

U.S. food trends

Health, sustainability, and pandemic-driven changes to how Americans eat

GWI.



In this report

- 04 **Introduction**
- 05 Discover our data
- 07 **Key insights**
- 09 **America's growing food consciousness**
Changing the way we think about food
- 13 **Different ages, different motivations**
Generational attitudes driving food consciousness
- 17 **Food is not the enemy**
From restrictive diets to a holistic view of health
- 21 **Shopping (and eating) for quality**
What we look for in the produce section
- 25 **The meatless revolution heats up**
A meat-loving culture grows more open to the idea of ditching it
- 31 **The rise of sustainable eating**
When health and environmentalism collide
- 37 Appendix
- 38 Notes on methodology

Click the dots to navigate



Introduction

Many aspects of American life changed during the pandemic. From the outset, our social interactions, work environments and leisure activities were wholly different from the pre-pandemic world. So it's no surprise that mealtime behaviors were also deeply affected.

More than that though, we've also witnessed a significant shift in the way we relate to food overall in the past year and a half. Some of these changes, like the rising prominence of plant-based meat, the increasing concern about the environmental impact of our food, and the growing importance of

body positivity, have been a long time coming. While other trends, like the growing engagement with digital cooking content and the increasing focus on healthy and natural foods can be tied, at least in part, to our collective, year-long preoccupation with health and wellbeing.

As we emerge from the pandemic, these trends will contend with our return to "normal", whatever that may look like. But if one thing is certain, the past year has left Americans more conscious of what we eat and where our food comes from.

Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyper-link that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.

Sneak preview of our new platform

The screenshot displays the GWI platform interface. At the top, there are navigation tabs for 'Charts', 'Audiences', and 'Crosstabs'. The main area is divided into two panels. The left panel shows a filter configuration for 'New Audience 7 May 2020 12:33'. It includes a 'Data set' dropdown set to 'GWI Core', a 'Waves' dropdown set to 'Q2 2020', and a 'Locations' dropdown set to 'UK'. Below these are filter rules: 'Include people with All of these 2 attributes' (Age (Groups) > 16 to 24 OR Age (Groups) > 35 to 44) and another rule for 'Include people with All of these 2 attributes' (Interests > Music). The right panel shows a chart titled 'New Chart 6 Feb 2020 12:33' with a callout box stating 'Your audience sample size is 9,188 respondents out of 40,453'. Below the chart is a table with columns: 'Data point %', 'Universe', 'Index', 'Responses', and 'Audience %'. The table contains five rows of data with corresponding horizontal bar charts.

Data point %	Universe	Index	Responses	Audience %
100	15.7K	84.9M	100	47%
100	15.7K	84.9M	100	32%
100	15.7K	84.9M	100	52%
100	15.7K	84.9M	100	38%
100	15.7K	84.9M	100	16%

1

Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report



Just click this icon to explore the data on the platform

Source

Information about the source

Base

and base

Key insights

Healthy eating looks different across the generations

At a time when gyms are less accessible and Americans are more stationary than ever, focus has shifted from calorie burning to caloric intake. While younger people have remained quite active throughout the pandemic, many older Americans have not. In this scenario, food becomes even more crucial for health.

Food is no longer the enemy

After years of “fad” diets and restrictive eating, American culture has opened up to a more inclusive idea of health, one that encapsulates psychological well-being, personal relationships, and self acceptance. People realize they can be healthy and enjoy their favorite foods.

Health information is on the front of the package, not the back

When shopping for healthy products, Americans have grown less concerned with the nutritional information – the sodium, fat and carbs – and more concerned with natural, organic, and locally sourced characteristics that, to them, speak to the quality of the product.

Plant-based foods are increasingly desirable

Alongside the booming availability of plant-based protein in both our grocery stores and restaurant menus, Americans have grown more open to ditching or reducing meat within their diets.

