2025 EDITION

Plant-Forward Opportunity

NEW CONSUMER PERSPECTIVES ON

Protein

A DATASSENTIAL REPORT

in collaboration with
The Culinary Institute of America, Food for Climate League, and the **Menus of Change University Research Collaborative**

About This Report

In partnership with The Culinary Institute of America, Food for Climate League, and the Menus of Change University Research Collaborative, this 2025 Datassential Plant-Forward Opportunity Report is a follow-up to similar reports in 2020-2024. In 2025, we're also dedicating this report to investigating the buzz around protein. From social media feeds to supermarket shelves, the word protein is everywhere, stamped on everything from bottled water and coffee to snack bars and ice cream. But when it comes to actual daily food choices, things get more complicated.

This year, we explored how consumers perceive protein within the broader context of plant-forward dining. What types of protein – animal or plant-based – are they incorporating into their daily diets? Which sources do they consider "complete" or high-quality, and how well do those perceptions align with nutritional science? Most importantly, how does protein influence what they choose when dining out? What we found is that while protein is top of mind – especially for younger consumers like Gen Z – actual food choices are shaped by a more complex mix of priorities, perceptions, and tradeoffs. Core values like taste, familiarity, and value often outweigh protein content when consumers decide what to order at restaurants. For chefs and foodservice operators, this takeaway should hopefully be reassuring: Despite shifting trends and cultural buzz, delivering delicious, craveable dishes at a reasonable price remains the most effective strategy to captivate and delight consumers.

The framing of "plant-forward" is an outgrowth of the CIA-Harvard T.H. Chan School of Public Health—Department of Nutrition joint initiative, Menus of Change. Join us as we explore consumers' eating habits and beliefs to uncover opportunities to reduce reliance on meat, dairy, and other foods from animal sources in ways that are approachable and appealing to diners.

Read on for insights to feed menu innovation and product development, as we dive deeper into plant-forward opportunities.

Methodology

The data populating this report was collected from an **online survey conducted in March 2025** through Datassential's Omnibus platform, with **1,504 American consumers representative of the general population, ages 18 and above**. When statistically appropriate, several figures from this report are compared with corresponding data from previous editions.

Table of Contents

Respondent Breakdown

GENDER	**Male** 50%	**Female** 50%		
GENERATION	**Gen Z** (1997-2012) 15%	**Millennial** (1981-1996) 33%	**Gen X** (1965-1980) 28%	**Boomer+** (1921-1964) 24%
HOUSEHOLD INCOME	**Low** ($50k or less) 36%	**Medium** ($50k-$100k) 34%	**High** ($100k or more) 30%	
RACE	**White / Caucasian** 68%	**Black / African American** 14%	**Asian / Pacific American** 5%	**Mixed Race / Other** 13%
ETHNICITY	**Hispanic** 17%	**Not Hispanic** 83%		
REGION	**Northeast** 18%	**Midwest** 21%	**South** 38%	**West** 23%
FOOD INTEREST	**Foodie** 18%	**Not A Foodie** 21%		
EATER STYLE	**Meat Eater** 76%	**Meat Limiter** 24%		

Definitions

Plant-Forward:

A style of cooking and eating that emphasizes and celebrates, but is not limited to, plant-based foods – including fruits and vegetables (produce); whole grains; beans, other legumes (pulses), and soy foods; nuts and seeds; plant oils; and herbs and spices – and that **reflects evidence-based principles of health and sustainability**. This dietary pattern is also often referred to as plant-rich or flexitarian and may include various foods from animal sources but in reduced quantities and/or less frequently.

Plant-Based:

Used to refer to **ingredients and foods themselves**, i.e., fruits and vegetables (produce); whole grains; beans, other legumes (pulses), and soy foods; nuts and seeds; plant oils; and herbs and spices. Can also be used to refer to dietary patterns made up only of these foods.

Plant-Based Meat Alternatives:

Foods designed to mimic the taste, texture, and appearance of traditional meat while being made entirely from plant ingredients like soy, pea protein, or mycoprotein. Unlike whole plant-based protein sources (e.g., legumes, grains, nuts), these products are typically more processed and engineered to replicate specific meat products using binders, oils, and natural flavors. Examples include brands like Beyond or Impossible Meat.

Meat:

Refers to **red meat** (e.g., beef, pork, lamb, etc.) and **poultry** (e.g., chicken, turkey, etc.) but **not fish or seafood**.

Animal Protein:

Refers to **all animal proteins**, including red meat, poultry, fish, seafood, dairy, eggs, etc.

Foodies:

Consumers who **love learning about food** and actively try new things when they dine out.

Meat Limiters:

Consumers who **limit meat in some way** (vegan, vegetarian, pescatarian, and flexitarian).

Key Takeaways

1. **In 2025, nearly a quarter of the general population is actively limiting meat in their diet.** Women, Boomers, and lower- to medium-income consumers are still leading the charge.
2. **Foodies are significantly open to plant-forward dining but are reluctant to limit meat entirely.** Rather than framing plant-based dishes as restrictions, foodservice operators should position them as culinary adventures. Highlighting creativity, flavor, and quality will help capture Foodies' enthusiasm and inspire greater plant-forward exploration.
3. **Poultry, fish, eggs, and dairy are consumed widely and regularly, while red meat is losing ground among meat limiters.** That said, all animal protein sources – including red meat – are rated by most consumers as the highest-quality sources of protein.
4. **Consumers overwhelmingly trust whole foods – nuts, legumes, and grains – over processed plant-based meat alternatives.** While Millennials and Gen X consumers are most likely to rate plant-based proteins – whether whole foods or process options – as good or excellent sources, male consumers express a particularly strong affinity for protein supplements (powders, shakes, etc.) and seitan.
5. **Taste, satiety, and protein concerns are the some of the biggest barriers to plant-forward dining at restaurants.** Gen Z and Millennials are especially concerned that plant-based dishes lack flavor or can't provide enough energy for daily pursuits. To drive trial and loyalty, operators should lead with bold flavors and thoughtfully optimize presentation and portion sizes.
6. **Cost sensitivity remains a major hurdle for plant-based dining, as many consumers still worry about overpaying for what they perceive as "just vegetables."** While providing value is about more than just numbers, you simply can't ignore the power of price in today's economic climate. Offering competitive prices, combos, and value deals can make plant-forward dishes feel both exciting and accessible to value-conscious diners.
7. **Familiarity and nostalgia are powerful tools to encourage plant-forward exploration.** Consumers are far more willing to try plant-based dishes that echo familiar flavors, formats, or cherished memories. Operators should lean into classic favorites – pizzas, sandwiches, bowls, etc. – while also tapping into cultural traditions and comfort foods.
8. **Though Gen Z and Millennials express the most reservations about ordering plant-based foods at restaurants, they are also the most open to being convinced.** Clear communication about flavor, nutrition, sourcing, and value can easily turn hesitation into enthusiasm.

PART A

Consumer Perspectives on Plant-Forward Dining

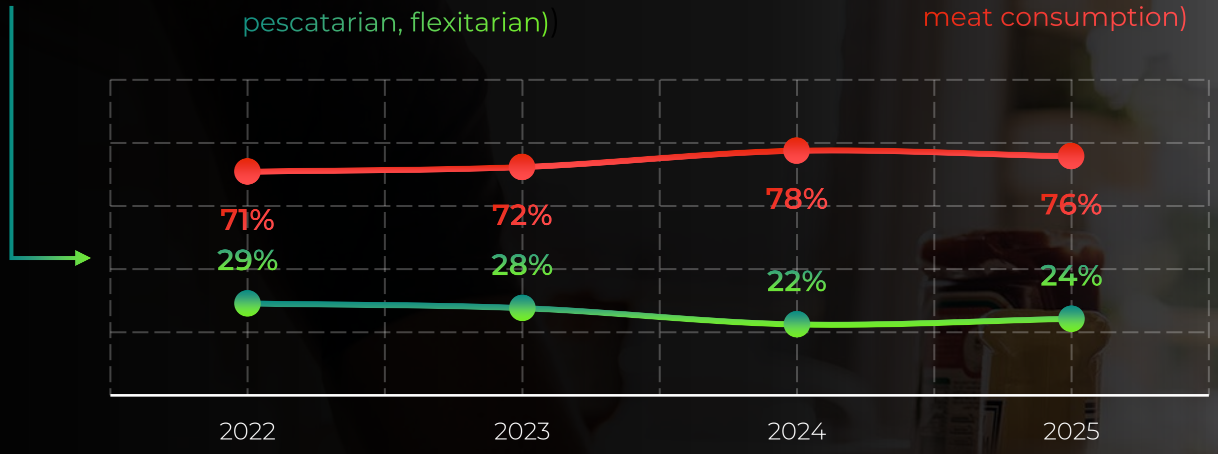
In 2025, nearly one in four consumers is actively limiting meat. But which types of consumers are driving this shift, and which are more resistant? In the coming year, how many consumers are planning on adopting more plant-forward eating habits, such as reducing the portion sizes of meat in the meals they make at home or embracing whole foods and other plant ingredients when dining out?

In 2025, nearly a quarter of the general population is actively limiting meat in their diet, while the remaining three-quarters do not limit their meat consumption in any way.

This balance is relatively unchanged from last year, though it reflects a slight decline in meat limitation compared to 2022.

24% of consumers are **Meat Limiters** (e.g. vegetarian, vegan, pescatarian, flexitarian)

76% of consumers are **Meat Eaters** (do not actively limit meat consumption)



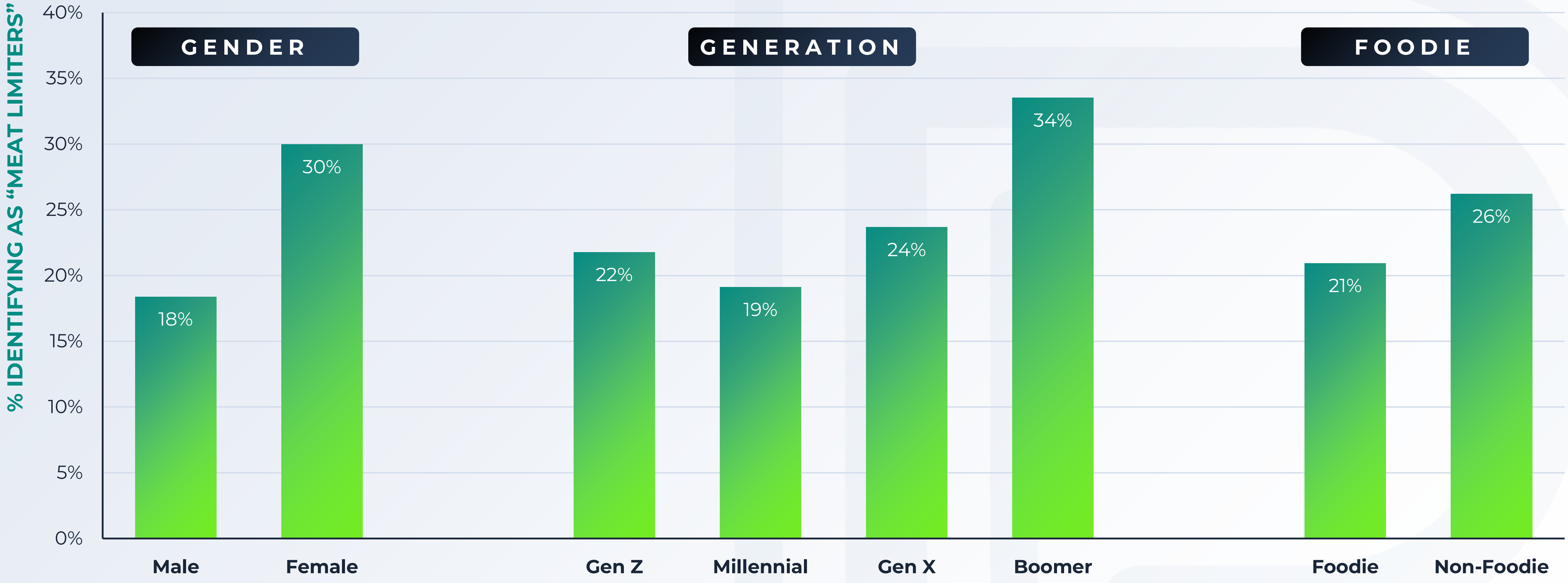
Q: Which best describes the way you eat today?

DATASSENTIAL

DEMOGRAPHIC DETAIL

Which Demographic Groups Are More Likely to Limit Meat Consumption?

- **Women and Boomers lead the movement of meat limiting**, with Boomers standing out as the generation most likely to identify as flexitarian or pescatarian, which suggests that for Boomers, reducing meat isn't necessarily about adopting strict diets or cutting out animal products completely, but about making balanced, mindful choices that align with long-term health goals.
- While **Foodies** are generally more enthusiastic than non-Foodies about plant-forward ways of eating, **they're less likely to restrict meat from their diets**, likely because their gastronomic pursuits compel them to eat as openly and broadly as possible.

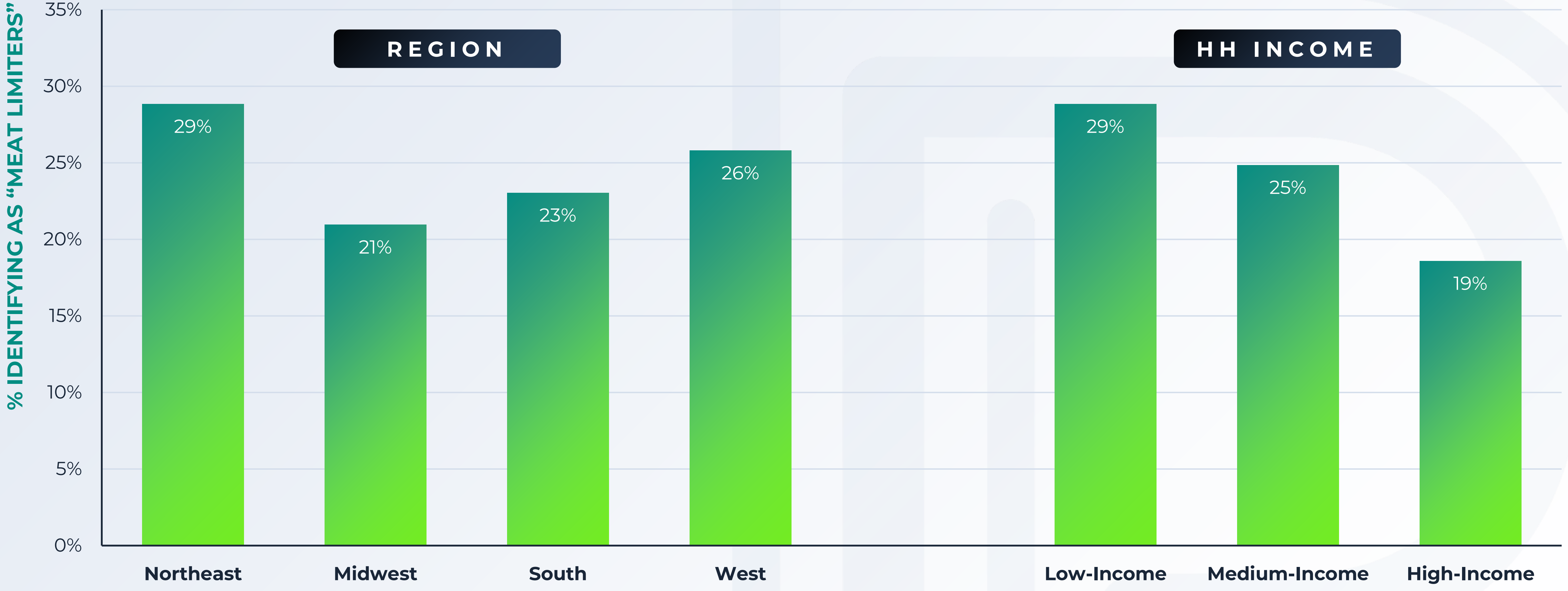


Q: Which best describes the way you eat today?

