



# Plant-based meat foodservice consumer insights & menu strategies

2026



# Contents

- 1 Key findings
- 2 Plant-based meat opportunity in foodservice
- 3 Plant-based meat foodservice consumer journey
- 4 Plant-based meat menu strategies

## Key findings

### The plant-based meat foodservice opportunity



### There is a big reachable market for plant-based meat

A majority (71%) of U.S. consumers from Gen X to Gen Z are open to plant-based meat and/or dairy. This is not a niche market—most interested consumers are omnivores motivated to add plant-based meat to their diets for various reasons.

### Plant-based diners are valuable

Foodservice plays a critical role in the category, starting with serving as a key channel for discovery. And plant-based meat diners are important to foodservice, spending more than the average diner. Offering plant-based options can also enhance restaurant perceptions, even among those not eating plant-based dishes regularly.

### Enhanced menu strategies can help reach diners open to plant-based options

Despite underlying consumer interest, plant-based meat adoption has faced headwinds in recent years as offerings have not aligned with demand. Consumers see plant-based options as too expensive (typically priced above conventional equivalents), are uncertain about taste, or do not clearly understand the value proposition.

In a foodservice context—where expectations for taste and indulgence are often higher—these gaps can be more pronounced. However, better menu design, pricing, and other nudges can help overcome concerns and reach interested consumers.

# Key findings

## The plant-based meat menu playbook

### Price

- Match or beat prices of comparable meat dishes to increase demand

### Taste

- Ensure dishes taste great—source delicious products, test final dishes
- Make flavor the primary message—sensory language like “delicious,” “rich & savory,” “tender and juicy” can help overcome *perceived* taste gaps

Affordability and strong taste cues are particularly important to drive adoption among new consumers.

### Naming

- Leverage plant identity—“plant-based,” “100% plant,” “plant-protein”—and avoid terms like “vegan” and “soy-based”
- Known brands can be somewhat effective as an additional identifier, but mostly with regular plant-based meat consumers

### Messaging

- Best: protein content
- Also effective: positive health claims like “high protein,” “heart healthy”
- Less effective: sustainability claims

### Social nudges

- Consider cues like “chef’s choice” or “customer favorite” to help normalize

### Menu design + structure

- Integrate plant-based into the main menu (vs. separate section)
- Increase the number of plant-based options
- Place plant-based items prominently or first
- Consider plant-based defaults or easy swaps

# **Plant-based meat opportunity in foodservice**



## Many consumers are open to plant-based meat, if products and dishes deliver a compelling value proposition

71% of U.S. consumers<sup>1</sup> say they are at least somewhat likely to eat plant-based meat and/or plant-based dairy in the future.

### Addressable consumers:

- Younger and higher household income—represent the **next generation of core consumers**.
- Largely **omnivores** motivated to add plant-based options to their diets for various reasons, often centered around health. But taste and price are key barriers today.

About half have tried plant-based meat, but current consumers only buy about once a month on average,<sup>2</sup> leaving significant room to grow by both **increasing frequency** and **growing adoption** with new consumers.

Check out GFI's [consumer segmentation](#) to learn more about the addressable market for plant-based meat and how to leverage segment-based insights to drive consumer adoption.

<sup>1</sup> Aged 18-59 who have purchased or eaten conventional or plant-based meat or dairy in past month

<sup>2</sup> GFI, [Analyzing plant-based meat and seafood sales](#)

Source: [GFI Plant-based meat consumer segmentation](#), Survey of n=3000 U.S. consumers aged 18-59, May 2024

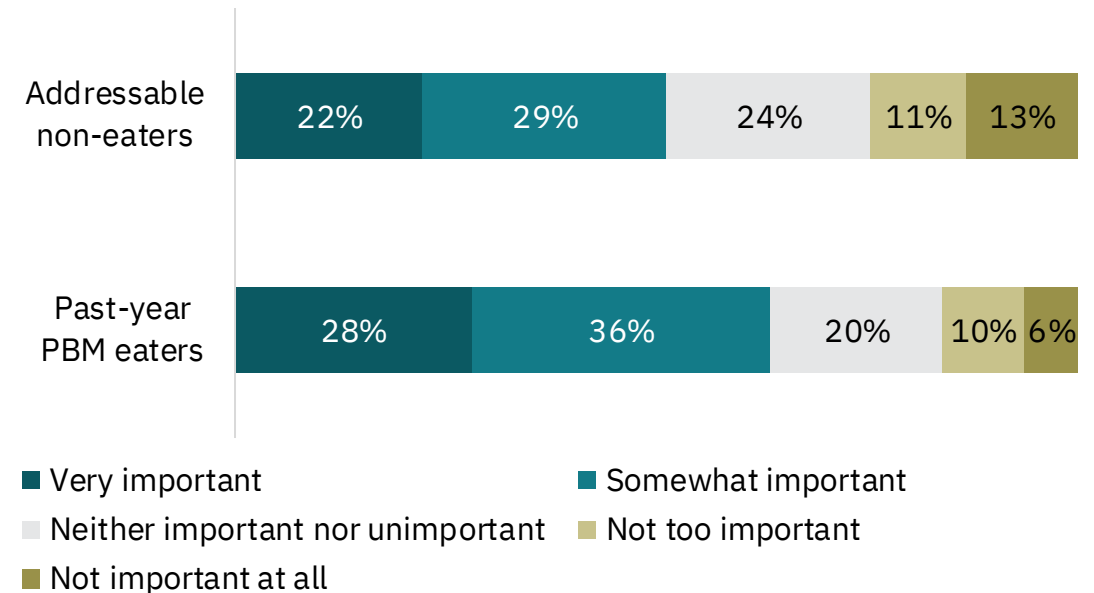
## Reachable consumers want to see plant-based options on menus

Over half of consumers open to plant-based meat say that having plant-based meat menu options is an important factor when choosing a restaurant, even those who haven't eaten plant-based meat recently or at all.

Plant-based menu choice may be important for consumers themselves or for others they are eating with—one in five addressable consumers say a top five factor in their restaurant choices is where others want to go.

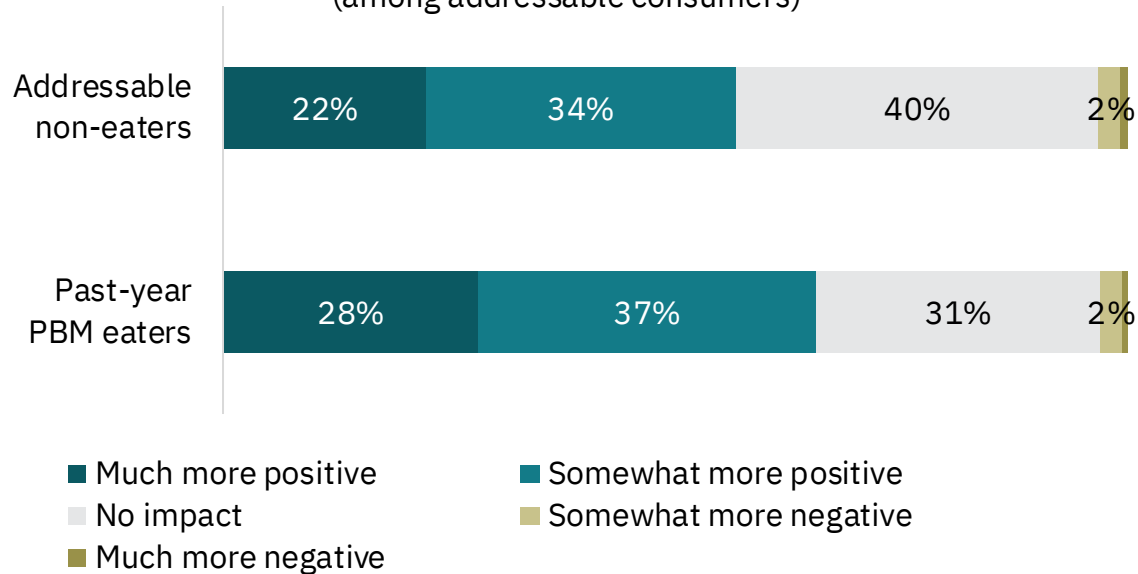
When choosing a restaurant to eat at or get food from, how important or unimportant is it that the restaurant has plant-based dishes on its menu?; Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025

