2026 EDITION

DATASSENTIAL

Plant-Forward Opportunity

NEW CONSUMER PERSPECTIVES ON Value +

IN COLLABORATION WITH
The Culinary Institute of America,
BITE: Building Impact Through Eaters, and the
Menus of Change University Research Collaborative

About This Report

In partnership with **The Culinary Institute of America**, **BITE: Building Impact Through Eaters**, and the **Menus of Change University Research Collaborative**, this **2026 Datassential Plant-Forward Opportunity Report** is a follow-up to similar reports in 2020-2025. This year, we're dedicating the report to a question that has become impossible for restaurants to ignore: What does "good value" actually mean to consumers when they consider a plant-forward dish? As elevated costs and economic uncertainty continue to shape consumer behavior, plant-forward menu items face a value test that affects every operator, from independent chefs to major chains.

Across the survey, we explored how consumers weigh plant-forward dishes (those that emphasize plants without necessarily excluding meat) against meat-based equivalents, how their definition of value shifts by income and generation, and which messaging levers actually move purchase intent. What emerged is a finding more layered than the simple assumption that consumers want plant-forward to be cheaper. While many consumers do believe plant-forward dishes should cost less than meat-based dishes, **they also rank high-quality ingredients, hearty portions, and indulgent flavors above price as drivers of perceived value.** The combo meal slot stands out as a particularly powerful lever, with half of consumers saying they would be more likely to order plant-forward dishes when offered as part of a value meal. For operators, the path forward is positioning plant-forward as worth ordering through quality, satiety, and craveability, supported by smart combo and meal-deal placement.

The framing of “plant-forward” is an outgrowth of Menus of Change, an initiative of the CIA and Harvard T.H. Chan School of Public Health Department of Nutrition. 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 **April 2026 through Datassential’s Omnibus platform**, with **1,500 American consumers** representative of the general population, ages 18 and above. When statistically appropriate, figures from this report are compared with corresponding data from previous editions.

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Respondent Breakdown

Gender

Male	41%
Female	51%

Generation

Gen Z	17%
Millennial	33%
Gen X	26%
Boomer	24%

Region

Northeast	18%
Midwest	22%
West	22%
South	38%

Income

Low Income	33%
Medium Income	34%
High Income	33%

Race & Ethnicity

White	70%
Black	13%
Asian	5%
Mixed / Other	12%
Hispanic (any race)	16%

Diet

Foodies	42%
Meat Eater	75%
Meat Limiter	25%

Definitions

Plant-Forward

A style of cooking and eating that makes plant foods – like fruits and vegetables (produce), whole grains, beans, nuts, seeds, or other legumes (pulses) – the main parts of meals. Animal foods such as meat, eggs, and dairy may still be included, but usually in smaller amounts and used to complement the dish rather than define it.

Plant-Based

Used to describe foods and ingredients that come from plants, including fruits, vegetables, grains, beans and other legumes, nuts, seeds, and oils. The term can also describe a way of eating that includes only plant-based foods, such as a vegan diet. This is different from “plant-forward,” which means eating mostly plants but still including some meat, dairy or eggs.

Plant-Based Meat Alternatives

Foods made from plant ingredients that are meant to look, taste, and feel like meat (such as burgers or sausages). These are usually made with ingredients like soy or pea protein. Examples include products from brands like Beyond Meat or Impossible.

Meat

Unless a specific type is mentioned, please assume the word “meat” includes all poultry (e.g., chicken, turkey, duck, etc.) and red meat (e.g., beef, pork, lamb, etc.), but not fish or seafood.

Plant Protein

Protein that comes from plant foods rather than animals. Common sources include beans, lentils, chickpeas, tofu, tempeh, nuts, seeds, and whole grains.

Animal Protein

Unless a specific type is mentioned, please assume the word “animal protein” includes all protein that comes from animal foods, such as poultry, red meat, fish, seafood, dairy, eggs, etc.

Foodie

Consumers who describe themselves as passionate, engaged food enthusiasts: they actively seek out new foods and are eager to try unfamiliar dishes when dining out, and they stay plugged into food culture by reading food media and watching food-related TV/content.

Key Takeaways

01

Openness to plant-forward eating is at its highest level in tracked years. After declining in 2024, the share of U.S. consumers open to a plant-forward eating pattern climbed to 54% in 2026, slightly above the 53% reading in 2023 (this openness statement was not asked in 2025). Millennials and Gen Z lead as the most receptive cohorts.

02

Consumer comfort with plant-forward dining continues to rise year over year. Most barriers softened between 2025 and 2026, including taste dissatisfaction, texture concerns, and worries about processed plant foods. The exceptions are perceptions that meat-based dishes offer better value and that plant-forward dishes are too carb-heavy, both of which have increased in 2026.

03

Familiar flavors and recognizable formats remain the strongest motivators for plant-forward trial. Sampling opportunities and simple, familiar ingredients also rank in the top tier of motivators in 2026, and the overall ranking of the factors that most effectively encourage plant-forward trial has stayed largely unchanged year over year.

Key Takeaways

04

Mixed-protein dishes, which combine animal and plant proteins in one meal, continue to draw strong interest among diners. Nearly two-thirds of consumers are open to trying more mixed-protein dishes, and more than a third say they are likely to order these dishes in the year ahead, offering operators a clear and approachable entry point for plant-forward menu development.

05

Gen Z and Millennials are the "both/and" generations. Both cohorts are significantly more likely than older generations to plan to increase their consumption of animal protein (in general) and red meat (specifically) in the year ahead, alongside expressing more interest in plant-forward dishes. For these younger consumers, plant-forward functions as additive to a protein-rich diet.

06

Plant-forward options at foodservice face a value perception conundrum. Nearly two-thirds of consumers agree that plant-forward dishes seem overpriced for what they offer, and a majority believe they should usually cost less than meat-based dishes. Resistance to paying a premium has also grown since 2024. **Read on for the strategies that can help operators close this gap.**

Key Takeaways

07

"Good value" in plant-forward dining is multi-dimensional. Quality, satiety, and indulgence each help shore up value perception alongside pricing. Consumers are most likely to view a plant-forward dish as good value if it uses high-quality ingredients or feels hearty and filling, both of which outrank lower-than-meat pricing.

08

There are two plant-forward markets, defined by how consumers weigh value. The Premium market is quality-oriented and willing to pay more, populated by Millennials and higher-income diners who respond to indulgent, ingredient-driven messaging. The Price-Conscious segment is affordability-oriented and less willing to pay a premium, populated mostly by Boomers and lower-income diners. Gen Z and Gen X sit between the two and oscillate depending on the occasion.

09

Combo meals are the most actionable but under-leveraged value lever for plant-forward menus. Half of consumers say they would be more likely to order plant-forward dishes if offered in value meals or combos, with Millennials and Foodies expressing even higher receptivity. Combos can also satisfy adjacent needs like variety, customizability, and portion control.

PART A:

Perspectives on Plant-Forward Dining

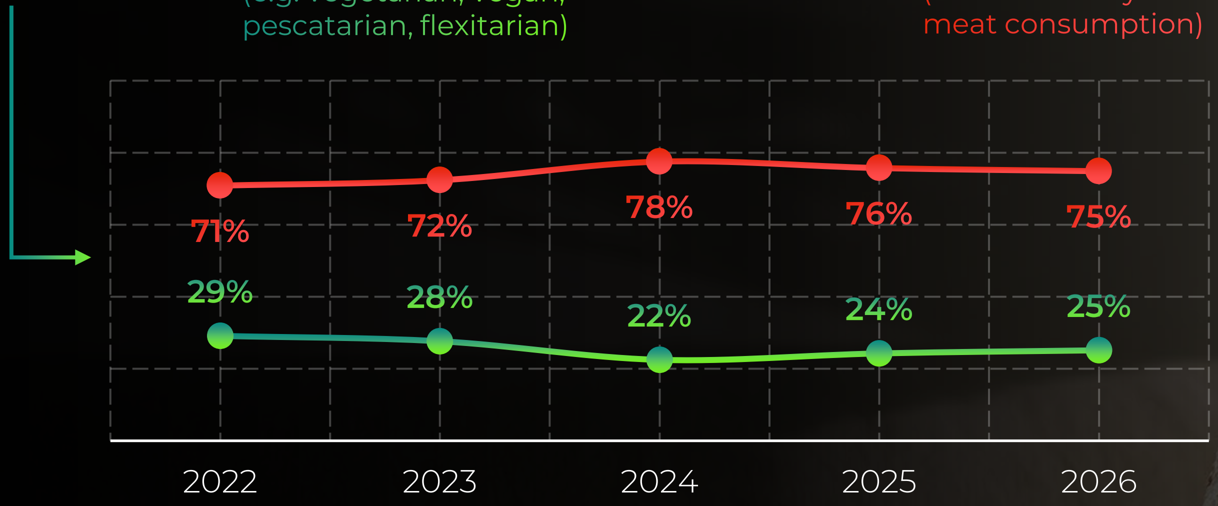
A look at who limits meat in 2026, how consumers feel about plant-forward eating, and where behavioral intent is heading.

In 2026, a quarter of consumers limit meat consumption in some capacity, a pattern that's held steady since the prior year.

Over the past five years, the share of consumers who actively limit meat in some capacity dipped briefly in 2024 before increasing again to current levels.

25% of consumers are **Meat Limiters** (e.g. vegetarian, vegan, pescatarian, flexitarian)

75% of consumers are **Meat Eaters** (do not actively limit meat consumption)



Q: Which best describes the way you eat today?

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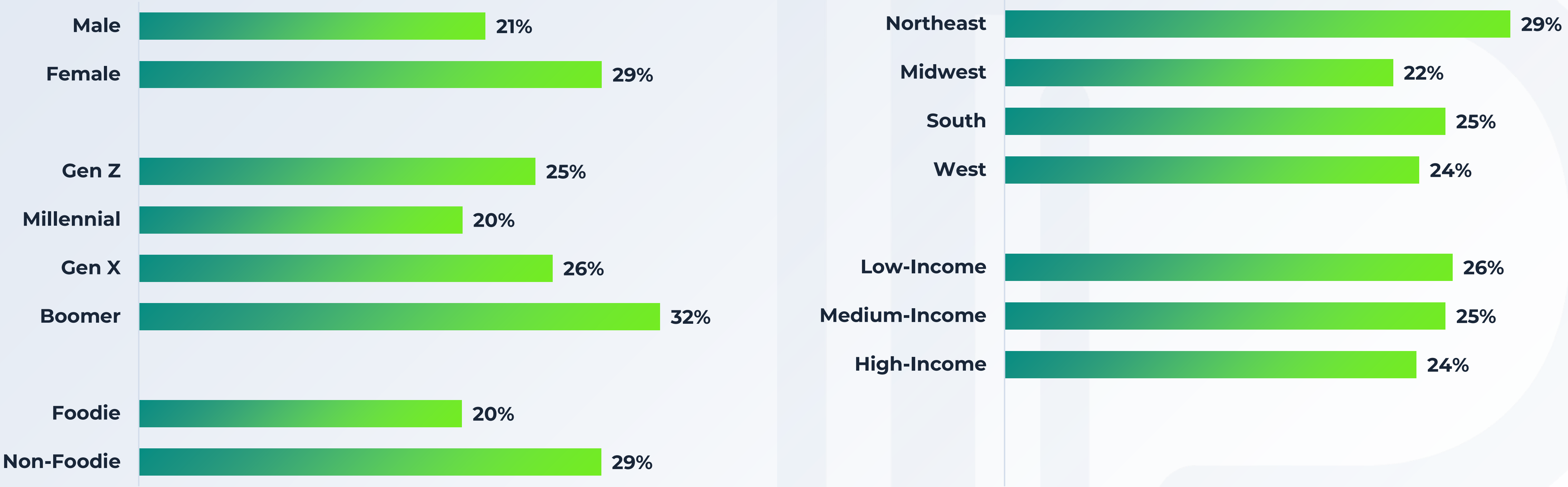
DEMOGRAPHIC DETAIL

Which Demographic Groups Are More Likely to Limit Meat Consumption?