DEMOGRAPHIC DETAIL

Which Demographic Groups Are More Likely to Limit Meat Consumption?

- **For many, reducing meat isn't just a health or environmental decision—it's a financial one: Meat limiting is slightly more common among low- and middle-income consumers**, perhaps due to rising costs of animal products. This presents a clear opportunity for foodservice operators to reframe plant-forward options as not only wholesome and flavorful, but also smart, value-driven choices.
- **Consumers based in coastal regions are more likely to limit their meat consumption than those in the Midwest and South**, likely due to greater access to fresh and local seafood or produce, as well as a higher concentration of health- and environmentally conscious diners.



Q: Which best describes the way you eat today?

In the coming year, many consumers still plan on adopting several plant-forward dining habits, though enthusiasm has declined compared to 2023 data.

The only exception to this pattern lies with mixed-protein dishes: 40% of consumers plan to order restaurant dishes with mixed protein options. One in five also intend to order more restaurant dishes without animal products at all – especially Gen Z and Millennials. At home, nearly a third expect to reduce the portion size of meat in the meals they make; this is significantly more likely among women than men.

IN THE NEXT YEAR

Consumers Are Likely To...

37% **order dishes of meat mixed with grains or veggies from restaurants** (i.e., stew with pork and lentils, burger patties made from beef mixed with mushrooms, etc.) — **+6%** vs. 2023

30% **reduce the portion size of meat in meals they make at home** — **-5%** vs. 2023

19% **intentionally choose meals or dishes without animal proteins or products when dining out at restaurants** — **-8%** vs. 2023

Q: How likely are you to do the following in the next year? (top 2 box; “Extremely” + “Very Likely”)

In the coming year, consumers are more likely to embrace dishes built around whole ingredients – like legumes and grains – than those designed to mimic dairy and meat.

Over a quarter plan to order more restaurant dishes that spotlight whole plants as the main protein, led by Millennials, Gen X, Hispanic diners, and Foodies. While nearly 20% intend to order more restaurant dishes utilizing plant-based meat and dairy alternatives, Boomers remain largely uninterested in making the switch.

IN THE NEXT YEAR
Consumers Are Likely To...

28% **-3%** vs. 2023

order more meals with beans, lentils, and/or legumes as the main protein source in meals at restaurants

21% **-8%** vs. 2023

order more dishes that are inherently plant-based from restaurants (i.e., chana masala, falafel, etc.)

18% **-8%** vs. 2023

order plant-based dairy to replace animal dairy when dining at a restaurant

17% **-7%** vs. 2023

order dishes with plant-based meat alternatives from restaurants

Q: How likely are you to do the following in the next year? (top 2 box; “Extremely” + “Very Likely”)

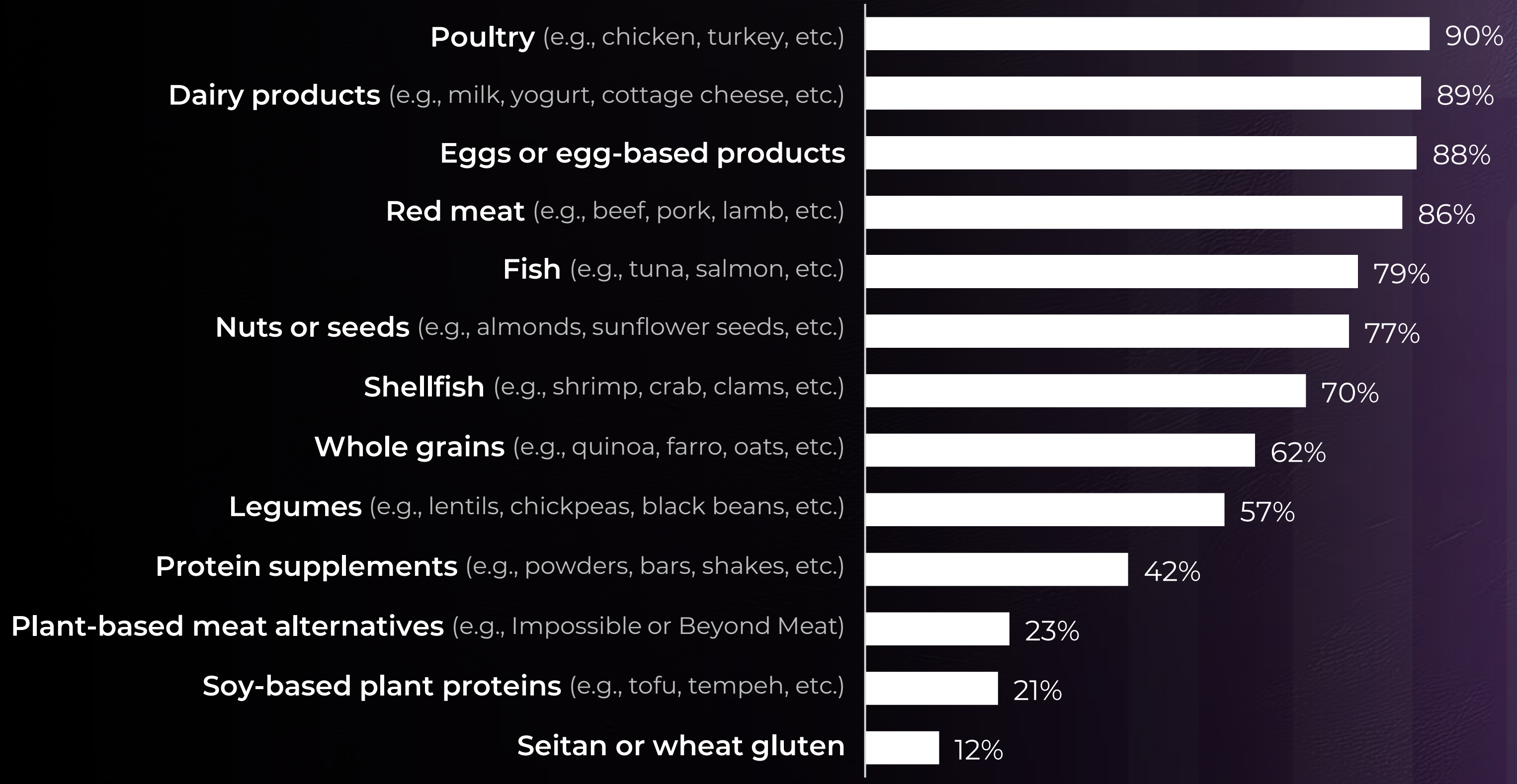
PART B

Consumer Perspectives on Protein

Protein has long been a key nutritional priority, but over the past year, it's exploded across the cultural landscape – from social media trends to restaurant menus and packaged foods. But in everyday life, what protein sources are consumers eating? And how well do they understand the differences between animal and plant-based proteins in both content and quality?

Poultry is the most commonly eaten source of protein among all consumers, followed by dairy products, eggs, and red meat.

What Protein Sources Do Consumers Eat?



Q: Which of the following types or sources of protein do you eat?

DATASSENTIAL

Meat eaters generally favor all types of animal proteins, while meat limiters turn to eggs and dairy as their most common protein sources.

While most meat limiters continue to include poultry and seafood in their diets, red meat consumption is significantly lower by comparison. **Consumers' preferences for these leaner animal proteins reflect broader nutritional research**, which consistently shows that poultry and seafood are associated with lower health risks than red meat.

What Protein Sources Do Consumers Eat?

MEAT EATERS

Poultry	94%
Red meat	94%
Dairy products	92%
Eggs or egg-based products	91%
Fish	79%
Nuts or seeds	77%
Shellfish	73%
Whole grains	62%

MEAT LIMITERS

Eggs or egg-based products	80%
Dairy products	80%
Poultry	78%
Nuts or seeds	78%
Fish	77%
Legumes	66%
Whole grains	63%
Shellfish	63%

Q: Which of the following types or sources of protein do you eat?

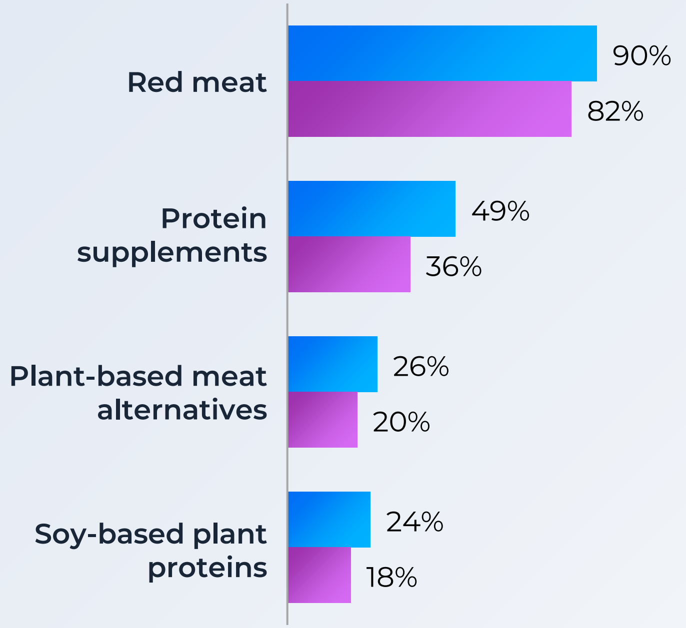
DEMOGRAPHIC DETAIL

Do Different Demographic Groups Consume Different Protein Sources?

- **Men are significantly more likely than women to consume red meat, protein supplements, and processed protein sources such as tofu, tempeh, and meat alternatives**.
- **Millennials and Gen X lead the way in adopting the broadest range of protein sources**, especially plant-based options. Over a quarter of Millennials regularly consume soy-based proteins like tofu, nearly 70% include whole grains in their diets, and 80% of Gen X eat nuts and seeds. In contrast, **Gen Z is the least likely generation to regularly consume poultry, seafood, or plant-based proteins** like legumes, nuts, or meat alternatives. Meanwhile, **Boomers adopt a more limited but intentional approach to protein selection**, over-indexing on leaner and more health-forward choices such as poultry, seafood, legumes, and nuts or seeds compared to younger generations.

GENDER DIFFERENCES

Men are significantly more likely than women to consume...



GENERATION DIFFERENCES

	GEN Z	MILLENNIAL	GEN X	BOOMER
Poultry	82%	90%	94%	91%
Fish	62%	78%	82%	87%
Nuts or seeds	64%	78%	83%	78%
Shellfish	58%	71%	74%	73%
Whole grains	59%	69%	64%	54%
Legumes	42%	59%	59%	62%
Plant-based meat alternatives	18%	29%	27%	13%
Soy-based plant proteins	16%	27%	22%	15%
Seitan or wheat gluten	15%	15%	11%	7%

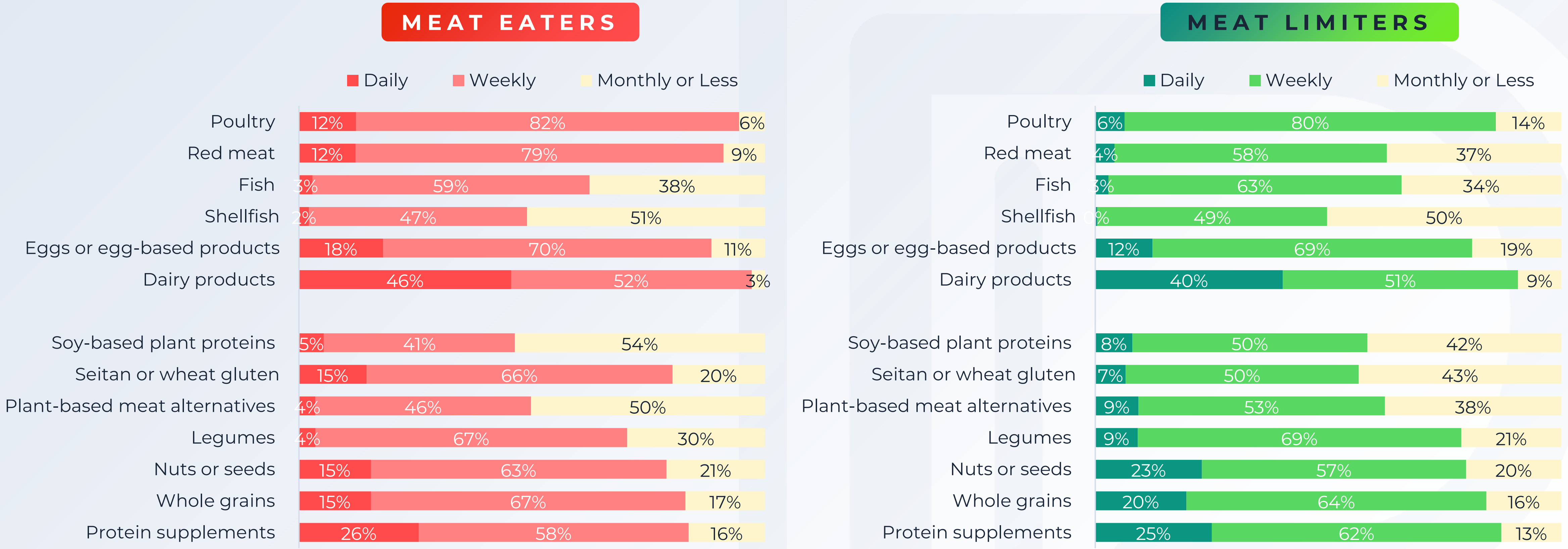
statistically more likely to eat

statistically less likely to eat

Q: Which of the following types or sources of protein do you eat?

In practice, meat limiters are mostly red meat limiters – they consume poultry, eggs, dairy, and seafood at similar rates as meat eaters, with red meat being the only animal protein they significantly reduce.

In contrast, they're far more likely to consume soy-based proteins (like tofu and tempeh), plant-based meat alternatives, and legumes. Interestingly, meat eaters are more likely than limiters to regularly consume seitan or wheat gluten.

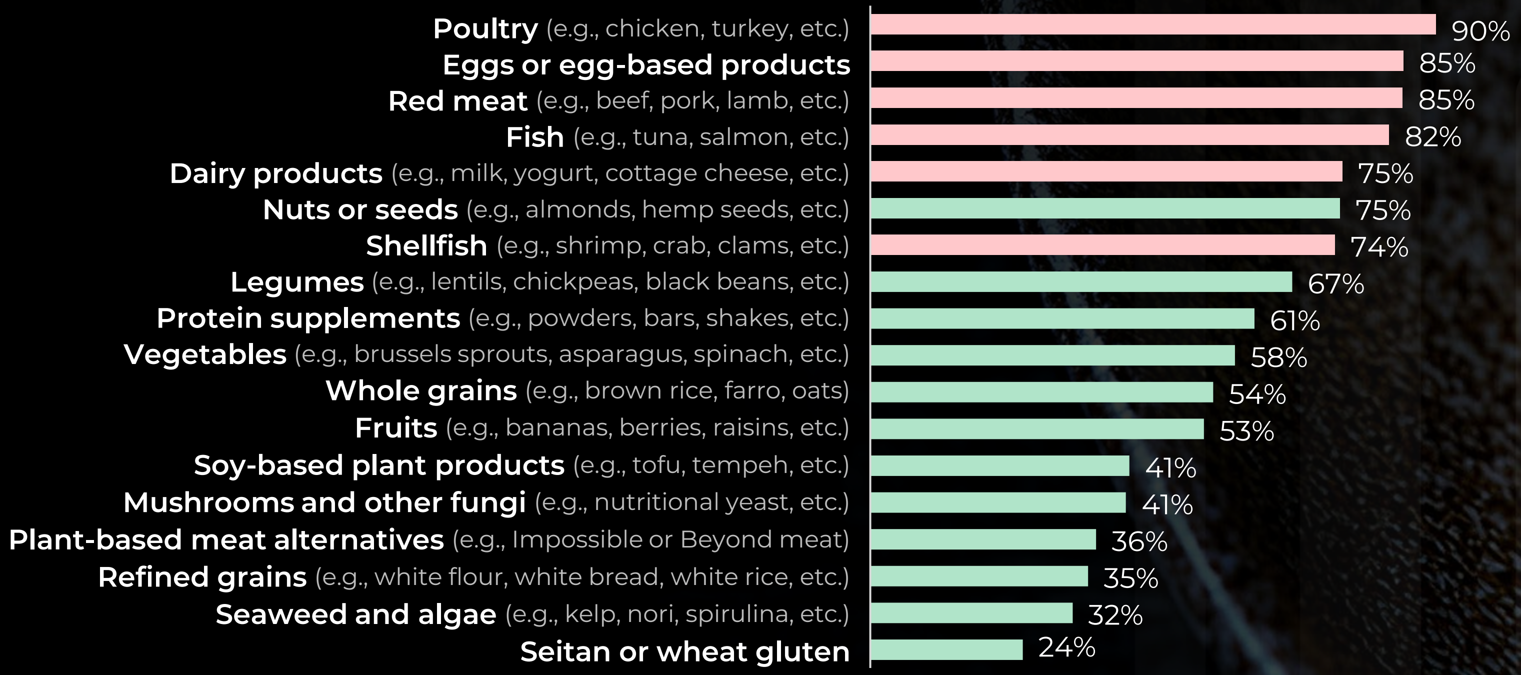


Q: How frequently do you eat the following foods? *[among consumers who do eat these foods, n = varies]*

DATASSENTIAL

Animal proteins (like poultry, eggs, and red meat) are viewed as the highest-quality, most complete sources. However, when it comes to plant-based protein sources, there is much room for consumer education.