### Importance that a restaurant has plant-based menu options (among addressable consumers)



## Plant-based dishes can improve restaurant perceptions, even among those not eating plant-based meat

**Perceptions of restaurants with plant-based dishes on the menu**  
(among addressable consumers)



How does having plant-based dishes on the menu impact your perceptions of a restaurant? Describe in a few words or a sentence why having plant-based dishes on the menu has this impact on your perceptions of a restaurant.  
Source: Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025

## Why?

“Gives me more healthy options to choose from.”

“It shows that the restaurant cares about the well-being of their customers”

“It shows they work more with flavor and texture”

“It is nice to have new and different options from time to time.”

“It shows the restaurant is welcoming and accommodates diverse dietary needs.”

“It makes the restaurant seem more modern and environmentally conscious”

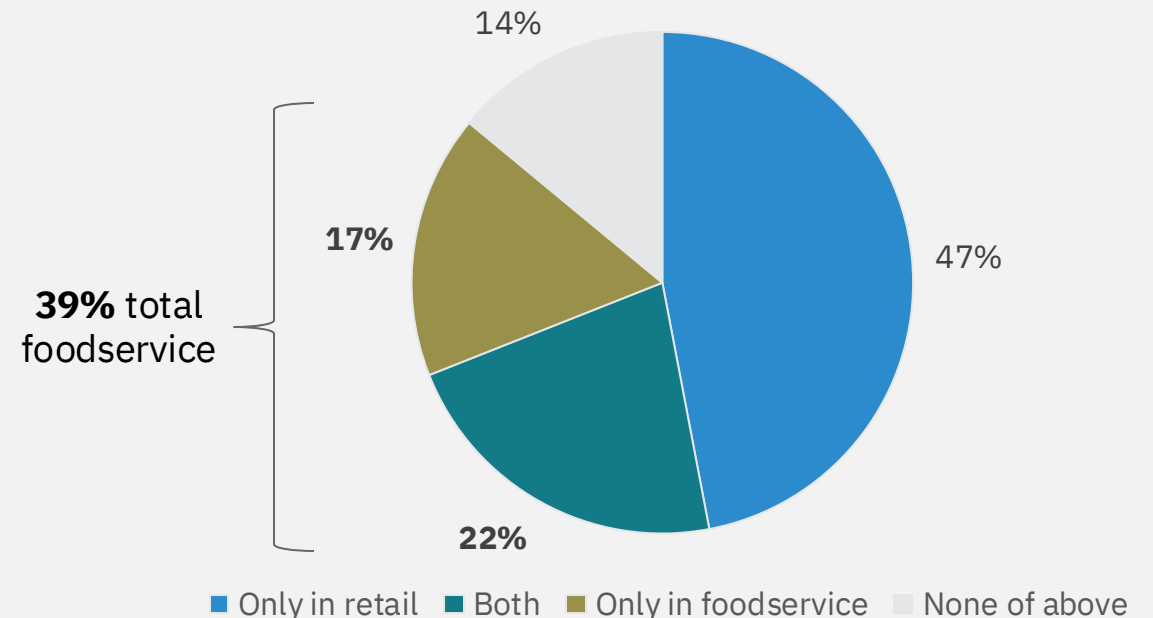
“Shows they're paying attention to trends. Trying to grow their business.”

## Foodservice is an important channel for current plant-based meat consumers

Almost 40% of plant-based meat consumers report purchasing plant-based meat dishes in foodservice, including fast food/fast casual restaurants, full-service restaurants, and cafeterias, in the past year.

Almost a quarter (22%) of all consumers who have eaten plant-based meat recall first trying it in foodservice. And qualitative research has found that foodservice trial experiences are especially salient with consumers likely to remember dishes that taste good and replicate a conventional meat experience.

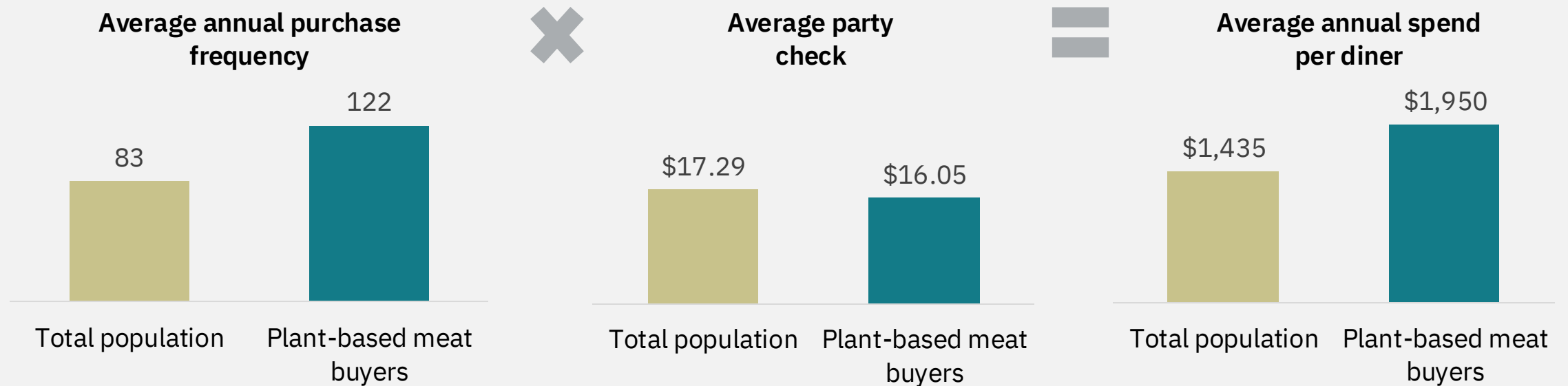
Plant-based meat purchase locations  
(self-reported)



## Plant-based meat diners are more valuable than the average customer

Plant based meat buyers make almost 50% more restaurant chain purchases annually compared to the total population and spend almost \$2,000, more than \$500 higher than the total population.

