

ISSUE 1 · MARCH 2025

Diner Trend Report

Focus: Allergens

Produced by

EveryBite

everybite.com

Partnered with



foodallergy.org

Diner Trend Report: Focus on Allergens

This report focuses on diners with allergies—just one part of the vast data we analyze. While we explore allergen-related dining habits, we’ve excluded broader insights into the relationship between restaurants and diners. This includes trends by time, location, and region, as well as restaurant types, menu structures, and ingredient-level preferences. We also track long-term shifts in diner behavior, from evolving tastes and pairings to the rise and fall of trending dishes. Our data goes far beyond allergies, providing a complete picture of how diners engage with restaurants.

Copyright & Legal Disclaimer

© 2025 EveryBite Inc. All rights reserved.

This report is provided for informational purposes only and is not intended to serve as legal, financial, or professional advice. While every effort has been made to ensure the accuracy and reliability of the information contained herein, EveryBite Inc. makes no representations or warranties, express or implied, as to the completeness, accuracy, or suitability of this content for any particular purpose. Any reliance on this information is at the reader’s own risk.

The content of this report is the intellectual property of EveryBite Inc. and may not be reproduced, distributed, or modified without prior written permission. However, this report may be shared or referenced for non-commercial purposes, provided that proper attribution is given to EveryBite Inc.

Any third-party trademarks, logos, or company names referenced in this report are the property of their respective owners and do not imply any affiliation, endorsement, or sponsorship unless expressly stated.

For permissions, inquiries, or further information, please contact report@everybite.com.

The Future Is Dynamic Menus

FARE (Food Allergy Research & Education), the leading charity that supports those impacted by food allergies, is partnering with EveryBite, a platform for personalized, dynamic, online menu solutions. EveryBite's dynamic menu provides both in-house and delivery customers with real-time ingredient information—crucial for those managing food allergy.

This partnership between FARE and EveryBite will utilize EveryBite's platform to produce a quarterly report analyzing the impact of food allergy diner behaviors. FARE's hypothesis is that by providing the restaurant industry with insights into the size, needs, and habits of the food allergy consumer group, along with tools to measure and understand this opportunity, restaurants will not only see the value in attracting these diners but also create safer dining environments for the food allergy community.

About FARE

FARE (Food Allergy Research & Education) is the leading nonprofit organization that empowers the food allergy patient across their journey of managing the disease. FARE delivers innovation by focusing on advocacy, research, and education, united by the through line of health equity. FARE's initiatives accelerate the future of food allergy through effective policies and legislation, novel strategies toward prevention, diagnosis, and treatment, and building awareness and community. To learn more, visit [FoodAllergy.org](https://www.FoodAllergy.org)



“This report will equip restaurants with the insights and tools to better understand and engage the food allergy community, moving beyond simply addressing liability concerns. By enhancing understanding and collaboration, we can help create more transparent and inclusive dining experiences that benefit both individuals managing food allergy and the restaurants serving them.”



Sung Poblete
PhD, RN, CEO of FARE



Overview

- 01 About EveryBite
- 02 Insights: The Food Allergic Diner
- 11 Findings
- 21 Final Thoughts
- 24 Appendix

About EveryBite

EveryBite is revolutionizing the restaurant industry through one-to-one menu personalization. By using smart filters that layer onto the digital menu page, diners can now personalize their menu view based off: allergens, nutrients, diets and ingredients just like the ones seen here on a customer's SmartMenu. This new view enables both the diner and restaurant to create an empowered dining experience, every time, for every bite.

Our innovative personalization will help the diner easily find and select meals that match their dietary preferences while enabling restaurants to boost revenue by 10–25%. Trusted by over 1 million consumers across 50+ restaurant chains, we believe transforming how restaurants connect with their diners is an essential way to personalize every meal experience.