Consumers generally view nuts, seeds, and legumes positively, with over two-thirds rating them as “excellent” or “good” protein sources. However, many consumers harbor a misguided understanding of how much protein fruits and vegetables contain, rating them more favorably than other plant-based sources which are nutritionally more protein-rich, such as whole grains, seaweed, soy proteins like tofu or tempeh, or even meat alternatives like Impossible or Beyond Meat.



Q: How would you rate the following ingredients as a source of high-quality, complete protein? (top 2 box; “Excellent” + “Good”)

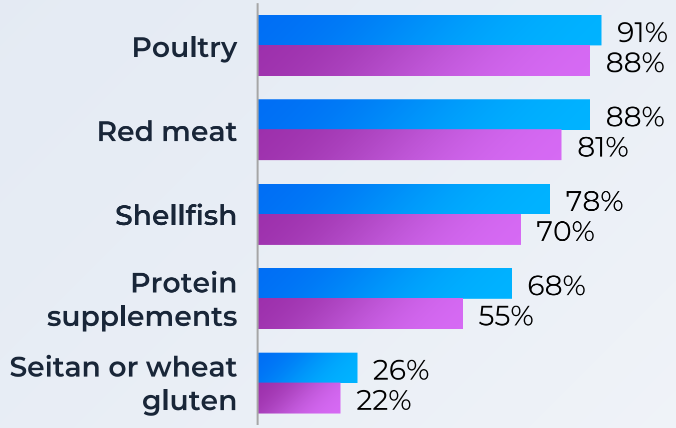
DEMOGRAPHIC DETAIL

How Do Different Demographic Groups Rate Various Protein Sources?

- Compared to women, **men are more likely than women to view animal proteins (like poultry, red meat, and seafood) and processed sources (such as supplements and seitan) as high-quality.** Conversely, **women have a much more favorable rating of vegetables** as a protein source than men.
- Millennials and Gen X, who regularly consume the widest variety of protein sources, are also the most likely to view plant-based proteins – whether whole foods like legumes, nuts, and mushrooms, or processed alternatives like tofu and seitan – as good or excellent. Meanwhile, Gen Z tends to rate non-traditional protein sources such as supplements, refined grains, processed meat alternatives, and wheat-based proteins like seitan more favorably than Boomers. This suggests **younger consumers are more open to experimental or functional food sources, even if those choices don't always align with traditional nutritional guidance.**

GENDER DIFFERENCES

Men are significantly more likely than women to view these protein sources as "excellent" or "good":



...with one exception:

GENERATION DIFFERENCES

	GEN Z	MILLENNIAL	GEN X	BOOMER
Poultry	89%	88%	93%	89%
Fish	76%	83%	83%	85%
Nuts or seeds	68%	76%	79%	72%
Legumes	56%	66%	71%	71%
Protein supplements	65%	70%	61%	46%
Soy-based plant products	38%	46%	43%	34%
Mushrooms & other fungi	37%	45%	42%	35%
Plant-based meat alternatives	36%	43%	36%	26%
Refined grains	44%	42%	31%	23%
Seaweed and algae	29%	39%	33%	24%
Seitan or wheat gluten	26%	32%	24%	13%

statistically more likely

statistically less likely

Q: How would you rate the following ingredients as a source of high-quality, complete protein? (top 2 box; "Excellent" + "Good")

DATASSENTIAL

DEMOGRAPHIC DETAIL

How Do Consumers Across Income Brackets Consume and Perceive Protein?

- Across the board, **higher-income consumers report greater consumption of both animal and plant-based proteins compared to their lower-income counterparts**, likely because of increased access to a wider variety of high-quality ingredients. High-income consumers are also more likely to view both animal proteins and whole plant-based sources – like legumes, grains, and nuts – as high-quality. **Interestingly, the one exception is fruits and vegetables, which are rated more highly as protein sources by low- and middle-income consumers**, possibly due to greater reliance on these ingredients in everyday meals or a broader, albeit scientifically less accurate, understanding of protein quality.

Protein Sources Consumed

(% of consumers who eat each protein source)

	Low-Income	Medium-Income	High-Income
Poultry	87%	91%	93%
Dairy products	84%	89%	94%
Eggs or egg-based products	83%	89%	93%
Red meat	81%	86%	91%
Fish	74%	79%	85%
Nuts or seeds	71%	76%	86%
Shellfish	65%	70%	77%
Whole grains	53%	62%	73%
Legumes	52%	55%	67%
Protein supplements	32%	44%	52%
Plant-based meat alternatives	19%	23%	28%
Soy-based plant proteins	17%	20%	27%
Seitan or wheat gluten	11%	11%	14%

statistically more likely

statistically less likely

Protein Source Rating

(% of consumers rating each protein source as "excellent" or "good")

	Low-Income	Medium-Income	High-Income
Poultry	86%	90%	94%
Eggs or egg-based products	81%	83%	91%
Red meat	79%	84%	92%
Fish	79%	81%	88%
Dairy products	74%	74%	78%
Nuts or seeds	71%	73%	80%
Shellfish	69%	73%	81%
Legumes	65%	65%	72%
Protein supplements	54%	62%	68%
Vegetables	61%	60%	52%
Whole grains	58%	53%	52%
Fruits	59%	53%	46%
Soy-based plant products	36%	40%	48%
Mushrooms & other fungi	41%	40%	41%
Plant-based meat alternatives	34%	35%	39%
Refined grains	34%	36%	33%
Seaweed and algae	32%	31%	33%
Seitan or wheat gluten	24%	24%	24%

Q: Which of the following types or sources of protein do you eat? How would you rate the following ingredients as a source of high-quality, complete protein? (top 2 box; "Excellent" + "Good")

PART C

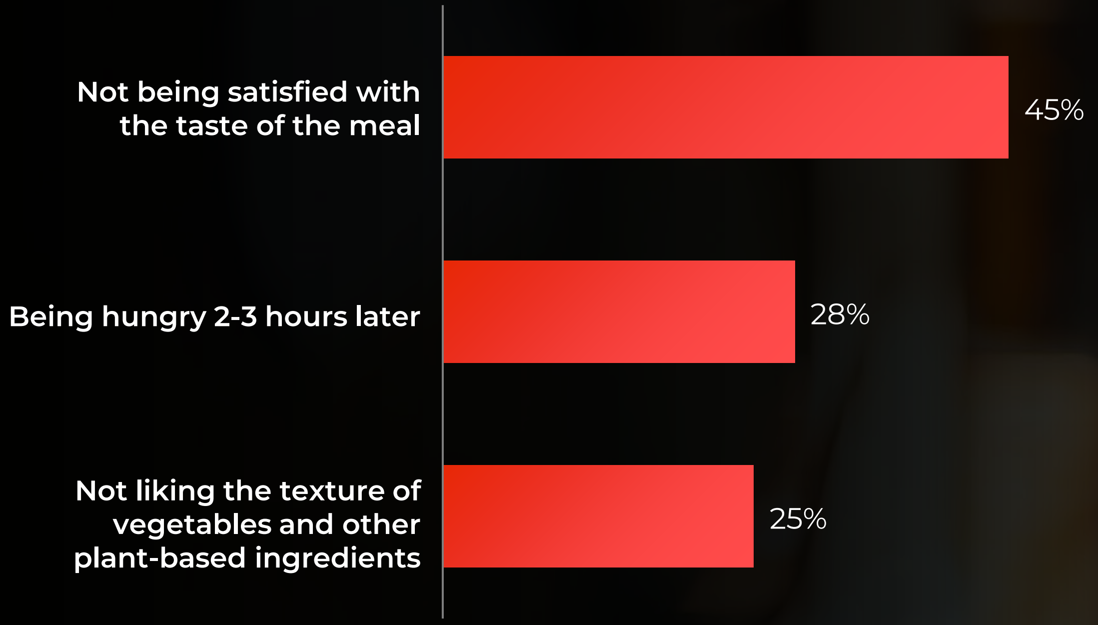
Barriers to Plant-Forward Restaurant Ordering

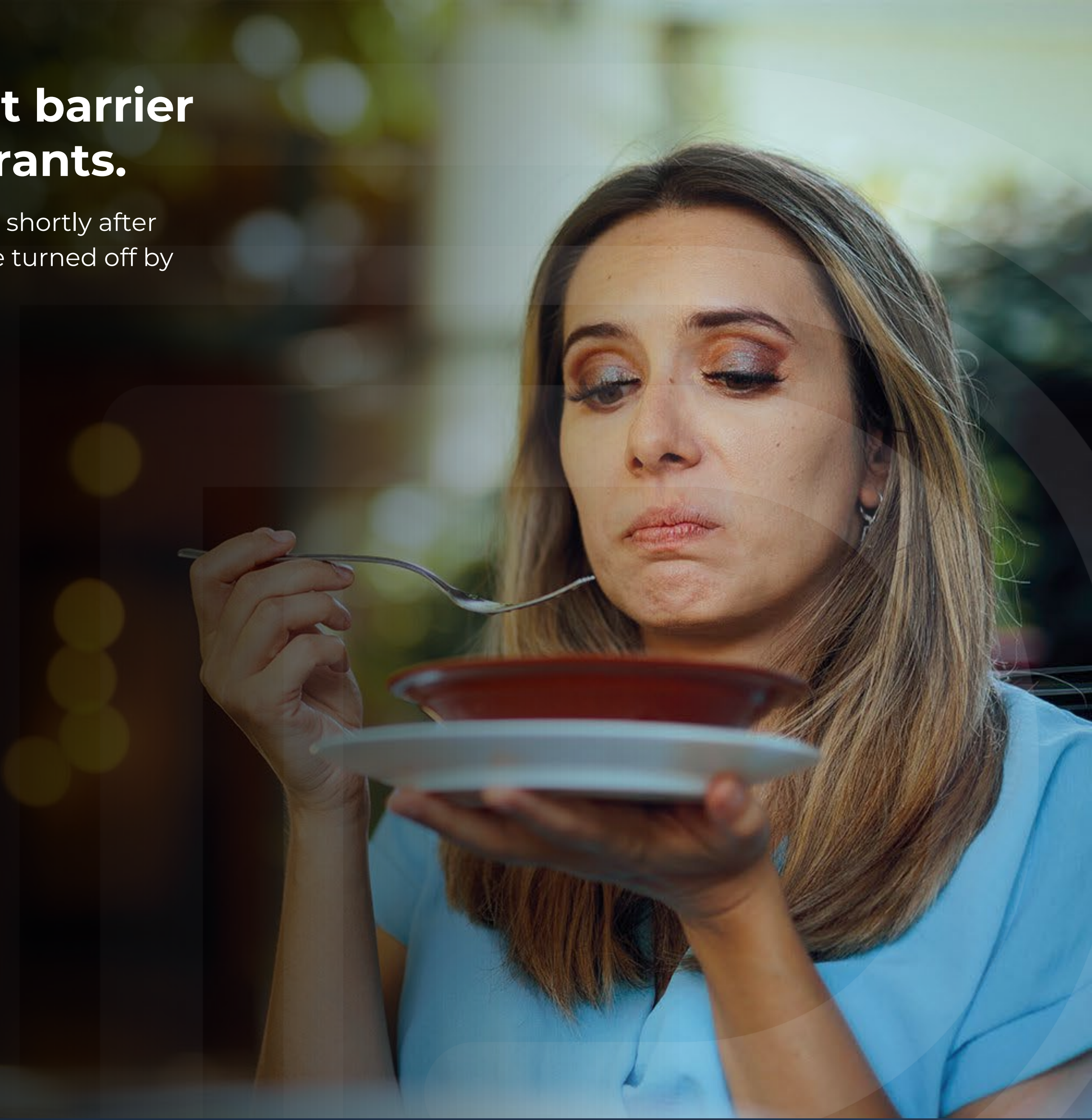
In 2025, many consumers still hesitate to order plant-forward meals at restaurants. This section delves into the most salient roadblocks that prevent diners from choosing plant-forward options away from home, from concerns about flavor and satiety to questions of value and protein content.

Taste satisfaction remains the most salient barrier to eating less meat when dining at restaurants.

Roughly a third of Gen Z and Millennials are also concerned about being hungry shortly after enjoying a plant-based restaurant meal, while a quarter of consumers overall are turned off by the texture of vegetables and other plant-based ingredients.

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES
Taste, Texture, and Satiety





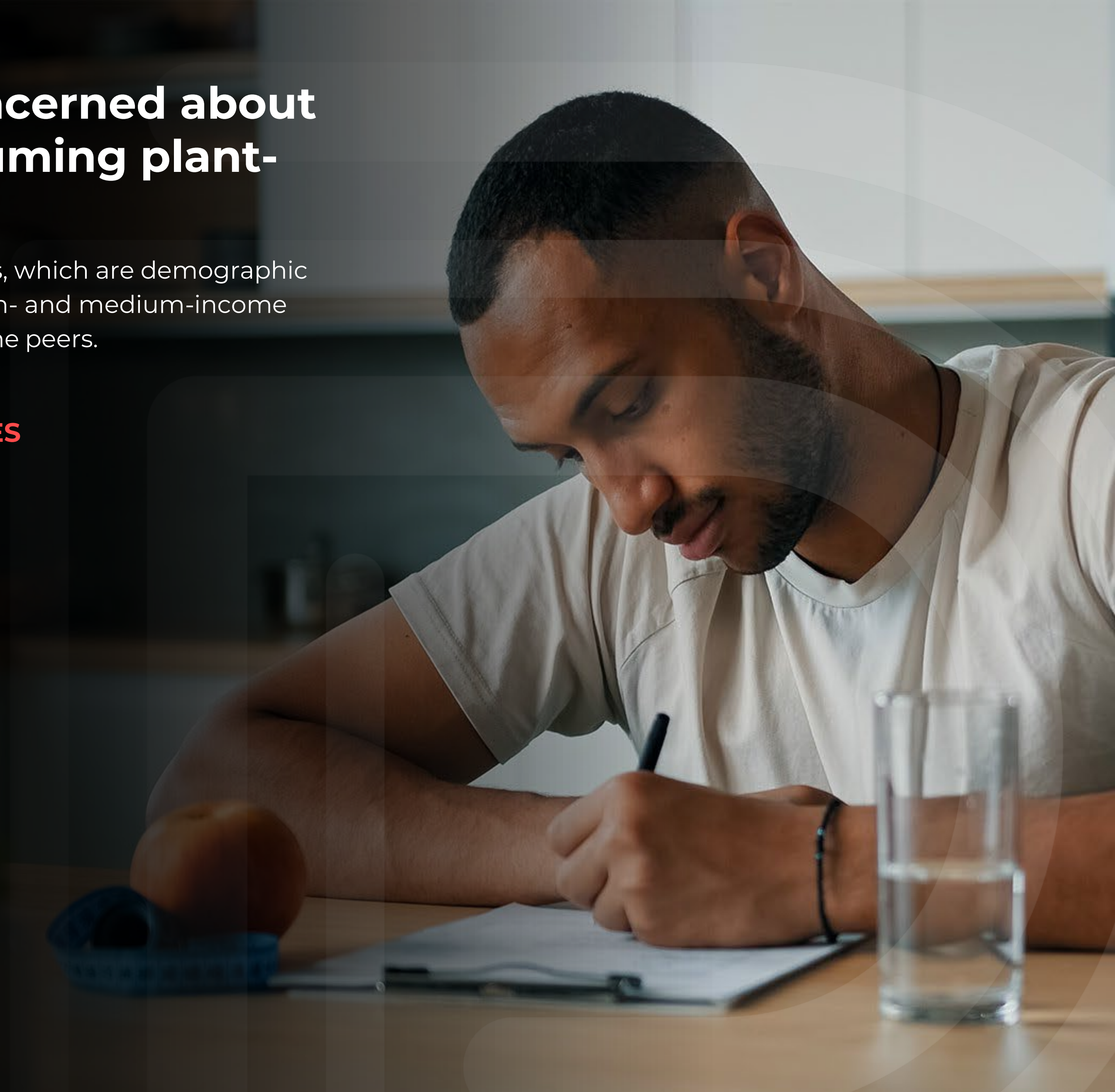
Q: What concerns do you have with ordering dishes with plant-based ingredients (more vegetables, legumes, etc.) at a restaurant instead of meat dishes?