Food and sustainability go hand-in-hand

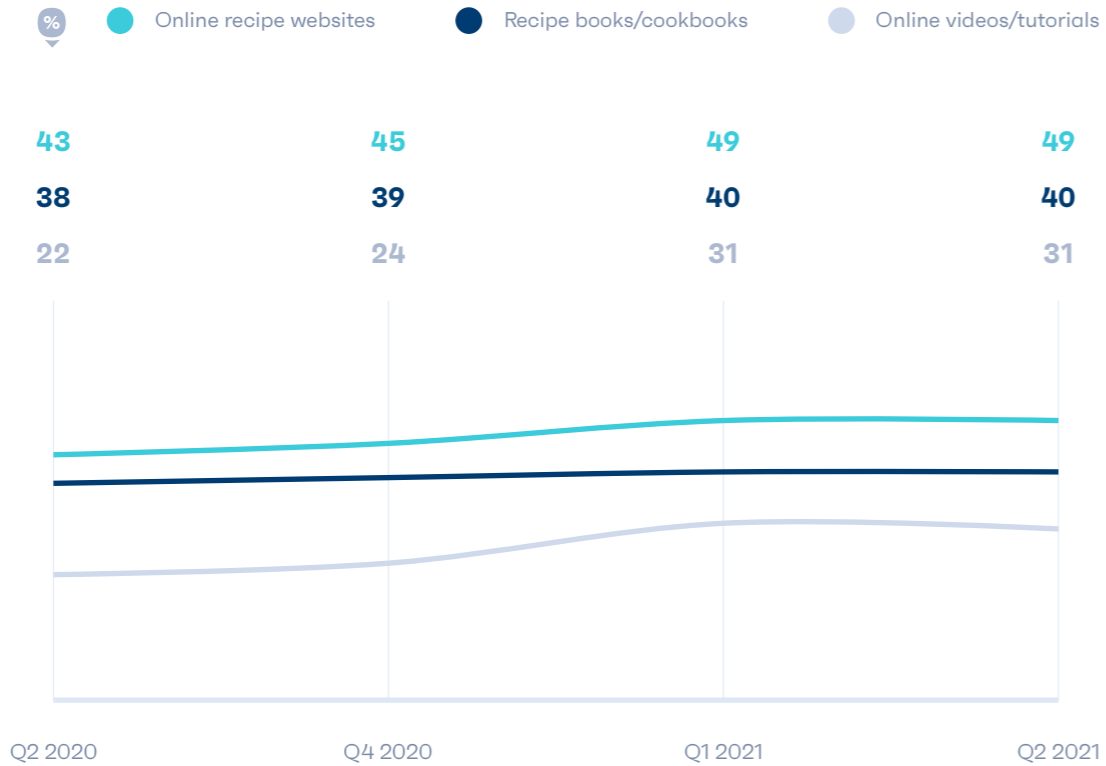
The pandemic revealed the stark reality of how food gets to our grocery stores in the first place, and consumers, especially those trying to eat healthy, are now more concerned than ever about the environmental footprint of their daily meals.

01

America's growing food consciousness

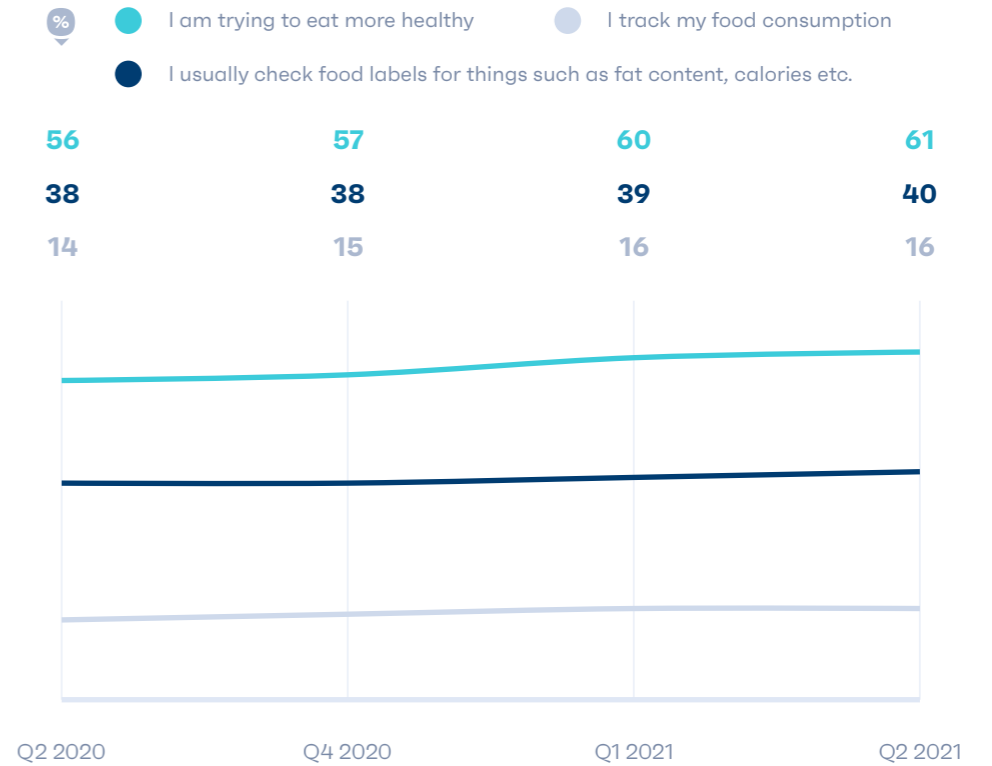
Americans are more engaged with cooking inspiration