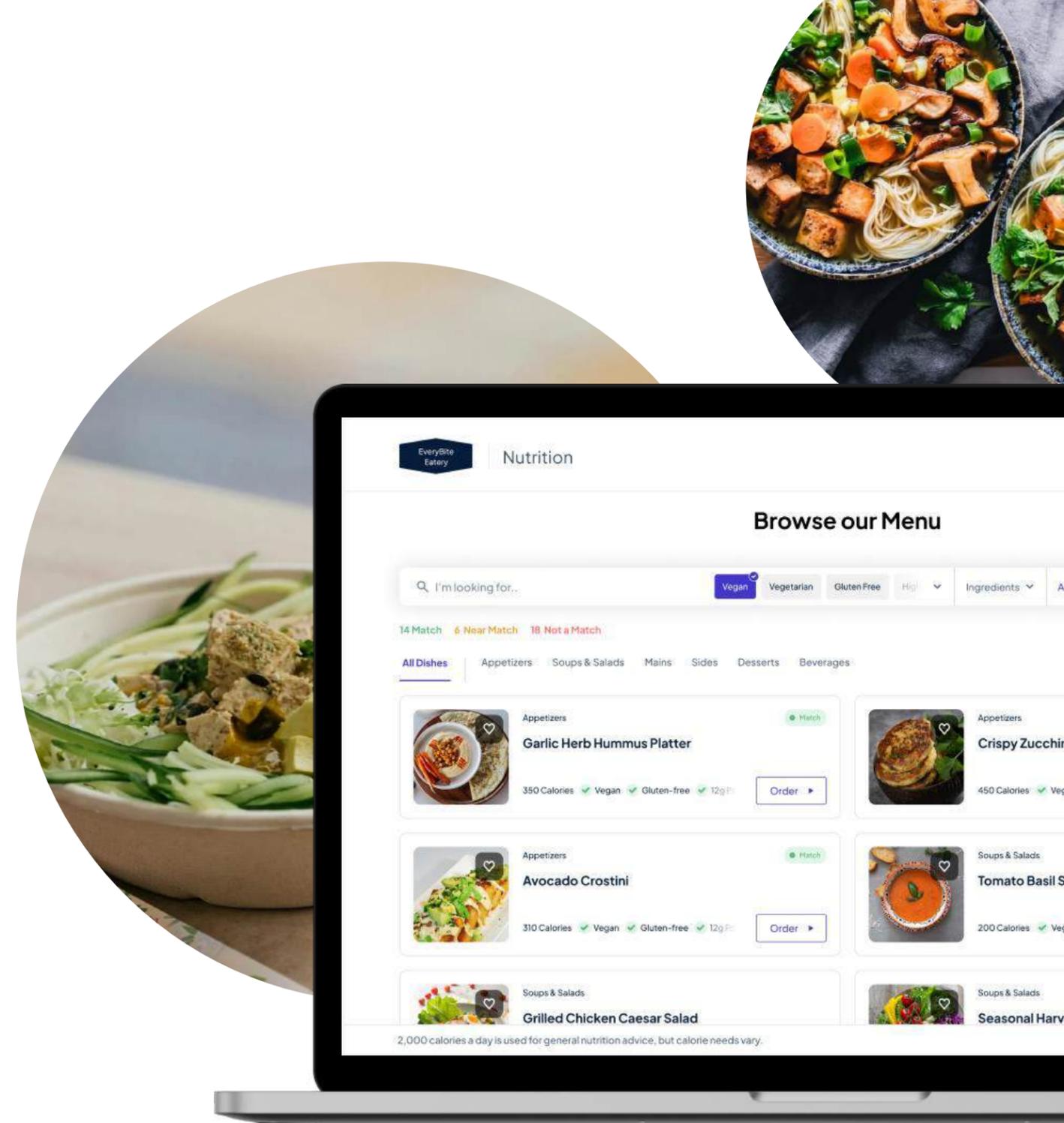
EVERYBITE RESTAURANTS

4.3k

Locations



Lucy Logan and Sid Conklin
Co-founders of EveryBite





INSIGHTS

The Food Allergic Diner



Setting the Table for 33 Million Diners

It's time to meet your new regular: The food allergic diner. **1 in 10 people in the US have a food allergen**, and when only 39% of food allergic consumers prioritize price when eating out, catering to this underserved guest can increase bottomline revenue and build brand loyalty for restaurants.

By gaining a deeper understanding and connection with these diners, **restaurants can boost their profit margins up to 24% by offering allergy friendly meals**. But that's not all, **food allergies influence dining choices for 80% of food allergic consumers and 44% of non-food allergic consumers** when eating out with others. With EveryBite's personalization of the menu, accommodating this share of the dining wallet can be the missing link restaurants crave in an already slim margin business.

KEY STATS

24%

boost to profit margins when offering allergy friendly meals

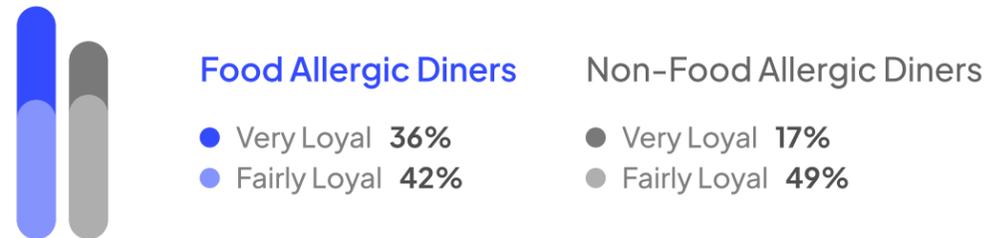
80%

of allergic consumers whose dining choices are influenced by allergies

44%

of non-allergic consumers whose dining choices are influenced by allergies

Restaurant Loyalty by Diner Type



Food for thought, and your revenue: Food allergic diners eat out as often as those without food allergy. **The majority (96%) of food allergic consumers dine out, dine in, or order food from restaurants at a frequency comparable to their non-food allergic counterparts (98%)**

Loyalty runs high among food allergic consumers: Food allergic diners express a much higher degree of restaurant loyalty with **36% of them saying that they are very loyal and typically always visit the same places.** By contrast, only 17% of non-food allergic consumers say the same.

KEY STATS

96%

of allergic consumers order food at the same frequency of non-allergic consumers

36%

of allergic consumers express loyalty, typically visiting the same places



Cooking up a Recipe for Success

Restaurants can drive loyalty and boost their bottom line by catering to the food allergic consumer.

Food allergies drive consumer choices and loyalty in the American dining scene for more than 33 million people. With an estimated food spend around \$19 billion a year avoiding categories or substituting products, restaurants that offer easy and accessible allergen data have a huge opportunity to grow bottom line revenue and market share of this underserved consumer.

Using your existing menu, this untapped consumer shows us that:

- 1) Food allergic consumers are less price-sensitive than the traditional dining guest
- 2) Food allergic guests exhibit strong brand loyalty and ROI
- 3) Having a food allergic guest in your group, influence dining choices

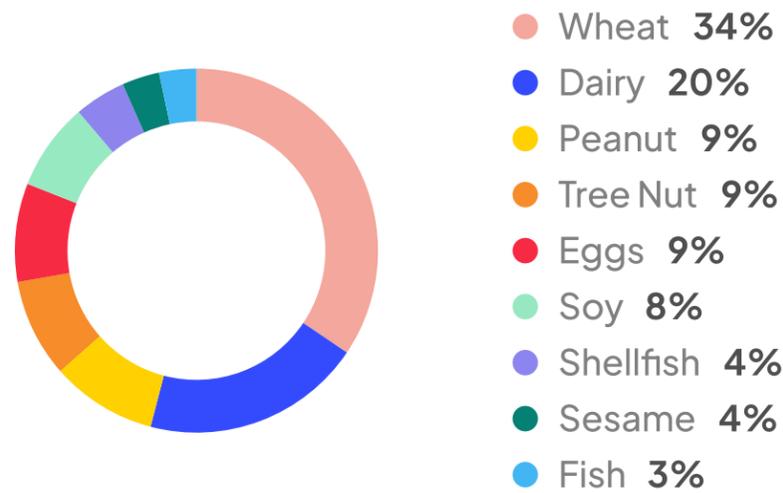
OVERVIEW

Diner Allergens

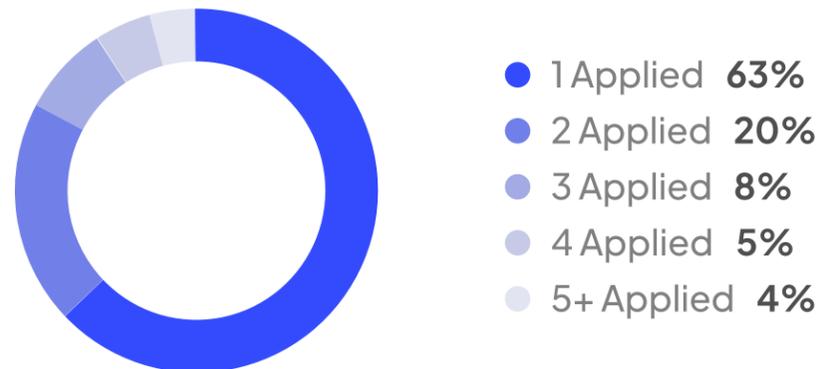
92% of food-allergic guests are likely to return to an establishment after a positive dining experience.