Roughly a quarter of consumers are concerned about not getting enough protein when consuming plant-based meals away from home.

Protein concerns resonate the strongest among men, Gen Z, and Millennials, which are demographic groups that typically are most conscious of their general protein intake. High- and medium-income consumers are also more concerned about this issue than their lower-income peers.

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES

Protein Content and Quality



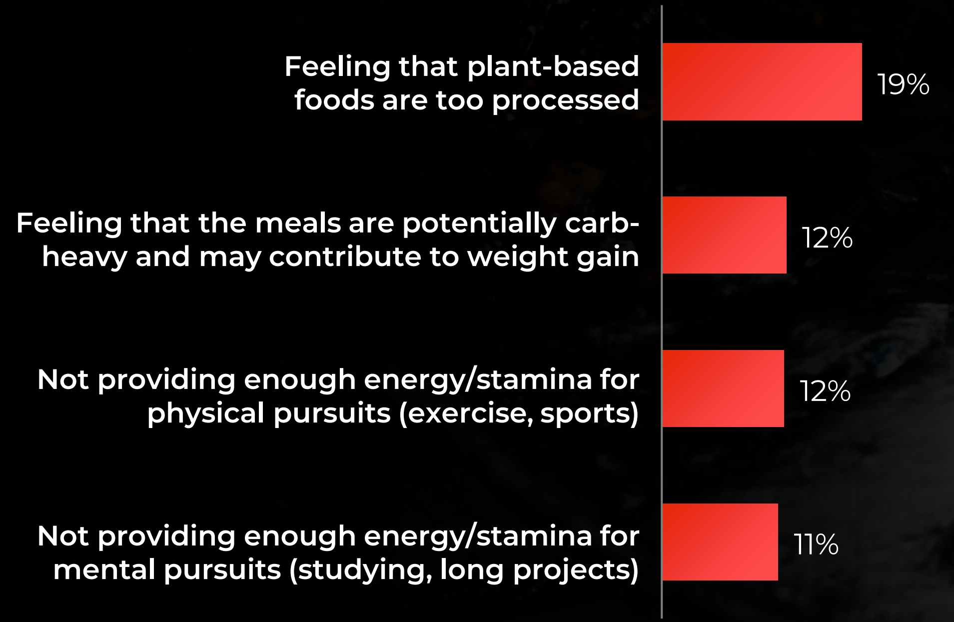
Q: What concerns do you have with ordering dishes with plant-based ingredients (more vegetables, legumes, etc.) at a restaurant instead of meat dishes?

Some consumers worry about plant-based dishes being too processed or failing to provide sufficient energy for mental and physical tasks.

Boomers are particularly wary of processing, while Gen Z consumers are more concerned about performance-based attributes like stamina and energy.

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES

Health and Nutrition



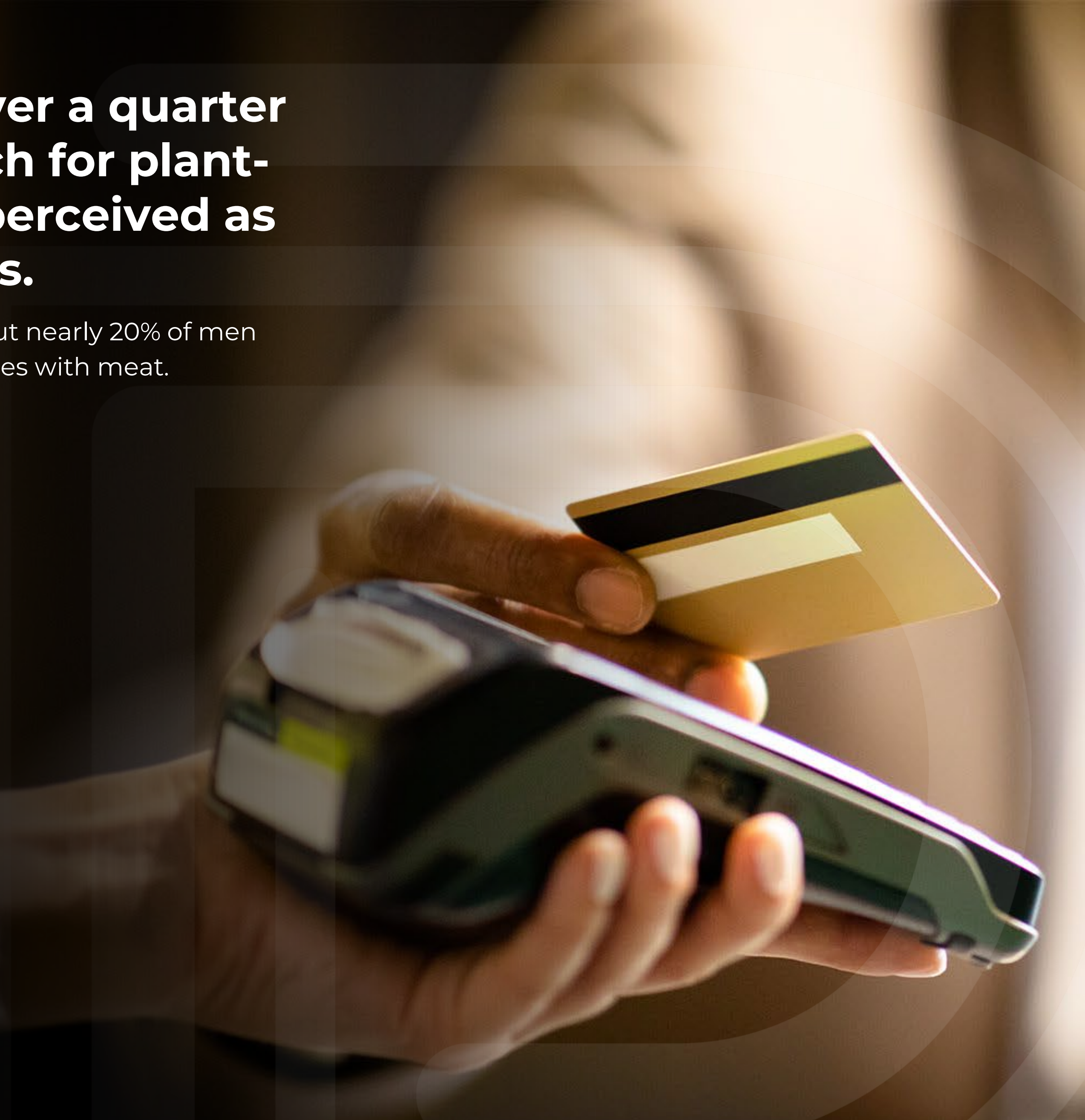
Q: What concerns do you have with ordering dishes with plant-based ingredients (more vegetables, legumes, etc.) at a restaurant instead of meat dishes?

Financial concerns are also top of mind: over a quarter of consumers worry about paying too much for plant-based restaurant dishes, which are often perceived as cheaper to prepare than meat-based meals.

Concerns about value are slightly less salient than concerns about ticket price, but nearly 20% of men and Millennials also believe they get more value for the dollar by purchasing dishes with meat.

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES

Cost and Value



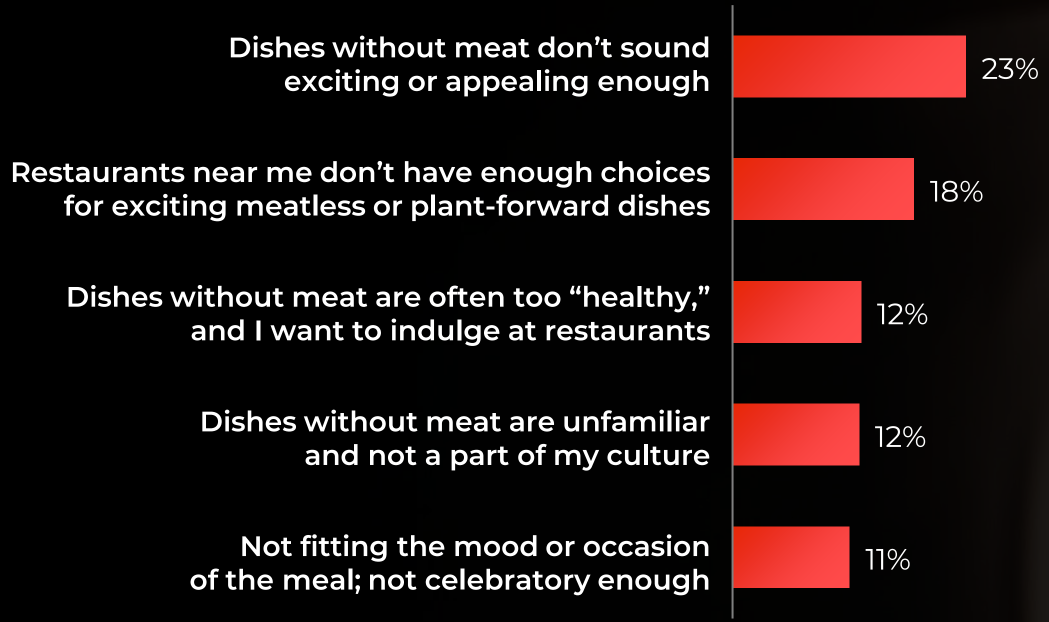
Q: What concerns do you have with ordering dishes with plant-based ingredients (more vegetables, legumes, etc.) at a restaurant instead of meat dishes?

One in four consumers don’t find meatless dishes exciting or appealing enough to order – particularly Gen Z.

A notable proportion of consumers also say their local dining options lack enticing plant-based choices, especially in the Midwest.

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES

Appeal and Vibe



Q: What concerns do you have with ordering dishes with plant-based ingredients (more vegetables, legumes, etc.) at a restaurant instead of meat dishes?

DEMOGRAPHIC DETAILS

Barriers to Ordering Dishes with Plant-based Ingredients

On the broadest level, women and Boomers tend to have fewer concerns about ordering plant-based meals than their demographic counterparts.

Among consumers who do express some level of concern about plant-based restaurant dining, Boomers are held back primarily on the taste of plant-based offerings, while Gen Z and Millennials are more likely to express a wider variety of concerns, from protein content and energy provision to cost and visual appeal.

	TOTAL	Statistically higher among…
Not being satisfied with the taste of the meal	45%	**Boomer** (53%)
Being hungry 2-3 hours later	28%	**Gen Z** (35%), **Millennial** (30%)
Paying too much for vegetables and other plant-based ingredients	27%	
Not getting enough protein	25%	**Men** (28%), **Gen Z** (34%), **Millen.** (27%)
Not liking the texture of vegetables and other plant-based ingredients	25%	**Gen Z** (32%)
Dishes without meat don't sound exciting or appealing enough	23%	**Gen Z** (28%)
Not getting enough complete protein	21%	**Men** (24%), **Gen Z** (24%), **Millen.** (23%)
Feeling that plant-based foods are too processed	19%	**Boomer** (25%)
Restaurants near me don't have enough choices for exciting meatless or plant-forward dishes	18%	**Gen Z** (23%)
I get more value for my dollar by purchasing dishes with meat	17%	**Men** (20%), **Millennial** (19%)
Dishes without meat are often too "healthy," and I want to indulge at restaurants	12%	
Dishes without meat are unfamiliar and not a part of my culture	12%	Men (14%)
Feeling that the meals are potentially carb-heavy and may contribute to weight gain	12%	
Not providing enough energy/stamina for physical pursuits (exercise, sports)	12%	**Gen Z** (18%), **Millennial** (14%)
Not fitting the mood or occasion of the meal; not celebratory enough	11%	**Gen Z** (17%)
Not providing enough energy/stamina for mental pursuits (studying, long projects)	11%	**Gen Z** (18%), **Millennial** (15%)
Other	3%	**Women** (4%)
None of the above	13%	**Women** (15%), **Boomer** (17%)

Q: What concerns do you have with ordering dishes with plant-based ingredients (more vegetables, legumes, etc.) at a restaurant instead of meat dishes?

HISTORICAL DATA CHANGES

Barriers to Ordering Dishes with Plant-based Ingredients

While concerns about plant-forward dining fluctuate, taste remains the most consistent – and salient – barrier.

In 2024, concerns around protein content, satiety, and energy provision gained traction among consumers, who were growing increasingly conscious about food and personal health. But by 2025, the proportion of consumers who express these concerns have declined. The one factor that hasn't budged is taste: over 40% consumers still doubt that plant-forward dishes at restaurants can be flavorful and exciting. Foodservice operators, take heed: To win over skeptical diners, lead with bold, craveable, and satisfying flavor profiles that make plant-forward menu offerings irresistible.

*N/A – New survey option in 2025

	2023	2024	2025	'24 vs. '23	'25 vs. '24
Not being satisfied with the taste of the meal	43%	44%	45%	0%	+1%
Being hungry 2-3 hours later	31%	34%	28%	+2%	-6%
Paying too much for vegetables and other plant-based ingredients	36%	33%	27%	-3%	-6%
Not getting enough protein	32%	39%	25%	+6%	-14%
Not liking the texture of vegetables and other plant-based ingredients	N/A	N/A	25%	N/A	N/A
Dishes without meat don't sound exciting or appealing enough	N/A	N/A	23%	N/A	N/A
Not getting enough complete protein	27%	31%	21%	+4%	-10%
Feeling that plant-based foods are too processed	21%	21%	19%	0%	-2%
Restaurants near me don't have enough choices for exciting meatless or plant-forward dishes	N/A	N/A	18%	N/A	N/A
I get more value for my dollar by purchasing dishes with meat	N/A	N/A	17%	N/A	N/A
Dishes without meat are often too "healthy," and I want to indulge at restaurants	N/A	N/A	12%	N/A	N/A
Dishes without meat are unfamiliar and not a part of my culture	N/A	N/A	12%	N/A	N/A
Feeling that the meals are potentially carb-heavy and may contribute to weight gain	19%	18%	12%	-1%	-6%
Not providing enough energy/stamina for physical pursuits (exercise, sports)	14%	18%	12%	+4%	-6%
Not fitting the mood or occasion of the meal; not celebratory enough	11%	15%	11%	+4%	-4%
Not providing enough energy/stamina for mental pursuits (studying, long projects)	14%	16%	11%	+2%	-5%
Other	2%	1%	3%	0%	+2%
None of the above	18%	14%	13%	-4%	-1%

Q: What concerns do you have with ordering dishes with plant-based ingredients (more vegetables, legumes, etc.) at a restaurant instead of meat dishes?

