



Ideas and Insights for Full-Service Restaurants | July 2, 2014

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Diners Weigh In on Healthy Menus


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THINKSTOCK

To better understand consumer preferences and expectations for healthy menus, FSR and Study Hall Research conducted a nationwide survey of full-service restaurant patrons in February.

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Healthy, fresh, organic, low-calorie—these buzz words are inundating menus in chains and independent restaurants alike, all across the U.S. For instance, Cracker Barrel, which has locations up and down the nation's interstates, introduced its Wholesome Fixin's menu in September, hoping to capture the market on low-calorie Southern cooking.

Cracker Barrel's Wholesome Fixin's menu limits the calorie count to fewer than 600 calories per item, and the breakfast options are all under 500 calories. Even pancakes—a Cracker Barrel favorite—are included as a Wholesome Fixin's option, but are offered with fresh berries and whole grains to cut back on the calorie count.

"Beyond meeting guests' desires for healthy options, the addition of Wholesome Fixin's to our menu increases the appeal of the Cracker Barrel brand and provides guests with better-for-you fresh ingredients," says Janella Escobar, head of corporate communications for Cracker Barrel, adding that sales from the lower-calorie menu suggest diners appreciate having those alternatives.

That was certainly one of the main take-away messages from a consumer survey conducted in February, when FSR teamed up with Study Hall Research, a market research firm based in Tampa, Florida. The exclusive

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nationwide survey was conducted to better understand consumer perceptions and preferences regarding healthy menu options.

The survey results, compiled from 451 respondents, showed that diners believe caloric intake is one of the best measures of how healthy a meal is. Consumers across the board think that adding more fresh vegetables or fruit to the menu is the best action a restaurant can take to make its menu healthier, but adding more low-calorie meals to the menu is the next best move.

Other ways that respondents said restaurants could make menus healthier would be to add more low-calorie beverages, add options for half-portions or shared meals, and add more low-fat options. To a lesser degree, respondents indicated adding more low-sodium and low-carbohydrate items would make the menu healthier, and adding more vegetarian options was another way restaurants might make menus healthier.

Additionally, respondents were overwhelmingly convinced that serving portions are just too large—presenting an obvious and easy opportunity for restaurants to reduce calories on the plate.



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Counting Calories

The FSR-Study Hall survey inquired at what calorie count would a meal be considered healthy, and respondents selected the calorie count that was most healthy on a sliding scale of 200 to 2,000 calories, presented in 10-calorie increments. The average healthy number, according to the survey results, suggested that any meal or entrée under 790 calories can be considered healthy—a much higher calorie count than most full-service restaurants allow on their low-calorie menus.

Whatever the magic number, 35 percent of diners said they had ordered a meal within the last 60 days based solely on the meal's calorie count. Fifty-four percent of consumers indicated they are satisfied with the healthy dining options available in full-service restaurants, and 69 percent believe that local restaurants do a good job providing healthy menu options. But when it comes to chain restaurants, the vote is split 50/50 as to whether or not the restaurants do a good job providing healthy menu options.

The reality is, however, that many national brands are aggressively adopting healthier platforms. In fact, Seasons 52, which is committed to seasonally inspired fare prepared with natural cooking techniques such as wood-fired grilling and brick-oven cooking, consciously exercises portion control that keeps all menu items less than 475 calories and allows diners to indulge appropriately.

Similarly, Darden Restaurants, which serves more than 425 million guests each year across its various brands, has a portfolio-wide commitment to reduce calories and sodium in all of its menus. Its Olive Garden restaurants added a "Lighter Italian Fare" section, with all items 575 calories or fewer, and LongHorn Steakhouse added a low-calorie menu

HOW RESTAURANTS CAN MAKE MENUS HEALTHIER

Best Improvements:

Add more fresh vegetables.
Add more fruit.
Add more low-calorie meals.

Desirable Improvements

Add more low-calorie beverages.
Add more low-fat meals.
Increase options for half or split servings.

Potential Improvements:

Add more vegetarian options.
Add more low-sodium dishes.

Source: Study Hall Research, Healthy Dining Perception Survey, February 2014.

featuring selections under 500 calories each.

“People want to be healthier, but they want options so they can balance choices in their own way,” says Cheryl Dolven, Darden’s director of health and wellness.

However, there are some subtle differences in choices made by different demographic groups. As a general rule, women may be more inclined to order low-calorie options than men. The survey indicated that 35 percent of women have ordered a meal based only on its calorie count, while only 30 percent of men reported doing so.

