Boost the Value of Your Menu Using New Consumer Definitions of Health

July 2025

BROUGHT TO YOU BY:

Today's Priorities

How are consumers defining health today away from home?

Which health terms provide value in away-from-home spaces ?

How can you boost the presence of better-for-you ingredients by daypart?

How can you successfully incorporate both health and indulgence?

Why are we talking about health?

52% of operators plan to expand the number of health-focused products on their menus in the coming two years

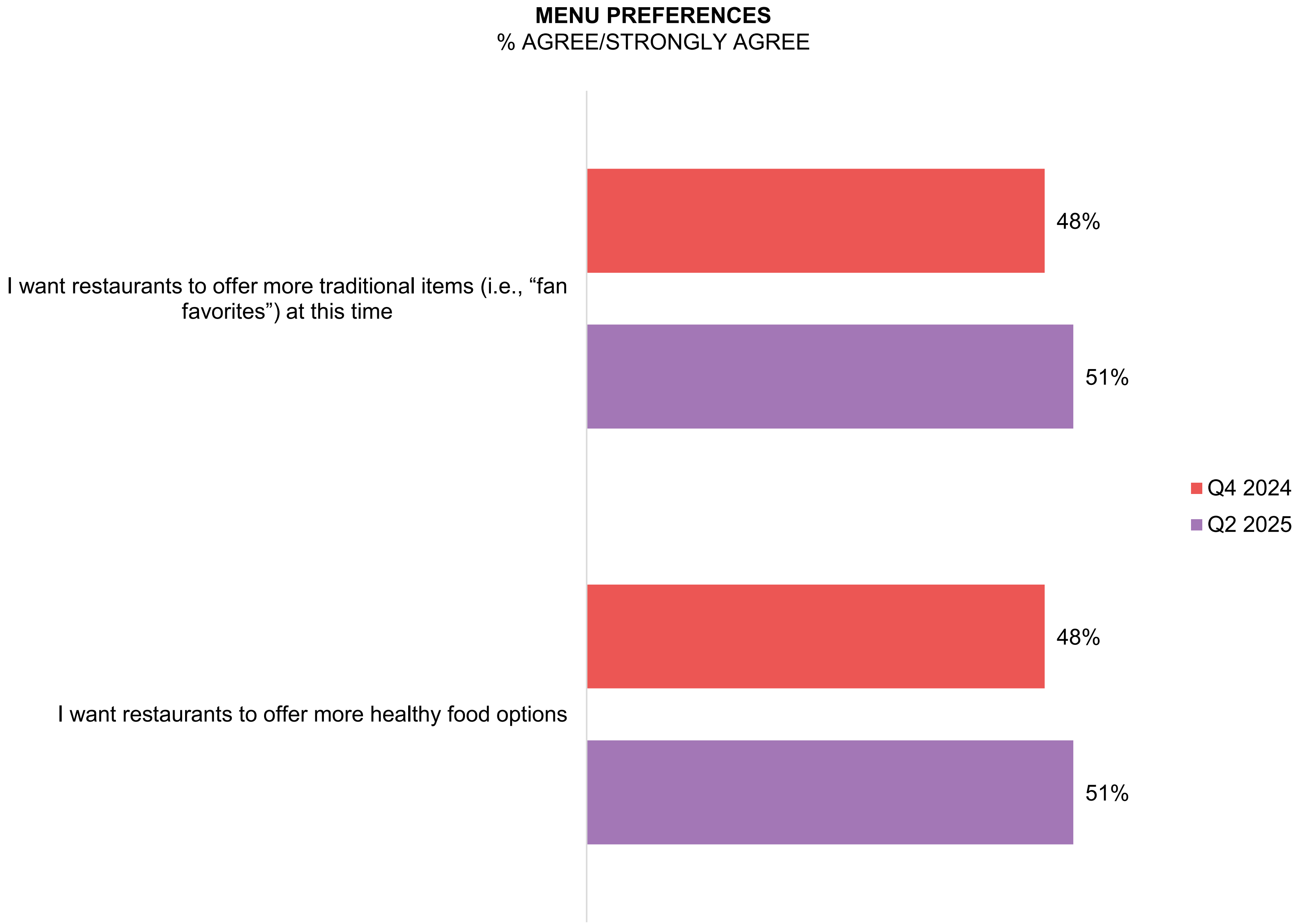
1/3 of consumers choose health away from home

% of consumers who choose health-focused food and beverage most of the time or always

63% at home

33% away from home

As consumers look for value, they increasingly seek fan favorites (known to be worth the spend) and a higher degree of health



Base: Approx. 635 consumers per statement; Varies by statement
Technomic Q2 2025 COOR Report
Q: Thinking about restaurant and other foodservice location menus, how much do you agree or disagree with the following statements?

