

DATASSENTIAL  TRENDS POTTING

FOODBYTES

2020 VISION



The trends to
know in the
year ahead.

DECEMBER 2019

| ISSUE 72 |

**YOUR FREE DATASSENTIAL
TREND REPORT**

IN WITH THE NEW

It's not only hard to believe that we're finishing up another decade, but it's also hard to wrap our minds around *just how much has happened* in the past 10 years. Thinking back to a decade ago, we had yet to meet Amazon's Alexa or Apple's Siri. In fact, we hadn't even gotten our hands on an iPad yet. Uber had yet to carry its first passenger, let alone deliver a meal. Instagram hadn't showcased its first shots of avocado toast or turmeric lattes. And of course, imagining products like the Beyond and Impossible Burgers on the menu at Burger King or White Castle would have seemed, well, impossible.

If all of that can happen in the last decade, imagine what can happen in the next 10 years. That's why it's already time to start thinking about the trends that will shape the year and years ahead. As we always do at Datassential, we're breaking down our trend predictions into the macro trends that have the potential to impact every facet of the industry and even society, plus the more focused micro trends that have specific applications and potential, and finally wrapping it up with the 10 flavors and ingredients to watch in the years ahead. And we do mean years ahead – these are adventurous, early-stage flavors.

In addition to the trends in the pages ahead, there are some even bigger factors that will be on everyone's minds in 2020, each with the potential to impact the industry. The possibility of a recession looms large: *The New York Times* recently reported

that "things look better now than they did last summer, but there is still cause for vigilance." In addition to the continued political ramifications of new or changing policies and tariffs, an election year always brings a range of issues to the forefront, with healthcare and the climate crisis already playing a major role. The oldest members of Gen Z will begin entering the workforce en masse, bringing with them new behaviors, ideas, habits, and expectations. And there are other events and factors we'll be watching, from the Tokyo Olympics stoking interest in Japanese foods to new technologies set to be released, like wearable tech and 5G networks that will only make technology more omnipresent and powerful in everyday applications.

In this issue of **FoodBytes**, we invite you to open your mind to the possibilities and changes we'll see in 2020 and beyond. Consider how they'll impact you, your brands and products, your customers, and society. But this is only a taste of our full 2020 trend predictions and research – the full report is over 100 pages long, packed with data, insights, and deep dives into a range of topics that will impact you in the future (and you'll have early access to it all if you subscribe to Datassential's **Ahead of the Trends** package for 2020). Contact us at info@datassential.com today to schedule your own 2020 trends presentation next year.

MACRO TREND

DIGITAL LIFE IRL



The rules that separate the online world from the real world are merging, creating a future where every interaction has a digital foundation.

In the past, there were two sets of rules – one for how the online world works, and another for how the “real” world works. But in the years ahead, online rules will increasingly become the default rules for many parts of our everyday existence.

Today's personalized menu boards and kiosks mimic the experience of browsing YouTube and Netflix, with AI technology working behind the scenes to seamlessly personalize the experience and impact the consumer's choices. These AI-managed experiences will only become more prevalent: this year McDonald's acquired Dynamic Yield, a company based in New York and Tel Aviv that specializes in decision technology. McDonald's says it will use the technology to update drive-thru menus based on the time, weather, or traffic, and it

can also instantly suggest other items based on what the customer is ordering. In the future, these types of digitally-driven experiences will move away from phones and computer screens and enmesh themselves in our lives in more subtle and continuous ways.

After a slow start, wearable technology could become the next big technology boom, with options like Amazon's Echo Frames and the Echo Loop digital finger ring being rolled out, while Apple is reportedly working on its own augmented reality headset and digital glasses. In the future, we may not even notice that the map in our glasses is directing us to a new restaurant based on what we've purchased in the past, or that our digital ring vibrates when our order is ready. These interactions will simply be a part of our everyday lives.

After the initial boom, the industry will grapple with what plant-based really means and how to best position products and brands.

With so many brands fearful that they'll be left behind and rushing to adopt trends at an ever-faster pace, plant-based meats went from science fiction to the Burger King menu in record time. After that initial rush, however, consumers and companies are starting to grapple with this new reality and, in the year ahead, will question what plant-based really means and how products should be positioned. Brands like Beyond, Impossible, and Awesome have made the product itself their brand, but as more companies enter the space and introduce new categories (watch for more plant-based chicken and seafood products to start hitting

the market), will consumers continue to understand each brand's product as its own distinct creation or will they merge into a single, broader category? At the same time, after the initial excitement over these products dies down, the plant-based industry will have to contend with concerns over whether these products are truly healthier than conventional meats. Companies and categories that are threatened by the growth of plant-based options will also push back more aggressively, with the dairy industry acting as a warning for every organization that you can't ignore changing preferences and trends.