### Total restaurant chain purchases (including plant-based meat and other purchases)



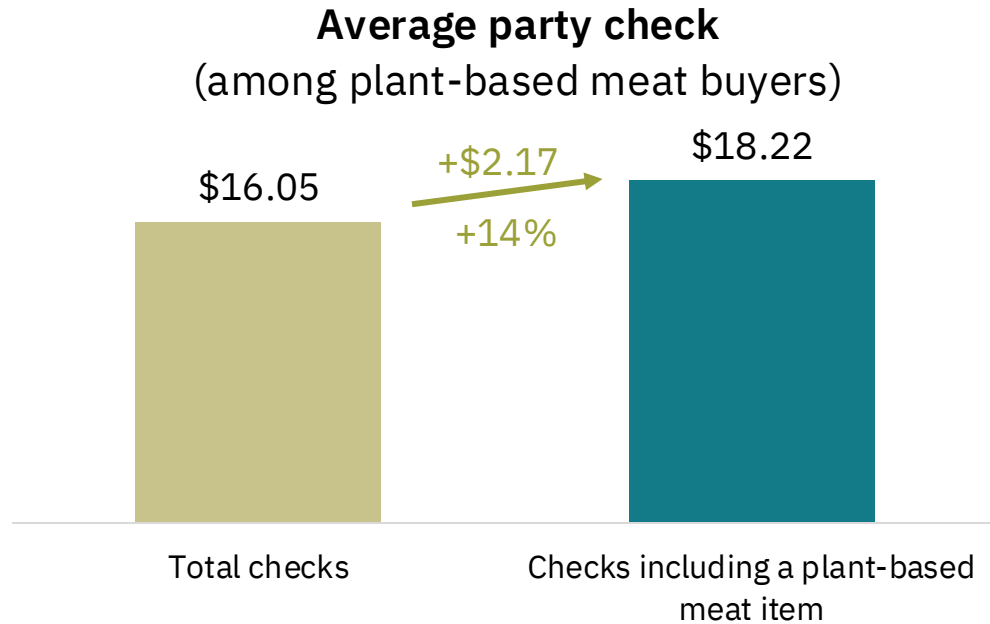
Plant-based meat buyers = restaurant chain customers who purchased a plant-based meat item at least once in the past year. Restaurant chains typically 50+ locations, does not include independent restaurants or non-commercial foodservice.

Plant-based meat item = dish with plant-based meat analog product, other ingredients may not be plant-based

Source: Circana, Checkout 12ME Dec 2025

## Plant-based meat diners spend more when they choose plant-based dishes

Offering plant-based meat menu items not only attracts frequent diners but can increase their total check size.



Plant-based meat buyers = restaurant chain customers who purchased a plant-based meat item at least once in the past year. Restaurant chains typically 50+ locations, does not include independent restaurants or non-commercial foodservice. Plant-based meat item = dish with plant-based meat analog product, other ingredients may not be plant-based  
Source: Circana, Checkout 12ME Dec 2025





## Despite strong demand signals, plant-based proteins have faced recent headwinds

Plant-based protein sales to foodservice operators from broadline distributors totaled \$291 million in 2025. Plant-based meat analogs meant to mimic the taste and experience of conventional meat accounted for 54% of those sales.

Sales declined from 2022 to 2025 following a peak that marked the foodservice channel's recovery from the Covid-19 pandemic. Similar declines were seen in the plant-based meat retail market. Despite these trends, the plant-based meat category is still meaningfully larger than it was just a decade ago—for example, the retail market in 2025 was almost double the size in 2017. And some formats and segments continued to grow in foodservice in 2025, including plant-based pork analogs and plant-based chicken nuggets and patties.

Plant-based meat dishes are underrepresented on restaurant menus relative to consumer interest. Just 8% of the top 250 restaurant chains by revenue offered plant-based meat items on their menus in 2025.

Check out GFI's [U.S. foodservice market insights for plant-based foods](#) to learn more about plant-based sales, trends, and opportunities.

# **Plant-based meat foodservice consumer journey**

## Foodservice plays a unique role in consumer discovery and adoption of plant-based meat

Foodservice experiences can shape perceptions of plant-based meat taste, quality, and credibility in unique ways. Unlike retail, where purchasing is often planned and ingredient-driven, restaurant choices are shaped by occasion, social influence, menu design, and perceived risk (e.g., what if I don't like what I order).

The following section provides context on how diners move from intent to order and their perceptions along the way, which helps explain both the challenges and the opportunities for plant-based meat in foodservice. Success is not about simply offering a plant-based option but about optimizing menu strategy and aligning with the moments when plant-based dishes are most compelling to diners.



# The broader context of dining out shapes how plant-based dishes are evaluated

The most common restaurant occasion is indulgence—consumers dine out to treat themselves. Plant-based meat, however, is often associated with health, sustainability, or dietary preferences. This can create a perceived mismatch with indulgent dining occasions. Yet this dynamic also points to opportunities. Plant-based meat may resonate strongly in other common occasions where diners are seeking variety, convenience, or balance. Aligning dishes and menu tactics with target occasions can ensure consumers see plant-based options as a good choice in those moments.

## Common eating out occasions for addressable consumers

(pick up to 3)

58%

Treat themselves



46%

Don't feel like/have time to cook



42%

Special occasions



35%

Away from home



32%

Explore new restaurants



21%

Cheaper than cooking



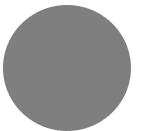
13%

Commuting



2%

Other

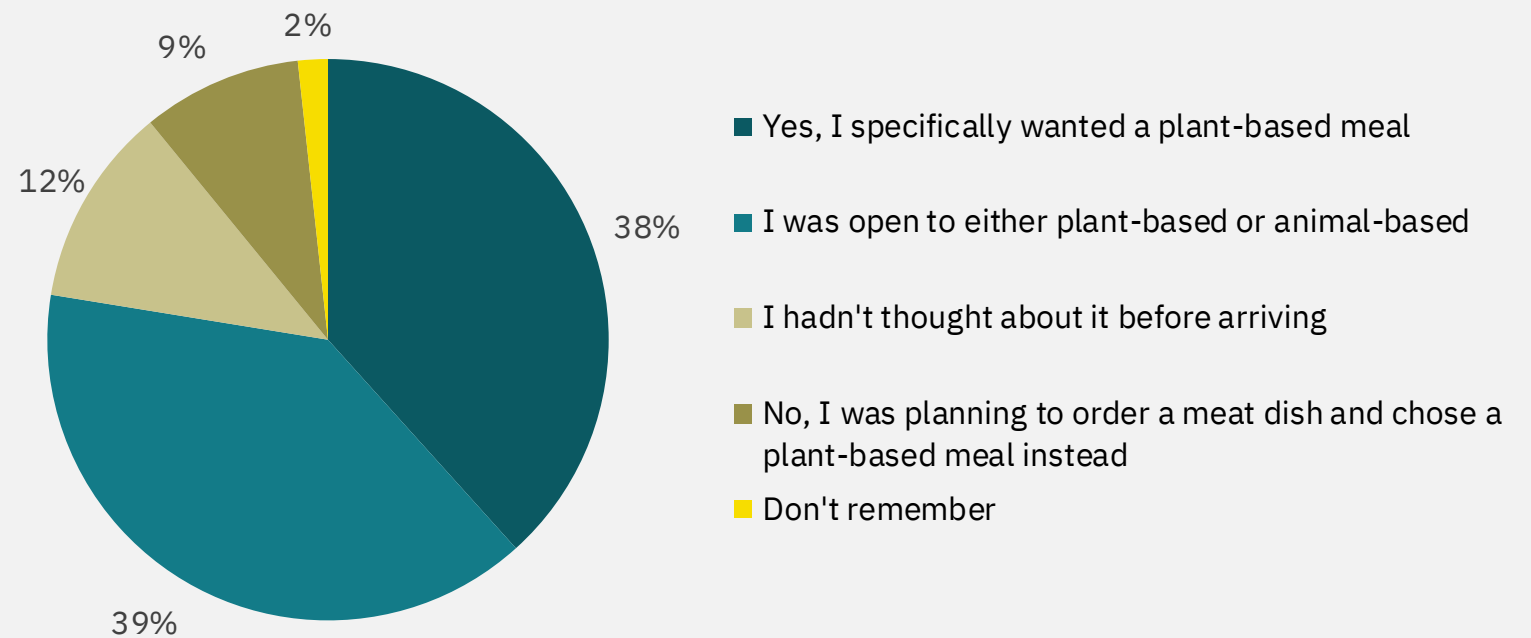


## Many consumers are thinking about plant-based before they arrive at the restaurant

Many consumers are thinking about plant-based ahead of time, making it important to clearly communicate availability (e.g., through online menus, signage, and marketing) to attract them before they even reach the point of choosing from the menu.