- **In 2026, women (29%) and Boomers (32%) continue to over-index on meat limiting compared to their demographic counterparts.** Foodies and Millennials, in contrast, are the groups least likely to limit meat consumption (both at 20%). These findings likely reinforce one another, since Millennials are also the most likely generation to identify as Foodies. For both groups, the low meat-limiting rate likely reflects a broader openness to all foods, including meat, rather than a rejection of plant-forward dining specifically.
- **Regionally, the Northeast (29%) leads clearly ahead of the Midwest (22%) and West (24%)**, a pattern consistent with greater access to fresh produce and a higher concentration of health- and environmentally-conscious diners. Income differences are relatively flat, with low-income consumers (26%) only marginally more likely to limit meat than high-income consumers (24%).

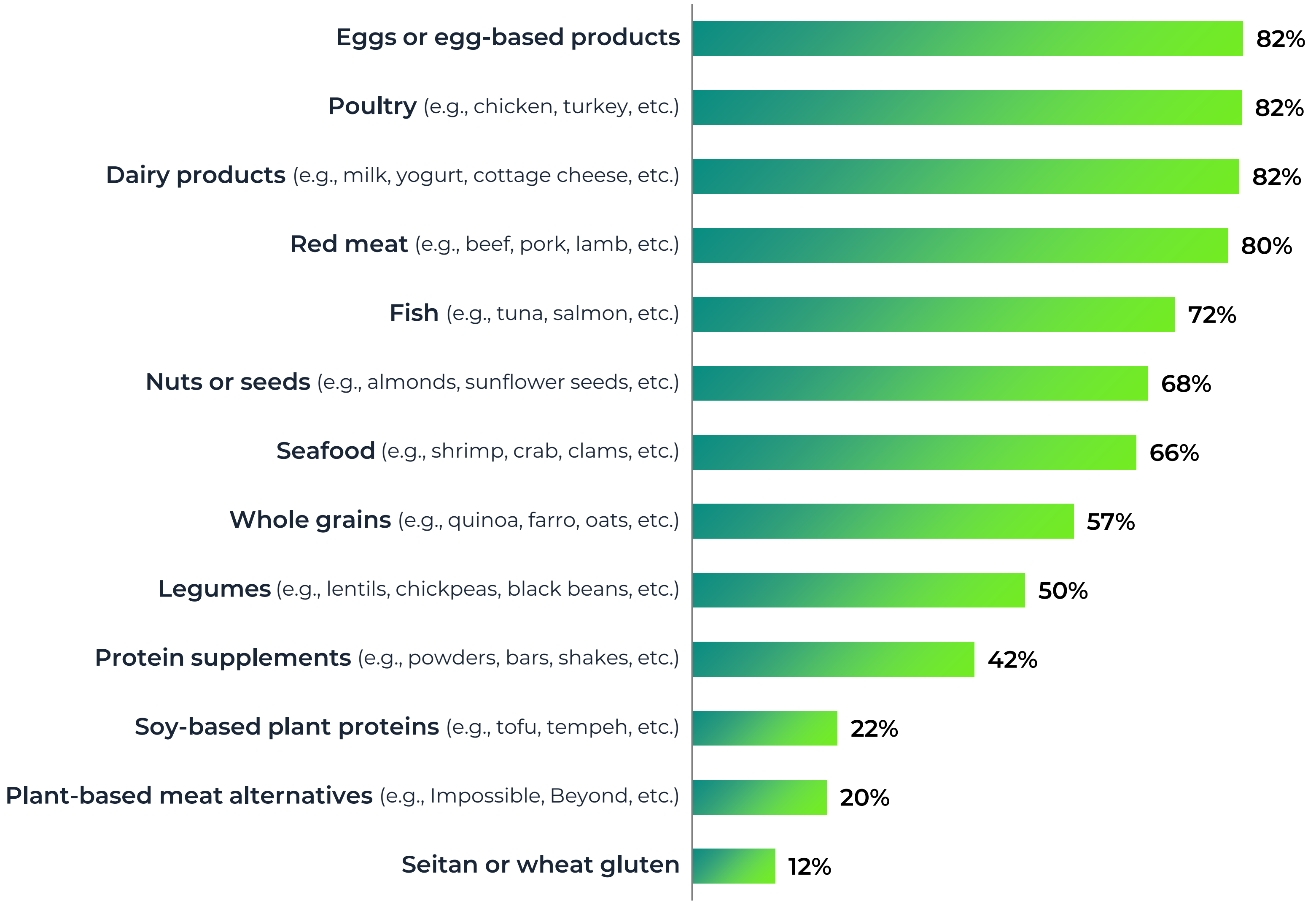
% IDENTIFYING AS "MEAT LIMITERS"



Animal proteins still dominate the plate in 2026, though whole plant proteins continue to hold their own.

Poultry, eggs, and dairy remain the most commonly consumed animal proteins in 2026, each appearing in roughly four out of five consumers' regular diets. Red meat is similarly widespread, while fish (72%) and seafood (66%) also play meaningful roles in the protein landscape.

Plant protein consumption follows a clearer pattern of preference for whole sources over processed ones. Nuts and seeds (68%), whole grains (57%), and legumes (50%) reach significantly more consumers than soy-based proteins like tofu and tempeh (22%) or plant-based meat alternatives (20%). Protein supplements, meanwhile, remain notable at 42%, supported by higher consumption rates among Gen Z and Millennials.



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

DEMOGRAPHIC DIFFERENCES

Consumed Protein Sources

Gen Z

Gen Z reports the **lowest consumption of nearly every traditional animal protein**, paired with very high consumption of **protein supplements** (50%) and notable over-indexing on **processed plant proteins** like tofu and tempeh (24%) and plant-based meat alternatives (20%).

Millennial

Millennials display the **broadest protein variety of any generation**, eating across animal and plant sources in roughly equal measure. They also lead the sample in **plant-based meat alternatives** (24%) and **protein supplements** (51%).

Gen X

Gen X **leans toward traditional animal proteins**, with consumption rates for poultry, red meat, fish, and dairy that fall between Millennials below and Boomers above.

Boomer

Boomers **consume animal proteins at the highest rates**, along with the **most whole-plant proteins** like nuts/seeds (79%) and legumes (61%) but use processed plant proteins and supplements the least.

In 2026, Meat Limiters cut red meat most sharply of all animal proteins, though a majority still consume dairy, eggs, poultry, and fish.

Among self-identified Meat Limiters, the defining behavioral difference shows up most sharply in red meat consumption: 57% eat red meat regularly, compared to 88% of Meat Eaters. That 30-point gap stands as the largest single-category difference between the two audiences. **Meat Limiters also reduce other animal proteins**, with **poultry** (68% vs 87%), **fish** (64% vs 75%), **seafood** (55% vs 70%), **eggs** (74% vs 85%), and **dairy** (75% vs 84%) all showing meaningful but smaller gaps.

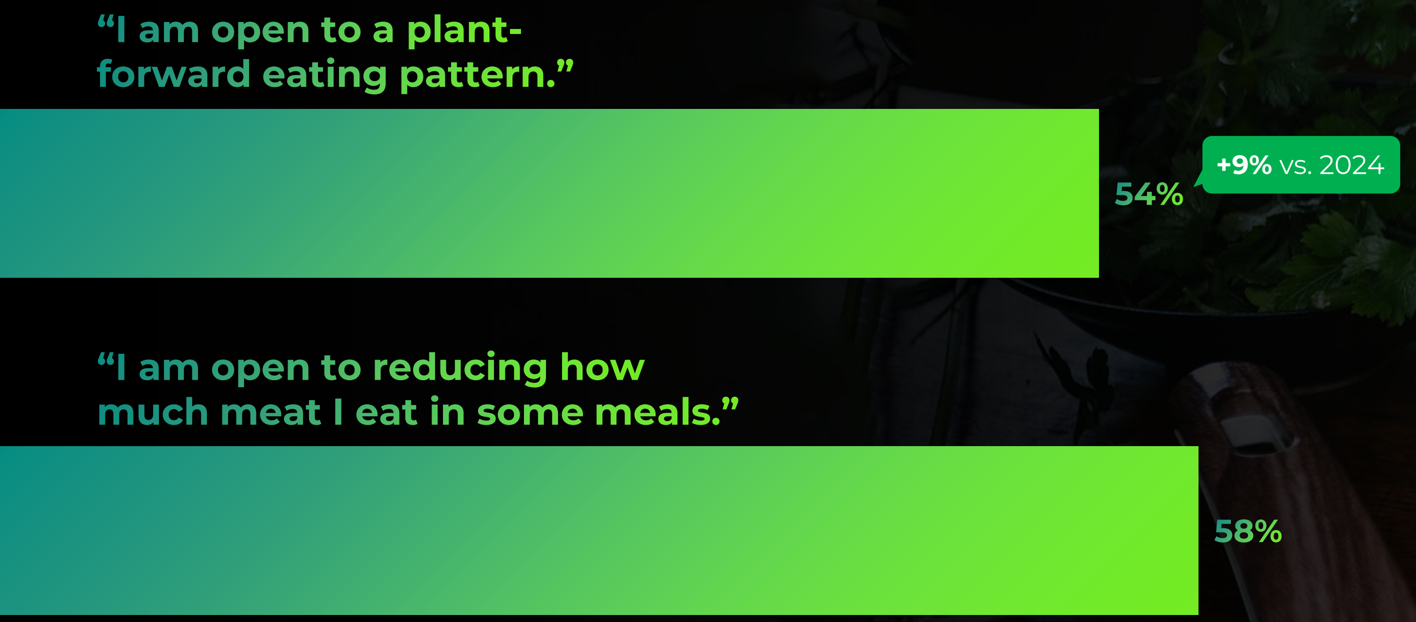
Where Meat Limiters diverge most from Meat Eaters is in their plant-protein consumption: they over-index roughly two to one on **plant-based meat alternatives** (33% vs 16%) and soy-based proteins like **tofu** and **tempeh** (32% vs 18%), and seven points higher on **legumes** (55% vs 48%). Engineered plant proteins and legumes emerge as the primary substitutes for red meat in the Meat Limiter diet, positioning this flexitarian middle as the natural audience for plant-forward menu programs that complement rather than replace animal proteins.

PROTEIN SOURCE	MEAT LIMITERS	MEAT EATERS	Δ
Dairy products (e.g., milk, yogurt, cottage cheese, etc.)	75%	84%	-8%
Eggs or egg-based products	74%	85%	-11%
Nuts or seeds (e.g., almonds, sunflower seeds, etc.)	69%	68%	+2%
Poultry (e.g., chicken, turkey, etc.)	68%	87%	-18%
Fish (e.g., tuna, salmon, etc.)	64%	75%	-11%
Whole grains (e.g., quinoa, farro, oats, etc.)	60%	56%	+4%
Red meat (e.g., beef, pork, lamb, etc.)	57%	88%	-30%
Seafood (e.g., shrimp, crab, clams, etc.)	55%	70%	-15%
Legumes (e.g., lentils, chickpeas, black beans, etc.)	55%	48%	+7%
Protein supplements (e.g., powders, bars, shakes, etc.)	40%	43%	-3%
Plant-based meat alternatives	33%	16%	+17%
Soy-based plant proteins (e.g., tofu, tempeh, etc.)	32%	18%	+13%
Seitan or wheat gluten	12%	12%	+0%

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

Consumer openness to plant-forward eating has rebounded after dipping in 2024, with the strongest interest centered on reducing meat in select meals.

More than half of consumers (54%) in 2026 say they are open to a plant-forward eating pattern, a figure that recovers above 2023 levels after dipping to 44% in 2024. Openness to reducing meat in some meals sits even higher at 58%, signaling that consumers find meat reduction particularly approachable when framed in selective rather than wholesale terms. Millennials lead both measures (63% on each), while Boomers represent the most cautious cohort at 41% and 55% respectively.