PART D

Motivators to Plant-Forward Restaurant Ordering

While barriers exist, there are also powerful incentives driving consumers to try more plant-forward meals when dining out. From familiar flavors and nutrition transparency to value deals, finding the right strategies can make all the difference for foodservice operators.

How do you motivate more consumers to try plant-forward options at restaurants? Lean into familiar dishes and flavors.

Over 40% consumers would be swayed by dishes featuring familiar flavor profiles, and nearly a third would be more willing to try recognizable formats like pizzas, sandwiches, and burritos. Sampling opportunities and nostalgic or culturally resonant dishes can also boost trial appeal, particularly among Gen Z, Millennials, and Hispanic consumers.

MOTIVATORS FOR CHOOSING PLANT-FORWARD RESTAURANT DISHES

Flavors and Familiarity

If it used flavors that I love	44%
If I could try it first or have a sample	38%
If it was in a dish I know, love, or have had before	30%
If it was a familiar format (like a pizza, sandwich, soup, burrito, etc.)	30%
If it were a traditionally plant-forward dish (wasn't modified to be plant-forward but already was)	17%
If it used flavors and ingredients from my culture and/or ethnicity	13%
If it made me feel nostalgic or reminded me of something I grew up eating as a child	9%

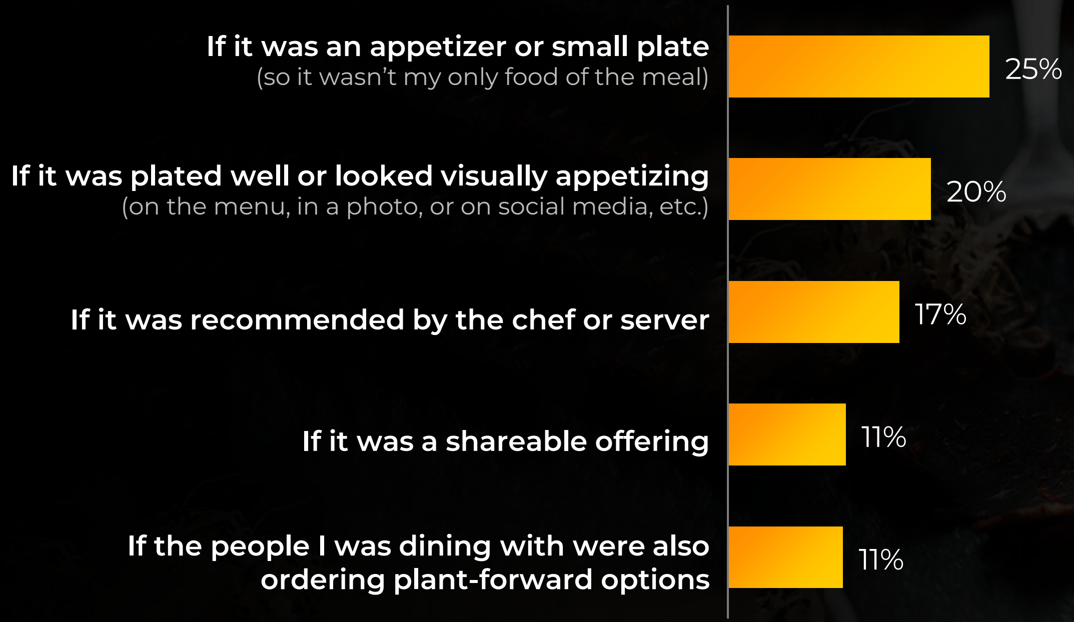
Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?

One in four consumers – especially Gen Z– would be encouraged to order plant-forward menu items as appetizers or small plates, so that they can pair these options with other foods they're planning to eat.

Eye-catching presentation also matters: Millennials and Gen Z are particularly drawn to photogenic dishes. Millennials are also slightly more likely than older generations to be influenced by the people they dine with.

MOTIVATORS FOR CHOOSING PLANT-FORWARD RESTAURANT DISHES

Dish Design and Service Format



Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?

Affordability is critical: one in five consumers would be more likely to try plant-forward dishes if they were cheaper or offered at a discounted rate compared to animal-based options.

A quarter of Millennials would also be tempted to try plant-forward items if they were offered as part of a combo or meal deal.

MOTIVATORS FOR CHOOSING PLANT-FORWARD RESTAURANT DISHES

Value and Promotions

Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?

Health considerations are top of mind for many consumers: a quarter of consumers would feel more secure ordering plant-forward dishes if they contain simple, familiar ingredients.

Nearly 20% would also appreciate being able to see specific nutritional information about a dish they're tempted to order, from calorie counts to protein and sugar content.

MOTIVATORS FOR CHOOSING PLANT-FORWARD RESTAURANT DISHES

Ingredients and Nutrition

Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?

DEMOGRAPHIC DETAILS

What Can Motivate Consumers To Choose Plant-Forward Dishes?

The fastest way to win over plant-forward dining skeptics is to speak to their hearts, by leveraging flavors, dishes, and ingredients they know and love.

Or, give them a sample and let your flavors do the talking. While it may seem like Gen Z and Millennials are more likely to voice concerns about ordering plant-forward dishes, they're also the most open to being swayed, as there are many strategies to do so.

	TOTAL	Statistically higher among…
If it used flavors that I love	44%	**Millennial** (51%), **Gen X** (45%)
If I could try it first or have a sample	38%	
If it was in a dish I have had before and know I love	30%	**Gen Z** (39%)
If it was a familiar format (like a pizza, sandwich, soup, burrito, etc.)	30%	**Gen Z** (35%), **Millennial** (35%)
If it was an appetizer or small plate (so it wasn't my only food of the meal)	25%	**Gen Z** (32%)
If I knew all the ingredients or if the dish contained simple ingredients	25%	
If it was offered as a part of a combo or meal deal	23%	**Millennial** (25%)
If they were cheaper / offered at a discount to animal-based dishes	21%	
If it was plated well or looked visually appetizing (on the menu, in a photo, on social media, etc.)	20%	**Gen Z** (28%), **Millennial** (25%)
If it were a traditionally plant-forward dish (wasn't modified to be plant-forward but already was)	17%	**Gen Z** (22%), **Millennial** (19%)
If it was recommended by the chef or server	17%	**Gen Z** (22%), **Millennial** (19%)
If they used local or seasonal ingredients	16%	**Millennial** (19%)
If I could see specific nutrition information (calories, protein content, sugar content, etc.)	15%	
If it used flavors and ingredients from my culture / ethnicity	13%	**Millennial & Boomer** (15%)
If it was a shareable offering	11%	**Millennial** (14%)
If the people I was dining with were also ordering plant-forward options	11%	**Gen Z** (18%), **Millennial** (14%)
If I got extra loyalty rewards or points for choosing plant-forward items	10%	**Gen Z** (13%), **Millennial** (15%)
If it made me feel nostalgic or reminded me of something I grew up eating	9%	**Gen Z** (14%), **Millennial** (12%)
If I could see the environmental information (carbon footprint, water footprint, etc.)	7%	**Gen Z** (10%), **Millennial** (8%)
If it was available as a Limited Time Offer (LTO)	5%	**Gen Z** (8%), **Millennial** (6%)
None of the above	18%	**Gen X** (19%), **Boomer** (29%)

Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?

HISTORICAL DATA CHANGES

What Can Motivate Consumers To Choose Plant-Forward Dishes?

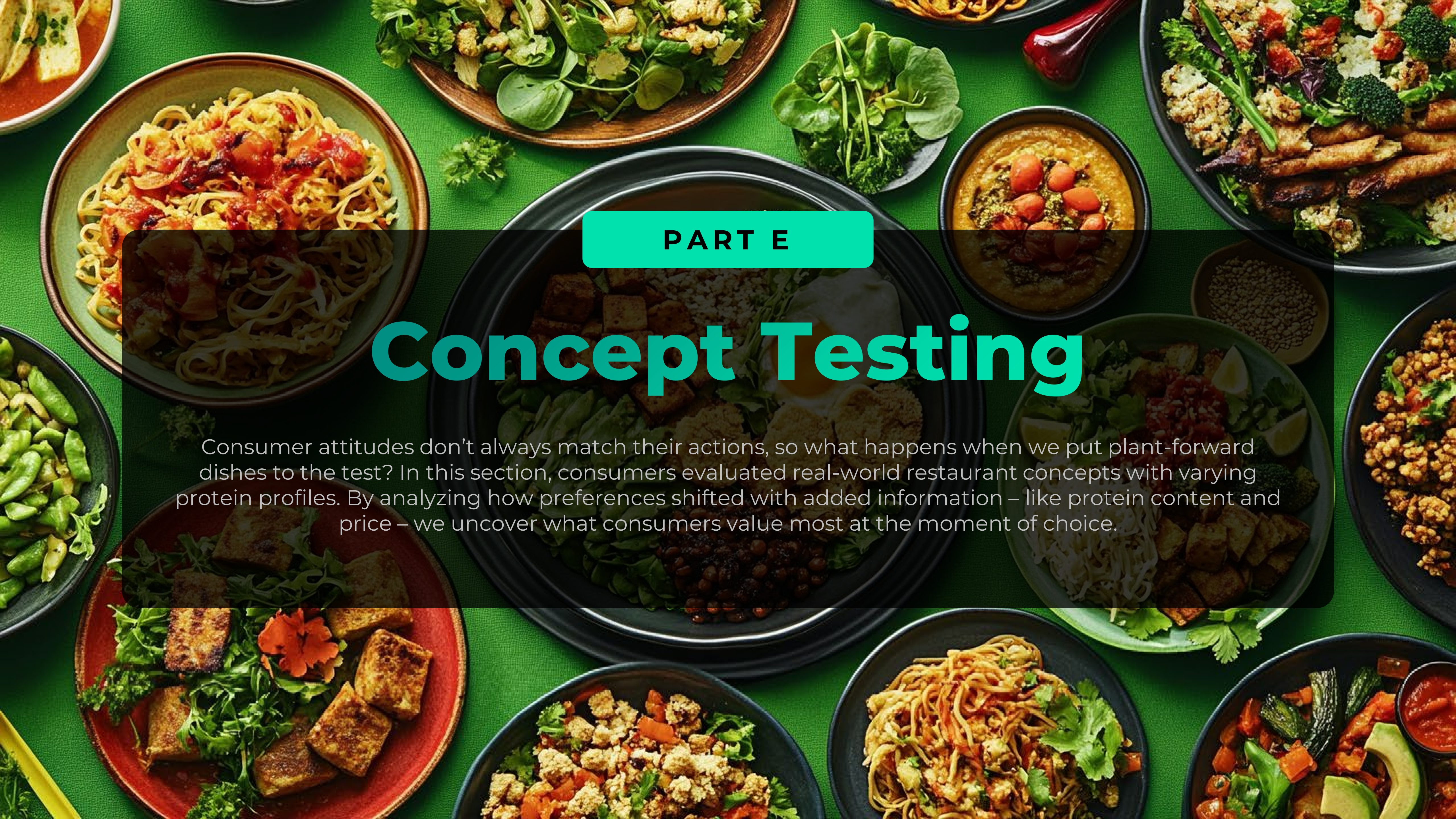
While craveable, well-loved flavors remain the most effective way to drive plant-forward ordering, consumers in 2025 are increasingly motivated by value and service-driven strategies – and less by sustainability or local sourcing messages compared to 2023.

Although price remains an important consideration, consumers in 2025 care slightly less about how plant-forward dishes compare price-wise with animal-based equivalents. Operators should instead highlight what diners gain from choosing plant-forward options – whether it's added value through combos and meal deals, familiar and satisfying formats like pizza or burritos, or trusted cues like chef and server recommendations. The key is to make plant-forward feel like the better, more exciting choice, not just the cheapest one.

***N/A – New survey option in 2025**

	2023	2025	'25 vs. '23
If it used flavors that I love	46%	44%	-2%
If I could try it first or have a sample	40%	38%	-2%
If it was in a dish I have had before and know I love	31%	30%	0%
If it was a familiar format (like a pizza, sandwich, soup, burrito, etc.)	27%	30%	+3%
If it was an appetizer or small plate (so it wasn't my only food of the meal)	23%	25%	+2%
If I knew all the ingredients or if the dish contained simple ingredients	26%	25%	-1%
If it was offered as a part of a combo or meal deal	19%	23%	+4%
If they were cheaper / offered at a discount to animal-based dishes	26%	21%	-5%
If it was plated well or looked visually appetizing (on the menu, in a photo, on social media, etc.)	17%	20%	+2%
If it were a traditionally plant-forward dish (wasn't modified to be plant-forward but already was)	19%	17%	-2%
If it was recommended by the chef or server	15%	17%	+2%
If they used local or seasonal ingredients	20%	16%	-4%
If I could see specific nutrition information (calories, protein content, sugar content, etc.)	N/A	15%	N/A
If it used flavors and ingredients from my culture / ethnicity	N/A	13%	N/A
If it was a shareable offering	12%	11%	-1%
If the people I was dining with were also ordering plant-forward options	12%	11%	-1%
If I got extra loyalty rewards or points for choosing plant-forward items	11%	10%	0%
If it made me feel nostalgic or reminded me of something I grew up eating	N/A	9%	N/A
If I could see the environmental information (carbon footprint, water footprint, etc.)	11%	7%	-4%
If it was available as a Limited Time Offer (LTO)	6%	5%	-1%
None of the above	15%	18%	+3%

Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?



PART E

Concept Testing

Consumer attitudes don’t always match their actions, so what happens when we put plant-forward dishes to the test? In this section, consumers evaluated real-world restaurant concepts with varying protein profiles. By analyzing how preferences shifted with added information – like protein content and price – we uncover what consumers value most at the moment of choice.

Concept Testing Overview

For this "Concept Testing" section of our survey, respondents were **divided into two even groups (Group A and Group B)**, each containing n = 750 respondents. Each group was given **three versions of the same menu concept to evaluate**: one version containing only animal protein (meat or seafood), the second only plant protein, and the third a mixture of animal and plant proteins. Group A saw three versions of a Mediterranean-inspired souvlaki plate, while Group B saw three versions of a poke bowl. All concepts were designed with input from chef experts at the Culinary Institute of America, and all were priced using calculated averages of similar items from Datassential's MenuTrends database. Concept images were generated using MidJourney.

Survey Process

STEP 01 Respondents were shown their three assigned dishes with only their **titles and general descriptions**, and asked to select the one they thought was the...

- **Tastiest and most flavorful**
- **Most filling**
- **Most protein-packed** (containing the highest quantity of protein per serving)
- **Healthiest and most nutritious**
- **Most unique and interesting / appealing**
- **Provides the most complete protein** (containing the highest quality of protein per serving)
- **Cheapest** (by their estimate)
- **Most value for the dollar**
- **The one they're most likely to buy on any given day** (if all 3 dishes cost the same)

STEP 02 Next, respondents saw the same three dishes, but with added details about **protein content**, and ranked them based on how likely they would be to order each at a restaurant.

STEP 03 Finally, respondents reviewed the same dishes with both information about **protein content and price**, and again ranked them based on how likely they would be to order each at a restaurant.