This also highlights the importance of broader messaging to motivate consumers to actively consider plant-based options.

**Plant-based meal decision-making before arriving at restaurant**  
(among those who ordered a plant-based meat dish in past year)



Now, think about a recent time you ordered a dish with plant-based meat at a restaurant. This could be plant-based beef, pork, chicken, poultry, or seafood that mimics the taste and texture of conventional meat, made from plant protein.

On this occasion, had you already decided you wanted a plant-based meal before you visited the restaurant?

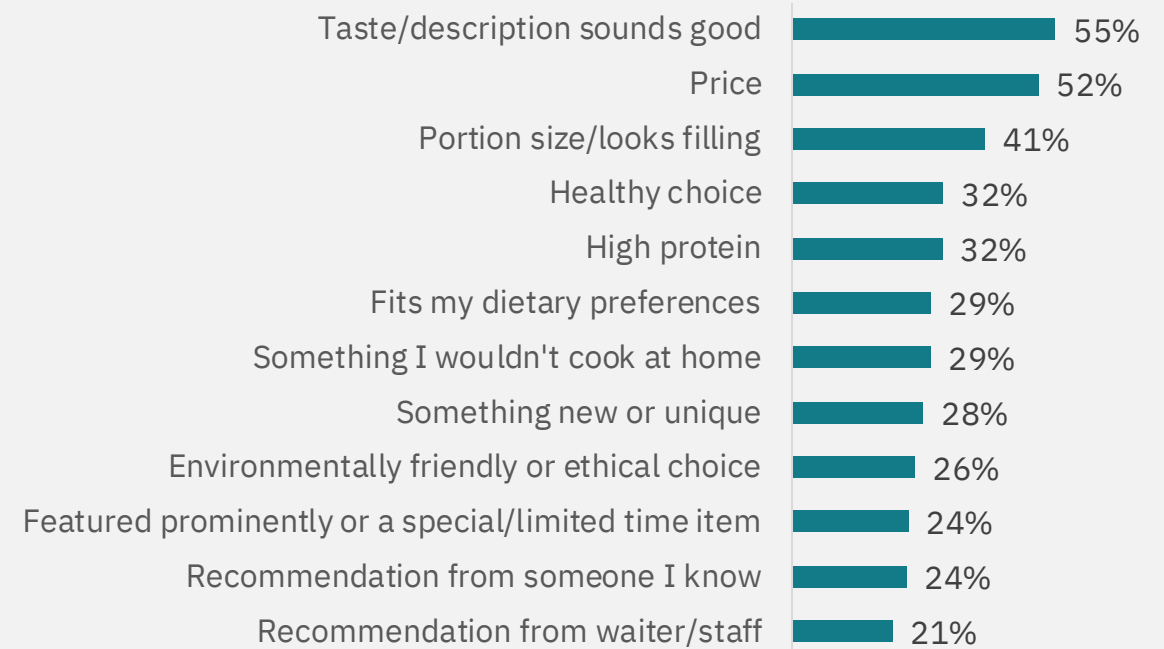
Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025, among n=1,127 who reported purchasing plant-based meat in a restaurant in the past year

## When diners reach the menu, taste and price are the key drivers of choice, regardless of occasion

Taste and price are top drivers of both restaurant and menu item choice. Plant-based meat dishes must compete on taste and price to be considered. However, these factors alone may not motivate consumers to choose plant-based.

Many consumers also look for healthy choices or specific health benefits like high-protein. These provide opportunity for plant-based meat to differentiate and reach interested segments of consumers in relevant dining-out occasions.

### Criteria when choosing a restaurant dish (% very important)



Once you have picked a restaurant, how important are the following when you are deciding what you are going to order to eat?

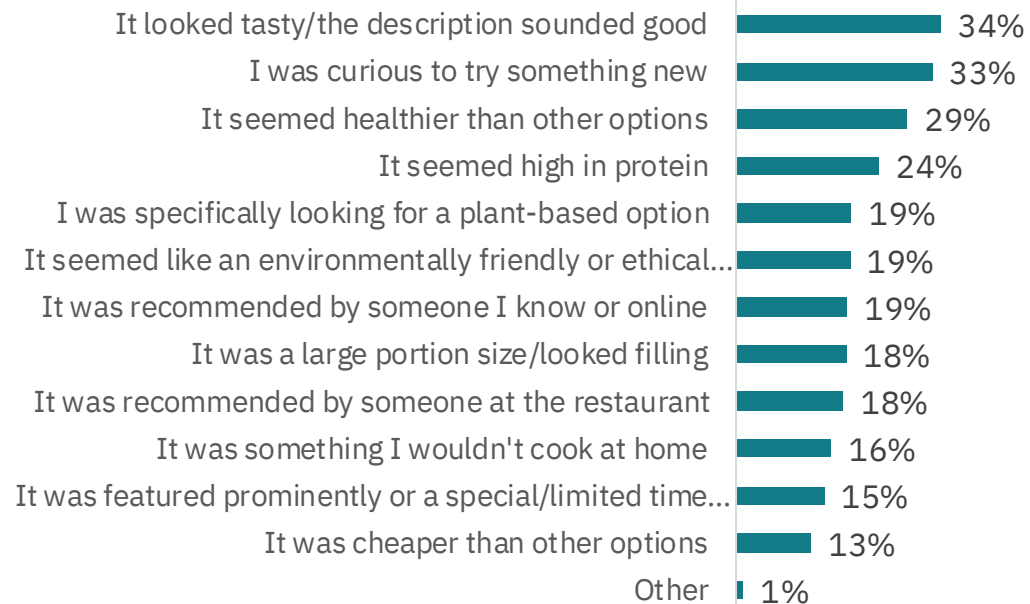
Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025; among n=1,171 who reported having purchased plant-based meat in a restaurant in the past year

## Plant-based meat dishes are more likely to be selected for health, dietary reasons, or interest in trying something new

Looking both at what consumers say motivates plant-based meat choice and what predicts future plant-based intent, attributes such as health, variety, and dietary compatibility emerge as particularly influential. While taste and price are necessary to compete, the differentiated value of plant-based dishes often lies in the additional benefits they offer.