% of Americans who use the following sources when cooking



Healthy eating and health consciousness are increasing

% of Americans who agree with the following statements



GWK USA Q2 2020-Q2 2021 81,092 U.S. internet users aged 16+

Since the early days of the pandemic, America's eating habits have undergone a significant transformation. The lockdowns and increased concern about the safety of public spaces forced many to swear off in-restaurant dining, forcing the majority of the country to either opt for delivery or, notably, actually cook at home.

As a result, Americans have become increasingly conscious about what they're putting into their bodies. Many who found themselves cooking more often than before the pandemic turned to online sources for recipes and food related content – which educated the country not only on how to bake bread, but also on the value of quality food.

Alongside the increasing engagement with these sources for food info, the number of Americans who said they're trying to eat more healthy, as well as the number who are actively tracking calories or other nutritional information, grew steadily over the course of the past year.

This health trend has taken hold in nearly every group we track; no matter the generation, income, race, political ideology, region of the country, or urban context. All of America seems to be more concerned about the healthfulness of the food they're eating, and the changes have affected the nature of what we consider healthy in 2021.

61% of
Americans
are trying
to eat more
healthily



02

Different ages, different motivations

It shouldn't come as a surprise that during a global health crisis, many consumers did whatever they could to stay healthy.

By Q2 2021, over 1 in 5 Americans used an app to track elements of their health, an increase of nearly 20% in a single year. Over the same timeframe, the number of people who used herbal medicines or regularly took vitamins grew nearly the same amount.

Even more importantly, consumers started to take ownership of the food they consume. Currently, 7 in 10 Americans say they diet or control their food intake in some way, which represents nearly a 13% increase since this time last year.

In a time when gym attendance and exercise behaviors have dropped dramatically, many people reevaluated their mealtime choices in order to maintain their health, fitness, and weight.

20%
of millennials say they are tracking their food consumption/caloric intake



Healthy eating is on the rise

% of Americans who say they are dieting or controlling their food intake



For younger Americans specifically, millennials and Gen Zs who remained more physically active during the pandemic, food consciousness may be linked heavily to aesthetics and body perceptions, especially in our beauty-obsessed culture.

On the other hand, older consumers held more targeted health goals in mind for their nutrition. Gen Xs and baby boomers, who consistently showed higher levels of concern about the coronavirus might have seen their food choices as part of an overall effort toward bodily health, and were more likely than their younger counterparts to seek to control or reduce their weight, blood sugar, and cholesterol.

● ● ● ● ● Different ages, different motivations

Health consciousness is increasing

% of Americans on a diet who are controlling their food intake for the following reasons

- To feel healthy
- To improve fitness
- To lose weight
- To gain muscle
- To maintain weight
- To control cholesterol levels
- To control salt levels
- To control blood sugar levels

	Gen Z (aged 16-24)	Millennials (aged 25-38)	Gen X (aged 39-57)	Baby boomers (aged 58-64)
To feel healthy	50	51	53	46
To improve fitness	38	37	35	26
To lose weight	37	39	50	52
To gain muscle	28	20	13	4
To maintain weight	26	28	27	27
To control cholesterol levels	13	14	21	33
To control salt levels	12	12	16	21
To control blood sugar levels	12	14	21	29

GW USA Q2 2021 5,857 U.S. internet users aged 16+ who are dieting or controlling their food intake • 386 Gen Zs • 1,285 millennials • 1,870 Gen Xs • 2,183 baby boomers.

03

Food is not the enemy

Interestingly, Americans trying to eat healthy are less restrictive in their eating habits than average. This data, alongside trends in the outside world and in social media, suggests that the perception of healthy eating has undergone a change since the days of “fad” diets.

Nowadays, healthy eating is seen as a single part of a holistic healthy lifestyle, one that also includes exercise, taking care of your mental health, getting enough sleep, and drinking water. More so, it’s even grown to encompass things like meditating, maintaining relationships, and reducing screen time.



Diet is just one part of the health equation...

