

# 2017 Good Food Restaurant Scorecard

*Top 100 U.S. Restaurant Brands*



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## Overview

The Boston-based market research and advisory firm Lux Research predicts that one third of all meat consumed in 2054 will be derived from plants, with a substantially reduced role for traditional meats and livestock products on our plates and menus.<sup>1</sup> Companies devoted to transforming the meat industry have raised hundreds of millions of dollars and attracted investments from the largest venture capital firms in Silicon Valley, as well as notable business magnates from Bill Gates and Richard Branson to Jack Welch and Prince Khaled bin Alwaleed. In recent years, big food has gotten involved, with notable equity investments into alternative plant-based proteins from Tyson Foods, Cargill, Nestlé, Maple Leaf Foods, ADM, and many more. Concerns about issues like environmental sustainability and human health are the drivers behind the growth in this market, but ultimately, investors recognize the opportunity for big returns.

*Nation's Restaurant News*, *Datassential*, and *Mintel* have all repeatedly highlighted the movement of consumers toward plant-based eating. A recent Nielsen survey found that 22% of Americans plan to eat less meat in the future.<sup>2</sup> In a 2017 *Mintel* report, 30% of Millennials report that they eat meat alternatives every day, while 50% eat meat alternatives a few times per week.<sup>3</sup> It's important to note that only 5% of those Millennials were vegetarians. This means that plant-based meat alternatives are largely being eaten by people who also eat animal proteins, rather than as a pure alternative for vegetarians and vegans. This is not a shift by a niche demographic, but rather from a wide swath of the U.S. public.

Meat alternatives can take the form of legumes, nuts and seeds, as well as finished products made from proteins found in soy, wheat, pea, and other grains. Tremendous progress and innovation has been seen in recent years by food manufacturers, which are embracing technology to create alternative products that are great-tasting and affordable. Companies like Impossible Foods and Beyond Meat have disavowed the nomenclature and scientific limits of the “veggie burger,” creating what they are calling “plant-based meat” (meat, made from plants) that mimics the taste, mouth feel, and experience of all-beef patties. Options also include plant-based chicken, fish, cheese, egg, and even sashimi! Hundreds of meat, dairy, seafood, and egg alternative products are available via foodservice distributors like Sysco for the creation of plant-based entrées.

On the retail front, the plant-based food sector (foods that serve as replacements for animal products) tops **\$3.1 billion** in U.S. sales within grocery stores, drug stores, and mass merchandisers, an 8.1% YOY increase; this is compared to a decline of .2% for all foods sold in the same channel.<sup>4</sup> So, the consumer demand is real.

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<sup>1</sup> [Alternative Proteins to Claim a Third of the Market by 2054](#)

<sup>2</sup> Animal or Plant? Understanding North American Protein Preferences

<sup>3</sup> The Protein Report: Meat Alternatives - US - January 2017

<sup>4</sup> Plant Based Foods Sales Experience 8.1% Growth Over Past Year

Unfortunately, the larger restaurant chains have been slow to make menu updates and provide consumers with plant-based options. Many smaller restaurant chains are finding significant commercial success by offering and promoting plant-based entrées that provide benefits from lower ingredient costs, increased food safety, and the ability to attract a wider share of the dining public.

With so much recent focus on sustainability, climate change, and health, adding plant-based entrées to your menu is a great way to get positive press, showing your customers, investors, and employees that your company is committed to addressing critical issues, while reaping financial benefits.

## The Restaurant Scorecard

The **2017 Good Food Restaurant Scorecard** ranks the top 100 chain restaurants<sup>5</sup> according to the breadth and depth of their plant-based menu entrées and their promotion of plant-based eating.<sup>6</sup> With 32% of all U.S. restaurant sales coming from just 100 restaurant chains, they have the opportunity to affect great change in supply chains, consumer eating habits, human health, and environmental sustainability.

This scorecard was developed to rank the top 100 chains using a 10-point scale evaluating multiple aspects of a restaurant's menu and promotion. In it, we highlight those restaurants that currently offer plant-based entrées and the scoring system is intended to provide guidance for those that can do more to take advantage of this opportunity. Each restaurant's online and in-store menu was analyzed June-August 2017 for this scorecard.

### What Qualifies as Plant-based?

More points were given for entrées that were completely plant-based and did not rely on animal-derived ingredients. Dishes that contained dairy cheese or mayonnaise that could be removed by the consumer during the ordering process or when delivered received fewer points.

One easy way for a restaurant to improve its ranking would be to take a dish that has animal ingredients and make those ingredients optional. For example, a restaurant could have a bean burrito and charge an extra dollar for cheese. Since the bean burrito is entirely plant-based, that would earn the most points on the **Good Food Restaurant Scorecard**.

### Dayparts & Rankings

Restaurants that operate over multiple dayparts were given distinct grades for each menu they serve over those time periods. For instance, if restaurants serve a separate breakfast menu, they will have a score for that daypart as well as another grade for lunch/dinner. The rankings are presented in multiple ways: Breakfast, Lunch/Dinner, and an overall Composite ranking which averages the dayparts of those restaurants serving breakfast and lunch/dinner. Rankings by restaurant segment are also provided.

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<sup>5</sup> Nation's Restaurant News, 2017 Top 100, June 28, 2017

<sup>6</sup> Auntie Anne's, Baskin-Robbins, and Krispy Kreme Donuts were not included in the Restaurant Scorecard since they do not sell entrées. The next three restaurants by sales were included.