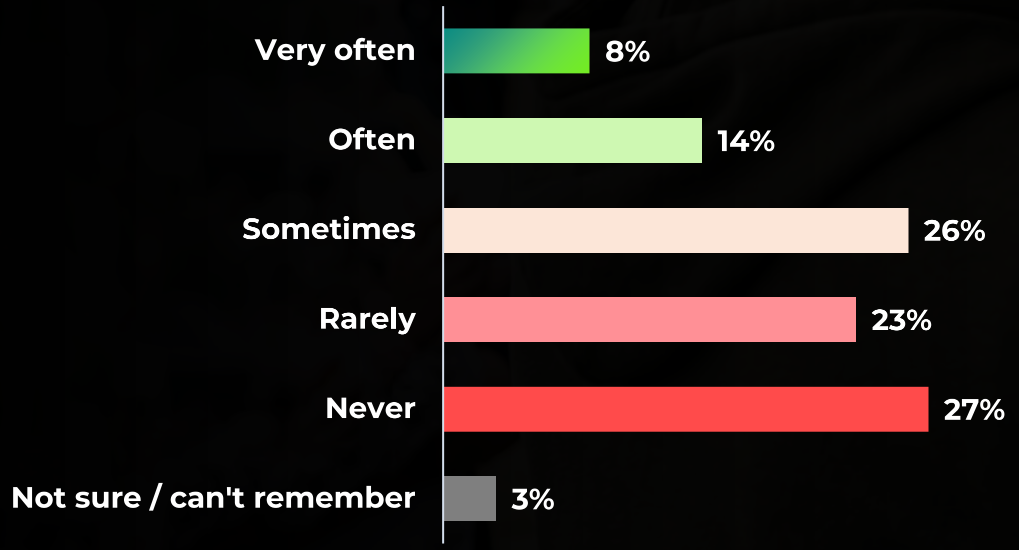
Q: How much do you agree with the following statements? (top 2, 5 pt. scale; "Agree completely" + "Agree somewhat")

Just under half of consumers (48%) order plant-forward dishes at least occasionally when dining out, while a similar share (49%) do so rarely or never.

Engagement varies significantly by demographic, with Foodies (35%) and Millennials (32%) over-indexing on frequent ordering and Boomers trailing at just 8%. High-income consumers (32%) order plant-forward dishes nearly twice as often as low-income consumers (16%). Because lower-income consumers dine out significantly less often than higher earners, restaurant meals may function more as indulgence occasions where meat-forward orders can feel like a better fit or stronger perceived value, outweighing the meat-limiting habits they practice at home.

HOW OFTEN DO CONSUMERS...

Order Plant-Forward Dishes Away From Home?



48%

order plant-forward dishes when dining away from home at least "sometimes"

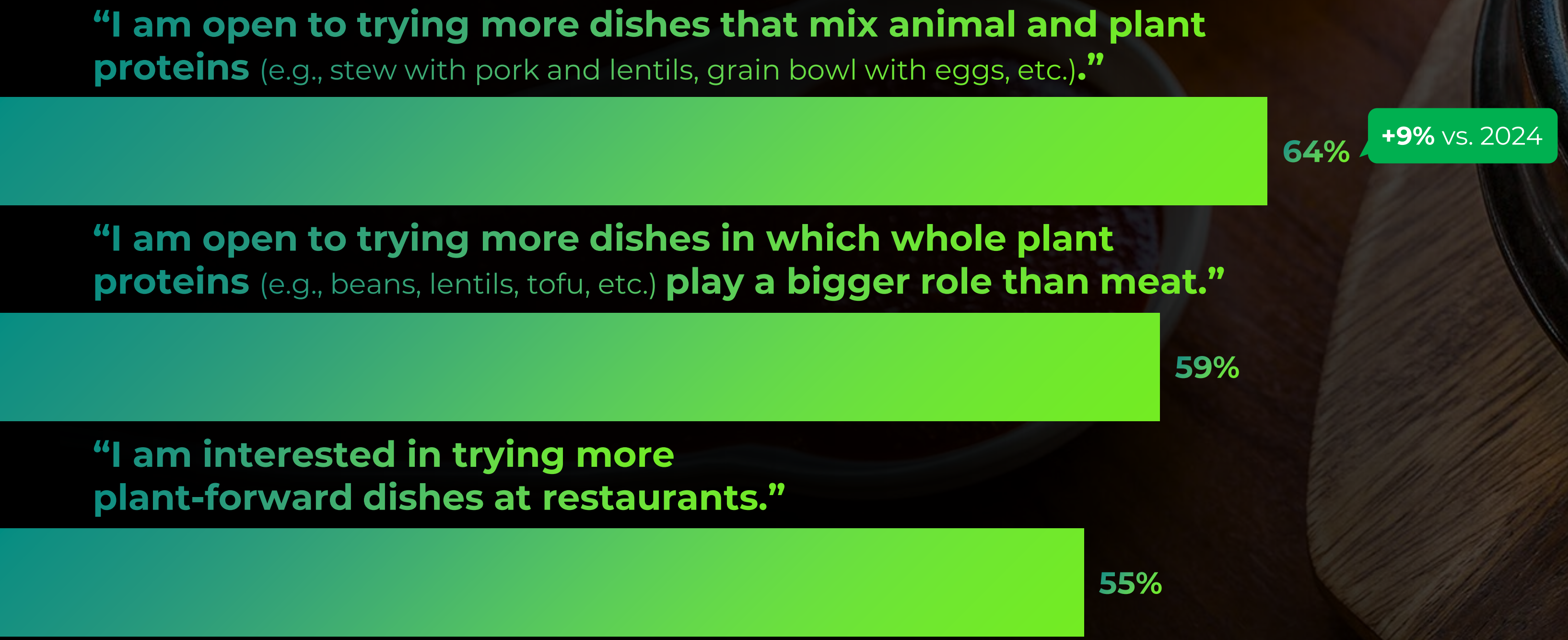
49%

"rarely" or "never" order plant-forward dishes when dining away from home

Q: When dining away from home, how often do you order plant-forward dishes?

Beyond broad openness, consumer interest in specific plant-forward formats sits highest for mixed-protein dishes.

Mixed-protein dishes that blend animal and plant proteins (such as a stew with pork and lentils or a grain bowl with eggs) attract the highest level of interest among general eaters, with 64% open to trying more of them. Openness to dishes where whole plant proteins like beans, lentils, and tofu take center stage sits close behind at 59%, while broader interest in trying more plant-forward dishes at restaurants reaches 55%. Millennials anchor the upper end across all three measures (73%, 68%, and 63%), while Boomers express the most reserved interest (54%, 49%, and 41%).



Q: How much do you agree with the following statements? (top 2, 5 pt. scale; "Agree completely" + "Agree somewhat")

Wellness-related behavioral changes are on consumers' minds in 2026, with nearly half planning to cut back on processed foods alongside similar shares planning to add more fiber, protein, and whole foods to their diets.

Millennials over-index on every wellness behavior, with intent levels above 50% on multiple measures. The collective pattern suggests that consumers in 2026 are pursuing health through dietary composition (more whole, more protein, more fiber, less processed), creating a natural opening for plant-forward menu items that meet several of these wellness goals at once.

IN THE NEXT YEAR

Consumers Are Likely To...

Q: How likely are you to do the following in the next year? (top 2, 5 pt. scale; "Extremely" + "Very Likely")

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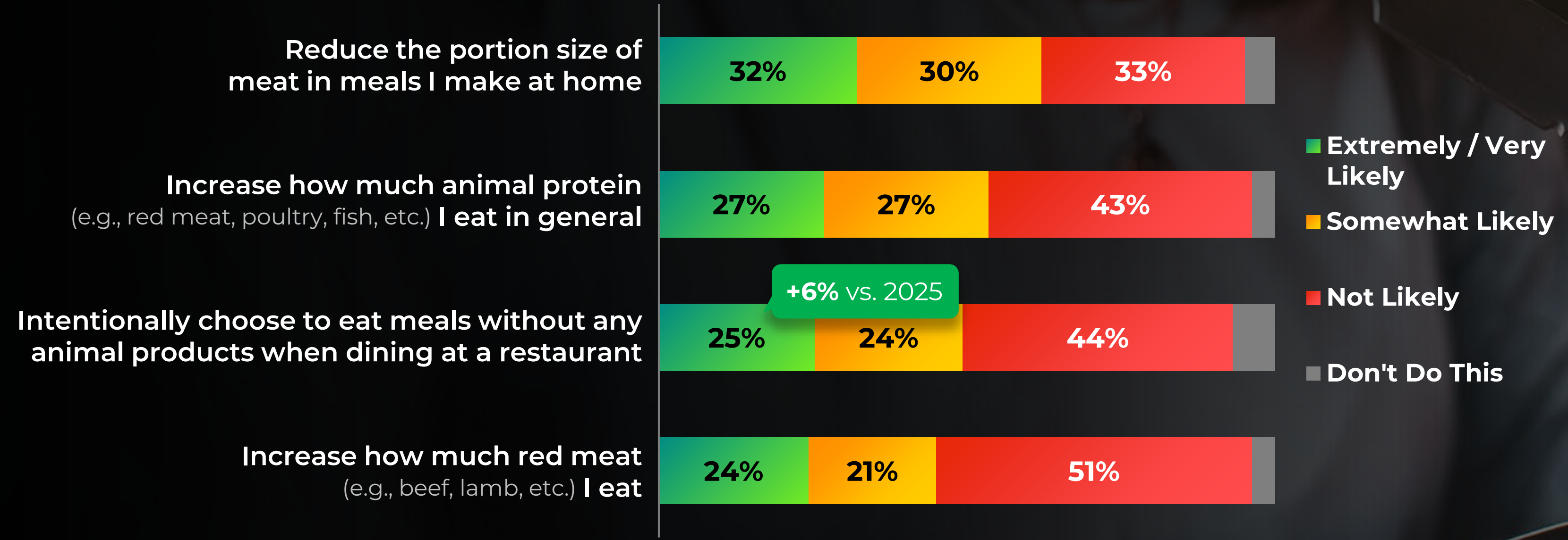
How consumers plan to eat meat in 2026 reveals a "both/and" pattern, especially among younger diners.

Roughly one in four consumers (27%) plan to increase their overall animal protein intake in the next year, and 24% plan to increase red meat specifically, with Millennials and Gen Z driving both. That said, Millennials also lead in plans to reduce meat portions at home, while both younger generations over-index on choosing meals without animal proteins when dining out compared to older eaters. For operators, the pattern points to a more intentional approach to dietary choices especially among younger eaters in today's health-conscious landscape. Even as meat-forward eating gains prominence in the wider cultural conversation, Gen Z and Millennials are layering plant-forward dishes into a broader, protein-rich diet.

IN THE NEXT YEAR

Consumers Are Likely To...



