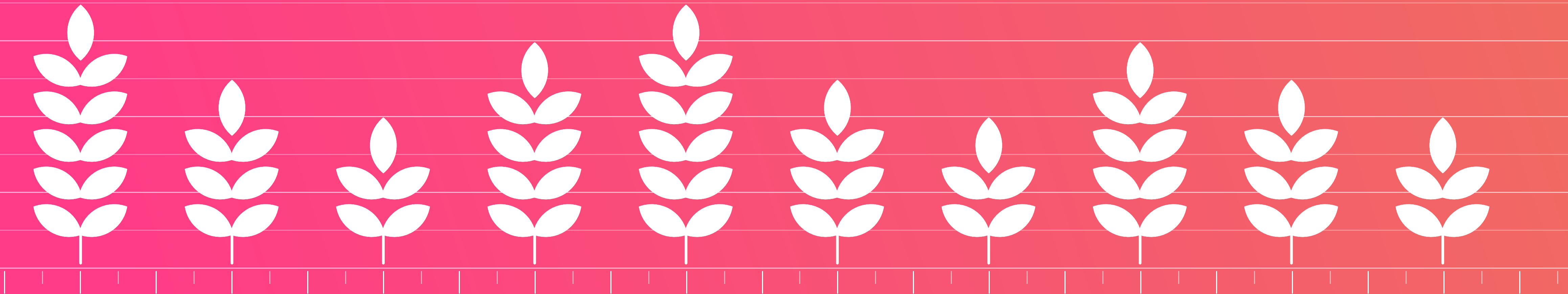




A Grain of Truth:

The Realities of Gluten-Free Dining and Restaurant Discovery in 2024



Consumer Survey Data Report

The Problem



Gluten sensitivity affects an astounding number of people, with between [6-10%](#) of the US population impacted. Simultaneously, Celiac disease has [quintupled](#) over the past 50 years, making “gluten-free” a common request at many dinner tables. And yet, for this growing community, eating out requires a ton of time-consuming research – and is a gamble at best, and dangerous at worst.

Whether they are diagnosed Celiac or ascribe to a gluten-free (GF) diet, these community members struggle to find new places to eat that meet their needs – and it shouldn’t be so difficult! GF eaters deserve to find restaurants that can accommodate them as easily as anyone else.

But even with many online resources and apps already available, the process is still lengthy and cumbersome, plagued by unreliable and out-of-date information.

For GF and Celiac consumers, it’s clear the multitude of existing tools are not only eating up too much time and effort, but also leaving them without a single reliable, go-to resource with up-to-date information that is tailored around their restrictions.

The Survey



Atly conducted a survey of over 300 US-based Celiac and gluten-free consumers to better understand:

- What hurdles GF eaters face in the discovery process for suitable places to eat and drink, and how much time and effort it involves.
- How GF eaters currently discover gluten-free restaurant options, what resources they consult, and how much trust they have in them.

- The general anxiety that GF individuals feel both when eating out and traveling.

The survey sheds light on what is and is not working for Celiac and GF consumers looking for restaurant and travel options that meet their needs, what factors influence their level of trust in the reviews and recommendations they uncover, and their overall habits for finding these locations in the first place.

Key Takeaways

- **Nearly 2/3 of GF/Celiac consumers** find it difficult or impossible to find a new place to eat that accommodates their GF needs.
- **For 50% of GF eaters**, it takes more than 30 minutes to vet new places to eat and 46% find themselves needing to make phone calls to restaurants to verify GF practices.
- When looking for a place to eat, **57% of GF eaters** suffer from a lack of information; 50% also struggle with the time-consuming research.
- The process of eating out also frequently ends in a stomachache, with **42% reporting they've gotten sick after eating out**, and **48% citing safety concerns as an obstacle** to finding suitable places to eat.
- **57% of respondents report limited GF options as an obstacle** to finding new, suitable eateries. This affects travel as well, with 65% of GF eaters feeling more limited in their ability to travel.

GF Eaters' Pain Points



Overarching Problem

55% of GF and Celiac individuals say finding a new place to eat that accommodates their GF needs is difficult or very difficult, with a further 10% reporting it's sometimes impossible.

Discovery Obstacles

GF eaters face the following obstacles when finding a gluten-free place to eat or drink:



Discovery Resources

People use a multitude of resources to discover and find new places to eat and drink that meet their GF needs, as well as to verify that they are safe. But despite the various digital tools available,

53% continue to rely on friends, and 46% still find themselves having to make phone calls to restaurants in advance, consuming precious time and effort.



Trust



A lack of trust plagues the GF discovery process. In an age where hoards of information are available at our fingertips, people must still rely on word-of-mouth recommendations in order to glean trustworthy insights about places to eat that meet their needs.

Friends and family remain the most reliable resource for GF discovery, with 33% of respondents reflecting their high degree of trust in these word-of-mouth recommendations.

45% of respondents have somewhat to little trust in Google Maps for finding places to eat that will accommodate their GF diet.

Respondents felt similarly about Google Search (37% somewhat to little trust), gluten-free websites and blogs (33% somewhat to little trust), and dedicated gluten-free apps as well (39%).