As a general rule, consumers are more interested in eating healthy when they are in casual-dining or family-dining restaurants. People who frequent upscale dining are more likely to indulge and said that the availability of indulgent menu items plays a role in choosing a restaurant. Upscale diners also indicated a higher threshold for calorie intake, suggesting that any meal with fewer than 890 calories could be considered healthy—perhaps stemming in part from the notion that fine dining is a treat. By comparison, diners said menu items should have fewer than 780 calories to be considered healthy in a casual-dining or family-dining eatery.

A quick fix for cutting calories is simply to eat less, and many diners choose this route by selecting a half-portion when it’s on the menu or by sharing an entrée. Women are more likely than men to view shared meals or half-portions as healthier dining options, and respondents on opposite ends of the generation platform—those younger (in the 18–34 demographic) and those older than 55—think splitting meals or eating half-portions is a healthy dining decision. Even though diners realize the food they are eating in smaller portions may not be inherently healthy, they believe the meal is made healthier by the reduced portion size and thus the reduced calories.



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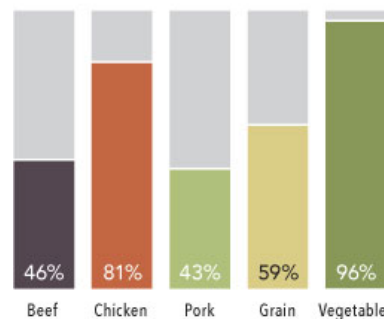
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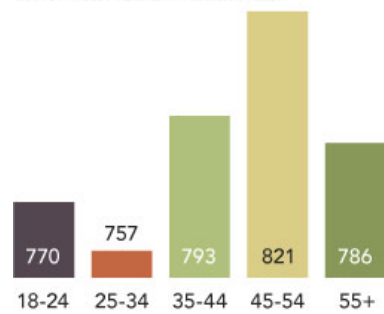
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PERCENTAGE WHO SAY THESE FOODS ARE CONSIDERED HEALTHIER WHEN SOURCED LOCALLY.



THE MAXIMUM NUMBER OF CALORIES FOR A MEAL TO BE HEALTHY VARIES WITH THE AGE OF THE DINER.



SOURCE: STUDY HALL RESEARCH, HEALTHY MENUS PERCEPTION SURVEY, FEBRUARY 2014

On the Side

Like beauty, what's healthy is often in the eye of the beholder—and public perception is often persuaded by popular trends. Local sourcing has become all the rage for chefs and full-service restaurants, with almost every restaurant jumping on the farm-to-fork bandwagon to some extent. However, consumer perception as to the value of local sourcing differs based on the menu item or ingredient.

Survey responses showed that local sourcing contributes in a large way to the impression that vegetables or chicken are healthier—96.4 percent said locally sourced vegetables are healthier and 81.5 percent said locally sourced chicken is healthier. To a lesser degree, local sourcing enhances the perception that grains are healthier, but local sourcing does not significantly

impact the perception that beef or pork is healthier.

Unsurprisingly, consumers agree that steamed, baked, and grilled vegetables, and fruit are healthy side dishes. Diners do not define potato chips, french fries, or fried vegetables as healthy. Rice presents a conundrum: Overall rice was not considered a particularly healthy side, but men are more likely than women to say rice is a healthy option.

On the sipping side, the majority of full-service diners agree water and unsweetened tea are healthy, but no other beverages were considered

particularly healthy. Consumers ranked wine, milk, and juice about the same in terms of being healthy choices. Diet soda was a clear loser—70 percent would not consider it healthy, and 92 percent said regular soda was not healthy.

Sugary sodas have increasingly come under fire as a contributor to obesity and a source of empty calories. This has been a particular focus where children are concerned, and Darden Restaurants—as part of its pledge to offer healthier options—recently pulled soda from its children’s menus and made low-fat milk the default beverage option. When polled, however, only 26 percent of full-service diners agreed that children’s beverages should be limited to low-fat milk.

Along with the focus on children’s menus, another talking point in the industry has been the need to create menus that cater to special diets, and underscoring that discussion has been the implication that in doing so menus become healthier. Not true, according to the survey respondents: While gluten-free, organic, and vegetarian options are often touted as healthier, none of these attributes registered as very important to the dining population as a whole. However, respondents in the 25–34 age bracket said restaurants can make menus healthier by adding more vegetarian options.

Finally, when asked which factors play a role in choosing a restaurant, consumers agreed that including healthy options on the menu was important—but healthy options ranked lower in the decision-making process than the freshness of food, menu variety, and price.

The Healthy Menus Perception Survey was conducted in February 2014 by Study Hall Research, Tampa, Florida. Surveys were completed by 451 respondents, age 18 years old and older. The Healthy Menus Perception Survey met the business industry-accepted standard for precision in a 95 percent confidence interval with an error rate of less than plus or minus 5 percent.