% of Americans who do the following weekly

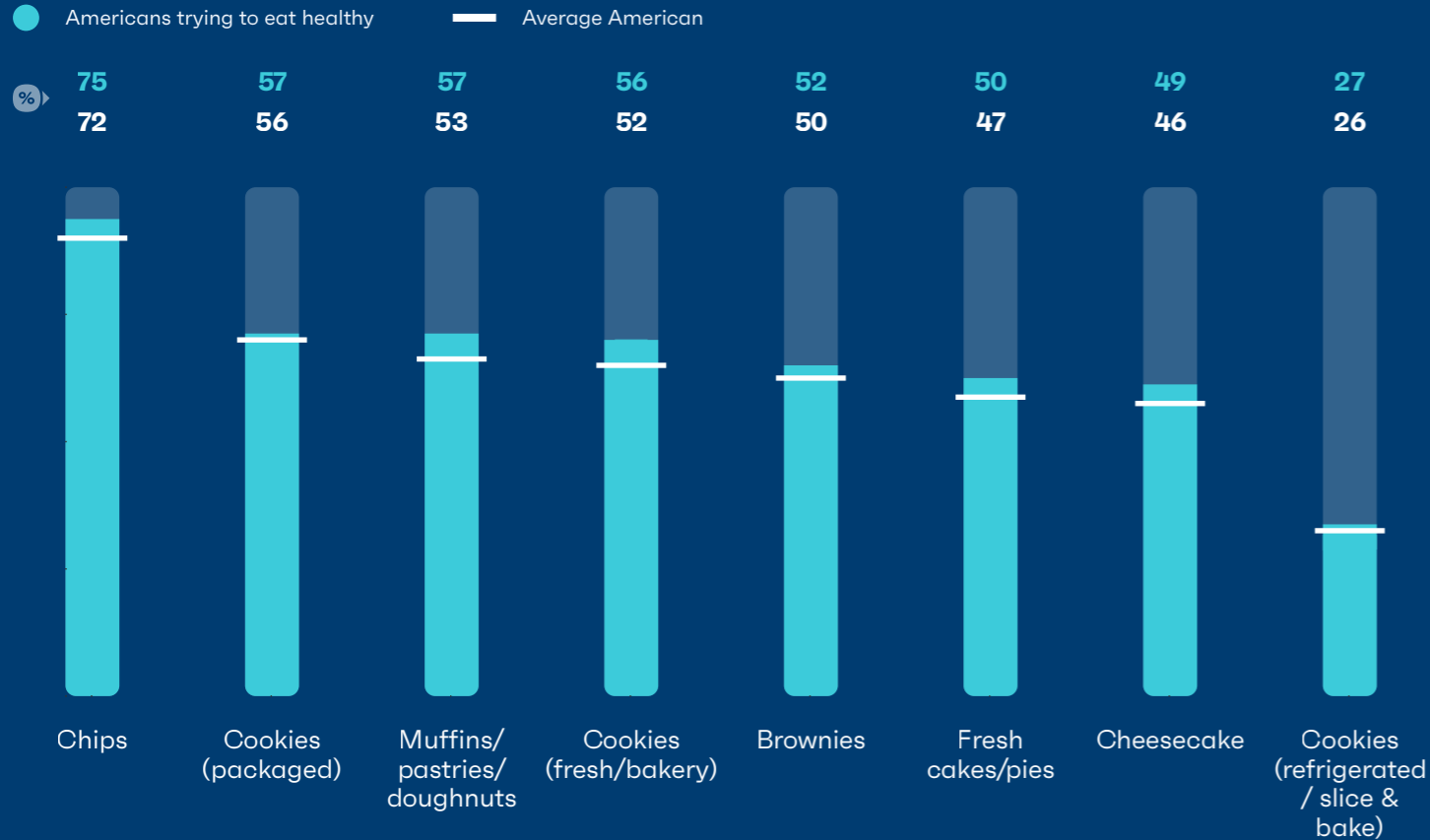


GW I USA Q2 2021 20,068 U.S. internet users aged 16+ • 5,142 say they're trying to eat healthier

...and snacking is normal

% of Americans who eat the following foods

3



More than 20% of Americans are dieting to improve their fitness

Healthy eating does incorporate a balanced diet, but sustaining one's overall health means so much more. It appears that many people are embracing this big-picture view.

In the media space, this trend started as body positivity and is quickly making way for **body neutrality**. Both trends are rooted in the idea that appearance has little bearing on the health conversation, especially when self-acceptance requires looking beyond physical attributes.

These growing movements toward self-love and self-acceptance add some

context as to why Americans who say being healthy is important to them are also more likely to say that we should be more open about our mental health, more likely to say that it's okay for people to say when they're struggling, and more likely to say that traditional gender roles are outdated.