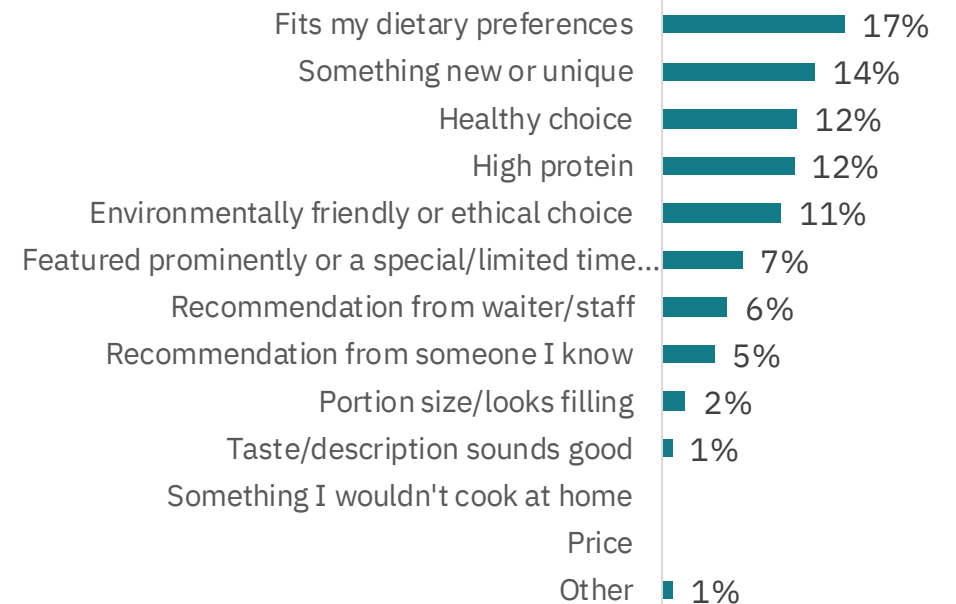
### Reasons for choosing PBM dish

(among those who ordered a plant-based meat dish in past year)



### Derived impact on likelihood of choosing PBM dish

(among addressable consumers)



What made you choose the plant-based meat dish you ordered from a restaurant recently? Please select up to three.

Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025; among n=1,171 who reported having purchased plant-based meat in a restaurant in the past year

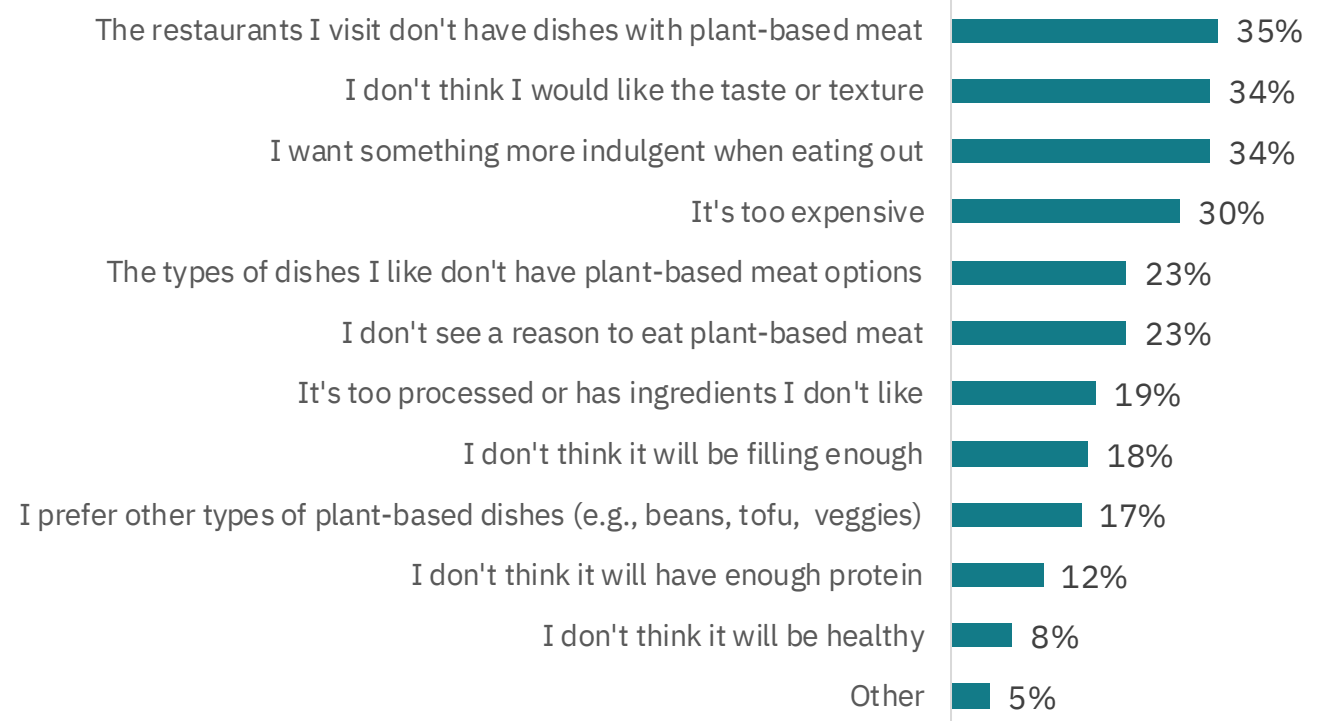
## Consumers who choose not to order plant-based dishes often cite concerns that taste and price expectations will not be met

Many consumers expect they will not enjoy the taste of plant-based meat dishes or find them indulgent enough or expect they will be too expensive.

Restaurants are uniquely positioned to overcome these barriers. Because dining experiences are memorable and sensory, a well-executed plant-based dish can quickly change consumer perceptions. Familiar formats, appealing flavor descriptions, and competitive pricing can help reduce perceived risk and encourage trial.

Consumers also report not seeing plant-based meat options where they typically dine (consistent with current low availability on menus) or not finding plant-based versions of foods they enjoy. Offering well-executed plant-based dishes can capture latent demand among diners already interested in trying them.

### Reasons for not ordering plant-based meat dishes (among those who did not order a plant-based meat dish in past year)



Why have you not purchased a meal with plant-based meat in a restaurant recently or ever? Please select up to five.

Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025; among n=1,171 who reported having not purchased plant-based meat in a restaurant in the past year



## Taste concerns are frequently driven by perception rather than experience

[Research from Dig Insights](#) found consumers are more likely to say they expect not to like the taste of a plant-based meat dish than to report disliking it after trying it. This indicates that perceived risk—rather than actual dissatisfaction—may be one of the largest barriers to ordering plant-based dishes in restaurants.

### What consumers think

**54%** would not order a plant-based meat dish because they wouldn't like the **taste**

**42%** would not order a plant-based meat dish because they wouldn't like the **texture**

### What consumers experience

Nearly **90%** who had tried a plant-based meat dish were satisfied with the **taste, texture, and value**



## Social influence can be uniquely impactful in foodservice

Social influence plays a powerful role in restaurant decisions, especially through dynamics like the “veto vote,” where one person’s preference can drive the decision for the entire group. 1 in 5 addressable consumers say a top 5 factor driving their restaurant choices is where others want to go. Having plant-based options ensures groups with someone looking for that choice are not lost.

“I prefer meat [but] I have *a lot* of vegan/vegetarian friends and I like to be inclusive. I will avoid restaurants they can't find food at.”

Social influence also shapes what consumers order—they may conform to group norms, follow recommendations, or choose items that align with how they want to be perceived (e.g., ordering something trendy or healthy). In the case of plant-based meat dishes, almost a third of addressable consumers say they would be convinced to try it if someone they knew recommended it. Restaurant staff recommendations can be almost as influential.