Q: How likely are you to do the following in the next year? (top 2, 5 pt. scale; "Extremely" + "Very Likely")

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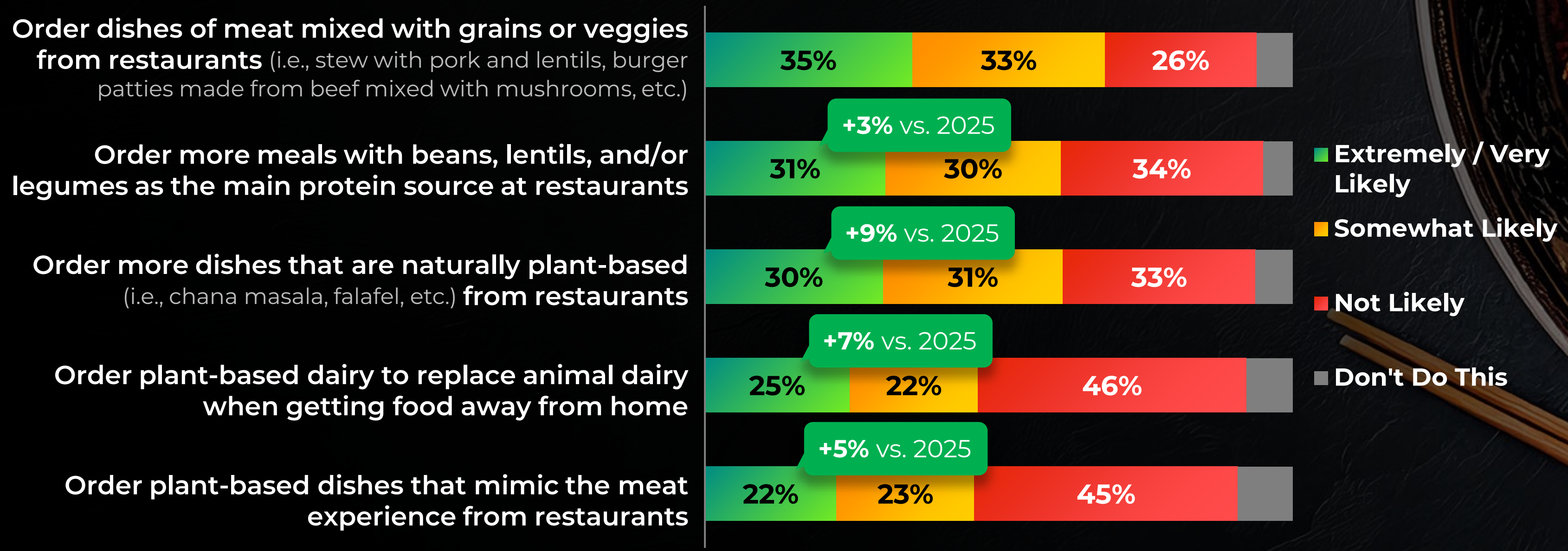
Mixed-protein dishes lead plant-forward intent in 2026, followed closely by whole-plant options.

More than one in three consumers (35%) say they're likely to order dishes that mix animal and plant proteins in the next year, making mixed-protein dishes the single highest-intent plant-forward behavior in the survey. Legume-based mains (31%) and naturally plant-based dishes like chana masala or falafel (30%) follow close behind. Meanwhile, consumers' likelihood of ordering plant-based dairy and meat alternatives in the next year trails behind whole-plant options. Millennials lead other generations across every plant-forward behavior, with intent levels reaching 46% on mixed-protein dishes, 40% on legume-based mains, and 40% on naturally plant-based dishes.

IN THE NEXT YEAR
Consumers Are Likely To...



Q: How likely are you to do the following in the next year? (top 2, 5 pt. scale; "Extremely" + "Very Likely")

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PART B:

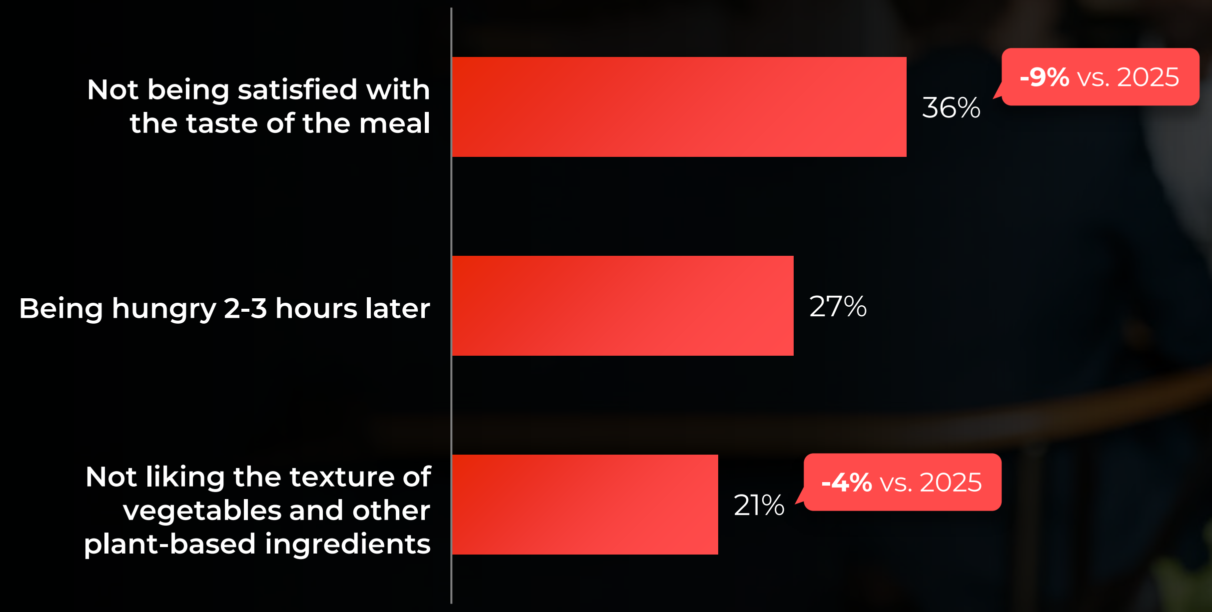
Plant-Forward Barriers & Motivators

The barriers that keep plant-forward dishes off consumers' plates when dining out, and the motivators that bring those dishes back into consideration.

Taste skepticism remains the most salient barrier to ordering plant-forward at restaurants.

Just over a third of consumers worry that plant-based dishes won't deliver on flavor, a notable decline from 45% in 2025. Boomers remain the most taste-skeptical generation at 45%, while Gen Z is the least at 32%, reflecting younger consumers' broader comfort with plant-forward dining. Satiety is also a meaningful concern: nearly a third of Gen Z and more than a quarter of consumers overall worry about being hungry shortly after a plant-based meal, while 21% hesitate around 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 choosing plant-based dishes instead of dishes that largely focus on meat?

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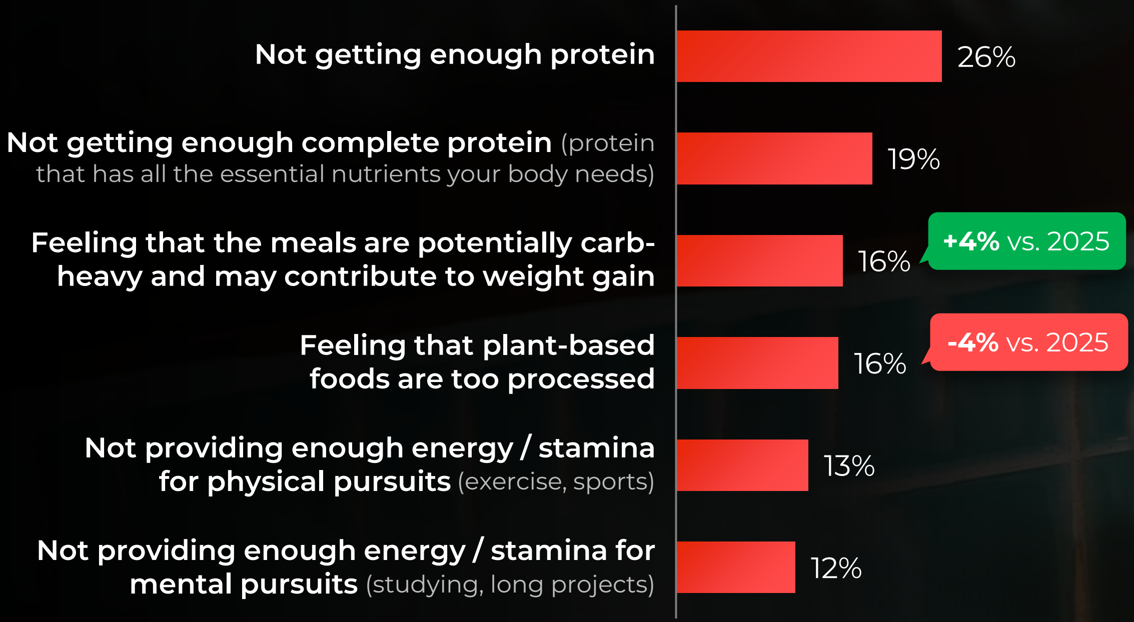
Protein credibility remains the biggest nutrition barrier for plant-forward dishes, with over a quarter of consumers doubting they'll deliver enough protein for daily demands.

This concern rises to 30% among Gen Z. Younger consumers are also significantly more likely to worry that plant-based meals won't sustain enough energy for physical or mental pursuits. On the flip side, Boomers express the strongest skepticism about processed plant-based foods (18%), while Gen Z is comparably more comfortable with engineered plant proteins (just 9% express processing concerns).

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES

Health and Nutrition

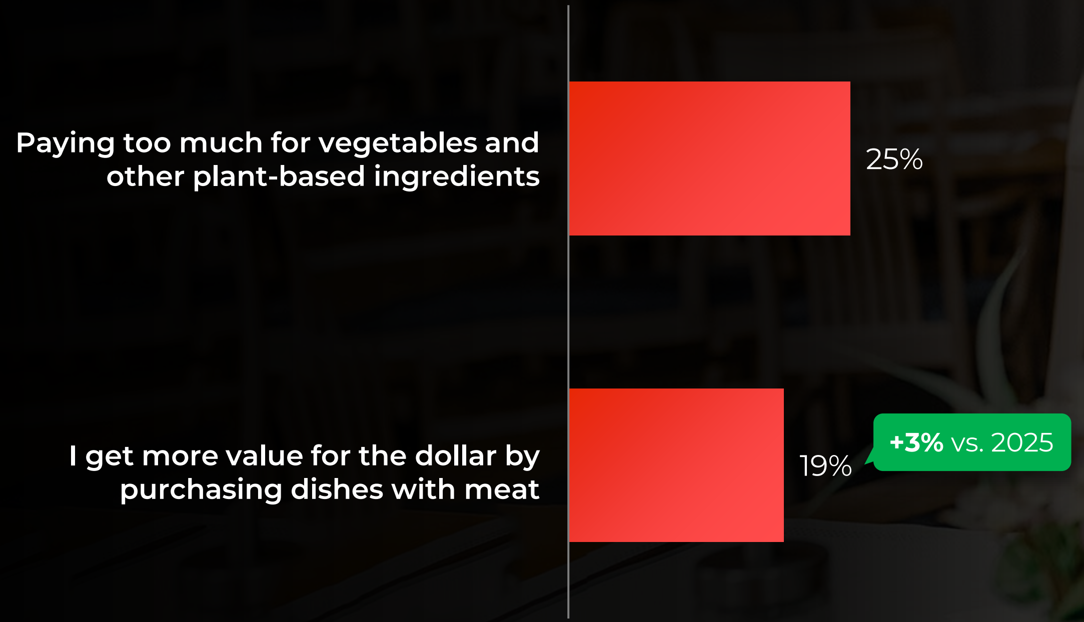


Q: What concerns do you have with choosing plant-based dishes instead of dishes that largely focus on meat?

Financial concerns persist for consumers ordering plant-forward at restaurants, with the perception that meat delivers more value for the dollar rising year over year.

Around a quarter of consumers (25%) worry about paying too much for vegetables and other plant-based ingredients, a figure that has held relatively steady over time. The more notable shift sits in value perception: just under one in five consumers (19%) now say they get more value for their dollar by purchasing dishes with meat, up from 17% in 2025 and rising fastest among Gen Z (26%) and Millennials (22%).