Key Takeaways

1. **Consumers initially gravitate toward fully-animal protein dishes,** rating them highest for taste, satiety, and value, while plant-forward dishes rate highly for healthfulness and creativity. This strong baseline preference for animal protein makes it important to amp up perceptions of taste and satisfaction in plant-forward options.
2. **Mixed-protein dishes are consistently viewed as the most unique and become more attractive when consumers are given additional details, like protein content and price.** Leveraging the novelty and balanced positioning of these options can help bridge the gap between fully-animal and plant-based dishes.
3. **At baseline, Gen Z, Millennials, and Foodies are significantly more receptive to plant-forward dishes (both mixed-protein and fully plant-based options) than their demographic counterparts, indicating that targeted marketing to these groups can yield strong results.** Tailoring communications to emphasize additional attributes like protein content or value can make plant-forward menu options even more appealing to these open-minded eaters.
4. **Providing clear information about protein content can help shift some consumers toward mixed or plant-based options, especially among younger groups like Gen Z and Millennials, but the impact is marginal.** This suggests that transparent nutritional communication is only mildly able to enhance the appeal of plant-forward dishes for health- and protein-conscious diners, and other strategies are likely more effective.
5. **Price is a far more powerful driver of decision-making, prompting notable shifts away from fully-animal dishes toward mixed-protein and plant-based alternatives.** Operators should leverage competitive pricing strategies to make plant-forward options more attractive and accessible to value-conscious diners.
6. **While consistent messaging around healthfulness and protein quality can reinforce trust in plant-forward meals, these attributes alone are not enough to shift behavior. Ultimately, what matters most to consumers is taste, value, and satisfaction.** To drive real change in consumer preferences, operators should focus on delivering flavor-first experiences at accessible price points. When plant-forward meals are delicious and feel like a well-priced, satisfying choice, adoption should naturally follow.

Group A: Mediterranean Plates

ANIMAL

Mediterranean-Style Grilled Chicken Souvlaki

25g protein | $15.99

Grilled chicken skewers served with a Greek Salad featuring tomatoes, cucumbers, and drizzled with Greek Extra Virgin Olive Oil and fresh pita.

MIXED

Mediterranean-Style Grilled Chicken & Falafel Souvlaki

25g protein | $14.50

Grilled chicken and falafel skewers served with a Greek Salad featuring tomatoes, cucumbers, and drizzled with Greek Extra Virgin Olive Oil and fresh pita.

PLANT

Mediterranean-Style Grilled Falafel & Lentil Kofte Souvlaki

25g protein | $12.99

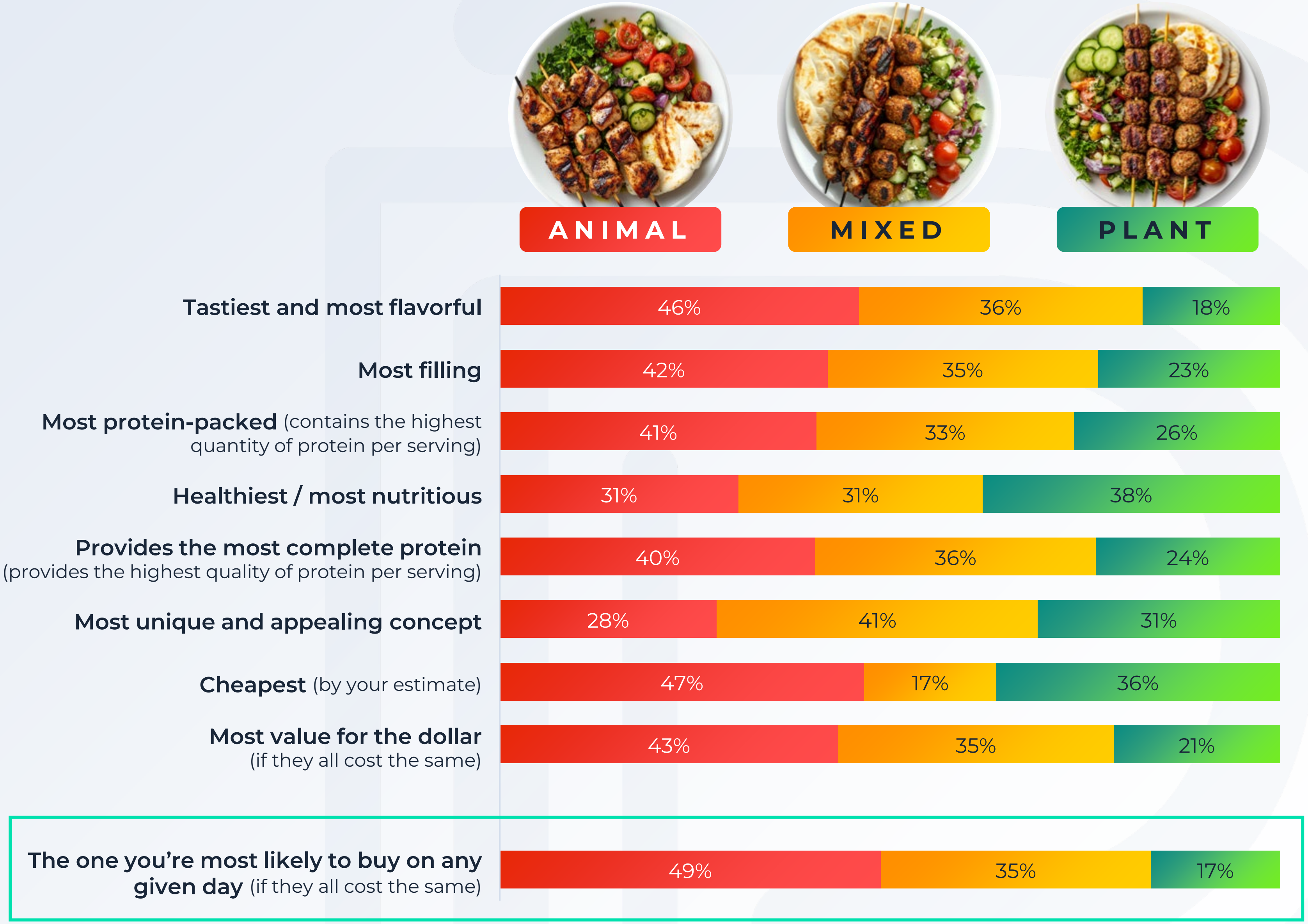
Grilled falafel and lentil fritter skewers served with a Greek Salad featuring tomatoes, cucumbers, and drizzled with Greek Extra Virgin Olive Oil and fresh pita.

GROUP A

Initial Impressions

At first glance, without the influence of price or information about protein content, nearly half of consumers gravitate toward the fully-animal chicken souvlaki, while over a third prefer the mixed-protein option.

Because the majority of consumers do eat meat without reservation, the fully-animal dish is rated most favorably across nearly all specified metrics, including taste, satiety, protein content, and value. The fully plant-based option (falafel and lentil kofte souvlaki) leads only in perceived healthfulness. The mixed chicken and falafel option stand out as the most unique, according to over 40% of consumers. Nearly half also believe the fully-animal option would be the cheapest, perhaps due to the association of chicken with affordability.



***Note: Sum totals may appear larger or smaller than 100% due to whole number rounding**

Q: Out of these three dishes, which one dish do you think is...

DATASSENTIAL

GROUP A

Demographic Details

ANIMAL

Mediterranean-Style Grilled Chicken Souvlaki

Grilled chicken skewers served with a Greek Salad featuring tomatoes, cucumbers, and drizzled with Greek Extra Virgin Olive Oil and fresh pita.

On first impression – without any additional context – which types of consumers in Group A gravitated most strongly toward the fully-animal Chicken Souvlaki concept?

- Older generations like **Gen X** and **Boomers** are significantly more likely than younger diners to rate the chicken souvlaki concept most favorably across many metrics like satiety, uniqueness, or value. **Nearly 60% of Boomers initially picked this option as the one they'd most likely purchase at a restaurant**.
- This concept also resonated more strongly with **Meat Eaters** and **consumers who don't identify as Foodies**.

INITIAL IMPRESSIONS

	TOTAL	Statistically highest among…
Tastiest and most flavorful	46%	**Non-Foodies** (49%), **Meat Eaters** (49%)
Most filling	42%	**Gen X** (49%), **High Income** (48%), **Meat Eater** (4%%)
Most protein-packed (contains the highest quantity of protein per serving)	41%	**West** (49%), **Meat Eater** (43%)
Healthiest / most nutritious	31%	
Provides the most complete protein (provides the highest quality of protein per serving)	40%	**Gen X** (46%)
Most unique and appealing concept	28%	**Gen X** (32%)
Cheapest (by your estimate)	47%	**Meat Eater** (50%), **Low Income** (51%)
Most value for the dollar (if they all cost the same)	43%	**Gen X** (49%)
The one you're most likely to buy on any given day (if they all cost the same)	49%	**Boomer** (57%), **Non-Foodie** (58%)

Q: Out of these three dishes, which one dish do you think is…

GROUP A
Demographic Details

MIXED

Mediterranean-Style Grilled Chicken & Falafel Souvlaki

Grilled chicken and falafel skewers served with a Greek Salad featuring tomatoes, cucumbers, and drizzled with Greek Extra Virgin Olive Oil and fresh pita.

On first impression – without any additional context – which types of consumers in Group A gravitated most strongly toward the mixed-protein Chicken & Falafel Souvlaki concept?

- The mixed-protein concept appealed broadly across regions, with especially strong interest from **Midwestern** consumers – likely reflecting a desire to explore plant-based ingredients without giving up meat entirely.
- It also resonated across generations, particularly with **Gen Z** and **Millennials**, who rated it highly on taste, satiety, healthfulness, and uniqueness. However, **Millennials and Gen X were ultimately more likely than other groups to select this concept** as the one they'd most likely to purchase at a restaurant.

INITIAL IMPRESSIONS

	TOTAL	Statistically highest among…
Tastiest and most flavorful	36%	**Men** (41%), **Gen Z** (42%), **Midwest** (46%)
Most filling	35%	**Millennial** (40%)
Most protein-packed (contains the highest quantity of protein per serving)	33%	**South** (37%)
Healthiest / most nutritious	31%	**Millennial** (37%), **West** (43%)
Provides the most complete protein (provides the highest quality of protein per serving)	36%	**Men** (40%), **Millennial** (42%)
Most unique and appealing concept	41%	**Gen Z** (44%), **Millennial** (47%), **Medium and High Income** (45%)
Cheapest (by your estimate)	17%	**Male** (20%)
Most value for the dollar (if they all cost the same)	35%	**Foodie** (40%).
The one you're most likely to buy on any given day (if they all cost the same)	35%	**Millennial** (38%), **Gen X** (37%), **Midwest** (42%), **Foodie** (37%)

Q: Out of these three dishes, which one dish do you think is…

GROUP A
Demographic Details

PLANT

Mediterranean-Style Grilled Falafel & Lentil Kofte Souvlaki

Grilled falafel and lentil fritter skewers served with a Greek Salad featuring tomatoes, cucumbers, and drizzled with Greek Extra Virgin Olive Oil and fresh pita.

On first impression – without any additional context – which types of consumers in Group A gravitated most strongly toward the fully plant-based Falafel & Lentil Kofte Souvlaki concept?

- While **Gen Z** was the most likely generation to perceive the plant-based souvlaki plate as offering the best value for the dollar, **the concept ultimately resonated most with Boomers** – aligning with earlier findings that Boomers are the most likely to identify as meat limiters.
- The plant-based concept also received strong ratings from **Low-Income consumers, Foodies, and those who already limit meat** – groups that are generally more open to plant-forward dining. Regional patterns further support this trend: **consumers in the Northeast were the most likely to say they'd purchase the fully plant-based option**, which is consistent with the coastal region's greater openness to plant-based eating.

INITIAL IMPRESSIONS

	TOTAL	Statistically highest among…
Tastiest and most flavorful	18%	**Low Income** (20%), **Foodies** (22%), **Meat Limiter** (27%)
Most filling	23%	**Meat Limiter** (33%)
Most protein-packed (contains the highest quantity of protein per serving)	26%	
Healthiest / most nutritious	38%	**Midwest** (45%), **Northeast** (43%),
Provides the most complete protein (provides the highest quality of protein per serving)	24%	**Boomer** (30%), **Meat Limiter** (30%)
Most unique and appealing concept	31%	**Boomer** (39%), **Low Income** (35%), **Meat Limiter** (38%)
Cheapest (by your estimate)	36%	**Non-Hispanic** (38%), **Northeast** (45%), **Meat Limiter** (47%)
Most value for the dollar (if they all cost the same)	21%	**Gen Z** (28%)
The one you're most likely to buy on any given day (if they all cost the same)	17%	**Northeast** (22%), **Low Income** (21%), **Foodie** (21%), **Meat Limiter** (29%)

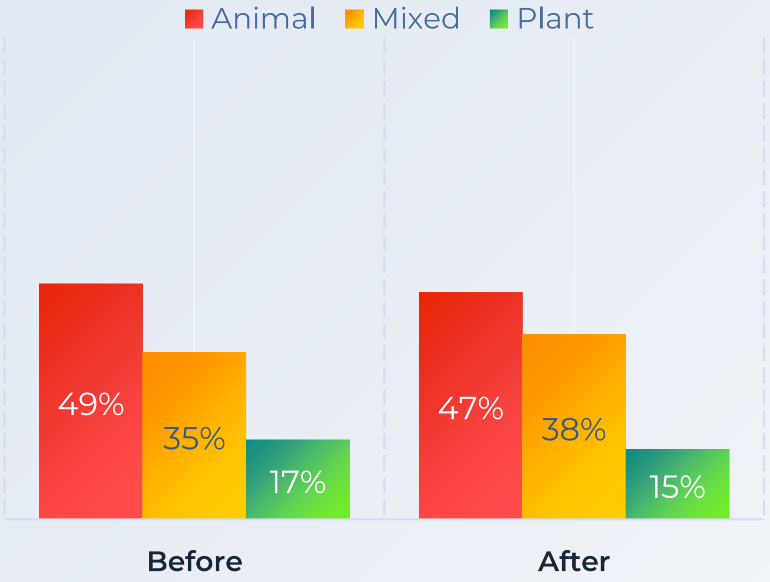
Q: Out of these three dishes, which one dish do you think is…

GROUP A

Does The Presence of Protein Content Change Consumer Choices?

After learning that all versions of the Mediterranean souvlaki plate contained the same amount of protein (in grams), consumers in Group A shifted slightly toward preferring the mixed option, though the fully-animal bowl was still top ranked. Across most major demographics, consumers became more inclined to choose the mixed-protein plate over the other options after learning about its protein content. About 10% of Gen Z shifted away from the fully-animal option in favor of the mixed-protein dish due to this information.

IMPACT OF PROTEIN INFO



***Note: Sum totals may appear larger or smaller than 100% due to whole number rounding**

DEMOGRAPHIC DETAILS

Willingness to Order

(% of consumers ranking each dish as #1 after seeing protein content)

	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal - Chicken Souvlaki	47%	47%	48%	43%	43%	50%	54%
Mixed - Chicken & Falafel Souvlaki	38%	42%	35%	45%	43%	39%	27%
Plant - Falafel & Lentil Kofte Souvlaki	15%	11%	18%	13%	14%	11%	20%

Degree of Change

(difference between selection likelihood before and after new information about protein content)

	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal - Chicken Souvlaki	-2%	-1%	-2%	-10%	0%	+1%	-3%
Mixed - Chicken & Falafel Souvlaki	+4%	+5%	+2%	+11%	+5%	+2%	-1%
Plant - Falafel & Lentil Kofte Souvlaki	-2%	-4%	0%	-1%	-5%	-3%	+4%

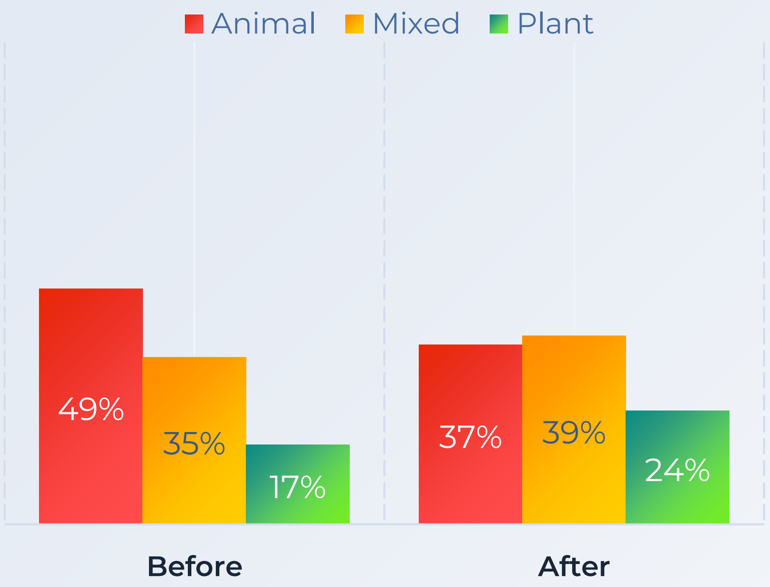
Q: With this new information in mind, rank the 3 dishes in order of how likely you'd choose them at a restaurant on any given day.