MACRO TREND

PLANT-BASED FINDS ITS IDENTITY

2

MACRO TREND

FOOD + THE CLIMATE CRISIS

3

As the public dialog shifts from "climate change" to "climate crisis," the food industry will increasingly become a central part of the story.

While in the past the focus may have been on fossil fuels or packaging, food itself is increasingly taking center stage as consumers, scientists, politicians, and companies grapple with the increasingly visible impacts of the climate crisis. Constant news stories covering wildfires on one side of the planet, floods on the other side, and extreme heat and droughts everywhere in between, are changing public perception – according to a *Washington Post* and Kaiser Family Foundation poll, 8 in 10 Americans believe "human activity is fueling climate change" and "roughly half believe action is urgently needed with the next decade," and numbers like these keep increasing.

Many companies are already changing how they do business, with wine and coffee producers moving production to new areas while agricultural scientists develop new crops that can withstand changing conditions and temperatures. Options like vertical farming and cellular agriculture will become mandatory evolutions if we want to continue to have access to the ingredients consumers know and love.

With 2020 being an election year, coverage of the issue will only increase, potentially shifting public sentiment from "it's good to be sustainable" to "we have to fix this right now."

A

MACRO TREND

RETHINKING SERVICE

What does hospitality mean when the next generation of consumers believes less is more?

How do you even define good service these days? In the past, the epitome of great service was the “white glove” treatment associated with fine dining, marked by extra attention and personalized care. Yet for many modern consumers, this type of service sends shivers down their spine – it’s too much. They want less eye contact, less direct interaction, and a more streamlined, information-driven experience enabled by technology.

These consumers praise brands like Sephora, which has offered color-coded baskets at some of its European stores – choosing a red basket means you want assistance, while a black basket means you want to be left alone. Or Uber, which introduced its “Quiet Mode” option earlier this year, letting a driver know that the customer prefers minimal interaction.

Other customers don’t want to leave their homes at all, happily ordering goods and services online – after all, they can find anything they want, with

plenty of information and customer reviews at their fingertips, and it will increasingly be delivered in minutes (for some food delivery options), an hour (Shipt, which brands like Targets use, often offers delivery in as little as an hour), or a day (Amazon has introduced one-day shipping options for millions of items).

As these same consumers enter the workforce and become the people *offering* the goods and services, brands will not only have to rethink how they train their workforce, but also how to continue offering a memorable, helpful brand experience. Some brands have started offering customers the option to request help through an app only when needed, while others are offering more opportunities to interact with a brand but on a customer’s own terms, such as through text messages or virtual assistants.

In other words, in the future, white glove service may be defined by the White Glove app.

Ghost kitchens, virtual brands, salad vending machines – are any of these restaurants?

Google "restaurant definition" and you'll get this: "A place where people pay to sit and eat meals that are cooked and served on the premises." But is that true anymore? Ghost kitchens continue to expand across the country, whether it's a dedicated ghost kitchen commissary or an existing restaurant brand that creates a delivery-only concept operating out of the same kitchen. If we expand the definition of a restaurant to include these options, we have the potential to create a near infinite number of virtual "restaurants" on demand: a single brick-and-mortar restaurant could, in fact, be multiple restaurant brands on a delivery platform. A restaurant brand that only exists on an app could open for a single two-hour lunch block and disappear just as quickly – LTOs could make way for LTRs (limited-time restaurants).

At Brew's Hall in Torrance, CA, the food hall may look like it has multiple different vendors, but these are little more than branded pass-throughs

– they all lead to the same kitchen where food is prepared by the same chefs who work for the same management company. Starbucks comprises seemingly every type of restaurant format one can imagine under its brand, from delivery-only stores without dining rooms to the massive experiential Starbucks Roastery concepts with multiple dining formats under one roof.

New York City's Health Department recently struggled with the question of what defines a restaurant when deciding to treat Farmer's Fridge salad vending machines as restaurants. In the years ahead, could a self-driving car where robots prepare and deliver the food also be considered a restaurant? Meanwhile, "dark supermarkets," the delivery-only retail equivalent of a ghost kitchen, are expanding the definition of a grocery store.

In the years ahead, rethink your idea of what a "restaurant" can be – it could open up new opportunities early in the game.

MACRO TREND

WHAT IS A RESTAURANT?