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES
Cost and Value



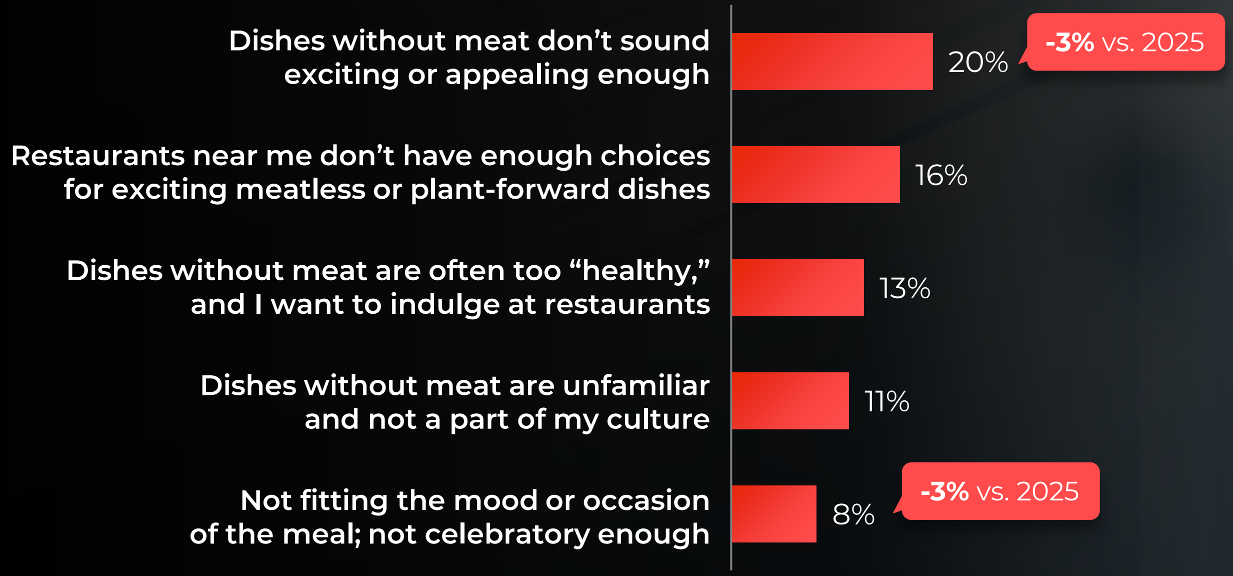
Q: What concerns do you have with choosing plant-based dishes instead of dishes that largely focus on meat?

Roughly one in five consumers find plant-based dishes unexciting or unappealing, with limited local availability and indulgence gaps reinforcing the barrier.

20% of consumers say plant-based dishes don't sound exciting or appealing enough to order, while a smaller share (16%) say their local restaurants don't offer enough enticing plant-forward choices. Generational patterns also matter: 18% of Gen Z say plant-based dishes feel too healthy for the indulgent restaurant occasions they're seeking, a meaningful signal that younger consumers want craveable, rewarding plant-rich dishes when dining out.

CONCERNS ABOUT ORDERING PLANT-BASED RESTAURANT DISHES

Appeal and Vibe



Q: What concerns do you have with choosing plant-based dishes instead of dishes that largely focus on meat?

1-YEAR DATA CHANGES

Barriers to Ordering Dishes with Plant-based Ingredients

Most barriers to ordering plant-forward dishes softened in 2026, though value and carb-related concerns resonated with slightly higher shares of eaters.

Taste skepticism saw the largest year-over-year decline, falling nearly 9 points from 45% in 2025 to 36% in 2026, suggesting consumers are becoming more confident in what plant-forward dishes can deliver. Texture concerns (-4 points), processing concerns (-4 points), and perceptions that plant-forward dishes don't sound exciting (-3 points) also eased.

Meanwhile, value perception stood out as a key countertrend: 19% of consumers now say meat dishes offer more value for the money, up 3 points from 2025. Concerns that plant-forward dishes are too carb-heavy also rose 4 points, likely reflecting heightened consumer focus on healthful eating and protein-forward diets.

	2026	2025	'1YΔ
Not being satisfied with the taste of the meal	36%	45%	-9%
Being hungry 2-3 hours later	27%	28%	-1%
Not getting enough protein	26%	25%	+1%
Paying too much for vegetables and other plant-based ingredients	25%	27%	-2%
Not liking the texture of vegetables and other plant-based ingredients	21%	25%	-4%
Dishes without a lot of meat don't sound exciting or appealing enough	20%	23%	-3%
I get more value for my dollar by purchasing dishes with meat	19%	17%	+3%
Not getting enough complete protein (protein that has all the essential nutrients your body needs)	19%	21%	-2%
Restaurants near me don't have enough choices for exciting plant-based or plant-forward dishes	16%	18%	-1%
Feeling that the meals are potentially carb-heavy and may contribute to weight gain	16%	12%	+4%
Feeling that plant-based foods are too processed	16%	19%	-4%
Dishes without a lot of meat are often too "healthy," and I want to indulge at restaurants	13%	12%	+0%
Not providing enough energy / stamina for physical pursuits (exercise, sports)	13%	12%	+1%
Not providing enough energy / stamina for mental pursuits (studying, long projects)	12%	11%	+0%
Dishes without a lot of meat are unfamiliar and not a part of my culture	11%	12%	-1%
Not fitting the mood or occasion of the meal; not celebratory enough	8%	11%	-3%
Other	1%	3%	-1%
None of the above	16%	13%	+3%

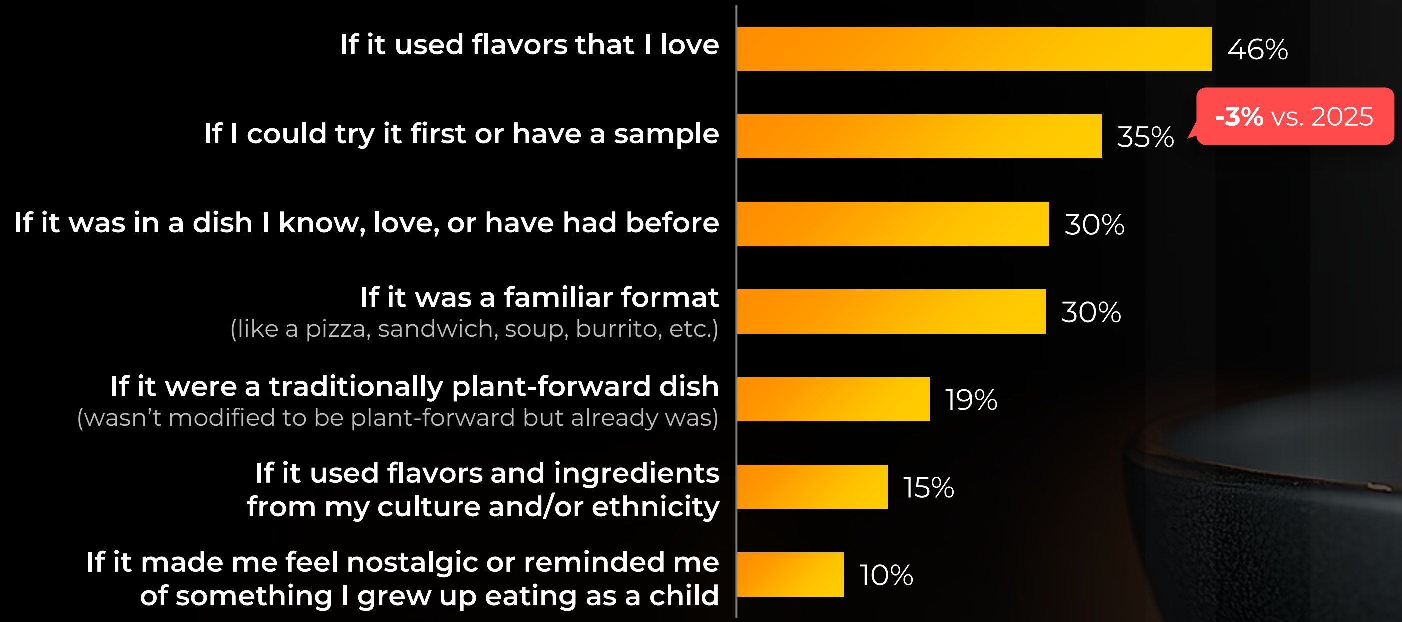
Q: What concerns do you have with choosing plant-based dishes instead of dishes that largely focus on meat?

Familiar flavors remain the most effective motivator for ordering plant-forward dishes at restaurants.

Nearly half of consumers (46%) say plant-forward dishes featuring familiar flavor profiles would encourage them to order. A third would be drawn in by the chance to sample first, and 30% would consider plant-forward when the dish is one they already know and love. These latter two motivators resonate especially strongly with Boomers compared to younger eaters: 41% say sampling opportunities would encourage trial, while 38% would be motivated by plant-forward versions of dishes they already know and love.

MOTIVATORS FOR CHOOSING PLANT-FORWARD RESTAURANT DISHES

Flavors and Familiarity



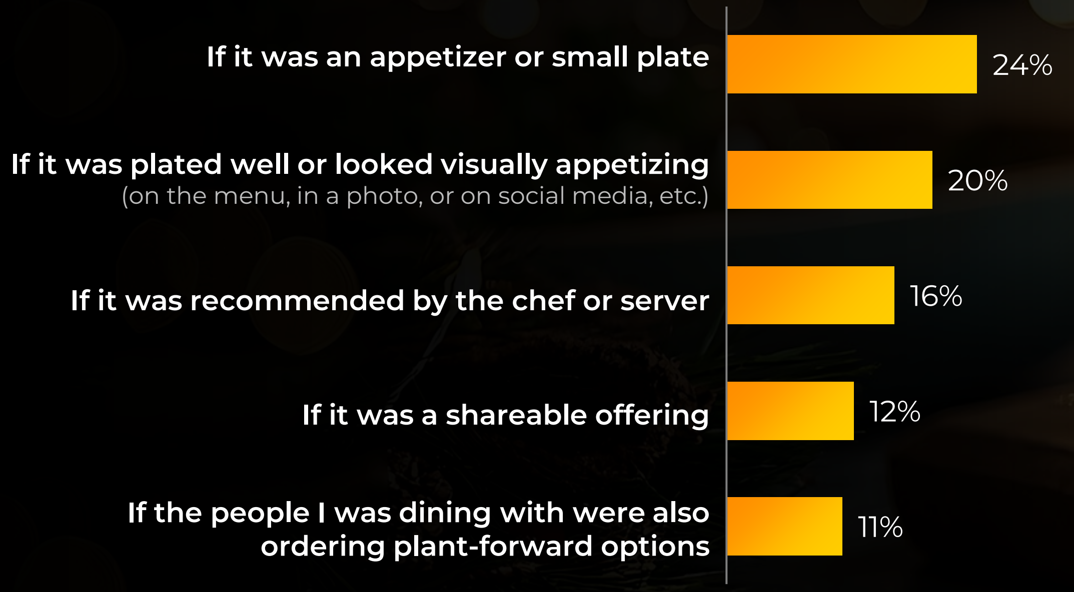
Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?

Smaller portions and enticing presentation can also play meaningful roles in driving plant-forward trial, especially among younger diners.

Roughly one in four consumers (24%) would be more inclined to try plant-forward menu items as appetizers or small plates, allowing them to pair the dish with other foods they're planning to order. Plating also matters: Millennials and Gen Z (both 23%) are notably more likely than older consumers to be drawn to photogenic dishes that translate well to social media. Millennials are also more swayed than other generations by their dining companions, with 14% saying they're more open to plant-forward dishes when others at the table are ordering them.