# 1 in 5

Say a top 5 factor in their restaurant choices is **where others want to go.**

# 31%

Say they would be **convinced** to try a plant-based meat dish if **someone they know recommends it.** 26% would be convinced if the restaurant staff recommends it.

# **Plant-based meat menu strategies**

## Marketing plant-based meat dishes on menus presents unique challenges and opportunities

Describing plant-based meat analog dishes presents a unique challenge for operators. Unlike whole-food plant-based dishes, where ingredients can signal freshness, flavor, and familiarity, plant-based meat does not benefit from the same intuitive cues. Simply listing ingredients often fails to communicate taste, texture, or satisfaction, and can even introduce uncertainty for some consumers.

While there is a growing body of guidance on menuing plant-based foods, much of it is based on vegetable-forward or whole-food dishes. Applying these principles to plant-based meat analogs requires adaptation. The following section outlines strategies for operators to effectively position plant-based meat dishes to maximize appeal, reduce uncertainty, and ultimately increase consumer interest.



# Plant-based meat menu descriptions were explored through a simulated choice exercise

In the survey-based choice exercise, respondents (addressable consumers open to plant-based meat and/or dairy) identified their preference from pairs of menu options, each of which contained a set of randomly selected attributes (see next page). The resulting data was analyzed to determine the attributes most and least likely to drive choice among plant-based meat menu options and between plant-based and conventional options.

This methodology surfaces the attributes that matter most to respondents based on the increased or decreased likelihood an option will be chosen when it contains a given attribute. This is unique from a traditional survey question where the respondent is asked how much a specific attribute impacts whether they order a plant-based meat menu item without the benefit of seeing the attribute in context.

## Choice task exercise example

Please review each set carefully and select the menu item you would be **most likely to order**, even if none are a perfect fit.

Given the choice between the plant-based option you selected on the prior screen and the following conventional meat option, which one would you choose?

### Option 1

Perfectly flame-grilled **house-made veggie** burger, **delicious** and all dressed up in your favorite toppings on a toasted bun.

sustainable choice

signature dish

\$11.00

### Option 2

Perfectly flame-grilled **plant protein** burger, **rich & savory** and all dressed up in your favorite toppings on a toasted bun.

heart healthy

chef's choice

\$9.50

*Perfectly flame-grilled **beef** burger, all dressed up with your favorite toppings on a toasted bun. At **\$10.00**.*

Note: Each respondent sees a total of eight pairs of plant-based menu options during this exercise. After choosing each plant-based option, they are asked if they would choose that option over the conventional meat option. While individual respondents may not see every attribute, each is shown a strategically selected subset of attribute combinations. Across all respondents, this approach ensures comprehensive coverage of all attributes.

## Various menu description elements were tested to understand the impact of each type of information as well as the best way to communicate it

A comprehensive list of attributes spanning five key dimensions as well as price were tested. The attributes and variants were carefully selected based on past research that explored the types of information and nudges that can be impactful in plant-based choice. Respondents were shown either plant-based burger menu options (and a conventional burger) or plant-based chicken bowl menu options (and a conventional chicken bowl) with various combinations of the attributes.

| Identifier              | Brand*            | Taste                | Benefit               | Social               | Price      |
|-------------------------|-------------------|----------------------|-----------------------|----------------------|------------|
| 1. Plant-based          | 1. [Real brand 1] | 1. Delicious         | 1. 20g of protein     | 1. Chef's choice     | 1. \$9.50  |
| 2. Plant-protein        | 2. [Real brand 2] | 2. Tender & juicy    | 2. High protein       | 2. Customer favorite | 2. \$10.00 |
| 3. 100% plant           | 3. [Fake brand]   | 3. Rich & savory     | 3. Heart healthy      | 3. Staff favorite    | 3. \$10.50 |
| 4. Vegan                | 4. House-made     | 4. Hearty & filling  | 4. High fiber         | 4. Limited time      | 4. \$11.00 |
| 5. Soy-based            | 5. <i>None</i>    | 5. Fresh & flavorful | 5. Sustainable choice | 5. Signature dish    | 5. \$11.50 |
| 6. Veggie [burger only] |                   | 6. Meaty             | 6. <i>None</i>        | 6. <i>None</i>       | 6. \$12.00 |
|                         |                   | 7. Indulgent         |                       |                      |            |

\*In the choice exercise, respondents were shown actual brand names. Those have been anonymized in this report.



# Making simple changes to the plant-based burger description had a significant impact on consumer choice

The “top performing” plant-based burger item was selected almost 5 times more often than the “worst performing” and captured a meaningful share of total choice relative to the conventional meat option.

How often un/optimized plant-based **burger** options chosen vs. conventional\*

| Top-performing plant-based option, 32%                                                                                                            | Worst-performing plant-based option, 6%                                                                                                        | Conventional meat option, 62%                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| A perfectly flame-grilled <b>[real brand 1] 100% plant</b> burger, <b>delicious</b> and all dressed up in your favorite toppings on a toasted bun | A perfectly flame-grilled <b>[fake brand] soy-based</b> burger, <b>indulgent</b> and all dressed up in your favorite toppings on a toasted bun | A perfectly flame-grilled <b>beef</b> burger that comes all dressed up in your favorite toppings on a toasted bun |
| 20g of protein                                                                                                                                    | Sustainable choice                                                                                                                             | -                                                                                                                 |
| Chef's choice                                                                                                                                     | -                                                                                                                                              | -                                                                                                                 |
| \$9.50                                                                                                                                            | \$12.00                                                                                                                                        | \$10.00                                                                                                           |

\* Share results are rebased to account for portion of population that are rejectors of plant-based meat and not included in conjoint; rejectors are assumed to always select the conventional meat option

Plant-based choice: You will be shown different versions of **menu offerings** that could be available in a restaurant. Each menu will include a combination of features that describe the items and their prices. Please review each set carefully and select the menu item you would be **most likely to order**, even if none are a perfect fit. You'll complete this task several times with different combinations of menu items.

Conventional choice: Given the choice **between the item you selected** on the prior screen and the following **conventional meat item**, which one would you choose?

% = modeled % of times chosen among these 3 options, based on 28,096 forced choice exercises in a conjoint analysis (8x per respondent) testing 6 aspects of description with 5-7 variants per.

Source: Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025

## Results were similar for the plant-based chicken bowl, suggesting similar attributes can be effective for a variety of plant-based meat dishes

The “top performing” plant-based chicken bowl was also selected almost 5 times more often than the “worst performing.”  
The “top performing” descriptor contained the same attributes as for the plant-based burger.

### How often un/optimized plant-based **chicken** options chosen vs. conventional

| Top-performing plant-based option, 30%                                                                                                                                                    | Worst-performing plant-based option, 5%                                                                                                                                                         | Conventional meat option, 64%                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| A perfectly-seasoned <b>[real brand 1]</b> 100% plant chicken bowl, <b>delicious</b> with fire-grilled veggies, rice, and piled high with your favorite toppings like guacamole and salsa | A perfectly-seasoned <b>[fake brand]</b> soy-based chicken bowl, <b>hearty &amp; filling</b> , with fire-grilled veggies, rice, piled high with your favorite toppings like guacamole and salsa | A perfectly seasoned <b>chicken</b> bowl, with fire-grilled veggies, rice, and piled high with your favorite toppings like guacamole and salsa |
| 20g of protein                                                                                                                                                                            | -                                                                                                                                                                                               | -                                                                                                                                              |
| Chef's choice                                                                                                                                                                             | -                                                                                                                                                                                               | -                                                                                                                                              |
| \$9.50                                                                                                                                                                                    | \$12.00                                                                                                                                                                                         | \$10.00                                                                                                                                        |

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## Pricing plant-based meat dishes at or below conventional equivalents increases choice

Price had the largest effect in the choice exercise, with items priced lower than conventional equivalent most often chosen. Preference dropped off at price points above conventional. Price was even more important to drive trial among those not currently eating plant-based meat. Plant-based burger items (possibly because they are more familiar and feel less risky) were less sensitive to price increases than plant-based chicken items, though both converged when priced at large premiums compared to conventional.

