



## V. DEMOGRAPHICS AND CONSUMER PREFERENCES: ISSUES, TRENDS, AND CHANGING APPETITES

If the thousand-plus professional chefs who belong to the American Culinary Federation have a true pulse on their diners' needs, then the nation is heading in an encouraging direction, increasingly taking personal and planetary health into consideration when dining out. According to the National Restaurant Association's What's Hot in 2015 survey, which bases its annual forecast on input from these chefs, nearly *all* of the Top 20 Food Trends relate to health and sustainability. Locally sourced animal proteins and produce make the top 10, as do sustainable sourcing, transparency about point-of-origin, and healthy, minimally processed foods. In the top 20, it's heartening to see an interest in more whole grains, more cuts of meats, and more kinds of fish, with the latter bearing importance both for human health and for not depleting stocks of the overly popular species.

The good news is that operators are on the same page as consumers, for the most part: three-fourths of both consumers and foodservice operators polled in a recent CIA-Datassential survey feel the foodservice industry must play an active role in addressing public health and environment issues.

The flows of influence are also complex: sometimes consumers are ahead of restaurateurs, and sometimes it's the reverse; sometimes consumers are ahead of policymakers, and sometimes it's the reverse. Supply cannot always keep up with demand, and the infrastructure, labeling, and certification systems are not always in place to turn aspirations into action. But chefs have an opportunity to menu in ways that better reflect consumer preferences: for instance, the CIA-Datassential survey found

that there aren't enough menu items featuring whole/intact grains compared with the way consumers wish to order. The same was true of nuts and legumes, Greek yogurt and tofu, and nut butters and nut flours. On the other hand, foodservice operators reported that several efforts to shift protein on plates have been unsuccessful, usually when they have neglected to communicate a change.

The way chefs address evolving consumer demands is of critical importance. Consumers are finicky, and often contradictory, in what they say they want and how they actually behave. Messaging is key—telling the story of ingredients, emphasizing the options available with a menu change and ways to customize, as well as putting a face to the food by bringing a chef front and center to explain a new menu item or offer up a taste.

Consumers receive information about nutrition and sustainability from an often overwhelming number of sources, from government recommendations and academic journal publications to blogs and the media, from celebrity chefs to athletes and artists. The ideas are often at odds, and it's easy to understand why confusion runs high.

The issue briefs in this section highlight the most important developments in the past year when it comes to promoting animal welfare, the nuances and challenges of shifts to greater local sourcing, investing in local food systems and urban agriculture, and equipping consumers to navigate the complexity so they can make food choices that benefit both their own well-being and that of the environment.

Consumers receive information about nutrition and sustainability from an often overwhelming number of sources...The ideas are often at odds, and it's easy to understand why confusion runs high.