So trying to be healthy in 2021 doesn't necessarily mean doing away with desserts or attempting to look a certain way. It's moving toward the concept of health as an all-encompassing set of behaviors that give way to feeling good about one's mental and physical wellbeing.

04

Shopping (and eating) for quality

Our growing food consciousness has played a large role at grocery store checkouts as well, but in an interesting way. Consumers started to value their food intake more, but instead of following a specific diet, they sought out more natural, healthy, and locally sourced products.

Turns out there are relatively very few Americans who are following the keto or the paleo diet, and instead the most common dietary preferences are ones that suggest a movement toward moderation and higher quality ingredients. Since the start of the pandemic, those looking to eat healthy have begun buying products that promise better nutrition with lower sugar content, higher protein, and higher fiber.

36%

of Americans think it's important that the food products they buy are made in the U.S.





The most common dietary preferences are ones that suggest a movement toward moderation and higher quality ingredients

Consumers are more deeply exploring what quality nutrition means to them, and in many ways this is driving purchases of more natural and plant-based products. More than just the nutritional information on the back of a food package, shoppers are favoring identifiers like “natural” and “organic” which suggest a higher quality source compared to overly-processed foods.

Since the end of 2020, reported consumption of oat milk has grown by 55%, and one quarter of consumers now drink almond or nut milk. The growth of natural remedies and supplements, like the CBD, further reflect this trend, with usage of cannabis-derived product increasing 17% among Americans 21 and older in the same time frame.

Demand for certain food qualities rises

% of Americans who say...

“The following things are important to me when buying food



The meatless revolution heats up

In practice, the increasing health consciousness of Americans has also had a huge impact on their relationship with meat. For many it has opened the door to a meat-free future, and the portion of U.S. meat eaters who have grown open to the idea of reducing or eliminating their meat intake has grown by 15% in a single year. Meanwhile, the portion of those who refuse to give up their meat fell below 50% for the first time.

This trend is very clearly driven by those who want to eat healthier, as meat is increasingly seen as a hindrance to a healthy diet. But it's also driven by younger audiences, who will continue

to flock to meat-free options as their purchasing power increases. Gen Zs and millennials, for instance, are more than 30% less likely than older generations to say they are meat eaters with no plans on changing.

The growing availability of plant-based food options also plays a huge role in the rising comfort Americans show toward ditching meat. Over the past few years, both grocery store shelves and restaurant menus have filled up with products from companies, like **Impossible Foods** and **Beyond Meat** who have spent millions attempting to recreate popular meat flavors from plants.

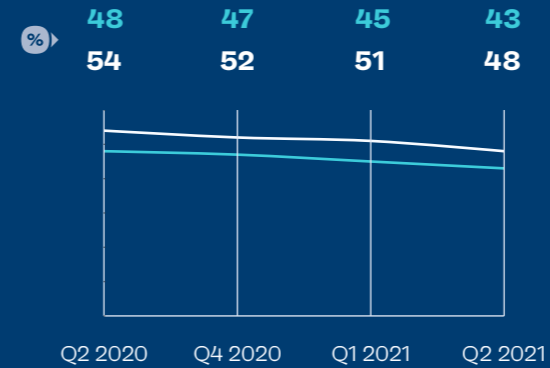
29% of meat-eaters are interested in reducing or eliminating their meat consumption

The diversification of Americans' diet

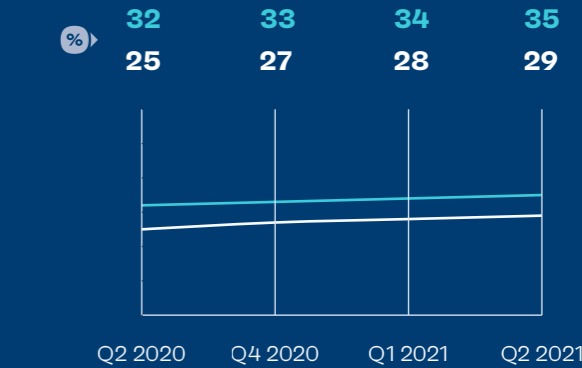
% of Americans who describe their diet in the following ways