Geert Merchaert, Epicbase “10 Eye-Opening Statistics on Restaurant Food Allergen Attitudes & Practices” (7)

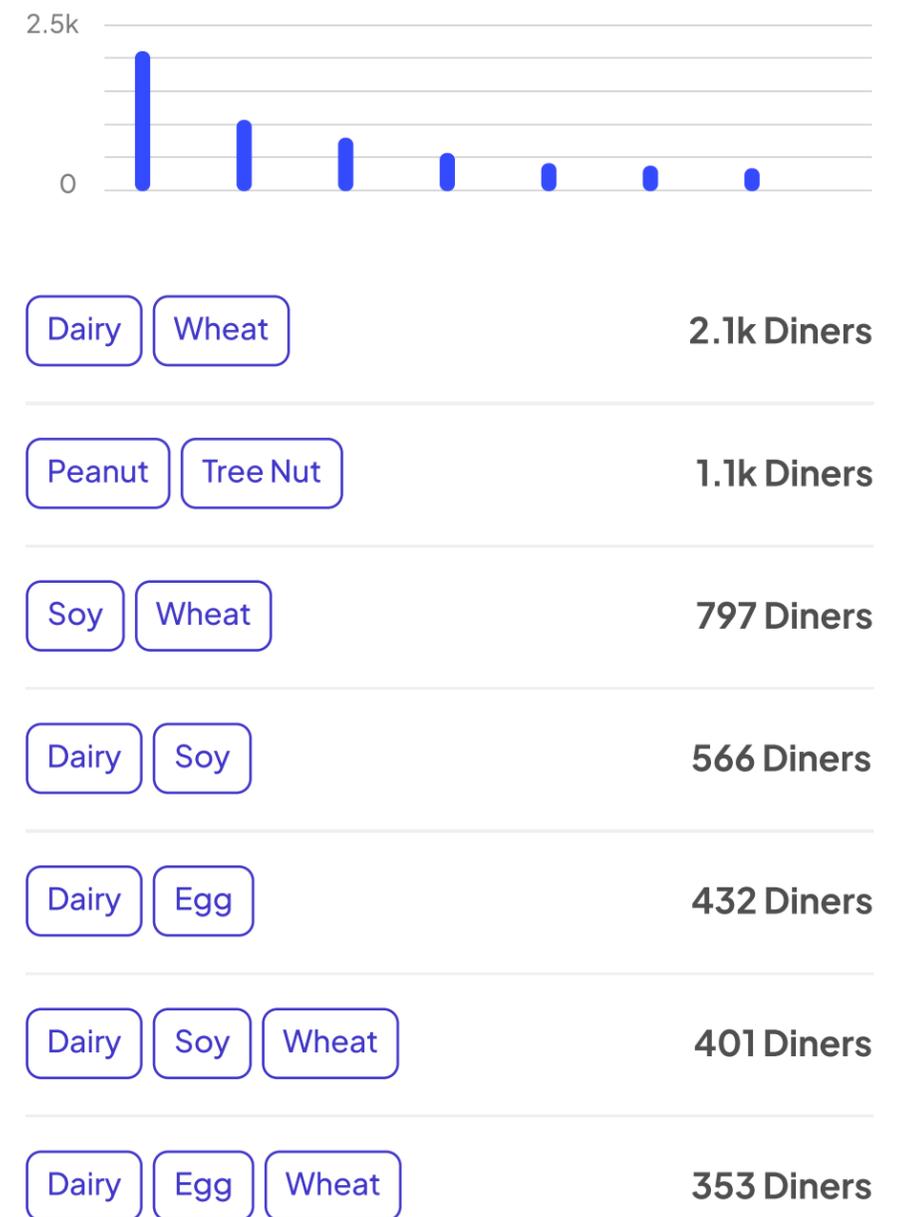
TOP ALLERGENS



NUMBER OF ALLERGENS



TOP ALLERGEN COMBINATIONS



Most Common Allergen Combinations

Why It Matters

Diners rarely have just one food allergy—many manage multiple allergens, making clear labeling and filtering essential. Restaurants that fail to tag and accommodate common allergen combinations risk losing customers looking for dining options.

Key Insights

- Allergen overlap is the norm—**2.1k diners, followed by Peanut & Tree Nut (1.1k diners) and Soy & Wheat (797 diners)**.
- Mislabeling or missing tags can lead to lost sales—diners need precise, trustworthy allergen information to make informed choices.
- Cross-contact concerns drive decisions—dining out is stressful for allergy-sensitive customers. The more confidence they have in menu transparency, the more likely they are to order.

What Restaurants Should Do

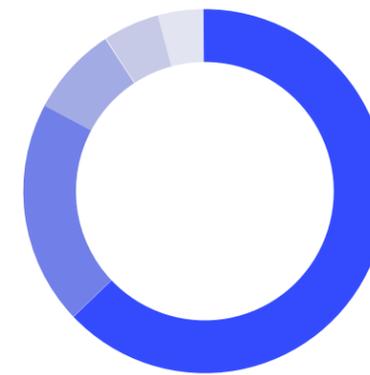
- Label multiple allergens accurately – If a dish is Dairy-Free and Soy-Free, make sure both are clearly tagged.
- Optimize search and menu filters – If a dish meets multiple allergen needs, ensure it appears in all relevant searches.
- Build trust with clarity – Clear, consistent allergen labeling reassures diners and increases the likelihood of repeat visits.

EveryBite helps restaurants streamline allergen transparency

EveryBite provides restaurants with detailed dish tagging that reflects real diner needs.