MACRO TREND

UNDERSTANDING AUTHENTICITY

6

It's time to embrace a more nuanced view of what authenticity means.

According to **Datassential MenuTrends**, 7% of menus feature the word "authentic" on them. Yet, when we use the term "authentic" to refer to a food or dish, what do we actually mean? It's an important – and fraught – question for the food industry at a time when consumers increasingly want to try new foods from around the world, yet questions of cultural appropriation and stereotypical ideas of "authenticity" remain. Authenticity can also be harder to define as cultures and cuisines around the world change and evolve at an ever-faster pace,

while chefs today may have a multi-hyphenate cultural background and extensive global life experiences that inform their cooking. In the years ahead, the industry will need to develop a more nuanced understanding of "authenticity" and what it means for their concepts. In fact, there's some evidence it's already happening – while the term "authentic" may be on 7% of menus today, that's down from a peak of 9% about a decade ago, and our **Haiku** machine learning engine predicts it will fall another 6% in the next 4 years.

WE ASKED CONSUMERS: WHICH OF THESE MEANS "AUTHENTIC" TO YOU?

47%

"I want the dish to taste exactly like it's prepared in the country of origin"

51%

"I want the dish to respect the heritage and culture of the cuisine"

1

MICRO TREND BREAKFAST, BRUNCH, BRINNER, BLURRED

As the breakfast bubble deflates and options like all-day breakfast become the new normal, re-inventing breakfast options will be key to keeping the menu fresh and exciting. A number of casual chains have introduced brunch to drive traffic during slower dayparts, while multiple QSRs and c-stores added brunch burgers to the menu last year (and they score well with consumers – check them out in our **SCORES** database). This blurring of the lines between dayparts is par for the course now – chicken is becoming a new breakfast staple, while burgers, tacos, and salads are some of the fastest-growing formats on breakfast menus, according to **Datassential MenuTrends**. Consider how these changes will impact your entire menu or product line in 2020.

"BRUNCH"
MENTIONS ON
MENUS ARE
EXPECTED TO
GROW

15%

IN THE NEXT
4 YEARS

2

MICRO TREND EATERTAINMENT EVOLVES

Datassential has covered the rise of eatertainment extensively in the past: in our 2017 trend predictions we noted that "next-generation eatertainment venues continue to spread across the country" in order to "get consumers out of their homes." Since then we've only seen the segment continue to change and evolve, with plenty of new concepts on the way in the years ahead. Japanese-style listening bars, where guests listen to albums on high-end audio equipment, are opening in New York, L.A., and Chicago, while smaller-format eatertainment venues, retail eatertainment, tech-centric venues, and "theatrical dining experiences" continue to pop up across the country. Meanwhile, the food industry has begun looking for ways to merge with another entertainment subculture: esports. Twitch, the game livestreaming platform that Amazon purchased for nearly \$1 billion, is now bigger than most cable networks in audience size, and today there are esports leagues, professional players, and massive global tournaments. Some restaurants are creating esports lounges, grocery and chain brands are sponsoring professional gaming teams or tournaments, and numerous food manufacturers are positioning themselves as gamers' favorite snack and drink options while they play.



3

MICRO TREND NEW WAVE TEA

The tea industry has been quietly following in the footsteps of the third wave coffee movement for a number of years, and in the next few years it's poised to reach a broader national market as consumers get more savvy about their tea and as the growing number of cafes across the country introduce premium, artisan options to the menu. Dedicated tea cafes are also creating an upscale tea experience, with tea baristas who can explain origins and tasting notes, plus unique equipment to achieve the perfect steep, custom-made tea blends, and experiential options like matcha tea ceremonies.



MICRO TREND TABLESPREADS

4

"Sit back and let us fill your table with an array of cold zakuski," says the description of the "Ruskie Zakuski Experience" at Portland's Kachka restaurant. An evolution of the small plates and "grazing tables" trends, tablespreads give diners a chance to try a little bit of everything, while also being perfect fodder for that "hover over the table" Instagram shot. Check out Khao Noodle Shop in Dallas, where nothing is more than \$8.00 and portions are small, which means plenty of diners order everything on the menu to fill the table. Want to do it yourself? Look for global inspiration – mezze, banchan, salatim, etc.



