **Target the intersection of health and indulgence:** consumers look to plant-based foods for a health boost, but also want satisfying meals. Examples include vegan mac and cheese, plant-based jerky, veggie burgers, nut-milk ice cream.





- **On a burger menu**, consider adding a “pick your patty” option, where consumers can swap out a veggie patty in any of the burger builds.
- **Beyond Burger ranks very well** in menu performance across the industry, and offers 20g of protein per patty, no GMOs, soy, or gluten.
- **Push plant-based entrées for dinner**: 88% of consumers say that they eat veggies for dinner, compared to 66% who eat them for lunch and 15% for breakfast. That said, operators report that they sell twice as many legumes for lunch compared to dinner.
- **Plant-based dishes** can be a point of differentiation, especially at large chains where meat is front and center (especially important for Applebee's, which has struggled financially in recent years).



## Varietals are overlooked as consumer favorites and as possible premium attributes:

- **Operators are missing out** on sales of premium plant-based foods. Fewer than half say they menu items with attributes consumers are more likely to buy and/or pay more for, such as “local,” “organic,” “heirloom,” and “non-GMO.”
- **Many of the fastest-growing fruits and vegetables** on restaurant menus are special varieties of grocery store classics. There is an opportunity for operators to call out specific varieties. Consumers love specific varieties of fruits, vegetables, and legumes; at least two-thirds say they love Golden Delicious apples and Yukon Gold potatoes. More than half of consumers say they love pinto, kidney and black beans. Onions, for example, are featured on 93% of menus, but callouts are growing: shallots are up 16% and Maui onions up 38%; within the legume category chickpeas are up 25%; within the leafy greens category, arugula mentions are up 43% and little gem lettuce is up 141%.
- **More than half of consumers** say they would pay more for heirloom varieties of fruit and vegetables, for example, yet fewer than 20% of operators menu these items.