● Americans trying to eat healthier ● Average American

🐮 Meat-eater with no plans to change



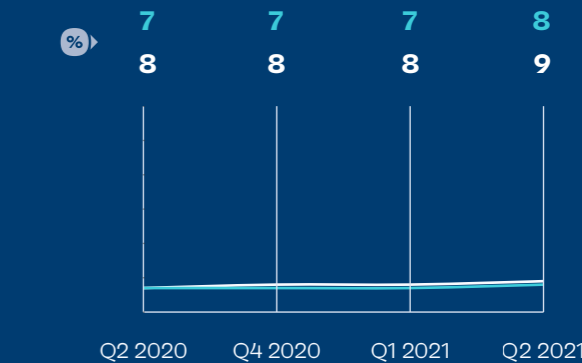
📉🐮 Meat-eater interested in reducing meat/becoming vegetarian



🐟 Flexitarian/Pescatarian



🌱 Vegetarian/Vegan*



*Americans who are vegan, vegetarian or say they "just don't eat meat"

These efforts have proved successful, as consumers are not only more eager than ever to reduce their meat intake, but also ready to spend real money to do so. KFC, for instance, tested vegan chicken at a store in Atlanta, and **sold out** within 5 hours.

The sales of meat-free options will only continue to grow as companies offering these products achieve greater economies of scale. So even though low income consumers are over 20% more likely than high income Americans to say they have no plans to change their meat consumption, this may not always be the case as plant-based options inch **ever closer** to the pound-for-pound price of meat.

The growing availability in plant-based food options plays a huge role in the diversifying American diet



Trend in action

2019

July

Beyond Meat offered in Blue Apron home cooking boxes

August

Burger King's "Impossible Whopper" begins U.S. national rollout

Beyond Meatball Sub begins testing at Subway

September

Impossible Burger launches hits the shelves at 27 grocery stores in CA

2020

January

Denny's launches Beyond Meat burger in 1,700+ locations

February

Disney partners with Impossible Foods to be the official plant-based Burger at its parks and cruise lines

March

Cheesecake Factory adds two Impossible dishes (pasta & salad) to their menu

May

Impossible Foods launches at 2,700 Kroger & Co. owned grocery stores

June

Starbucks launches the Impossible Breakfast Sandwich in U.S. stores

Impossible Foods launches direct-to-consumer site

July

Beyond Meat launches first plant-based chicken at California KFC

Trader Joe's starts selling Impossible Beef

September

Beyond Meat launches meat-free meatballs in U.S. grocery stores

November

Pizza Hut launches "Great Beyond Pizza" with Beyond Italian Sausage

2021

January

Beyond Meat partners with PepsiCo increasing its global reach

March

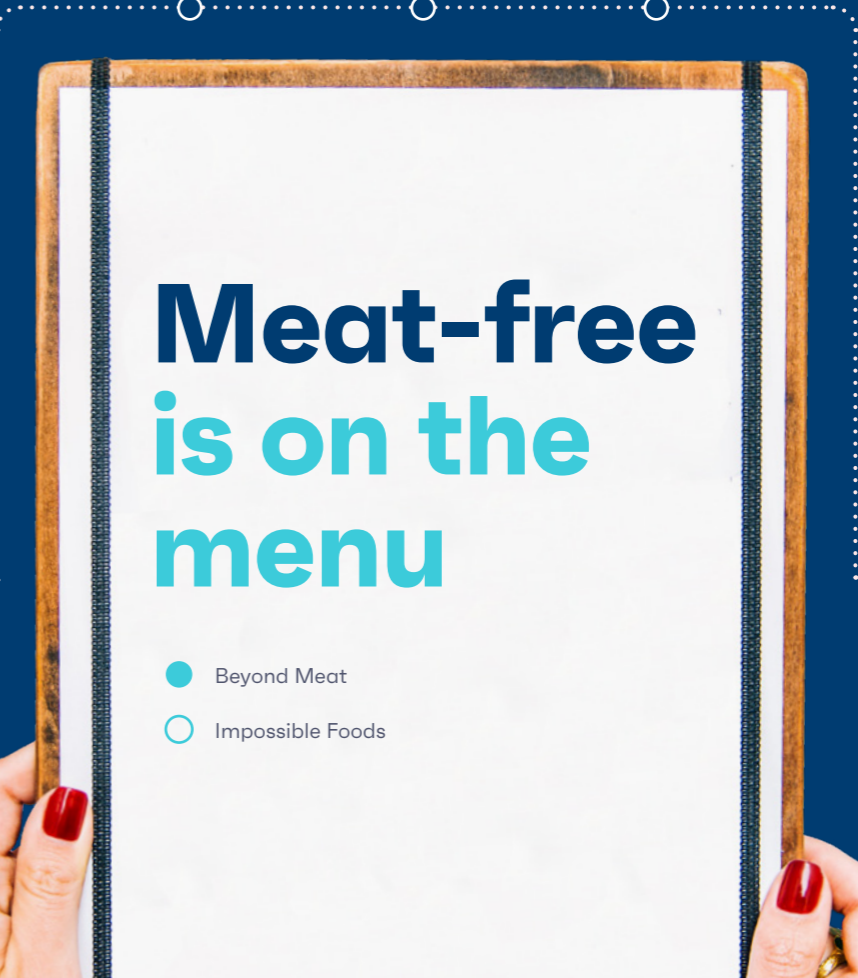
McDonald's begins testing Beyond Meat "McPlant" burger in global markets