MOTIVATORS FOR CHOOSING PLANT-FORWARD RESTAURANT DISHES

Dish Design and Service Format

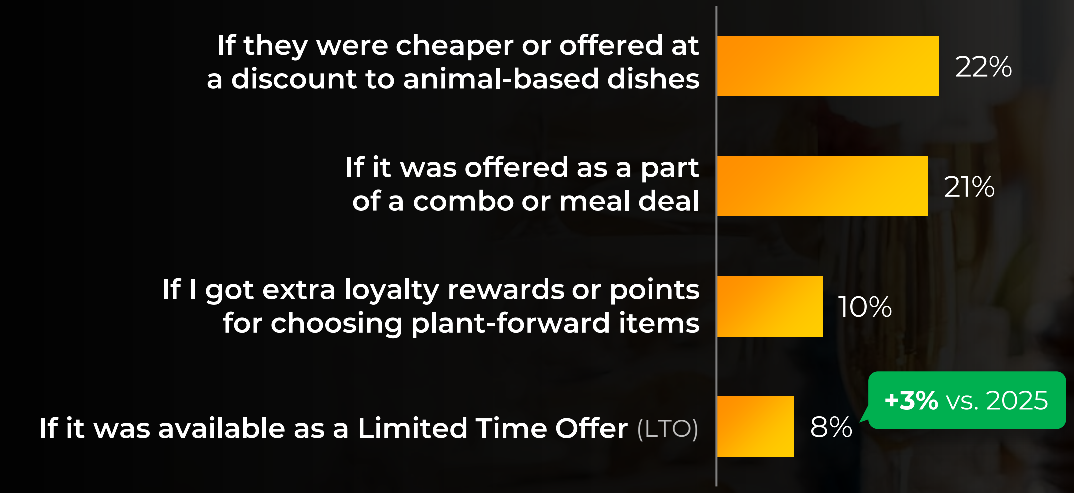


Affordability and combo meal placement are the strongest value-driven motivators for trying plant-forward foods away from home.

Roughly one in five consumers (22%) say a cheaper or discounted price would encourage them to try a plant-forward dish, while combo and meal-deal positioning has held steady at around 21% and resonates broadly across generations. That said, these figures reflect what consumers pick as their strongest motivators when asked openly. When the question is posed more directly, asking whether they would be more likely to choose a plant-forward dish if offered as part of a combo, half of consumers say yes (see slide 39). Combo positioning may not be the first thing consumers select when asked what motivates them, but a majority still respond to it when the offer is actively presented.

MOTIVATORS FOR CHOOSING PLANT-FORWARD RESTAURANT DISHES

Value and Promotions



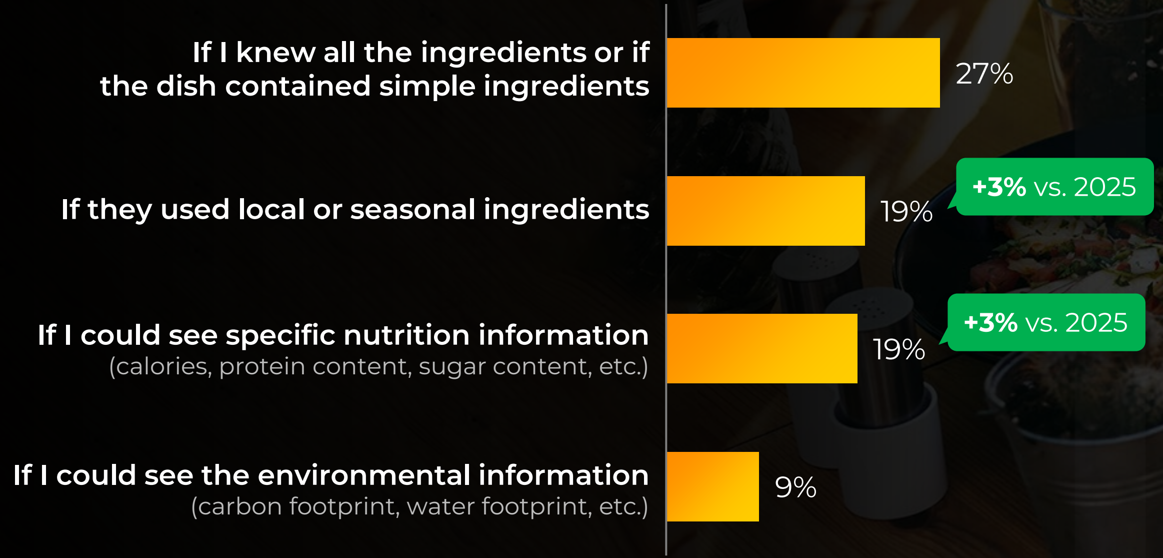
Q: What would encourage you to choose a plant-forward option from the menu at a restaurant?

Ingredient transparency and visible nutrition information motivate roughly a quarter of consumers to consider plant-forward dishes.

Just over a quarter of consumers (27%) say they'd feel more confident ordering plant-forward dishes that contain simple, familiar ingredients, a motivator that resonates especially with Boomers (32%) and Gen X (29%). Nearly one in five (19%) would be encouraged by visible nutrition information on the menu, from calorie counts to protein and sugar content, with Millennials and Gen Z (both 20%) particularly receptive. Environmental messaging remains a comparatively niche signal at 9% among all consumers.

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?

1-YEAR DATA CHANGES

What Can Motivate Consumers To Choose Plant-Forward Dishes?

Most plant-forward motivators held statistically steady in 2026, but the addressable audience grew as the "nothing motivates me" cohort shrank.

Most plant-forward motivators held statistically steady in 2026, and taste and familiarity remain the strongest motivators overall. That said, four motivators showed slight year-over-year gains: local and seasonal ingredients (+3 pts to 19%), visible nutrition information (+3 pts to 19%), limited-time offerings (+3 pts to 8%), and visible environmental information (+2 pts to 9%).

Meanwhile, sampling opportunities (35%) and combo or meal-deal framing (21%) both softened slightly as motivators for plant-forward trial, but neither change reached statistical significance. Combo positioning in particular remains a robust value lever in 2026, consistent with its role elsewhere in this report where half of consumers say a combo offer would make them more likely to choose plant-forward.

	2026	2025	'1YΔ
If it used flavors that I love	**46%**	44%	**+2%**
If I could try it first / have a sample	**35%**	38%	**-3%**
If it was in a dish I have had before and know I love	**30%**	30%	**+0%**
If it was a familiar format (like a pizza, sandwich, soup, burrito, etc.)	**30%**	30%	**+0%**
If I knew all the ingredients / it used simple ingredients	**27%**	25%	**+2%**
If it was an appetizer or small plate	**24%**	25%	**-1%**
If they were cheaper / offered at a discount to animal-based dishes	**22%**	21%	**+1%**
If it was offered as a part of a combo or meal deal	**21%**	23%	**-2%**
If it was plated well or looked visually appetizing (on the menu, in a photo, on social media, etc.)	**20%**	20%	**+0%**
If they used local / seasonal ingredients	**19%**	16%	**+3%**
If it were a traditionally plant-forward dish (wasn't modified to be plant-forward but already was)	**19%**	17%	**+2%**
If I could see specific nutrition information (calories, protein content, sugar content, etc.)	**19%**	15%	**+3%**
If it was recommended by the chef or server	**16%**	17%	**-0%**
If it used flavors and ingredients from my culture / ethnicity	**15%**	13%	**+2%**
If it was a shareable offering	**12%**	11%	**+1%**
If the people I was dining with were also ordering plant-forward options	**11%**	11%	**+0%**
If it made me feel nostalgic or reminded me of something I grew up eating	**10%**	9%	**+1%**
If I got extra loyalty rewards/points for choosing plant-forward items	**10%**	10%	**+0%**
If I could see the environmental information (carbon footprint, water footprint, etc.)	**9%**	7%	**+2%**
If it was available as a Limited Time Offer (LTO)	**8%**	5%	**+3%**
None of the above	**15%**	18%	**-4%**

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

PART C:

The Plant-Forward Value Equation

What consumers mean by "good value" in plant-forward dining, how that definition shifts by income and generation, and which factors matter most.

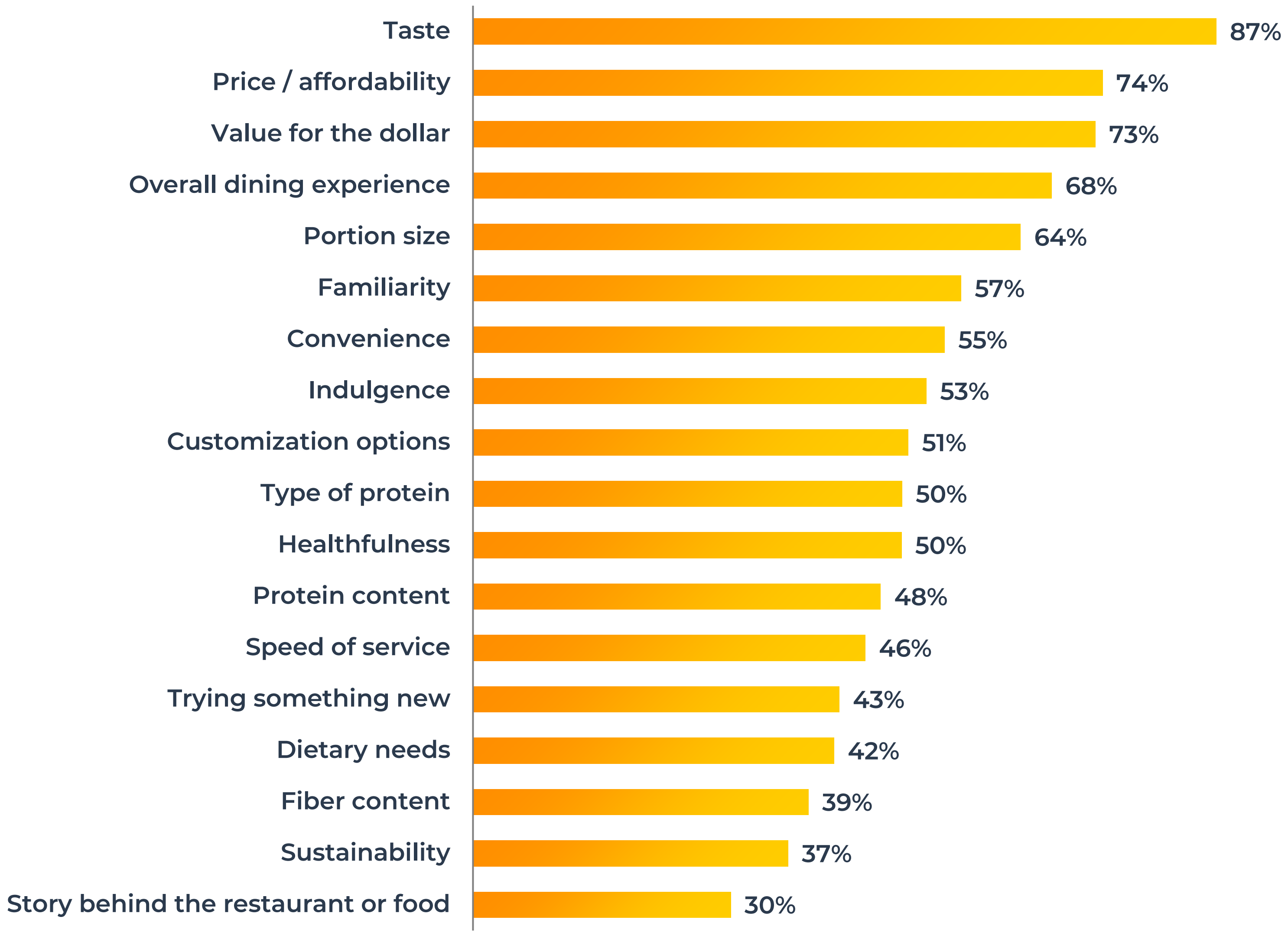
What Are Eaters' Most Important Priorities Away From Home?

When ordering food away from home, taste, price, and value for the dollar form the universal foundation of consumer decision-making.

Taste leads consumer priorities by a wide margin in 2026, with 87% of consumers rating it as important when ordering food away from home. Price (74%) and value for the dollar (73%) round out the top three, anchoring the practical economics of menu choice. The overall dining experience (68%) and portion size (64%) follow close behind. By contrast, attributes that often dominate plant-forward marketing tend to rank lower: healthfulness (50%) and protein content (48%) sit in the middle of the pack, while sustainability (37%) and the story behind the food (30%) are selected by fewer eaters.