GROUP A

Does The Presence of Price Change Consumer Choices?

For Group A consumers, price was a much stronger influence than protein content: After seeing pricing details, the mixed-protein chicken and falafel plate became the most popular choice, albeit by a narrow margin. Across all major demographics, price prompted a significant shift away from the fully-animal option, with over a quarter of Gen Z and nearly 15% of Boomers choosing the mixed-protein or plant-based plates instead.

IMPACT OF PRICE



***Note: Sum totals may appear larger or smaller than 100% due to whole number rounding**

DEMOGRAPHIC DETAILS

Willingness to Order

(% of consumers ranking each dish as #1 after seeing price)

	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal - Chicken Souvlaki	37%	36%	39%	26%	35%	41%	43%
Mixed - Chicken & Falafel Souvlaki	39%	42%	36%	50%	39%	38%	35%
Plant - Falafel & Lentil Kofte Souvlaki	24%	22%	25%	24%	27%	21%	22%

Degree of Change

(difference between selection likelihood before and after new information about price)

	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal - Chicken Souvlaki	-12%	-12%	-11%	-26%	-8%	-7%	-14%
Mixed - Chicken & Falafel Souvlaki	+5%	+5%	+4%	+16%	+1%	+1%	+8%
Plant - Falafel & Lentil Kofte Souvlaki	+7%	+7%	+7%	+11%	+7%	+6%	+6%

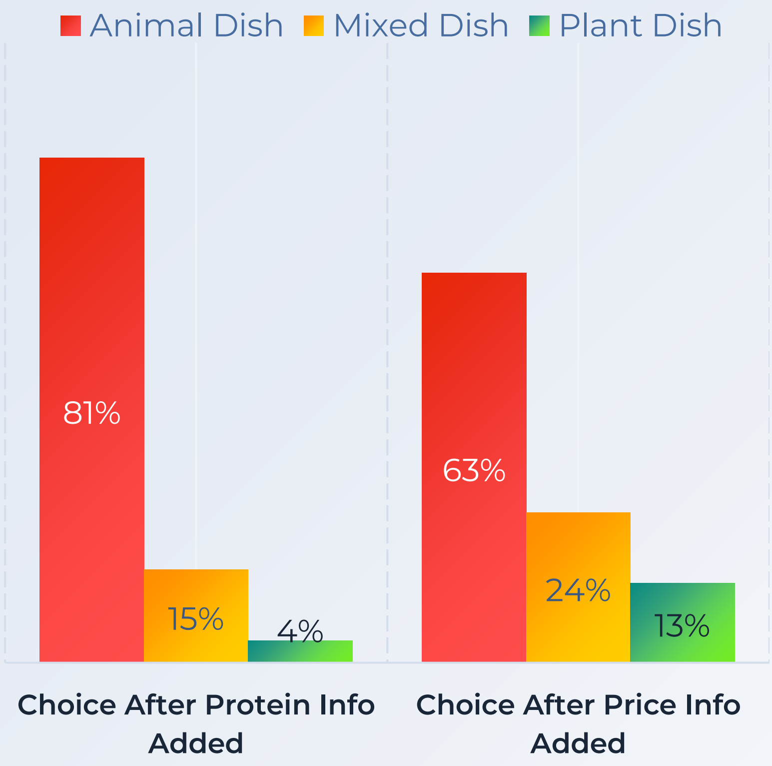
Q: With this new information in mind, rank the 3 dishes in order of how likely you'd choose them at a restaurant on any given day.

GROUP A

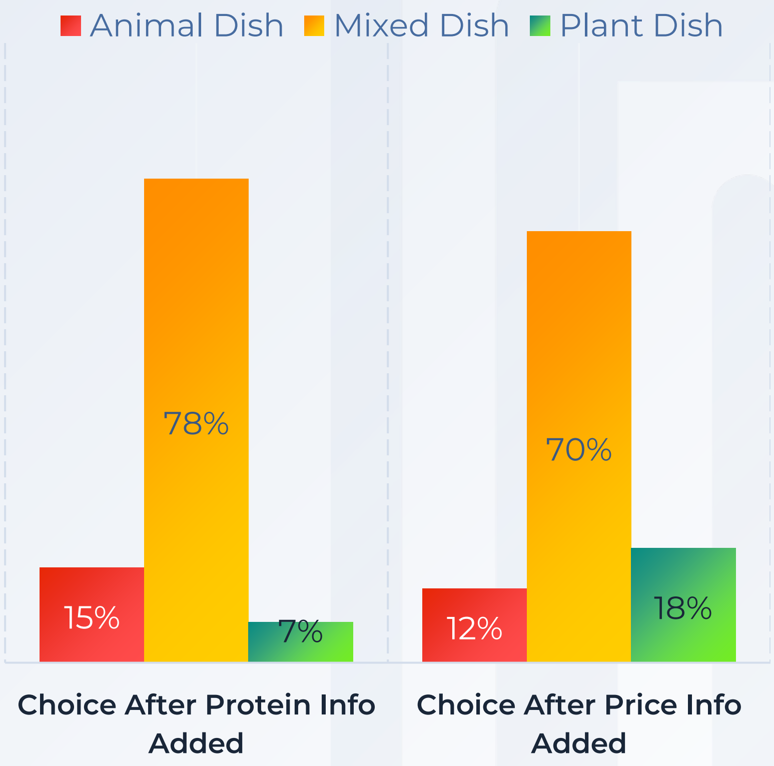
Is Price A More Effective Motivator Than Protein Content?

For most Group A consumers, price proved to be a stronger driver of shifts in purchase intent than protein content – especially among those who were initially less inclined to choose plant-forward dishes. Once prices were revealed, **nearly 40% of those who initially chose the fully-animal dish switched to either the mixed-protein or plant-based option**, and about a third of those who chose the mixed-protein dish also changed their selection due to price. In contrast, among those who initially picked the falafel and kofte plate, both protein and price influenced nearly a third to change their decision, though protein had a slightly larger impact.

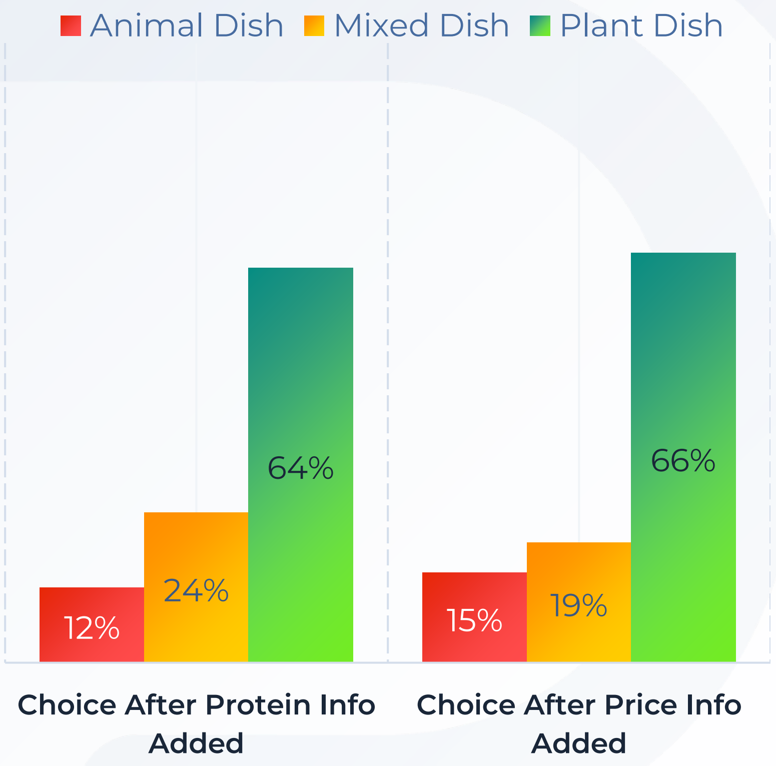
INITIALLY CHOSE ANIMAL



INITIALLY CHOSE MIXED

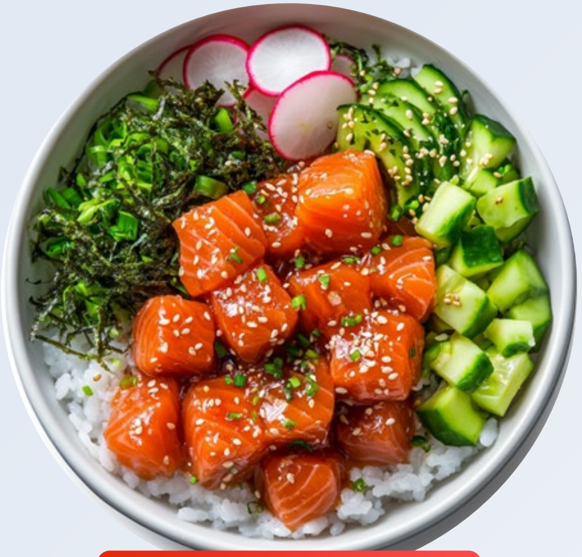


INITIALLY CHOSE PLANT



Q: With this new information in mind, rank the 3 dishes in order of how likely you'd choose them at a restaurant on any given day.

Group B: Poke Bowls



ANIMAL

Zesty Hawaiian Salmon Poke Bowl

25g protein | $16.50

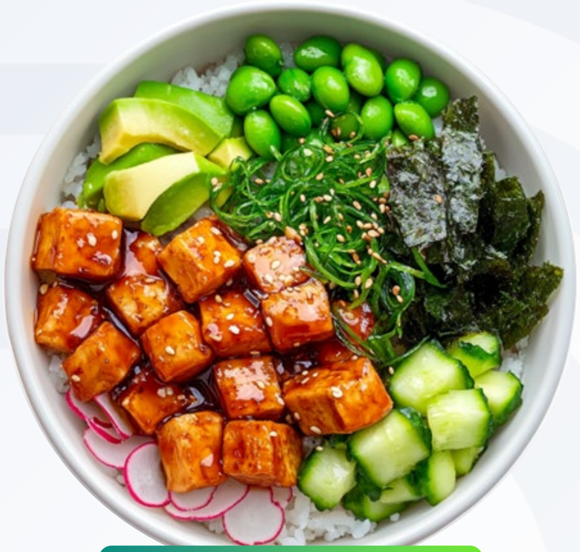
Fresh sriracha-sesame marinated salmon served over a bed of sushi rice, topped with avocado, seaweed salad, cucumber, radish, and a sprinkle of sesame seeds. Topped with a signature poke sauce.

MIXED

Zesty Hawaiian Salmon & Tofu Poke Bowl

25g protein | $15.00

Fresh sriracha-sesame marinated salmon and tofu over a bed of sushi rice, topped with avocado, seaweed salad, cucumber, radish, and a sprinkle of sesame seeds. Topped with a signature poke sauce.



PLANT

Zesty Hawaiian Tofu & Edamame Poke Bowl

25g protein | $13.50

Sriracha-sesame marinated tofu and fresh edamame over a bed of sushi rice, topped with avocado, seaweed salad, cucumber, radish, and a sprinkle of sesame seeds. Topped with a signature poke sauce.

GROUP B

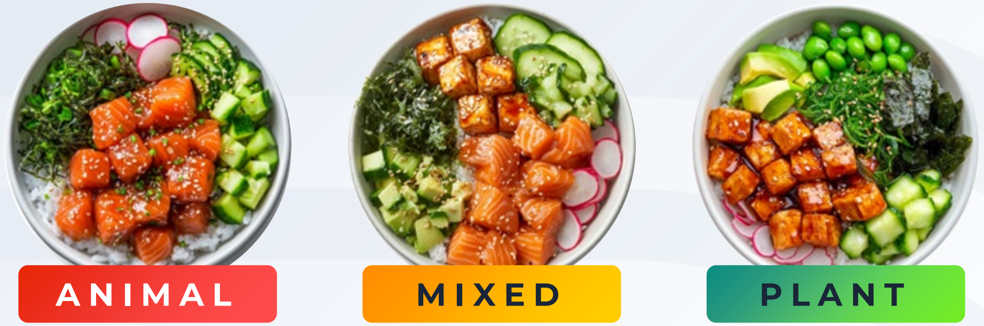
Initial Impressions

On first impression, over half of consumers prefer the fully-animal salmon poke bowl, with just over a quarter favoring the mixed-protein option and one in five choosing the tofu poke bowl.

Like with Group A, the fully-animal concept is rated most favorably by Group B consumers on most metrics, from taste and satiety to protein content and value. However, the margins between the fully-animal and mixed-protein options are narrower on Group B compared to Group A.

Notably, by a slim margin, the salmon poke bowl is perceived as both the healthiest and most unique offering. When it comes to price perception, over 40% of consumers estimate the salmon poke bowl as cheaper than both the tofu and mixed-protein options, which is surprising given how salmon is typically priced compared to tofu at both retail and foodservice.

***Note: Sum totals may appear larger or smaller than 100% due to whole number rounding**

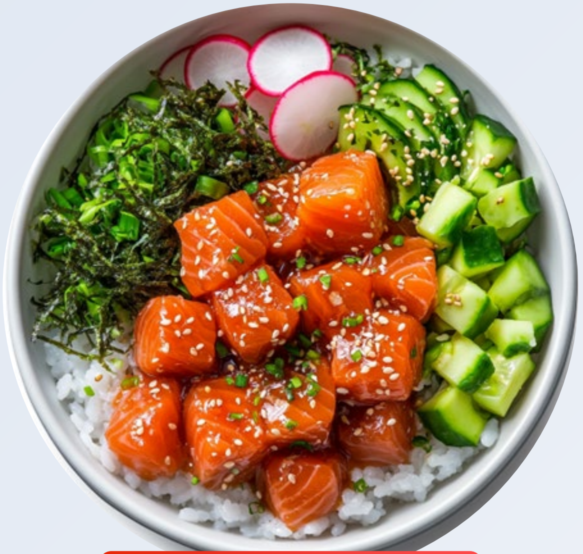


	ANIMAL	MIXED	PLANT
Tastiest and most flavorful	52%	28%	20%
Most filling	42%	35%	24%
Most protein-packed (contains the highest quantity of protein per serving)	38%	36%	26%
Healthiest / most nutritious	35%	31%	34%
Provides the most complete protein (provides the highest quality of protein per serving)	40%	36%	24%
Most unique and appealing concept	36%	33%	31%
Cheapest (by your estimate)	41%	14%	45%
Most value for the dollar (if they all cost the same)	44%	33%	23%
The one you're most likely to buy on any given day (if they all cost the same)	52%	27%	20%

Q: Out of these three dishes, which one dish do you think is...

GROUP B

Demographic Details



ANIMAL

Zesty Hawaiian Salmon Poke Bowl

Fresh sriracha-sesame marinated salmon served over a bed of sushi rice, topped with avocado, seaweed salad, cucumber, radish, and a sprinkle of sesame seeds. Topped with a signature poke sauce.

On first impression – without any additional context – which types of consumers in Group B gravitated most strongly toward the fully-animal Salmon Poke Bowl concept?

- Older generations – particularly **Gen X and Boomers – rated the salmon poke bowl highest across nearly all key metrics**, including taste, satiety, nutrition, and value. They were also the most likely to choose this concept as the one they'd actually purchase at a restaurant.
- Like in Group A, the fully-animal concept in Group B appealed most to **Meat Eaters** and **non-Foodies**, as well as consumers based in the **Midwest and South** – regions where meat limiting is slightly less common.