And The Better-For-You Need Continues to Grow

% of consumers who identify better for you as **leading need state**

Segment Category	2019	2024
Limited service	19%	21%
Full service	17%	22%

Source: Ignite Consumer

% Increase From 2019
LSR & FSR Combined

Gen Z
+4% pts

Millennial
+2% pts

Gen X
+2% pts

Baby Boomer
+2% pts

Healthy options can increase patron satisfaction

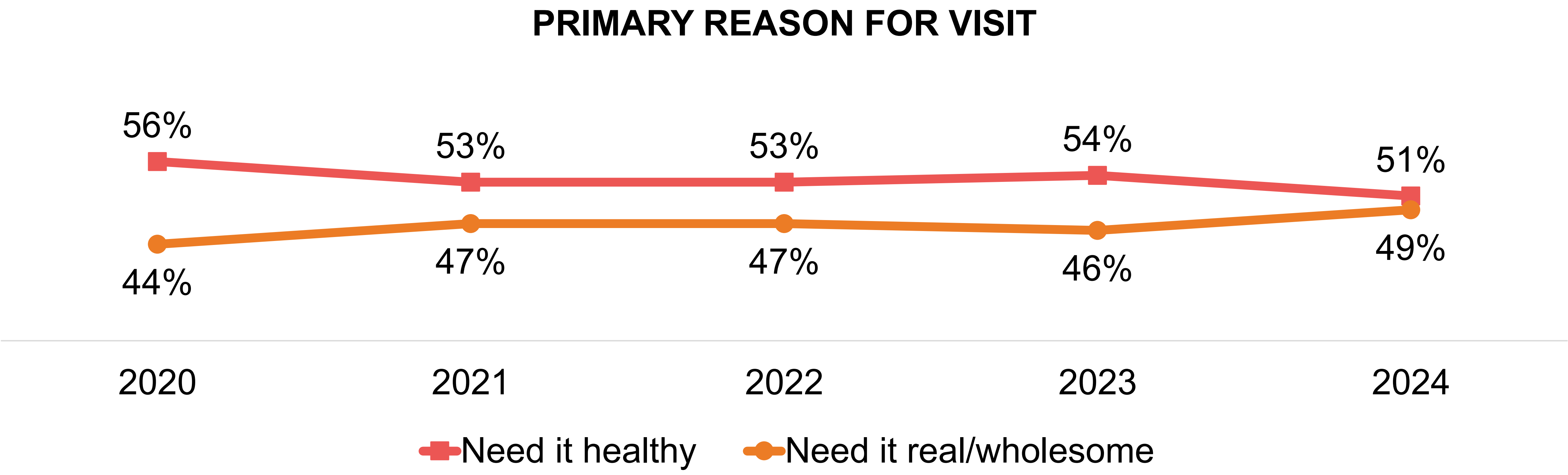
60%

of better-for-you occasions were rated "excellent," compared to 51% overall

Base: 113,776 consumers ages 18+
Source: Technomic Ignite Consumer, Q1 2024-Q4 2024
Image source: Shutterstock

How are consumers **defining health** today **away from home**? What provides **value**?

Among consumers identifying a better-for-you need state for a recent occasion, the balance is shifting to foods that are “real” or “wholesome”



*Base: Varies by health claim
*Source: Technomic Ignite Consumer Order Insights, Q4 2024

Leading Claims Operators Purchase*

Restaurants	Beyond Restaurants
Gluten-free 57%	Gluten-free 61%
All-natural 57%	Vegetarian 55%
Vegetarian 56%	Low-sodium/no sodium 53%
Organic 54%	Dairy-free 53%
Low-sugar/sugar-free 47%	Low-sugar/sugar-free 52%

*Base: 628 operators
*Source: Technomic January 2025 operator survey
**Base: Varies by response
**Source: Technomic January 2025 consumer survey