May

Johnny Rockets launches Impossible Burger, vegan shakes & dairy-free cheddar

July

Beyond Meat launches new meat free chicken tenders at 400+ indie restaurants



06

The rise of sustainable eating

Consumers aren't giving up meat for the health benefits alone. Meat-free companies have spent a lot of resources highlighting the environmental benefits of plant-based meat vs raising livestock.

For instance, **both** Beyond Meat and Impossible Foods commissioned their own independent studies which suggested their plant-based burgers contributed up to 90% less greenhouse gases than a traditional burger. And all signs suggest that messages

like these are resonating well with American consumers.

Those who are looking to eat healthy or reign in their meat consumption are far more likely than the average American to feel concern about the impact their purchases have on the environment. They want companies to be sustainable and to reduce their environmental impact, which, among other issues, includes the pitfalls associated with factory farming and industrial-scale livestock rearing.

The importance of sustainable food for healthy eaters

		All Americans	Americans trying to eat healthier	Meat-eaters reducing meat consumption
% of Americans who want brands to do the following	Be sustainable	27	32	36
	Reduce environmental impact	37	44	50
	Support local suppliers	30	34	33
% of Americans who say the following things are important when they buy food	Products made in the U.S.	38	43	39
	Locally-made/sourced products	30	36	36
	Sustainable/eco-friendly products	24	30	33
	High animal welfare products	19	22	25
	Free/fair trade products	16	29	23

GW USA Q2 2021 20,068 U.S. internet users • 5,142 trying to eat healthier • 2,134 meat eaters interested in reducing their meat consumption or becoming vegetarian aged 16+



Consumers are increasingly drawn to brands that produce food products without animal cruelty or labor exploitation

Throughout the pandemic, people have also learned a hard lesson about the effects that agricultural supply chains have on both the environment and the population's food security. Consumers these days are more drawn to brands that produce food products through socially beneficial supply chains - ones without animal cruelty or labor exploitation.

And with the movement toward supporting local businesses and eating with seasonality in mind, they are increasingly seeking food products that don't have to travel a great distance to get to their kitchens.

More importantly, they're willing to hold onto these attitudes when deciding which food brands to buy.

Want more answers?