## Product Availability

The Scorecard analyzes public-facing menu items and does not count dishes that need to be specially ordered (i.e., from a separate vegetarian or “secret” menu that is only available upon request at the restaurant). While intuitively the idea of a special menu might seem appealing, in fact, diners are more likely to order plant-based entrées if they are integrated into the overall menu and not relegated to a menu that must be requested or that is only for customers who seek it out. This reflects that most diners who eat plant-based meals also eat meat and are simply choosing the items they prefer at any given time.

Additionally, items need to be carried in more than half (51%+) of a restaurant’s locations in order to be fully counted. While a plant-based regional or limited time offer is a great start, it won’t make an impact if the majority of a restaurant’s diners don’t have access to it. If any of the criteria are only applicable online and not in-store, half-credit was given.

## Protein

Restaurants are awarded an additional point if at least one of their plant-based entrées has the word “protein” in its name or description. Consumers see protein as the “most popular attribute in meat alternatives,” due to health, satiety, weight management and other concerns<sup>7</sup>. Research has shown that 50% of consumers say they have protein at every meal<sup>8</sup>. So consumers will order more plant-based entrées if they believe they are a good source of protein.

## Plant-based Eating Promotion & Education

Restaurants can earn an extra point for highlighting plant-based entrées (e.g. “chef’s special,” “featured menu item,” etc.) or by promoting “plant-based eating” as a concept. One way to highlight plant-based eating is by partnering with [Meatless Monday](#) which offers many free marketing resources for restaurants. Since 2003, Meatless Monday has waged an effective campaign in 44 countries, working with grocers, restaurants, K-12, hospitals, corporate dining, and more, to encourage meatless eating at least one day of the week.

## Plant-based Entrée Marketing

Restaurants are rewarded for promoting plant-based dining to all customers. Points are given to restaurants that offer plant-based items without conspicuously marking them as vegetarian, vegan, or meatless. Studies have shown that when plant-based entrées are moved from a “Vegetarian” section of a menu into the general menu, sales more than double.<sup>9</sup> Consumers like plant-based entrées, but they prefer that those entrées not be conspicuously identified as vegetarian.

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<sup>7</sup> Mintel’s “The Protein Report: Meat Alternatives - US - January 2017”

<sup>8</sup> [Nielsen, U.S. Homescan Panel Protein survey, April 2017](#)

<sup>9</sup> World Resources Institute, “We’re Lousy at Describing Sustainable Food, but it Doesn’t Have to Be That Way”; “Don’t Put Vegetables in the Corner”

## Scoring

A rubric was developed to objectively score each restaurant based on the criteria outlined above.

CRITERIA	POINTS
At least one 100% plant-based entrée (2 points if the dish contains dairy cheese or mayonnaise that can be removed by the consumer)	3
More than one 100% plant-based entrée (1 point if the extra dishes contain dairy cheese or mayonnaise that can be removed by the consumer)	2
One or more plant-based entrée has the word “protein” in its name or description	1
Restaurant promotes plant-based eating by: <ul style="list-style-type: none"> <li>• Highlighting plant-based entrées on the menu (e.g. “Chef’s special”) and/or highlighting plant-forward eating (without using the words “vegetarian” or “vegan”) through campaigns like Meatless Monday</li> </ul>	1
Restaurant markets plant-based items in a way that does not reduce their appeal to omnivores (must have plant-based entrées to qualify): <ul style="list-style-type: none"> <li>• Does not <b>overtly</b> name plant-based entrées as vegan/vegetarian/meatless; a “v” or other subtle symbol is recommended</li> <li>• Does not list them in a separate vegan, vegetarian, or meatless section of the menu</li> </ul>	1 2
<b>TOTAL POSSIBLE POINTS</b>	<b>10</b>

**\*\* If any criteria was only online and not in-store, the points awarded are halved.**

## The Opportunities

The results of the **2017 Good Food Institute Restaurant Scorecard** show tremendous opportunity for the leading restaurant brands to capitalize on the movement toward plant-based eating. More than half of the hundred restaurants we evaluated do not yet offer plant-based entrées and can take relatively modest steps to increase their appeal to the changing tastes of the dining public.

Some simple suggestions for adding plant-based items to menus without disrupting operations include:

### Using plant-based ingredients:

- Oatmeal: Make it with water or plant-based milk
- Breakfast Sandwiches: Create a plant-based version using soy sausage, dairy-free cheese, and vegetables
- Sandwiches: Add plant-based deli slices in subs and sandwiches or use fillings like falafel or hummus
- Pizza: Offer a dairy-free cheese option and plant-based meat toppings like sausage and pepperoni
- Salads: Remove cheese (or charge extra), add plant-based protein toppings like falafel, chickpeas, or plant-based meat alternatives
- Chicken: Offer plant-based “chicken tenders” and patties for sandwiches
- Burgers: Offer a plant-based burger, make cheese an add-on or offer a dairy-free cheese

### Promotion of plant-based entrées

- Remove the word “vegetarian” or “vegan” from existing products
- Integrate plant-based foods into the main menu
- Implement a Meatless Monday program
- Make the default of dishes like pasta and salads meat-free; charge the consumer more to add animal-based protein
- Use indulgent language when describing plant-based products

[Read GFI's full guide to developing plant-based entrées at goodfoodscorecard.org >>](https://www.goodfoodscorecard.org)

## Who is GFI?

The Good Food Institute is a team of scientists, entrepreneurs, lawyers, and lobbyists, all of whom are laser focused on using markets and food technology to transform our food system away from conventional animal products and toward plant-based alternatives.