Number of Allergen Preferences Applied



- 1 Applied 63%
- 2 Applied 20%
- 3 Applied 8%
- 4 Applied 5%
- 5+ Applied 4%

Allergens and Dietary Preferences

Why Allergen Labels Matter

Restaurants that include allergen labels attract more diners and increase sales by ensuring dishes appear in relevant searches.

Key Insights

- Allergen tags help diners find dishes based on specific needs, in addition to lifestyle and diet, improving visibility and sales.
- Vegan diners filter most frequently for Wheat-free options, in addition to Dairy-free and Egg-free.
- Vegans apply more allergen filters than any other lifestyle group.

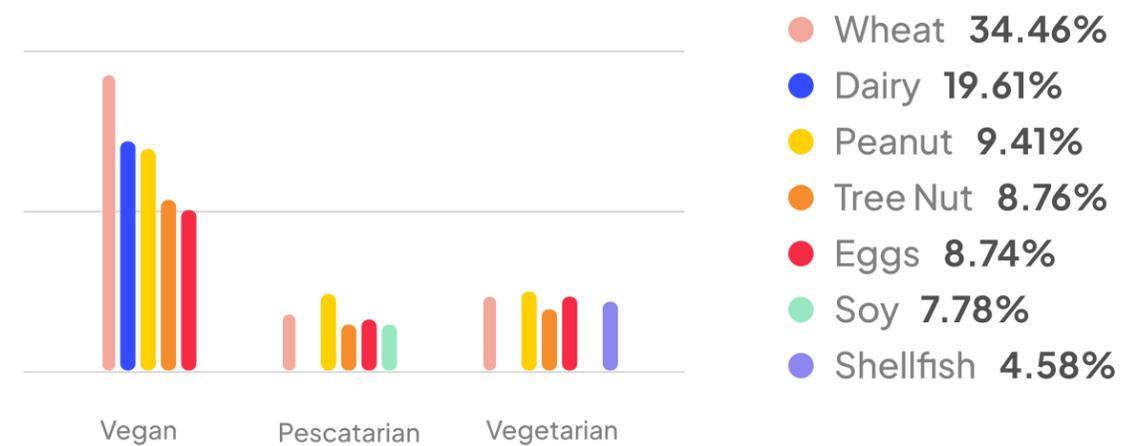
What Restaurants Should Do

- Go beyond Vegan labels – Add allergen tags like Dairy-Free, Nut-Free, and Gluten-Free to ensure dishes appear in searches.
- Make filters work together – A Vegan dish missing a Dairy-Free tag may never show up for diners looking for both.
- More filters = More visibility – Accurately tagging menus increases discoverability and diner trust.

EveryBite: Smarter Dining, Personalized for You

Discover meals that fit your lifestyle with effortless filtering by dietary preferences and allergies—all in one place.

Allergen Types by Diet





Gluten-free Searches

Why It Matters

Even though diners often filter for Wheat-Free options, they overwhelmingly search for Gluten-Free dishes as well. Restaurants that fail to clearly label both may miss out on diners looking for safe, well-tagged meals.

Key Insights

- Wheat-Free is just one filter—diners also search for Gluten-Free and Celiac-Safe options to ensure the dishes align with their specific dietary needs.
- Gluten-Free dominates searches among diners who choose the Wheat-Free filter, outpacing all other search terms.
- Diners demand clarity—they want precise labels that provide the information they need to make informed choices.

What Restaurants Should Do

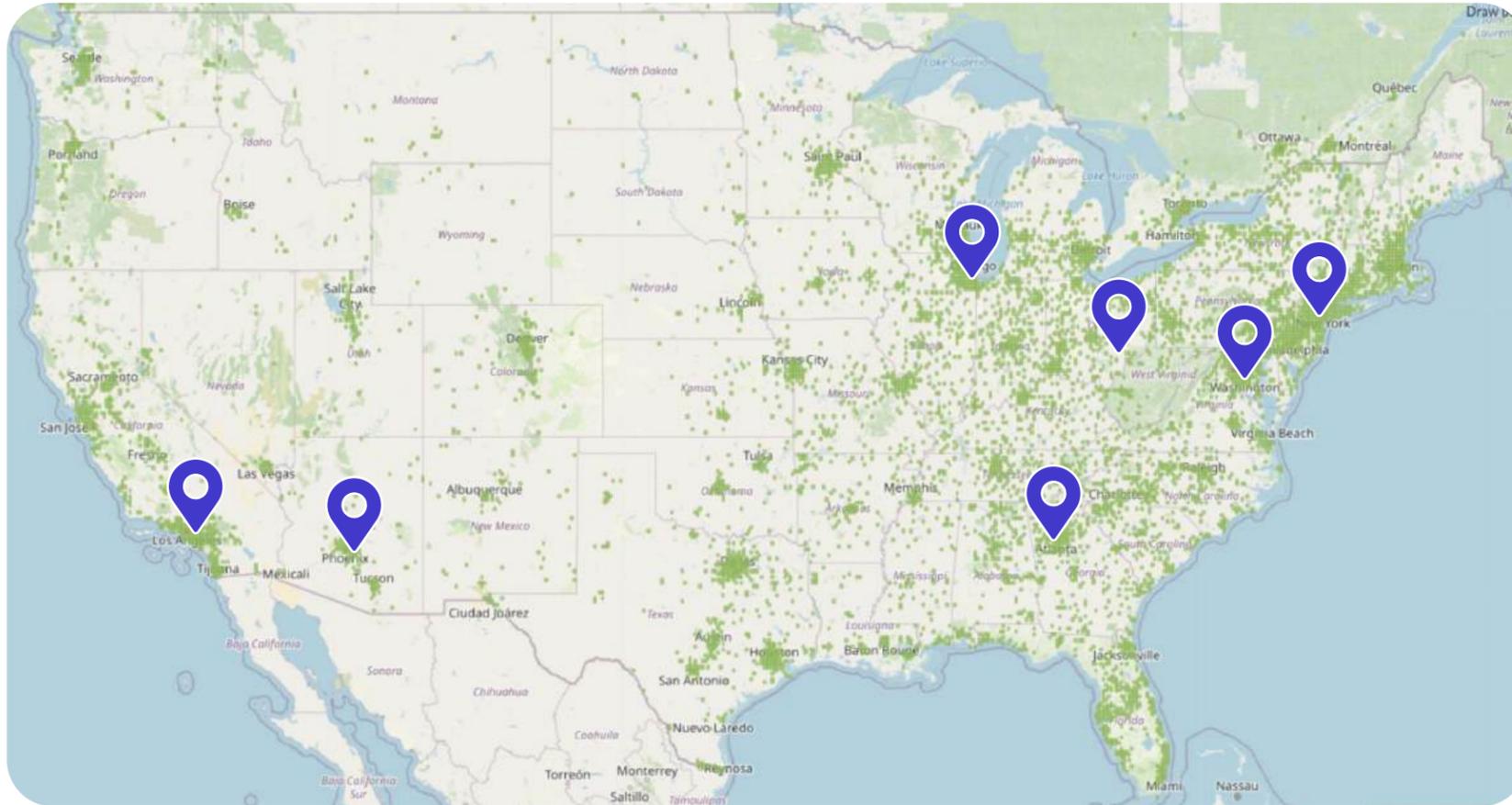
- Label accurately – If a dish is both Wheat-Free and Gluten-Free, ensure both labels are applied.
- Be specific – Use terms like Celiac-Safe for those with more stringent gluten requirements.
- Maximize search visibility – Missing key tags could mean missing diners searching for both Wheat-Free and Gluten-Free options.
- Meet multiple allergen needs – Wheat-Free diners also often avoid Dairy, Soy, and Eggs. The right labels build trust and boost sales.