The amount of trust in TikTok and Instagram influencers correlates to age – with the highest amount of trust coming from 18–29-year-olds; 29% of this age group either trusts or highly trusts gluten-free content creators.

In-Restaurant Experience



GF eaters' dining out experience leaves much to be desired.

61% reported they have been dissatisfied with the place they chose to eat/drink due to limited gluten-free menu options

A further 42% cited a total lack of gluten-free options available as the source of their dissatisfaction

52% have felt uncomfortable asking too many questions at a restaurant

42% reported getting sick from eating out

41% say servers misunderstand, belittle, or oversimplify their needs

38% reported they believe restaurant staff don't know how to prepare their meals safely

And 21% have felt too anxious about food safety to even enjoy their meal

Travel



GF eaters have a diminished travel experience overall:

65% say they feel more limited in their ability to travel and 28% say they're less likely to travel at all.

This number was even higher for younger eaters, with 33% of 18-29 year olds reporting they are less likely to travel.

50% of GF eaters say their dietary needs affect how long they are willing to travel, with 45% also reporting their GF needs affect which accommodations and which cities they choose to stay in.

Nearly 39% say it even affects the country they choose to travel to.

55% say they feel more anxious while traveling because of their dietary needs.

Conclusion



The existing gluten-free location discovery resources are failing the GF and Celiac community.

From the quality of the available information, to the experience of discovering that information across the various existing tools – whether search or mapping platforms, or even wholly dedicated apps – to the time it takes to unearth existing information, the current solutions for the growing population of GF eaters leave much to be desired.

And when GF eaters do settle on a restaurant choice, their in-person experience is marred by a lack of trust and a high rate of anxiety.

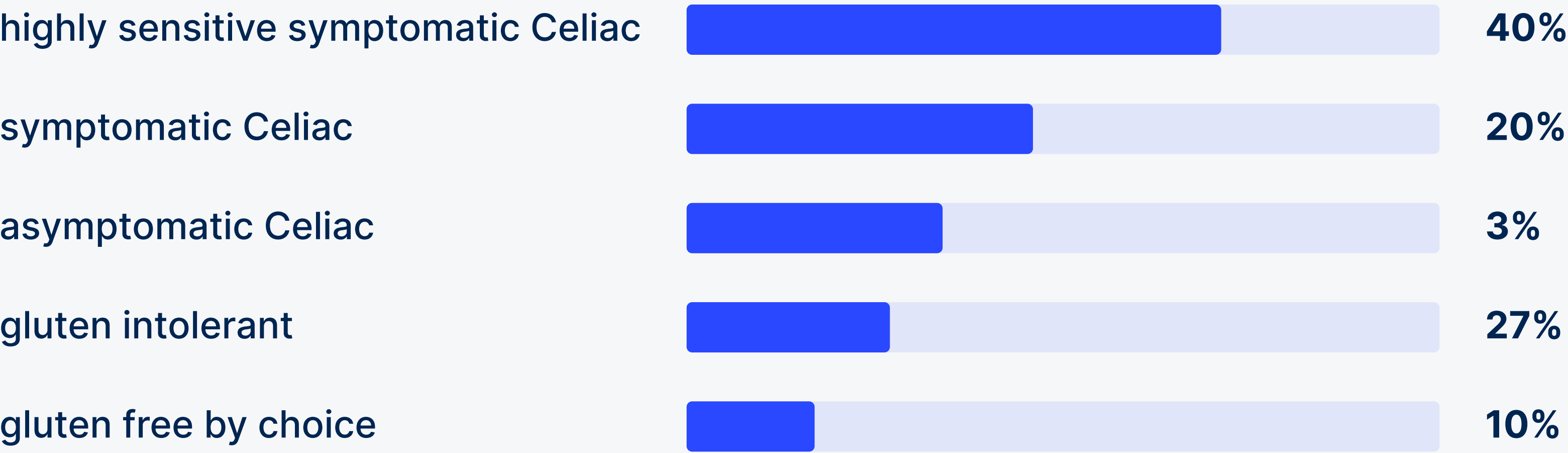
After cumbersome research, many GF eaters are still scared to trust restaurants deemed safe and are also missing out on the plethora of eateries that may actually be accommodating of their personal level of gluten intolerance. These issues plague – and even limit – the travel experience as well.

The GF and Celiac community deserves better tools to discover and vet restaurant options quicker, more easily, and with more confidence – enabling them to enjoy dining out without hassle, worry, or stomachaches.

Methodology

Total surveyed: 308 respondents
Ages: 18-60+
Location: Across the United States.

Only respondents who reported being Celiac or gluten-free were surveyed. The respondents who completed the survey reported their gluten intolerance levels as follows:





Atly is a social mapping platform purpose-built for discovering places to go and things to do. The company is dedicated to facilitating location-based knowledge sharing by enabling users to create map-based communities alongside like-minded people about the places and things they love. With over 7,000 communities across the globe, Atly's proprietary collaborative app blends the visual intuitiveness of mapping with the niche-based specificity of online forums or interest groups, all while leveraging the crowdsourced insights of social media community sharing.

Download Atly here and subscribe to the Gluten-Free Eats map here, which is making it easier and safer than ever before to eat out gluten-free, featuring over 40,000 places across the US.