Other research has also found a minority of consumers willing to pay a premium for plant-based proteins or plant-forward dishes in restaurants. And consumers consistently indicate that one of the top barriers to them choosing plant-based dishes is that offerings are too expensive.

Pricing is a complex issue for operators focused on maintaining or growing revenue, but it's clear lower price premiums to conventional dishes are likely to improve plant-based meat's sales volume.

# 15%

Only 15% of those open to ordering plant-forward meals are willing to pay more. 23% *might* be willing depending on the menu item.

DATASSENTIAL

# Meeting consumer taste expectations starts with designing a great tasting dish

## Pick a great plant-based meat item

Selecting a tasty plant-based meat product is key to developing a great dish. Plant-based meat products are constantly improving—many across formats have reached an important threshold in sensory testing of at least 50% of tasters rating the product the "same or better" than an animal benchmark in overall liking.

Almost half (40%) of addressable consumers say they would try a plant-based meat dish if the taste and texture were exactly like conventional meat.

## Design for flavor and appeal

Familiar contexts, formats, flavors, and preparation resonate with consumers and can drive appeal of plant-based meat dishes. 30% of consumers would be motivated to try a plant-forward option if it was in a dish they know, love, or have had before.

Plant-based meat is well-positioned to both meet the need for familiarity as well as the desire to try new and exciting foods. Layering taste with sauces, spices, and textures can help maximize appeal.

## Validate with consumers

Test final dishes with a broad audience including mainstream consumers (not just vegans/vegetarians). Use structured sensory evaluation (taste, texture, overall liking) and consider benchmarking against conventional meat dishes.

GFI's sensory best practices guide provides insights on how to evaluate the sensory performance of alternative protein products, which also has relevant learnings for evaluating plant-based meat dishes.

## In the simulated choice exercise, all elements of the description were influential—while impact varied slightly, no attribute drove choice alone

| Decreasing impact on menu item choice<br>↓ | Attribute         | Most effective                               | Moderately effective                             | Least effective                   | Summary learnings                                                                                                                                                                                                       |
|--------------------------------------------|-------------------|----------------------------------------------|--------------------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                            | <b>Taste</b>      | Delicious<br>Rich & savory<br>Tender & juicy | Hearty & filling<br>Fresh & flavorful            | Meaty<br>Indulgent                | <b>Focus on flavor, but don't oversell:</b> Emphasizing taste or credible flavor elements was impactful, even more so to provide reassurance for <b>new customers</b> and <b>less common plant-based meat formats</b> . |
|                                            | <b>Identifier</b> | 100% plant<br>Plant-based<br>Plant protein   | Veggie<br>Vegan                                  | Soy-based                         | <b>Leverage plants as a benefit:</b> Focusing on the “plant” element (which can cue taste and other benefits) was more effective than terms that reference who it's for or specific ingredients.                        |
|                                            | <b>Benefit</b>    | 20g protein                                  | High protein<br>Heart healthy<br>High fiber      | Sustainable choice<br><i>None</i> | <b>Highlight health:</b> Items featuring a health claim, especially protein quantity, performed better than those featuring a sustainability claim or no benefit.                                                       |
|                                            | <b>Social</b>     | Chef's choice<br>Customer favorite           | Signature dish<br>Staff favorite<br>Limited time | <i>None</i>                       | <b>Selectively add social nudges:</b> These can help normalize plant-based items, but the effect on choice was weaker than other descriptors and benefits.                                                              |
|                                            | <b>Brand</b>      | Known brands                                 | House-made<br><i>None</i>                        | Unfamiliar brands                 | <b>Consider whether to brand:</b> Using known brands had marginal value. Brand was relatively more effective with <b>existing plant-based meat consumers</b> , likely given their higher familiarity with brands.       |

## Sensory-based menu language is important to convey good taste before trial

**Most effective:** Describing the dish as **delicious** was most effective at driving choice. Meat-related flavor and texture cues also performed well, especially when used in appropriate context—**rich & savory** for plant-based beef and **tender & juicy** for plant-based chicken. Other resources highlight the benefit of referencing taste-related attributes like provenance, preparation method (e.g., flame grilled) and ingredients and using strong imagery.

**Moderately effective:** Other sensory terms – **fresh & flavorful** and **hearty & filling**—also increased choice.

**Least effective:** **Meaty** and **indulgent** underperformed, potentially due to lower credibility for plant-based options, although they may resonate in some contexts.



# Identifiers help consumers understand the dish and can signal benefits like taste and health

**Most effective:** Descriptors that included the term “plant”—**100% plant**, **plant-based**, **plant-protein**—combined with a meat specific identifier (e.g., burger, chicken bowl) were most likely to be chosen. Past research has shown that the “plant” term can cue taste and health benefits in addition to identifying the dish.

**Moderately effective:** Terms like **veggie** and **vegan** were moderately effective and likely appeal to some consumer segments. However, these terms (and similarly “meat-free” or “meatless,” which were not tested here) can suggest that the dish is only for those following a special diet and are generally not recommended for broad reach.

**Least effective:** Referencing primary plant ingredient—**soy-based**—was the least likely to drive choice.

Source: Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025



## Health benefits, particularly protein content, can be effective drivers of choice

**Most effective:** Highlighting **20g of protein** had the highest impact on choice. This likely reflects both the relevance of protein and the credibility that comes with referencing a specific quantity.

**Moderately effective:** Other health claims also influenced choice. **High protein** and **heart healthy** were relatively more effective, followed by **high fiber**. Focusing on positive health benefits has been shown in other research to be more effective than making a more general “healthy” claim or using restrictive language like “low fat.”

**Least effective:** The **sustainability** claim underperformed versus health claims, although it may be effective in select situations when targeting the small segment of consumers motivated by these benefits.