EveryBite empowers restaurants with precise allergen tagging

EveryBite gives restaurants the ability to differentiate Wheat-Free and Gluten-Free dishes with great granularity. Soon, we'll add Celiac-Safe options, helping diners find exactly what they need for their specific dietary restrictions.

OVERVIEW

Diner Locale

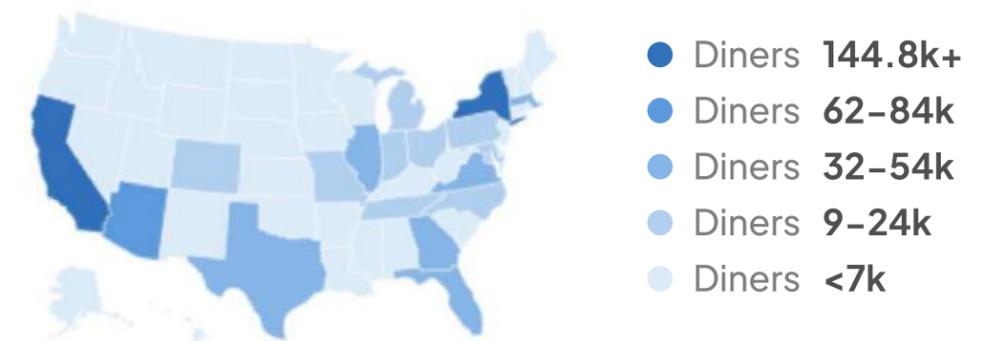


DINER HEATMAP

This heatmap provides a visual snapshot of diner activity across regions. Each square represents a 7x7 mile area, with color intensity indicating diner concentration—green for lower activity and red for higher. Zooming into major urban areas reveals more red zones, highlighting hotspots of diner engagement.

- 📍 New York, New York **55k**
- 📍 Los Angeles, California **52k**
- 📍 Ashburn, Virginia **41k**
- 📍 Chicago, Illinois **40k**
- 📍 Phoenix, Arizona **40k**
- 📍 Atlanta, Georgia **31k**

DINERS BY STATE



“Knowing where food allergic guests are located, helps restaurants target these consumers with personalized menus, driving loyalty and repeat visits.”



Sid Conklin, EveryBite



INSIGHTS

Findings

OVERVIEW

Wheat-free Diners

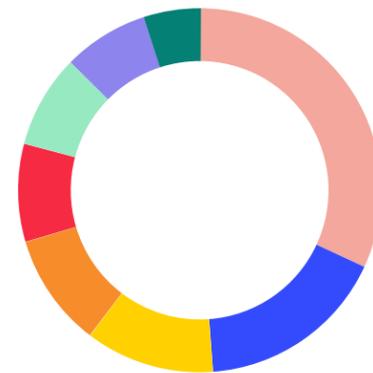
POPULAR DISHES

	Crispy Cauliflower
	Baja Fish
	Grilled Chicken Tenders
	Gluten Free French Loaf
	Hashbrown Casserole

TOP SEARCHES

	Gluten Free	2.8k
	Chicken	381
	Casserole	188
	Grilled	184
	Hashbrown	176

OVERLAPPING ALLERGENS



● Dairy	32%
● Soy	17%
● Egg	11%
● Peanut	10%
● Fish	9%
● Tree nut	8%
● Shellfish	8%
● Sesame	5%

OVERLAPPING DIETS



● Vegan	42%
● Vegetarian	38%
● Vegan, Vegetarian	10%
● Pescatarian	10%

TOP ALLERGEN COMBINATIONS

Wheat Dairy	28.4%
Wheat Soy	10.5%
Wheat Soy Dairy	5.3%
Wheat Dairy Eggs	4.7%
Wheat Eggs	2.0%
Wheat Shellfish	1.9%
Wheat Top 9 Allergens	1.8%

OVERVIEW

Soy-free Diners

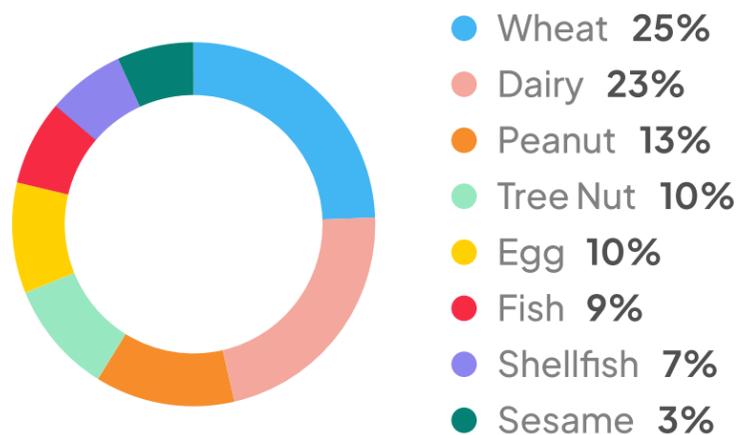
POPULAR DISHES

-  Southwest Chicken & Rice
-  Spiced Chicken Verde
-  Create Your Own Stir-Fry
-  Sweet Potato Bowl
-  Mediterranean Bowl