MICRO TREND SOUTH AFRICAN CUISINE

Interest in the varied cuisines of Africa has been growing in the U.S. for years, from the spices and stews of North African countries to the grains of East Africa. Now, interest is turning toward South Africa. South African wine, after years of drought had impacted the industry, is making a comeback with new premium varieties and styles. Numerous brands that specialize in biltong (South African jerky) are hitting mainstream store shelves at retailers like Whole Foods and Aldi, while South African tea is earning a prime place on both shelves and menus. Piri piri sauce, perhaps most associated with South African chain Nando's, has grown 44% on U.S. menus in the past 4 years (**MenuTrends**). Or check out braai, aka South African BBQ, at restaurants like New York's Braii Wine & Cuisine or Baobab BBQ in Chicago.

5

MICRO TREND

HYPER REGIONALITY

In our 2016 trend predictions, we noted that younger generations, who were not only more multicultural themselves but also more interested in global cuisines compared to other generations, were "moving beyond painting ethnic cuisine with a broad brush and instead focusing on individual dishes." Rather than going out for Mexican or Japanese food, they're seeking out tacos or ramen specifically. That same understanding and savviness, plus the aforementioned focus on a better understanding of cuisines and what "authenticity" means, is also leading to an interest in specific regions. Now cities like L.A. or Chicago don't just have Mexican restaurants, they have restaurants that specialize in Oaxacan or Yucatecan cuisine, while other cities may have Italian restaurants that specialize in Piemontese or Sardinian dishes. On the menu or retail shelf level, expect more regionally-focused menus, LTOs, and products/line extensions in the future as well as even more hyper-focused concepts that specialize in a particular city or neighborhood.

A FEW REGIONALLY-FOCUSED CONCEPTS

- Both Hawker Fare in San Francisco and Zaap Thai in Portland specialize in the cuisine of the Isan region of northeastern Thailand, bordering Laos.
- Detroit's San Morello, which opened late last year, features the cuisine of southern Italy and Sicily, while the city's Mariscos El Salpicon specializes in seafood dishes from the Nayarit region of Mexico.
- In New York, Tomino Taberna Gallega homes in on small plates from the Galician region of northwest Spain, while the city's Txikito features cuisine from Spain's Basque region.

MICRO TREND

FARMS EVERYWHERE

While massive indoor greenhouses and hydroponics and aquaponics farms continue to open around the world, there's a smaller revolution happening on the other end of the spectrum – a rise in micro-farming. These small, often automated growing appliances (known as Controlled Environment Agriculture, or CEA) are showing up in hospitals, college campuses, hotels, supermarkets, restaurants, and even residential homes – imagine a small grow box built into the kitchen right next to the microwave. Farmshelf (pictured right) can be found at restaurants like Marcus Samuelsson's Red Rooster in New York, and the company is also developing a home version for future release. And just this year, Kroger announced it would add Infarm hydroponic micro-farms to some stores, which resemble a freezer case growing fresh produce. Kitchen farms for retail and residential use not only shrink food mileage down to zero, but they also mean that chefs and consumers can grow exactly what they want and need – a hyper-personalized farm, so to speak.



FLAVOR TRENDS

10 FLAVORS & INGREDIENTS TO WATCH

**AJVAR**

From sriracha to gochujang to ajvar? Pepper-based condiments like this fire-roasted red pepper option from the Balkans can quickly trend because of their versatility as a spread or dip.

GRAINS OF PARADISE

Native to West Africa, this intriguingly-named spice has a flavor all its own, with notes of black pepper, cardamom, and citrus mixed with floral flavors. Try it on seafood, drinks, or desserts.

**KARAAGE**

This Japanese frying technique (pronounce it kah-ra-ah-geh) is becoming a trendy prep method for chefs in the U.S. Try it with chicken for an on-trend chicken sandwich option.

UNRIPE PRODUCE

Chefs are starting to discover and get creative with the unique flavors and textures of unripe produce – think options like unripe mango, green strawberries, or unripe avocado.

**PILI NUTS**

Everything from the keto diet to the constant search for more superfoods to the rise of nut-based alternatives is driving interest in Filipino pili nuts, often eaten whole or as a powder.

**ASH**

With so many restaurants adding hearths, it was almost inevitable that chefs would start playing with the ash. Look for ash-baked veggies, ash-crusted meats, and a sprinkling of ash as a garnish.

**TEPACHE**

From kefir to kombucha, fermented drinks continue to grow, including this fermented pineapple-based beverage from Mexico that's flavored with piloncillo and cinnamon.

**SABZI KHORDAN**

Interest in Persian cuisine continues to build due to chefs like Samin Nosrat. With the continued growth of plant-based cuisine, check out sabzi khordan, a fresh platter of herbs and feta.