Source: Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025



## Social and normalizing nudges have a consistent, but modest, impact on choice

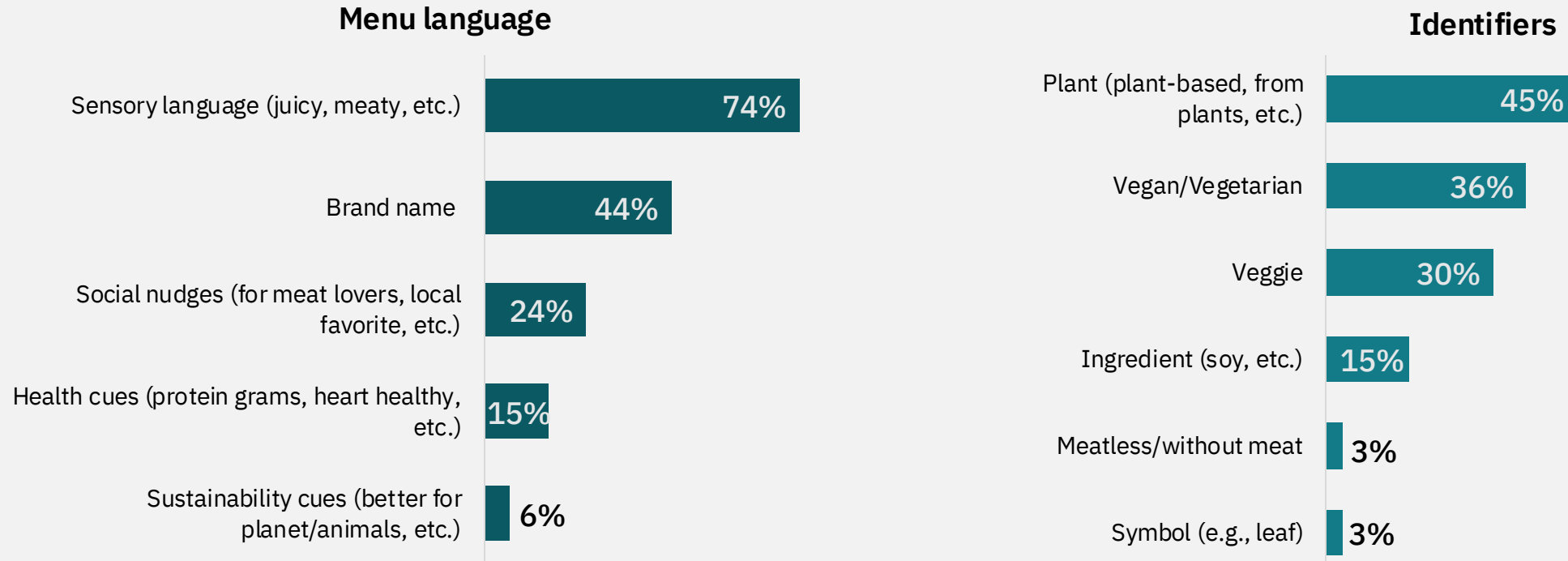
**Most effective:** Dishes labeled as **chef's choice** or **customer favorite** were most likely to be chosen although by a relatively small margin. This may cue taste as well as normalizing the plant-based option.

**Moderately effective:** Other social nudges—**signature dish**, **limited time**, **staff favorite**—were similarly effective in driving choice and dishes with any of these were more likely to be selected than if no claim was made.



# Large operators with plant-based items are leveraging some best practices, but “plant” identifiers as well as health and social cues may be underutilized

## Share of operators using descriptor for plant-based meat or other plant-based protein dishes



Cues and identifiers are not mutually-exclusive and multiple may be used on a single item

Source: GFI analysis of menus at top 250 chains by revenue based on [Technomic's Top 500 Chain Restaurant Report, 2025](#). Includes restaurants offering plant-based meat or plant-based non-analogs (e.g., bean burger) identified on menus as of October-November 2025. Plant-based non-analog dishes were included to provide a sufficient sample size for analysis.

## Other menu and marketing strategies can also help drive adoption of plant-based foods



Behavioral research shows that small changes in how choices are presented—often called “nudges”—can influence what diners order. Nudges typically involve adjustments to menu design, placement, or default options that steer consumers toward certain items while preserving freedom of choice.

Prominent menu placement and strategies like default plant-based can build awareness and make plant-based more top of mind.

Nudges can help diners notice and consider plant-based dishes, but they are most effective as supporting strategies when paired with strong menu fundamentals. **Price and taste expectations remain the primary drivers of choice** and must be met to motivate consumers to try and repurchase plant-based dishes.

While some of the experimental evidence on nudges in foodservice comes from international studies, U.S. research suggests the same behavioral mechanisms can be effective.

# The quantity and placement of plant-based dishes on menu can influence how often they are selected

## Plant-based variety

Across studies, increasing the number of plant-based options has been correlated with increased uptake of plant-based meals. There may be a tipping point—one study found when plant-based items represented 75% of menu choices rather than 25% or 50%, diners were more likely to select them.

When plant-based items are limited, they can seem niche or unfamiliar; when they are many, they feel more normal. A wider selection also helps attract a broader range of consumers.

## Menu integration

Diners were 56% less likely to choose plant-based dishes when they appeared in a separate vegetarian section compared with when they were integrated into the main menu, in one study.

Integrating plant-based dishes can help make them feel more mainstream while increasing their visibility. At the same time, subtle indicators (like small “V” icons) can guide diners specifically seeking plant-based options.

## Menu placement/visibility

Listing plant-based options first on a menu can increase selection—in one study, plant-based selection rates nearly doubled. In another study, making a plant-based dish more visible by featuring it as “dish of the day” drove roughly 85% of choices.

Prominent placement can help normalize plant-based dishes, plus consumers often choose the first option they see. Since a large share of plant-based meat dishes are ordered online, there may be unique opportunities to highlight them in digital menus.

## Plant-based defaults have been effective in institutional foodservice and can be adapted to restaurants

In some institutional dining environments, such as cafeterias and campus dining environments, plant-based meals have been made the default option, with conventional meat available upon request. These approaches have been shown to increase plant-based selection in these settings.

Defaults can be more challenging to implement in traditional restaurants, where diners often expect full control over their menu choices. However, in these environments, related strategies may achieve similar goals. For example, offering **base dishes that are plant-based with the option to add meat, having easy plant-based substitutions for common dishes, or featuring plant-based options as limited-time or special menu items.**

In 2023, the Food For Climate League, in partnership with Better Food Foundation, Sodexo, and researchers at Boston College, tested the implementation of default plant-based dishes in U.S. university dining halls. Among the two universities that implemented default plant-based dishes consistently, the selection of plant-based dishes rose from 31% on control days to 82% on days where plant-based offerings were the default option. World Resources Institute's playbook outlines additional interventions that can encourage diners to select plant-based dishes.

# Background on consumer research

## Consumer research methodology

Much of the research referenced in this report, unless otherwise cited, comes from a poll conducted by Morning Consult on behalf of GFI with n=3,512 U.S. non-plant-based meat or dairy rejecting adults in December 2025.

Respondents were asked a series of questions about their consumption of plant-based and conventional proteins, engagement in foodservice, and perceptions of and experience with plant-based meat in foodservice. They also completed a simulated choice exercise where they were shown various menu descriptions of plant-based meat dishes and asked to select which was preferred and whether it would be selected versus a similar conventional meat dish.

## Respondent sample

### Open to plant-based foods

- At least somewhat open to plant-based meat
- Or, if “not very” open to plant-based meat, at least somewhat open to plant-based dairy

### Engaged in foodservice

- Report eating out, doing takeout, or getting delivery at least every 1-2 months, more frequently than “a few times a year”

### Have representative eating habits

- Report eating conventional and/or plant-based meat in past year

## Acknowledgements

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## About GFI

The Good Food Institute is a nonprofit think tank working to make the global food system better for the planet, people, and animals. Alongside scientists, businesses, and policymakers, GFI's teams focus on making plant-based and cultivated meat delicious, affordable, and accessible. Powered by philanthropy, GFI is an international network of organizations advancing alternative proteins as an essential solution needed to meet the world's climate, global health, food security, and biodiversity goals. To learn more, please visit [gfi.org](https://gfi.org).

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