TOP SEARCHES

-  Gluten Free 279
-  Chicken 109
-  Soy 65
-  Green 37
-  Steak 32

OVERLAPPING ALLERGENS



OVERLAPPING DIETS



TOP ALLERGEN COMBINATIONS

Soy	Wheat	10.5%		
Soy	Dairy	7.2%		
Soy	Wheat	Dairy	5.3%	
Soy	Top 9 Allergens	1.8%		
Soy	Wheat	Dairy	Eggs	1.7%
Soy	Peanut	Tree Nut	1.5%	
Soy	Peanut	1.3%		

OVERVIEW

Shellfish-free Diners

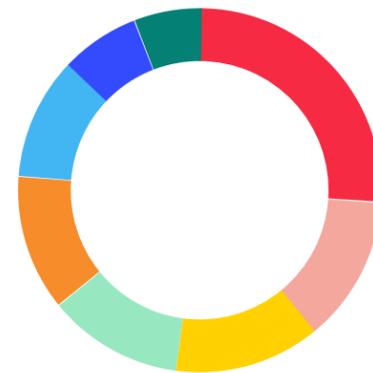
POPULAR DISHES

-  Spiced Chicken Verde
-  Crispy Cauliflower
-  Southwest Chicken & Rice
-  Sweet Potato Bowl
-  Avocado Sandwich

TOP SEARCHES

-  Gluten Free 78
-  Vegan 72
-  Chicken 61
-  Breakfast 27
-  Fried 25

OVERLAPPING ALLERGENS



- Fish **26%**
- Dairy **13%**
- Egg **13%**
- Tree Nut **12%**
- Peanut **12%**
- Wheat **11%**
- Soy **7%**
- Sesame **6%**

OVERLAPPING DIETS



- Vegan **51%**
- Vegetarian **23%**
- Vegan, Vegetarian **20%**
- Vegan, Vegetarian, Pescatarian **6%**

TOP ALLERGEN COMBINATIONS

Shellfish	Dairy	Egg	Fish	3.4%
Shellfish	Peanut	Tree Nut		2.0%
Shellfish	Wheat			1.9%
Shellfish	Top 9 Allergens			1.8%
Shellfish	Fish			1.3%
Shellfish	Fish	Peanut	Tree Nut	0.9%
Shellfish	Fish	Egg		0.8%

OVERVIEW

Sesame-free Diners

POPULAR DISHES

-  Spiced Chicken Verde
-  Create Your Own Stir-Fry
-  Glazed Pork Belly
-  Avocado Sandwich
-  Southwest Chicken & Rice

TOP SEARCHES

-  Gluten Free 50
-  Chicken 47
-  Green 24
-  Bowl 22
-  Breakfast 19

OVERLAPPING ALLERGENS



- Peanut **20%**
- Tree Nut **19%**
- Wheat **11%**
- Egg **11%**
- Dairy **10%**
- Soy **10%**
- Fish **10%**
- Shellfish **9%**

OVERLAPPING DIETS



- Vegan **43%**
- Vegetarian **34%**
- Vegan, Vegetarian **12%**
- Pescatarian **11%**

TOP ALLERGEN COMBINATIONS

Sesame	Peanut	Tree Nut	3.1%	
Sesame	Top 9 Allergens		1.8%	
Sesame	Peanut	Tree Nut	Egg	0.8%
Sesame	Tree Nut			0.7%
Sesame	Wheat			0.6%
Sesame	Peanut	Tree Nut		0.6%
Dairy	Egg			0.6%
Sesame	Peanut	Tree Nut	Shellfish	0.6%

OVERVIEW

Peanut-free Diners

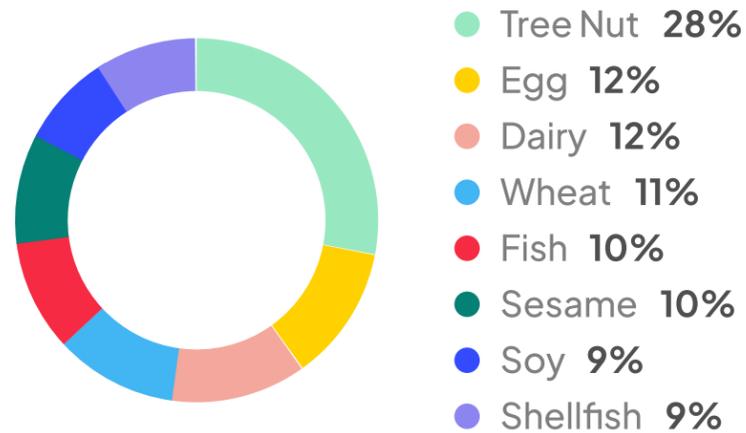
POPULAR DISHES

-  Spiced Chicken Verde
-  Create Your Own Stir-Fry
-  Baja Fish
-  Grilled Chicken Tenders
-  Southwest Chicken & Rice

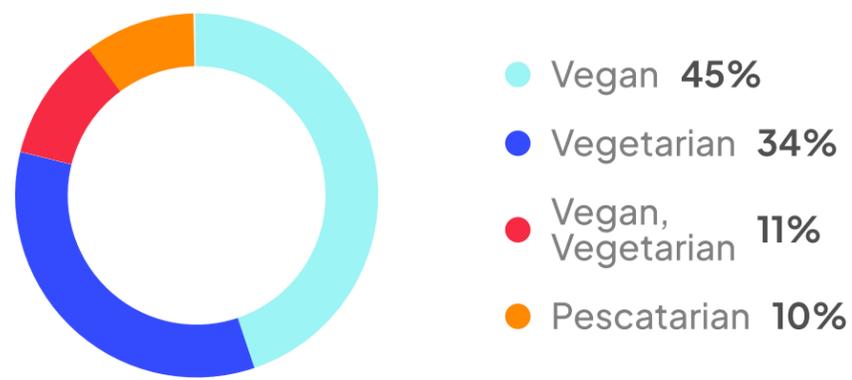
TOP SEARCHES

	Chicken	137
	Gluten Free	80
	Cheese	50
	Fried	43
	Grilled	40

OVERLAPPING ALLERGENS



OVERLAPPING DIETS



TOP ALLERGEN COMBINATIONS

Peanut	Tree Nut	14.6%		
Peanut	Tree Nut	Sesame	3.1%	
Peanut	Tree Nut	Egg	2.6%	
Peanut	Tree Nut	Shellfish	2.0%	
Peanut	Top 9 Allergens	1.8%		
Peanut	Tree Nut	Peanut	Dairy	1.7%
Peanut	Wheat	1.7%		