Demographically, Millennials over-index on price (77%) and indulgence (60%), while Boomers place the greatest weight on taste (94%) and the lowest weight on sustainability (22%).

Top 2, "Extremely" + "Very Important" (among all consumers)



Q: When deciding what to order when eating food away from home (such as at restaurants, takeout, or delivery), how important are the following?

Which Attributes Are Most Important When Consumers Order Plant-Forward Dishes?

Plant-forward orderers expect these dishes to satisfy core dining needs while also delivering on nutrition, dietary fit, indulgence, and discovery.

Among consumers who order plant-forward foods away from home, the universal "big three" of restaurant decision-making (taste, affordability, and value for the money) remain the most salient priorities, largely consistent with their general dining expectations. Where plant-forward dishes face a higher bar is in the added benefits consumers expect them to deliver.

Compared to general dining priorities, plant-forward orderers place greater importance on healthfulness, protein and fiber content, dietary-needs alignment, and the opportunity to try something new. They are also more likely to prioritize indulgence and craveability, reinforcing that plant-forward is not viewed as purely health-driven; these dishes still need to feel satisfying, flavorful, and worth ordering.

Q: When considering plant-forward dishes at restaurants, how important is it that the dish...?
(among consumers who do order plant-forward dishes away from home; n = 1,026)

What Would Make Non-Orderers Consider Plant-Forward Dishes?

For consumers who don't currently order plant-forward dishes, taste and affordability form the gateway to consideration, with value and familiarity following close behind.

Among consumers who rarely or never order plant-forward dishes, roughly one in three say they would not consider plant-forward dishes at all, regardless of attributes, defining a hardcore refuser segment that operators are unlikely to convert.

But for the remaining persuadable share, the conversion playbook follows a simple sequence: prove the dish tastes good, price it accessibly, and lean on familiar ingredients and satisfying portion sizes to lower the perceived risk of trying something new.

Q: What factors would be important to you if you were considering a plant-forward dish at a restaurant?
(among consumers who don't order plant-forward dishes away from home; n = 474)

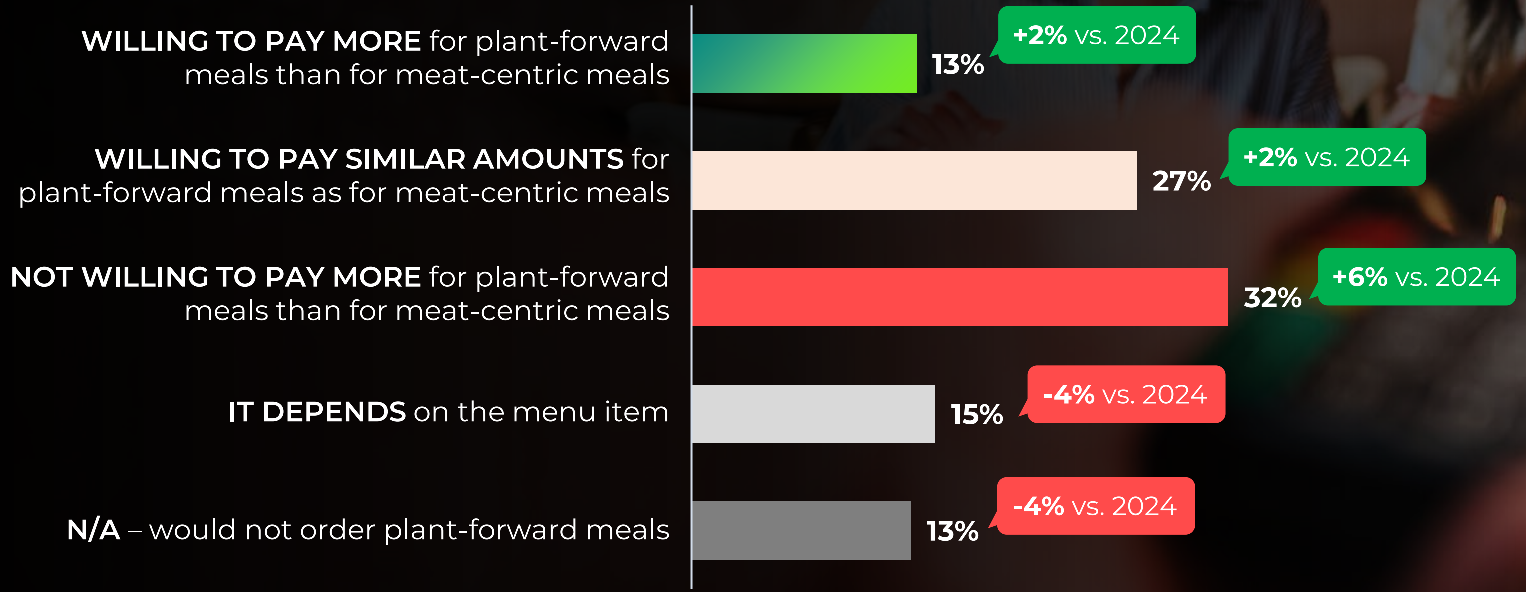
DATASSENTIAL

Just over one in eight consumers are willing to pay more for plant-forward dishes than for meat-based equivalents, while more than half would pay similar amounts, less, or only in certain cases.

Millennials (22%) and high-income consumers (22%) are the likeliest cohorts to express willingness to pay more for plant-forward meals than for meat-centric meals, while Boomers represent the most price-resistant cohort (at just 4% willing to pay more).

ARE CONSUMERS…

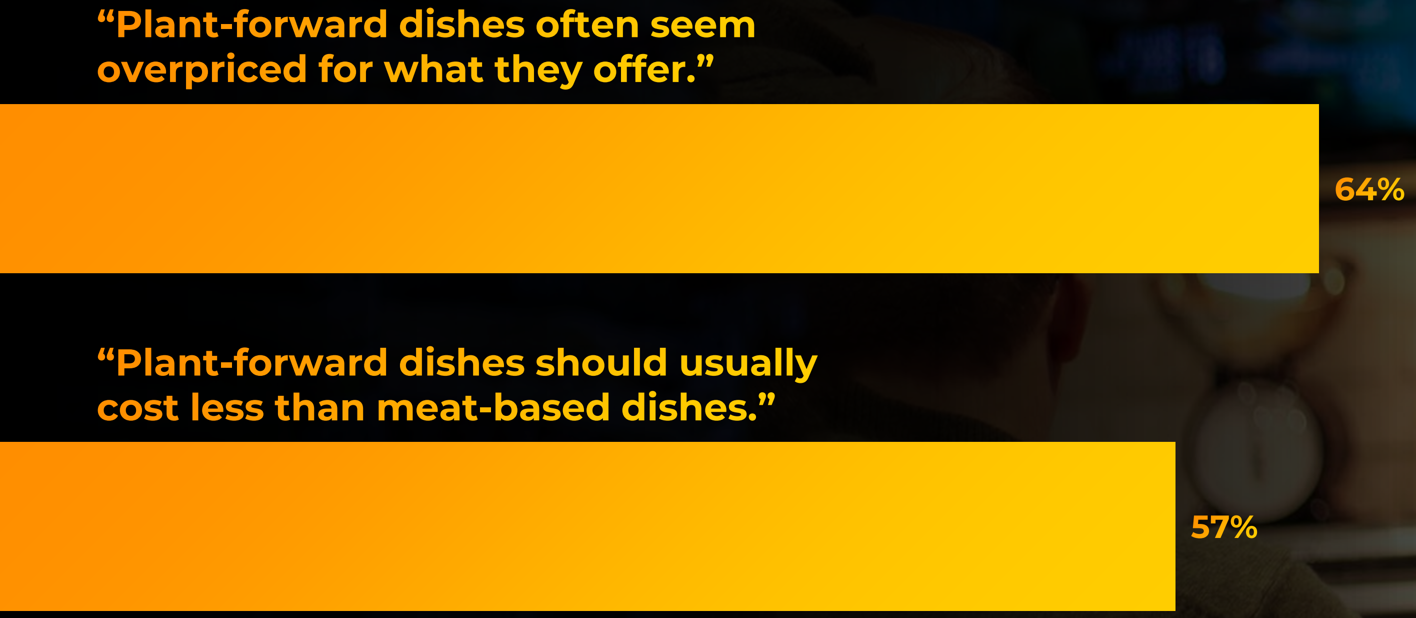
Willing To Pay More For Plant-Forward Meals?



Q: Which best describes your overall willingness to spend on plant-forward menu items at restaurants?

A majority of consumers are skeptical of plant-forward pricing, with 64% calling these dishes overpriced and 57% saying they should cost less than meat-based equivalents.

Nearly two in three consumers (64%) agree that plant-forward dishes "often seem overpriced for what they offer," while 57% say they should usually cost less than meat-based dishes. This skepticism is fairly consistent across income groups and generations. Together, these findings point to a broad expectation that plant-forward dishes should be priced below meat-based options, likely reflecting assumptions about lower ingredient or preparation costs.



Q: How much do you agree with the following statements? (top 2, 5 pt. scale; "Agree completely" + "Agree somewhat")

Despite pricing concerns, two in three consumers say taste matters more than price, and most believe plant-forward dishes can match meat-based value when done well.

Two-thirds of consumers (67%) agree that taste and flavor matter more than price when choosing between plant-forward and meat-based dishes, and over half (58%) also agree that plant-forward dishes can offer just as much value as meat-based dishes if they are flavorful and satisfying. While consumers are certainly price-conscious, great taste clearly has potential to outweigh cost concerns at the point of decision.

“Taste and flavor are more important to me than price when deciding to order between a plant-forward or meat-based dish.”

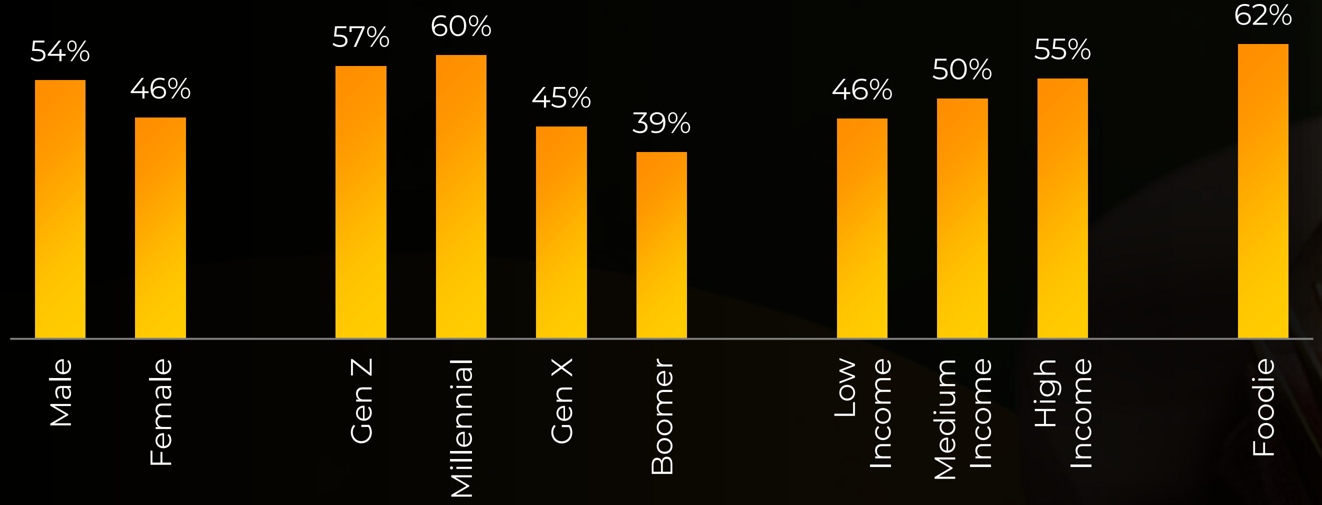
“Plant-forward dishes can offer just as much value as meat-based dishes if they are flavorful and satisfying.”