Leading Claims Driving Consumers to Visit**

Housemade 83%

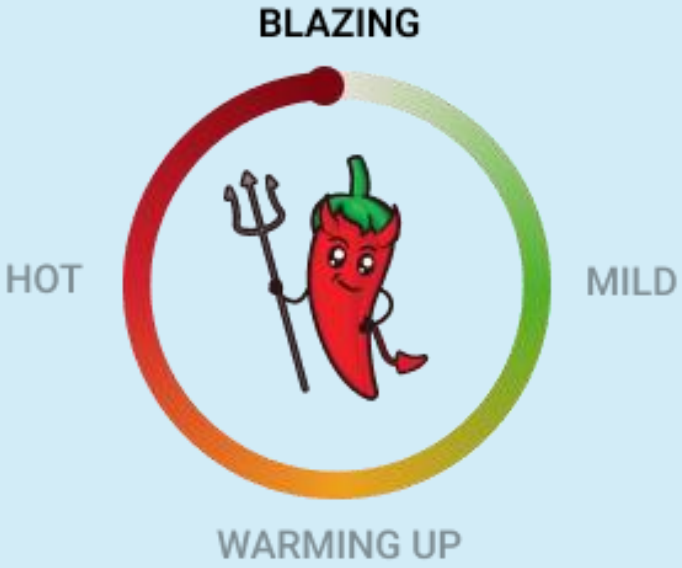
All-natural 79%

High-protein 79%

Clean label 78%

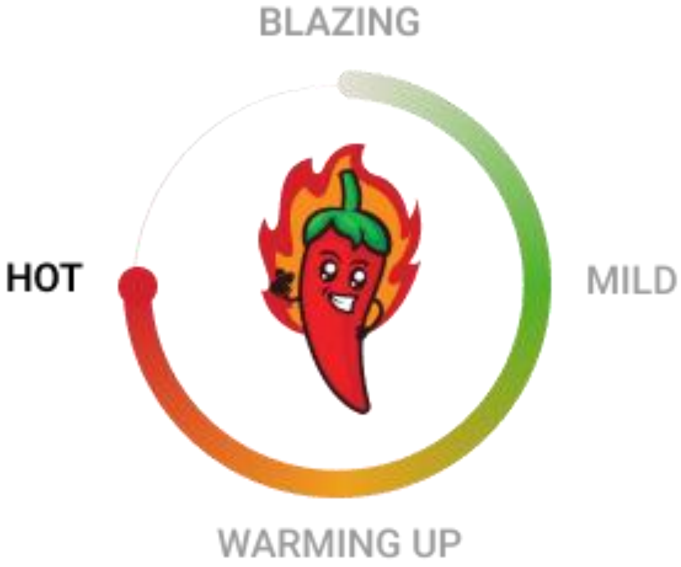
No artificial additives/preservatives 77%

Buzzy Menu Items



Alcohol-free

Low-alcohol



Organic

High-fiber

Gluten-free

Naturally raised

Local

Quality and sourcing cues are buzzworthy on menus

Fastest-Growing Claims

2018-2019

Plant-forward +41%

Keto +16%

Low-gluten +16%

Nut-free +13%

Probiotic +12%

2022-2023

Regenerative +64%

Pasture-raised +36%

Low-carbon +36%

Plant-forward +26%

Clean label +19%

2023-2024

Nutrient-dense +233%

Local +23%

Milk-fed +16%

Sustainable +12%

Pasture-raised +11%

Source: Technomic Ignite Menu

Health-Forward Predictions

Morel mushroom
+89%

Chia pudding
+27%

Swiss chard
+58%

Core Facets

Physical, mental and emotional benefits

Meat replacements

Great grains and super seeds

Stealth health

Bluefin tuna
+37%

Blended meat
+33%

Amaranth
+53%

Recommended Actions

Incorporate health trends in meaningful ways that align with your concept positioning

- New menu item to generate excitement
- A new preparation or format variance, single ingredient swap
- Better marketing of an ingredient that’s already in use

Understand what resonates with consumers

- Clean label, real, fresh, natural, etc., are claims with longevity; nutrient-dense is growing fast
- NOT strict health that limits choice or enjoyment