OVERVIEW

Fish-free Diners

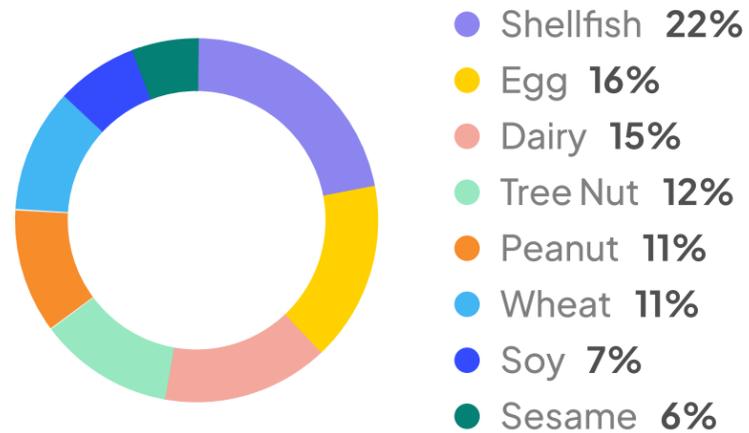
POPULAR DISHES

-  Southwest Chicken & Rice
-  Avocado Sandwich
-  Spiced Chicken Verde
-  Crispy Cauliflower
-  Grilled Chicken Tenders

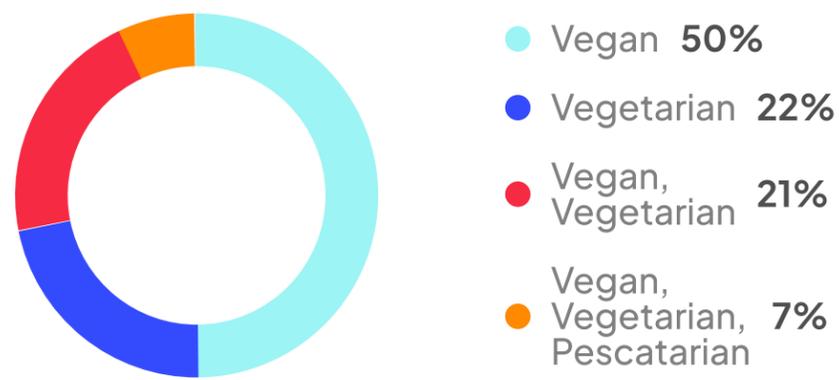
TOP SEARCHES

-  Vegan 73
-  Chicken 54
-  Gluten Free 51
-  Breakfast 26
-  Bowl 26

OVERLAPPING ALLERGENS



OVERLAPPING DIETS



TOP ALLERGEN COMBINATIONS

Fish	Shellfish	Egg	Dairy	3.4%	
Fish	Top 9 Allergens			1.8%	
Fish	Shellfish			1.3%	
Fish	Shellfish	Peanut	Tree Nut	0.9%	
Fish	Shellfish	Egg		0.8%	
Fish	Shellfish	Wheat		0.7%	
Fish	Shellfish	Wheat	Egg	Dairy	0.7%

OVERVIEW

Egg-free Diners

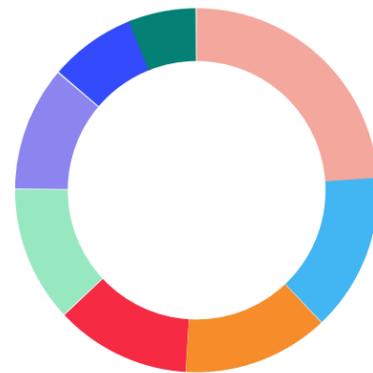
POPULAR DISHES

-  Southwest Chicken & Rice
-  Spiced Chicken Verde
-  Crispy Cauliflower
-  Create Your Own Stir-Fry
-  Fried Apples

TOP SEARCHES

-  Chicken 121
-  Gluten Free 99
-  Vegan 96
-  Cheese 62
-  Fried 48

OVERLAPPING ALLERGENS



- Dairy **24%**
- Wheat **14%**
- Peanut **13%**
- Fish **12%**
- Tree Nut **12%**
- Shellfish **11%**
- Soy **8%**
- Sesame **6%**

OVERLAPPING DIETS



- Vegan **58%**
- Vegan, Vegetarian **19%**
- Vegetarian **16%**
- Vegan, Vegetarian, Pescatarian **7%**

TOP ALLERGEN COMBINATIONS

Egg Dairy	5.6%
Egg Dairy Wheat	4.7%
Egg Peanut Tree Nut	2.6%
Egg Dairy Fish Shellfish	2.4%
Egg Wheat	2.0%
Egg Top 9 Allergens	1.8%
Fish Dairy Wheat Soy	1.7%

OVERVIEW

Dairy-free Diners

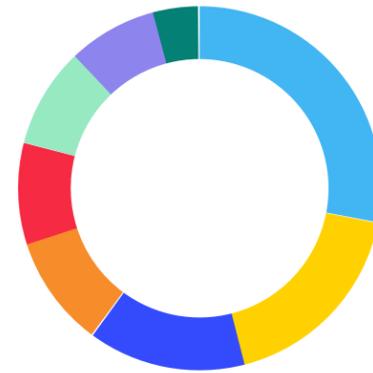
POPULAR DISHES

-  Crispy Cauliflower
-  Southwest Chicken & Rice
-  Fried Apples
-  Spiced Chicken Verde
-  Baja Fish

TOP SEARCHES

	Gluten Free	432
	Chicken	250
	Vegan	110
	Green	84
	Fried	79

OVERLAPPING ALLERGENS



- Wheat **28%**
- Egg **18%**
- Soy **14%**
- Peanut **10%**
- Fish **9%**
- Tree Nut **9%**
- Shellfish **8%**
- Sesame **4%**