Q: How much do you agree with the following statements? (top 2, 5 pt. scale; “Agree completely” + “Agree somewhat”)

Combo meals are emerging as an actionable lever in plant-forward's value conversation.

Half of consumers say they would be more likely to choose a plant-forward dish if offered as part of a combo meal. Receptivity is higher among younger consumers and higher-income earners than their demographic counterparts, but Foodies are the most likely to be influenced by plant-forward combos. For operators, this means that combo-related strategies may work hardest with audiences already over-indexing on plant-forward openness and ordering frequency: younger, more affluent, and more food-engaged eaters.

50% **of consumers would be more likely to choose a plant-forward dish if it were offered as an option in a value meal or combo.**



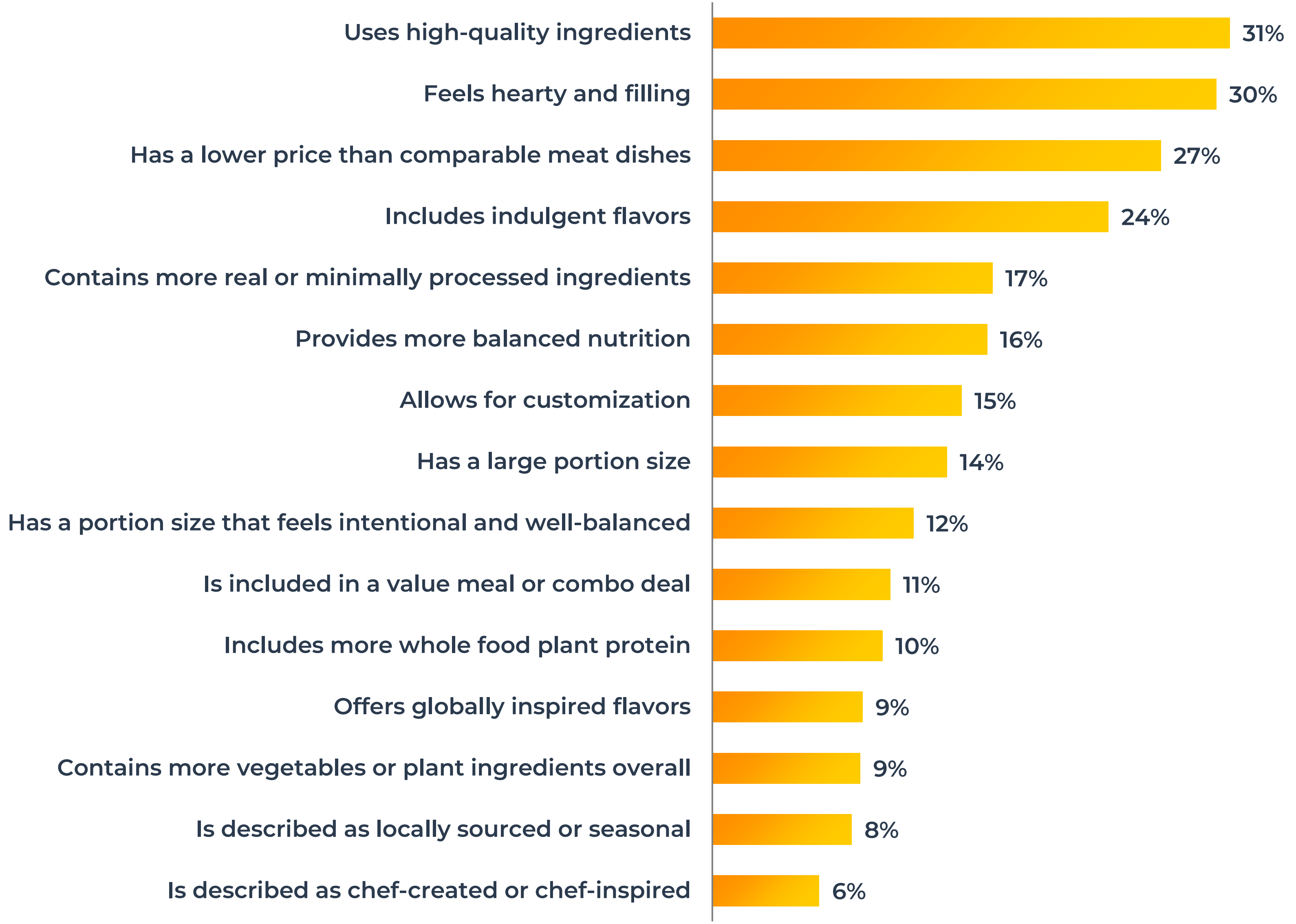
Q: How much do you agree with the following statements? (top 2, 5 pt. scale; “Agree completely” + “Agree somewhat”)

Which Attributes Are Most Effective At Making Plant-Forward Dishes Feel Like Good Value?

Consumer definitions of “good value” for plant-forward dishes extend beyond price, with quality, satiety, and indulgence carrying equal or greater weight.

High-quality ingredients are the top value driver for plant-forward dishes (31%), followed by hearty/filling appeal (30%), lower pricing than meat dishes (27%), and indulgent flavors (24%). Secondary cues include utilizing real or minimally processed ingredients (17%), balanced nutrition (17%), customization (15%), and large portion sizes (14%).

For operators, the broader implication is that pricing plant-forward dishes lower than meat alternatives represents just one lever among several, with quality, satiety, and indulgence each carrying as much (or more) weight in driving the perception that a plant-forward dish is worth ordering.



Q: Which of the following would make a plant-forward dish feel like good value for the money when ordering at a restaurant?

DEMOGRAPHIC DIFFERENCES

What Can Make Plant-Forward Dishes Feel Like "Good Value"

Gen Z

For Gen Z consumers, lower-than-meat pricing is the top value driver at 30%, followed by hearty portions (28%) and indulgent flavors (27%). They lead all generations on their prioritization of price, indulgence, customization (19%), and combo deals (15%), placing less weight on high-quality ingredients (27%) than older cohorts.

Millennial

For Millennials, high-quality ingredients top the value list at 32%, followed by hearty portions (31%) and lower-than-meat pricing (28%). Millennials also lead the sample on balanced nutrition (20%), large portion size (18%), and whole-food plant protein (13%). Just 7% say nothing on the list feels like good value, the lowest across generations.

Gen X

For Gen X, hearty, filling portions lead the value list at 32%, the highest share across generations, followed by high-quality ingredients (29%) and lower-than-meat pricing (26%). Their overall value profile is the flattest of any generation, with no other drivers standing out sharply within the cohort.

Boomer

For Boomers, high-quality ingredients top the value list at 35%, followed by hearty portions (29%) and lower-than-meat pricing (25%). Boomers show much less interest in combo deals (7%), global flavors (5%), and large portions (8%). One in five (20%) say nothing would make plant-forward dishes feel like good value.

Q: Which of the following would make a plant-forward dish feel like good value for the money when ordering at a restaurant?

DEMOGRAPHIC DIFFERENCES

What Can Make Plant-Forward Dishes Feel Like "Good Value"

Low Income (<$50k)

Low-income consumers care most about price when weighing plant-forward value. Nearly one in three (31%) say a plant-forward dish feels worth ordering when it costs less than a meat-based equivalent. Hearty portions (29%) and indulgent flavors (21%) also matter, though high-quality ingredients (23%) rank lower here than any other income tier. One in five (19%) also say nothing on the list feels like good value, the highest across income brackets.

Medium Income ($50k-$99k)

Medium-income consumers weigh indulgence and quality in roughly equal measure when judging plant-forward value. Just over one in four (27%) say indulgent flavors make a plant-forward dish feel worth ordering, the highest share across income tiers, and 35% cite high-quality ingredients. Their overall value picture is the most balanced of any income tier, with quality, hearty portions (31%), and lower-than-meat pricing (27%) all landing close together.

High Income ($100k+)

High-income consumers see value primarily through the lens of quality. Over one in three (36%) cite high-quality ingredients as a value driver, and 21% also point to real or minimally processed ingredients. Lower-than-meat pricing ranks fourth among this group at 22%, whereas it was the most-selected factor among lower-income diners. High-income diners are also more likely to judge value based on balanced nutrition (18%) and global flavors (13%).

Q: Which of the following would make a plant-forward dish feel like good value for the money when ordering at a restaurant?

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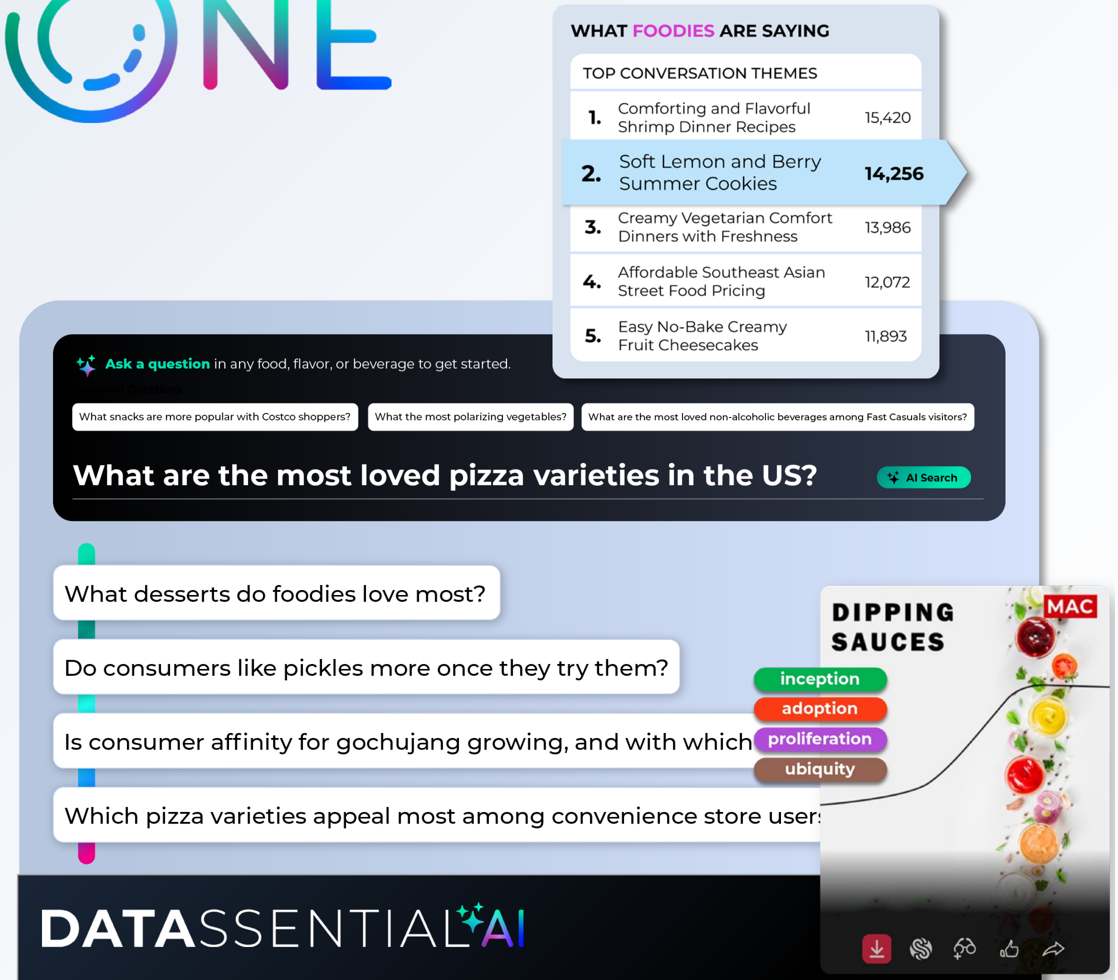

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