Generational shifts require different approaches

Gen Z and millennial are now the most influential generations for most segments

AN IMPORTANT GENERATIONAL SHIFT IS OCCURRING

	Change	% of Population		Primary Generation
	2020-2030	2020	2030	2030
Under 18 years	1,685,000	22.2%	21.7%	Gen Alpha
18-24 years	232,000	9.1%	8.9%	Gen Z
25-44 years	5,527,000	26.7%	26.8%	Gen Z, Millennial
45-64 years	-2,069,000	25.1%	23.7%	Millennial, Gen X
65 years and older	17,086,000	16.9%	20.6%	Baby boomer, Mature

The consumer of…

	Generational Skew	Gender Skew
Organic	Millennials	Female
Low-calorie	Baby boomers	Female
Fat-free	Gen Z/Millennials	Female
Natural	Millennials	Male
Fresh	Millennials	Male/Female
High-protein	Millennials	Female
Gluten-free	Baby boomers	Male/Female
Vegetarian	Millennials	Female
Clean label	Millennials	Female
Plant-based	Millennials	Female

Base: Varies by health claim
Source: Technomic Ignite Consumer order insights data, Q4 2024

Provide Opportunities to Personalize

Allows generations to address personal health needs

51% of consumers who purchase breakfast at a restaurant or other food service during the week agree that it is important for breakfast items to be customizable*

- up from 6 pts from 2021

*Base: 750 weekday breakfast consumers

*Source: Technomic 2024 U.S. Breakfast Consumer Trend Report

TOP CHAINS VISITED

BY CONSUMERS NAMING BETTER FOR YOU AS THE PRIMARY OCCASION DRIVER

1. Sweetgreen
2. Cava
3. Smoothie King
4. Jamba
5. Tropical Smoothie Cafe

Common element?
Customization!

Base: 113,776 consumers ages 18+
Source: Technomic Ignite Consumer, Q1 2024-Q4 2024

Recommended Actions

Invest in the claims that matter to your customer

49% of consumers are more likely to visit a restaurant that's transparent about what's in its menu items (up from 43% in 2022)

Be transparent on your menu

Labeling should simplify and support informed choices

Train your staff to discuss ingredients with confidence

Allow customization when feasible to address individual needs; if not possible, consider several healthy options vs. one item that tries to cover all health claims

Source: Technomic 2024 Generational Consumer Trend Report

What is the role of **health vs. indulgence**?

Even health-conscious consumers want to indulge away from home

Need State	All Away-From-Home Consumers
Need to satisfy (Indulge)	35%
Comfort: Need it simple	13%
Experience Need to connect	12%
Better for you: Need it healthy	10%
Better for you: Need it real	10%

Need State	Health-Conscious Consumers
Need to satisfy (Indulge)	30%
Better for you: Need it healthy	16%
Better for you: Need it real	13%
Experience: Need to connect	12%
Comfort: Need it simple	11%

64% of consumers find this appealing

Miso Glazed Eggplant Bliss Bowl with **sesame-chia-crusted avocado** (Pret A Manger)

Mango Lemonade with **real fruit** and **cane sugar** (Charleys Cheesesteaks)

67% of consumers would increase visits

69% of consumers deem unique

Fried **Zucchini** Star Sandwich (Carl's Jr.)

Source: Technomic Ignite Menu Consumer-Rated LTOs
Image Sources: Pret A Manger Instagram, Charleys Cheesesteaks website and Carl's Jr. website

Recommended Action

It doesn't have to be either-or: Blend the two by menuing indulgent items with health claims