OVERLAPPING DIETS



- Vegan **65%**
- Vegetarian **16%**
- Vegan, Vegetarian **13%**
- Vegan, Vegetarian, Pescatarian **6%**

TOP ALLERGEN COMBINATIONS

Dairy	Wheat	30.1%		
Dairy	Soy	7.2%		
Dairy	Egg	5.6%		
Dairy	Soy	Wheat	5.3%	
Dairy	Wheat	Egg	4.7%	
Dairy	Egg	Fish	Shellfish	2.4%
Dairy	Top 9 Allergens	1.8%		

OVERVIEW

Tree Nut-free Diners

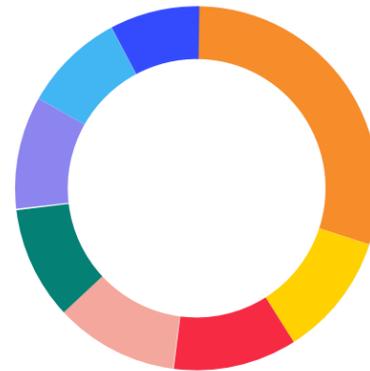
POPULAR DISHES

-  Spiced Chicken Verde
-  Create Your Own Stir-Fry
-  Baja Fish
-  Southwest Chicken & Rice
-  Grilled Chicken Tenders

TOP SEARCHES

-  Chicken 112
-  Gluten Free 80
-  Cheese 44
-  Nuts 35
-  Green 35

OVERLAPPING ALLERGENS



- Peanut **30%**
- Egg **11%**
- Fish **11%**
- Dairy **11%**
- Sesame **10%**
- Shellfish **10%**
- Wheat **9%**
- Soy **8%**

OVERLAPPING DIETS



- Vegetarian **48%**
- Vegan **31%**
- Vegan, Vegetarian, Pescatarian **11%**
- Vegan, Vegetarian **10%**

TOP ALLERGEN COMBINATIONS

Tree Nut	Peanut	14.6%		
Tree Nut	Peanut	Sesame	3.1%	
Tree Nut	Peanut	Egg	2.6%	
Tree Nut	Peanut	Shellfish	2.0%	
Tree Nut	Top 9 Allergens	1.8%		
Tree Nut	Peanut	Egg	Dairy	1.7%
Tree Nut	Peanut	Soy	1.5%	



Final Thoughts

Imagine a world, where you know more than "this diner logged onto our wifi....twice" Or "We think this diner is vegetarian [because they purchased the Veggie Pizza]," with EveryBite's personalization suite, these assumptions become facts.

Because the EveryBite diner uses our personalization filters to customize their menu experience, our real-time data solves the most basic problem facing restaurants today: who is my diner?



Lucy Logan and Sid Conklin

Co-founders of EveryBite



CINEMARK™



honeygrow



POSTINO



rōti



The EveryBite Restaurant Network

These pioneering restaurant brands use a SmartMenu today, to meet the needs of diners living with allergens or dietary preferences. These brands understand the importance of transparency, and are leading the way to better a personalized menu experience every time.

Want to see more restaurants using a SmartMenu, explore menus here:

<http://everybite.com/explore-menus>

Why the EveryBite Diner is so unique

Personalization thrives in a constant state of real-time interactions. Just like in e-commerce, every menu interaction is a chance for restaurants to create an engaging, tailored experience adding value to their brand. Spending hours reading through sales receipts, or relying on archaic panel-based reports, simply isn't effective nor tells the true story about today's diner.

Get In Touch

- **Restaurants:** Join the hundreds of brands that have already unlocked their menu potential with our personalized solutions.
- **Food manufactures & distributors:** Discover how customized ingredient reports can drive product success and increase customer satisfaction

Contact us today, for your customized proposal:
sales@everybite.com

Appendix

Glossary

- **Diner:** A person/consumer that eats at a restaurant or places a to go order.
- **Interactions:** An action taken by the diner to modify or customize their dish.
- **Dietary Preferences:** A dietary preference is an attitude or evaluation of food, including how much someone likes or dislikes a food. Dietary preferences can be influenced by many factors, including culture, health, and lifestyle.
- **Diner Allergens:** Refers to a person's choice to avoid certain foods or ingredients that they are allergic to, essentially meaning they actively choose to not eat foods that could trigger an allergic reaction.
- **SmartMenu:** Proprietary (patent pending), personalization tool for restaurant menus.
- **Filtering:** Action taken by diner on SmartMenu using one or more of the following: drop-downs, checkboxes, search bars and clicks.
- **Real-time:** The way in which a SmartMenu system receives data and then communicates it or makes it immediately available.
- **Insights:** EveryBite's capacity to gain an accurate and deep intuitive understanding of a diner, interacting with a SmartMenu.

Citations

1. National Restaurant Association. (2024). "Consumer Dining Trends: Customization & Allergen Awareness." Retrieved from <https://www.restaurant.org/research/reports/consumer-trends>
2. McKinsey & Company. (2023). "Optimizing Menus with Real-Time Data: How Restaurants Can Reduce Waste and Improve Margins." Retrieved from <https://www.mckinsey.com/industries/restaurants/insights>
3. Deloitte Insights. (2024). "Ingredient Transparency & Personalization: What Today's Diners Expect." Retrieved from <https://www2.deloitte.com/us/en/insights/consumer-industry.html>
4. Food Allergy Research & Education (FARE). (2024). "Understanding Allergens & Dietary Preferences in Foodservice." Retrieved from <https://www.foodallergy.org/research>
5. Technomic. (2023). "How Consumer Preferences Shape Restaurant Menus: Data-Driven Insights." Retrieved from <https://www.technomic.com/consumer-insights>
6. National Institutes of Health (NIH). (2023). "The Impact of Food Allergies on Dietary Choices and Eating Habits." Retrieved from <https://www.nih.gov/health-information/dietary-guidelines>
7. Geert Merchaert, Epicbase "10 Eye-Opening Statistics on Restaurant Food Allergen Attitudes & Practices" <https://get.apicbase.com/statistics-food-allergies-restaurant-allergen-practices/>

These references provide credible data and insights into diner behavior, food allergies, menu optimization, and restaurant industry trends.