INITIAL IMPRESSIONS

	TOTAL	Statistically highest among…
Tastiest and most flavorful	52%	**Boomers** (69%), **Meat Eater** (56%).
Most filling	42%	**Boomers** (54%), **Midwest** (43%), **South** (46%), Meat Eater (44%)
Most protein-packed (contains the highest quantity of protein per serving)	38%	**Boomers** (50%), **South** (40%), **Meat Eater** (41%)
Healthiest / most nutritious	35%	**Boomer** (44%)
Provides the most complete protein (provides the highest quality of protein per serving)	40%	**Men** (44%), **Boomer** (54%), **Non-Foodie** (54%), **Meat Eater** (43%)
Most unique and appealing concept	36%	**Boomer** (55%), **Gen X** (37%), **Midwest & South** (40%), **Non-Foodie** (48%)
Cheapest (by your estimate)	41%	**Gen Z** (55%), **Low Income** (48%), **Meat Eater** (43%), **Non-Foodie** (55%)
Most value for the dollar (if they all cost the same)	44%	**Gen X** (46%), **Boomer** (63%), **Meat Eater** (46%)
The one you're most likely to buy on any given day (if they all cost the same)	52%	**Gen X** (53%), **Boomer** (69%), **Non-Foodie** (63%), **Meat Eater** (56%)

Q: Out of these three dishes, which one dish do you think is…

GROUP B

Demographic Details

MIXED

Zesty Hawaiian Salmon & Tofu Poke Bowl

Fresh sriracha-sesame marinated salmon and tofu over a bed of sushi rice, topped with avocado, seaweed salad, cucumber, radish, and a sprinkle of sesame seeds. Topped with a signature poke sauce.

On first impression – without any additional context – which types of consumers in Group B gravitated most strongly toward the mixed-protein Salmon & Tofu Poke Bowl concept?

- In Group B, the **mixed-protein poke bowl resonated most with Gen Z, Millennials, and Gen X** – all of whom were significantly more likely than Boomers to rate it highest for flavor, satiety, protein content, and uniqueness.
- **Foodies** also rated this concept especially well, likely due to their openness to diverse ingredients and textures. They were significantly more likely than non-Foodies to view it as both the most unique and can offer the best value. Notably, **men were also more likely than women to select the mixed-protein poke bowl** as the dish they'd be most likely to order on any given day.

INITIAL IMPRESSIONS

	TOTAL	Statistically highest among…
Tastiest and most flavorful	28%	**Gen Z** (36%), **Millennials** and **Gen X** (30%), **Foodie** (32%)
Most filling	35%	**Gen Z** (38%), **Millennial** (38%), **Gen X** (36%)
Most protein-packed (contains the highest quantity of protein per serving)	36%	**Gen Z** (44%), **Gen X** (42%)
Healthiest / most nutritious	31%	**Medium Income** (37%)
Provides the most complete protein (provides the highest quality of protein per serving)	36%	**Gen Z** (49%), **Gen X** (37%), **Foodie** (41%)
Most unique and appealing concept	33%	**Gen Z** (41%), **Millennial** (37%), **Foodie** (38%)
Cheapest (by your estimate)	14%	**Millennial** (19%), **Foodie** (18%)
Most value for the dollar (if they all cost the same)	33%	**Gen Z** (46%), **Millennial** (39%), **High Income** (38%), **Foodie** (36%)
The one you're most likely to buy on any given day (if they all cost the same)	27%	**Men** (32%), **Gen Z** (40%), **Millennial** (31%), **Foodie** (35%)

GROUP B
Demographic Details

PLANT

Zesty Hawaiian Tofu & Edamame Poke Bowl

Sriracha-sesame marinated tofu and fresh edamame over a bed of sushi rice, topped with avocado, seaweed salad, cucumber, radish, and a sprinkle of sesame seeds. Topped with a signature poke sauce.

On first impression – without any additional context – which types of consumers in Group B gravitated most strongly toward the fully plant-based Tofu & Edamame Poke Bowl concept?

- The **fully plant-based poke bowl appealed most to Gen Z and Millennials**, though over half of **Gen X and Boomers perceived it as the cheapest of the three options**. This signals a key opportunity for operators to leverage value messaging to make plant-based options more attractive to older, more price-conscious diners.
- Like in Group A, the fully plant-based concept also saw stronger traction among consumers based in the **Northeast** and **West**, as well as those who already limit their meat consumption. Interestingly, consumers across all **income levels found the tofu bowl to be the most filling**. While medium- and high-income diners saw it as the cheapest, low-income consumers viewed it as offering the best value for the dollar.

INITIAL IMPRESSIONS

	TOTAL	Statistically highest among…
Tastiest and most flavorful	20%	**Women** (24%), **Gen Z** (24%), **Millennial** (25%), **Northeast** (27%), **Meat Limiter** (31%)
Most filling	24%	**Gen Z** (31%), **Northeast** (34%), **Low Income** (26%), **High Income** (28%), **Meat Limiter** (32%)
Most protein-packed (contains the highest quantity of protein per serving)	26%	**Meat Limiter** (33%)
Healthiest / most nutritious	34%	**Gen Z** (39%), **Millennial** (37%), **Meat Limiter** (42%)
Provides the most complete protein (provides the highest quality of protein per serving)	24%	**Northeast** (31%), **Meat Limiter** (32%)
Most unique and appealing concept	31%	**Gen Z** (39%), **Millennial** (35%), **West** (38%), **Meat Limiter** (38%)
Cheapest (by your estimate)	45%	**Gen X** (51%), **Boomer** (51%), **West** (50%), **Medium & High Income** (49%), **Meat Limiter** (53%)
Most value for the dollar (if they all cost the same)	23%	**Women** (26%), **Northeast** (28%), **Low Income** (27%), **Meat Limiter** (30%)
The one you're most likely to buy on any given day (if they all cost the same)	20%	**Meat Limiter** (32%)

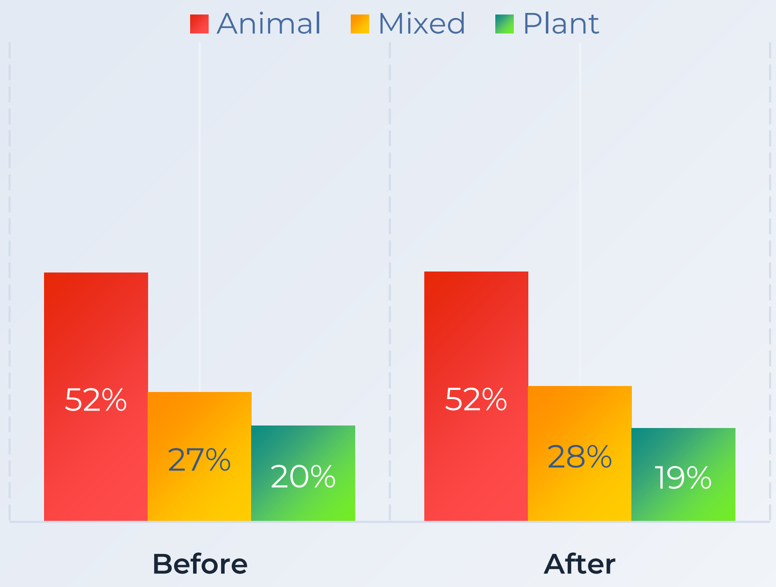
Q: Out of these three dishes, which one dish do you think is…

GROUP B

Does The Presence of Protein Content Change Consumer Choices?

Despite knowing that all three variations of the poke bowl contained the same amount of protein (in grams), the majority of consumers in Group B would still rank the fully-animal bowl as the option they'd most likely pick. Unlike Group A, very few consumers in Group B changed their initial choice after learning about protein content, a pattern consistent across demographics. Men, Gen Z, and Millennials are more likely to prefer the mixed-protein dish, while nearly 70% of Boomers continue to rank the fully-animal bowl as their top pick.

IMPACT OF PROTEIN INFO



***Note: Sum totals may appear larger or smaller than 100% due to whole number rounding**

DEMOGRAPHIC DETAILS

Willingness to Order

(% of consumers ranking each dish as #1 after seeing protein content)

	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal – Salmon Poke	52%	51%	53%	38%	47%	51%	69%
Mixed - Salmon & Tofu Poke	28%	33%	24%	41%	31%	28%	17%
Plant – Tofu & Edamame Poke	19%	16%	23%	21%	22%	21%	14%

Degree of Change

(difference between selection likelihood before and after new information about protein content)

	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal – Salmon Poke	0%	+1%	-1%	-3%	+2%	-2%	+1%
Mixed - Salmon & Tofu Poke	+1%	+1%	+1%	+1%	0%	+2%	+2%
Plant – Tofu & Edamame Poke	-1%	-2%	0%	2%	-2%	0%	-3%

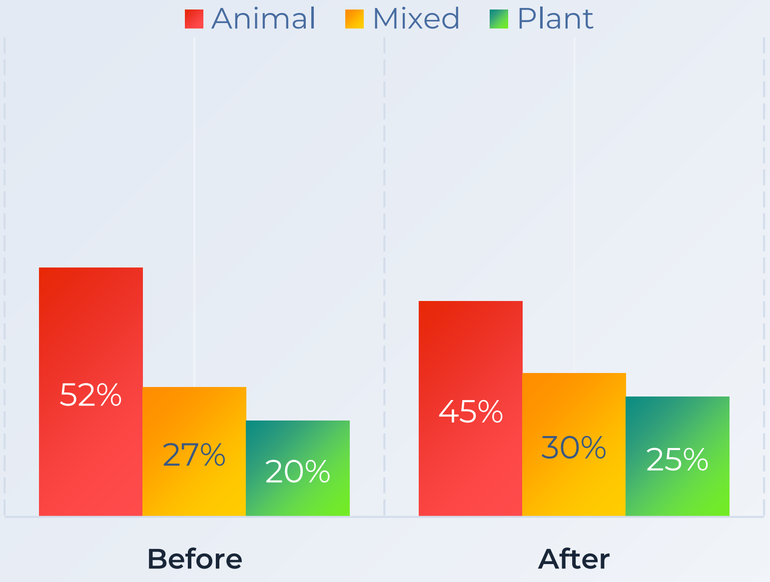
Q: With this new information in mind, rank the 3 dishes in order of how likely you'd choose them at a restaurant on any given day.

GROUP B

Does The Presence of Price Change Consumer Choices?

Just like with Group A, information about price was a powerful agent of change for consumers in Group B. While most consumers still chose the fully-animal dish after comparing prices, about 7% across all demographics shifted to either the mixed-protein or plant-based options. **Notably, 15% of Gen Z switched to the plant-based tofu bowl**, while Gen X and Boomers who moved away from the fully-animal option were significantly more likely to choose the mixed-protein concept after considering prices.

IMPACT OF PRICE



*Note: Sum totals may appear larger or smaller than 100% due to whole number rounding

DEMOGRAPHIC DETAILS

Willingness to Order

(% of consumers ranking each dish as #1 after seeing price)

	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal – Salmon Poke	45%	43%	48%	34%	40%	43%	62%
Mixed - Salmon & Tofu Poke	30%	33%	26%	32%	30%	35%	21%
Plant – Tofu & Edamame Poke	25%	24%	26%	34%	30%	21%	17%

Degree of Change

(difference between selection likelihood before and after new information about price)

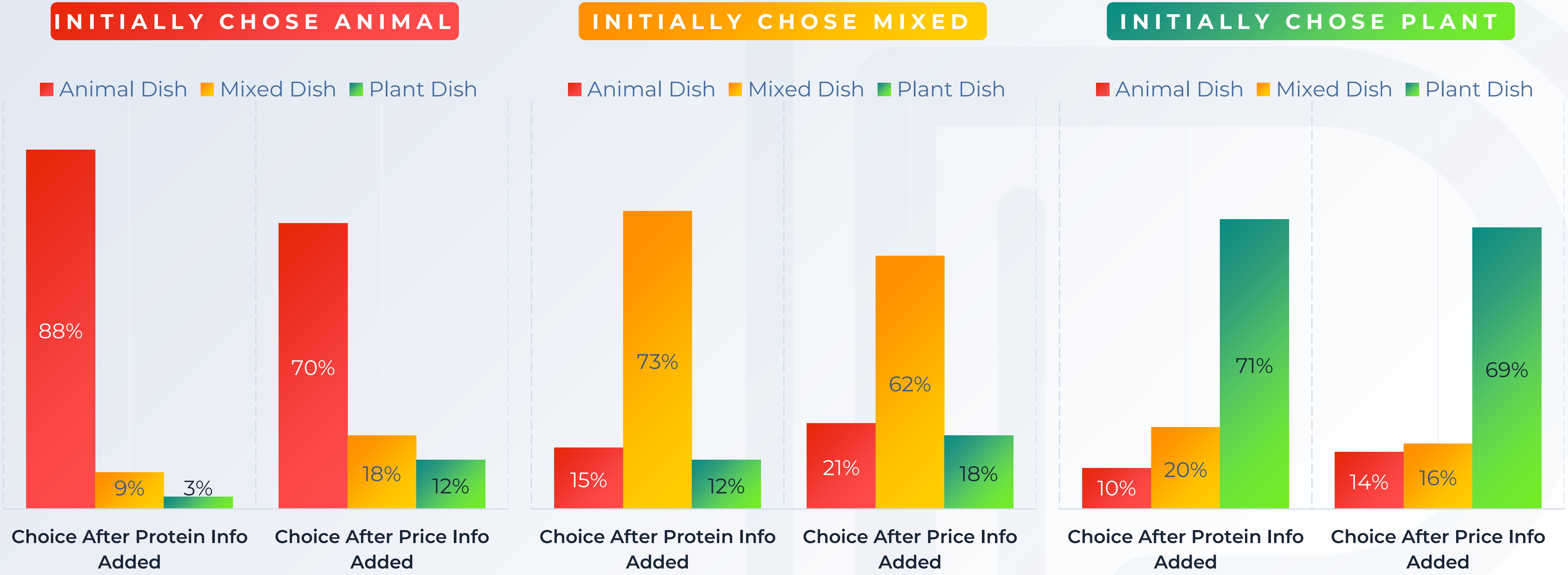
	TOTAL	Male	Female	Gen Z	Millen.	Gen X	Boomer
Animal – Salmon Poke	-7%	-8%	-7%	-7%	-6%	-10%	-7%
Mixed - Salmon & Tofu Poke	+3%	+2%	+3%	-8%	0%	+9%	+6%
Plant – Tofu & Edamame Poke	+5%	+6%	+3%	+15%	+6%	0%	+1%

Q: With this new information in mind, rank the 3 dishes in order of how likely you'd choose them at a restaurant on any given day.

GROUP B

Is Price A More Effective Motivator Than Protein Content?

As with Group A, price was a stronger driver of purchase intent than protein content for Group B consumers. This is particularly the case among those who initially selected the fully-animal or mixed-protein poke bowls, **about a third of whom changed their choice after seeing prices**. For those who originally chose the plant-based bowl, protein and price had roughly equal influence.



Q: With this new information in mind, rank the 3 dishes in order of how likely you'd choose them at a restaurant on any given day.

For additional inquiries & information, please reach out to:

The Culinary Institute Of America

www.ciachef.edu | www.ciaindustryleadership.com
For media inquiries: Amanda Secor, Senior Manager, Marketing & Communications amanda.secor@culinary.edu
Social Media: Facebook | Instagram | Twitter | LinkedIn

Food For Climate League

www.foodforclimateleague.com
For media inquiries: Eve Turow-Paul, Founder and Executive Director
eve@foodforclimateleague.org
Social Media: Instagram | Twitter | LinkedIn

Menus Of Change University Research Collaborative

www.moccollaborative.org
For media inquiries: Sophie Egan, Co-Director
smegan@stanford.edu
Social Media: LinkedIn

Datassential

https://datassential.com
For media inquiries:
media@datassential.com
Social Media: LinkedIn

DATASSENTIAL

Global Food & Beverage Intelligence

Datassential is revolutionizing the way food and beverage companies plan for the future. Predict trends, test your ideas, and find new customers with astounding ease.

- INDUSTRY INSIGHTS
- MENU & CONSUMER DATA
- CHAIN BENCHMARKING
- SALES INTELLIGENCE

Ready to get started? **Request a demo**