37% of consumers find this appealing

Base: 1,501 consumers
Source: Technomic January 2025 consumer survey

More Examples in Action

Blueberry Crumble Sundae

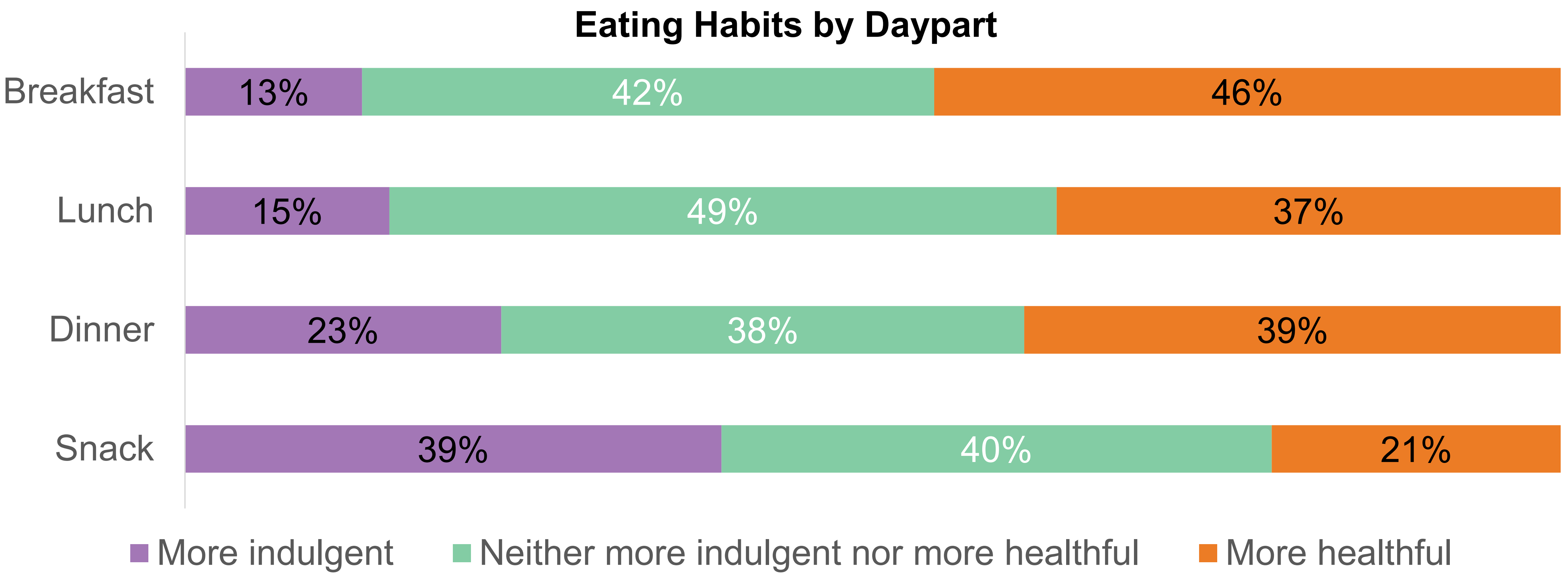
Organic grass-fed ice cream, **organic** blueberry compote, Marcona almond and date crumble (True Food Kitchen)

Golden Latte With Protein

Espresso with **turmeric-ginger-honey** flavor, plus **20-plus grams of whey protein** (Peet's Coffee)

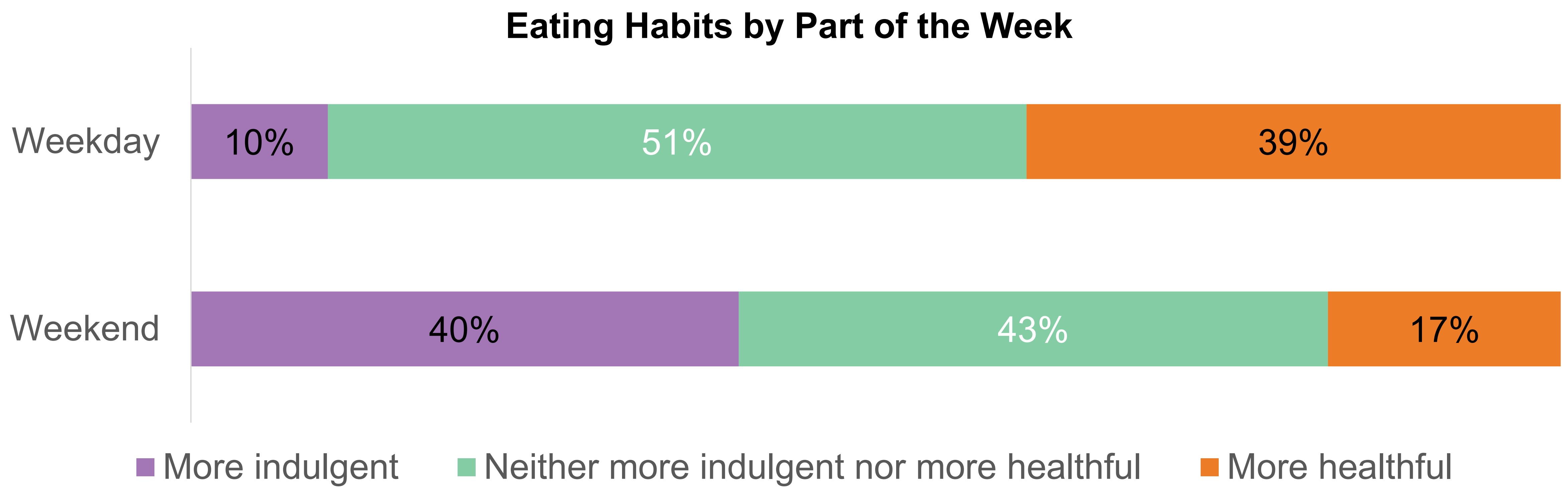
How can you **boost health across dayparts**?