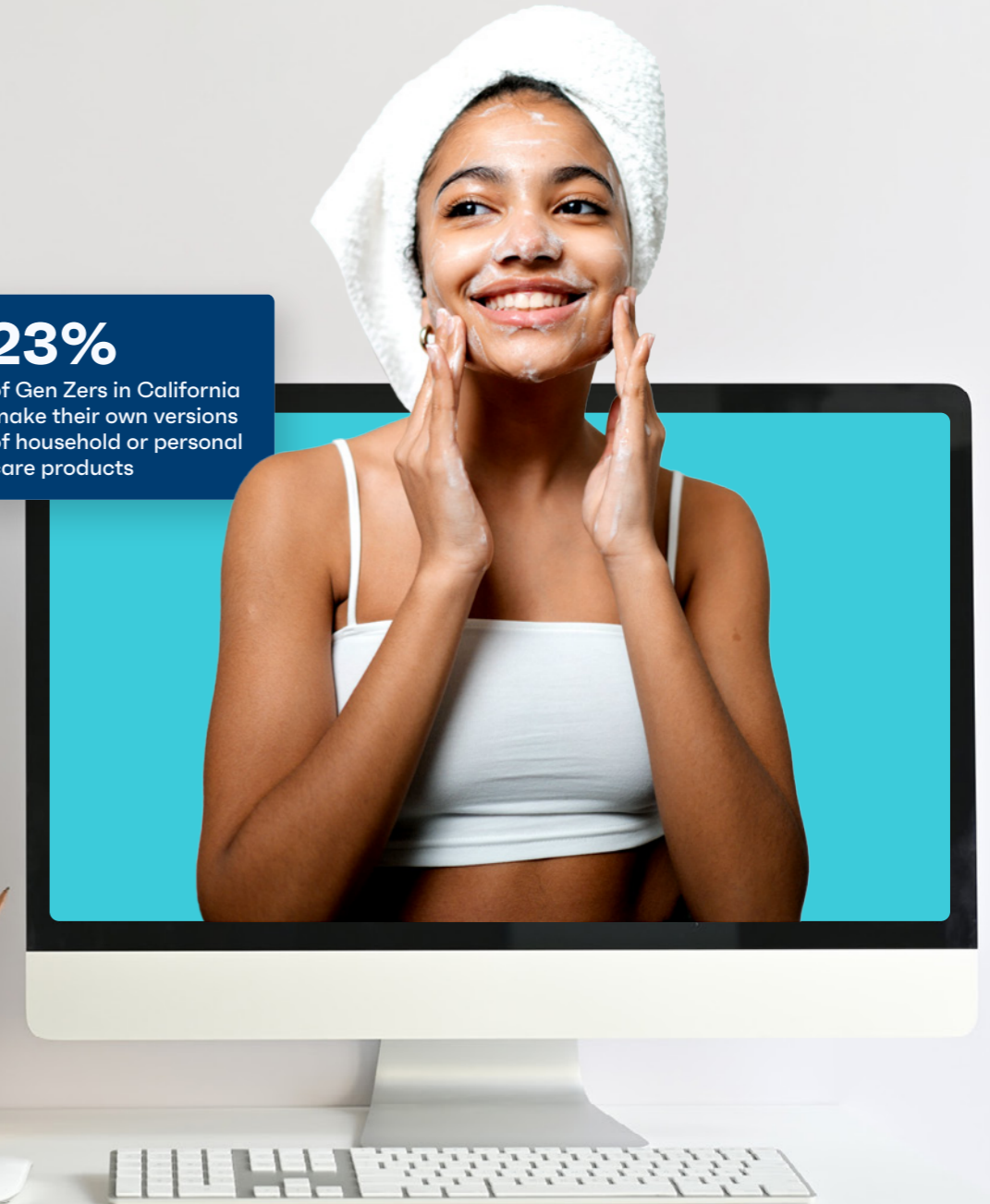
Our GWI USA data set asks the questions others don't to paint a true picture of the modern American consumer. See how over 240 million consumers think across all 50 states.



[Find out more](#)

23%

of Gen Zers in California make their own versions of household or personal care products



Appendix

- 1 Which of these do you use when cooking? • Which of these statements do you agree with?
- 2 Are you dieting or controlling your food intake for any of these reasons?
- 3 How frequently do you do the following? (Go to a gym, Have a workout session at home, Go running/jogging outside) • Which of these do you eat?
- 4 Thinking about the food you buy, how important are these things to you?

- 5 Which of the following would you describe yourself as?
- 6 Which of the following do you most want brands to be? (sustainable) • Which of the following do you most want brands to do? (reduce their environmental impact) (support local suppliers) • When thinking about buying food, how important are these things? (Important) (Very important)

Notes on methodology

All figures in this report are drawn from GWI USA, GWI's online research among internet users aged 16+ in the U.S. Because we conduct our research online, we represent the internet-using part of the U.S. population only. According to our own projections, 90% of the U.S. population aged 16+ are internet users.

Representation and quotas

In the past four waves of research between Q2 2020 - Q2 2021 GWI interviewed 81,092 internet users aged 16+ in the U.S. (approx. 20,000 per quarter) via

an online questionnaire for our GWI USA dataset. This is representative of an estimated 241 million internet users in the U.S. aged 16+. To ensure our sample accurately reflects the make-up of the U.S. internet population aged 16+, we set quotas on age, gender, race/ethnicity, income, and regional location. These quotas are calculated using a number of demographic research sources, including the U.S. Census Bureau and Pew Research Centre. During each wave of research, responses are weighted based on the age, gender, race/ethnicity and income of the respondent.

Language and cultural indicators

Separate from asking about racial identity, we also ask about Hispanic identity. Any respondent is able to identify as Hispanic, regardless of their answer to the racial identity question. Within the Hispanic group, we monitor language preferences to ensure we achieve a good balance of those identifying as Spanish-dominant vs. English-dominant. We interview a minimum of 2,500 Hispanic respondents each quarter.

Multicultural questions are shown only to Hispanic,

Black/African American and Asian American respondents. All respondents choose whether they want to complete the survey in Spanish or English.

Mobile

GWI USA has been designed so that all questions are mobile-friendly. Respondents are therefore able to complete the survey via mobile, tablet, PC/desktop or laptop/notebook. This means respondents take the same version of GWI USA regardless of the device they are using.

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