Consumers are most likely to eat healthy early in the day…



Base: 1,501 consumers
Source: Technomic January 2025 consumer survey

And consumers prioritize health on weekdays



Base: 1,501 consumers
Source: Technomic January 2025 consumer survey

Breakfast: Higher Willingness to Pay for Items that Feature Healthy ingredients

Fresh Start Omelet—three-egg omelet filled with chicken sausage, mushrooms, roasted red peppers, tomatoes, caramelized onions, feta, provolone and arugula (Bob Evans)

Median Willingness to Pay: **$9.00**

Compared to Median Price:

+22% Breakfast Entree

+11% Egg Dish

Metabolism Boost Strawberry Pineapple Smoothie—strawberries, pineapples, kiwi-apple juice blend, Gladiator Protein Vanilla, protein blend, metabolism boost enhancer and fiber blend enhancer (Smoothie King)

Median Willingness to Pay: **$8.00**

Compared to Median Price:

+37% Breakfast Nonalcohol Beverage

+37% Frozen Beverage

Source: Technomic Ignite Menu Consumer-Rated LTOs, July 2024-March 2025
Image Source: [Bob Evans website] and [Smoothie King website]

Regardless of daypart, start with ingredient call-outs

Pret A Manger

Blueberry Granola Cottage Cheese Pot

A little pot of cottage topped with blueberries and crunchy granola, consisting of gluten-free oat flakes, apple cinnamon glaze, pumpkin seeds, raisins, sunflower oil, golden linseed, buckwheat flakes.
A snack high in protein for any time of the day

Positive nutrition callout and layers of sweet flavors, crunchy texture from granola

Source: Technomic Ignite Menu consumer-rated LTOs data, Q3 2023-Q3 2024
Image Source: Pret A Manger website

THE IMPACT OF GRANOLA AT BREAKFAST*
ON GUEST EXPERIENCE

Higher Median Spend

Approximately how much did you pay for just the food and/or drinks that you had?

$20.00

Consumers who purchase Granola at Breakfast **spend $5.00 more****

Higher Visit Satisfaction

How would you rate your visit overall on this occasion?

66%

Consumers who purchase Granola at Breakfast **are 14% more satisfied with their visit**

Source: Technomic Ignite Consumer order insights data, Q4 2023-Q3 2024
*Note: Data is being calculated for *Fruit/Yogurt Parfait* which is the dish with the highest % of consumers ordered
**Note: Compared to the average reported spend at those chains where this item is available.

Recommended Actions

Be more targeted with health-forward applications. Healthy occasions lean towards breakfast, followed by dinner, then lunch; weekdays more than weekends

Data shows operators are currently most focused on lunch and dinner when it comes to healthy offerings; better alignment needed

Base: 628 operators
Source: Technomic January 2025 operator survey

Design items that consumers will be willing to pay more for. Ask yourself…

- Can you “boost” (and call out!) the positive elements without sacrificing taste to enhance perceived value and appeal?
- Can you allow for customization?
- Give consumers permission to enjoy and spend by enhancing with better-for-you elements

Example of highly appealing concept:

Pumpkin Protein Bites—pumpkin-flax granola, peanut butter, honey, chia seeds, vanilla whey protein, pumpkin butter and pumpkin spice (Playa Bowls)

Source: Technomic Ignite Menu Consumer-Rated LTOs

So, what’s next?

Do you have questions on this report or want more information about other vital topics? Reach out to your Technomic team today

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Technomic

Since 1966, we have produced in-depth research focused on the foodservice industry.

We provide insights into consumer, industry and menu trends in the U.S., Canada and 23 countries around the world.

Our team of experts helps leaders in the industry make complex business decisions, set strategy and stay ahead of the curve.

Have questions?
Reach out to us today.

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