**VERMOUTH**

A long-time supporting player, vermouth is starting to take center stage on the drink menu as consumers discover its lower ABV and the wide variety of styles and brands available.

**URFA BIBER**

Consumers can't get enough new varieties of peppers, so watch for this Turkish dried chili pepper, which has a smoky, almost raisin-like taste, to start appearing on more menus and retail shelves.

READY FOR MORE?

More data?

More research?

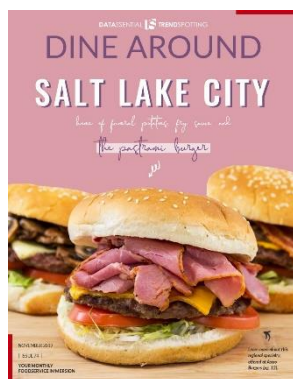
More ideas?

More of the future?

This is only a taste of our full 2020 trend predictions and research — the full report is over 100 pages long, packed with data, insights, and deep dives into a range of topics that will impact you in the future.

Contact us at info@datassential.com today to schedule your own 2020 trends presentation.

LAST MONTH'S TRENDSPOTTING



DINE AROUND

We explored the culinary scene in **Dine Around: Salt Lake City**, where regional staples like pastrami burgers and fry sauce (no, not ketchup), plus macro trends like the plant-based movement, are center-stage.

IN JANUARY: Jackson, MS



INTERNATIONAL CONCEPTS

We headed back to **France** to check out the chain scene in last month's **International Concepts**. Discover how burgers have taken over the country, a French take on poutine, and a dining in the dark concept.

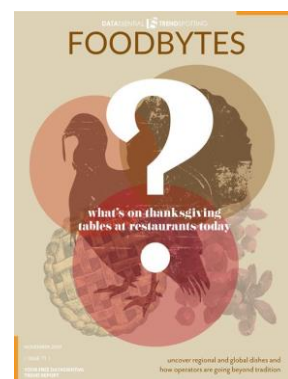
IN JANUARY: Pastries



ON THE MENU

In November's **On the Menu** we feasted on **mezze**, checked in on **turducken**, and looked at **camu camu**, **Japanese omelets**, and **kernza**.

IN JANUARY: Baobab, yucca, souffle pancakes, cold foam, and more.



FOODBYTES

In last month's **FoodBytes**, we looked at modern approaches to the Thanksgiving feast, including plant-based options, convenient solutions, and friendsgiving.

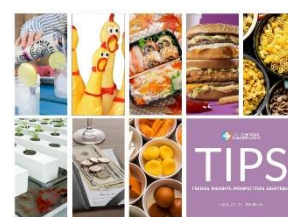
IN JANUARY: MenuTrends Infinite



CREATIVE CONCEPTS

The future is now in **Creative Concepts**. In our November issue, we looked at the **latest technologies**, from AI-powered inventory software to smart menus to VR experiences and more.

IN JANUARY: Spirit-free & Low-ABV Bars



TIPS

Our Fall issue of **TIPS** was jam-packed with research. We looked at **secret menus**, the growth of **spiked seltzers**, the latest on the **chicken trend**, **next-level pasta shapes**, **aquaponics**, **healthcare surcharges**, and **Indian desserts**.

WINTER ISSUE: Seed butters, ugly produce, DNA diets, lent, and more.

For information about an issue or to subscribe to a title, contact
Datassential Business Development Manager Susan Cohen at
312-219-6428 or **susan.cohen@datassential.com**.

AHEAD OF THE TRENDS PACKAGE

How can we react to trends faster? How do we lead the trends instead of follow them? How can we be the source for the latest concepts and ideas? If you have been asking yourself questions like this – if you want to inject a little of that Datassential vibe into your company – invest in the 2020 Ahead of the Trends package. You'll have access to a steady stream of cutting-edge publications, webinars, reports, and presentations for the entire year, PLUS two tickets to join us at the most trend-forward event in the industry – FOODSCAPE.



TRENDSPOTTING SUBSCRIPTION

Where does Datassential's Trendologist discover the latest concepts and ideas? From Datassential's TrendSpotting series. Get 70 digital issues a year delivered to everyone at your company and create an army of your own creative trendologists who are up to date on the latest trend information. Plus, you'll have access to the entire back catalog – hundreds of issues – searchable in SNAP!

100 TRENDS & IDEAS SPECIAL ISSUE

Start the year with 100 trends and ideas inspired by our TrendSpotting series, only for Ahead of the Trends package subscribers.

PERSONALIZED 2020 TRENDS PRESENTATION

Schedule a personalized virtual overview of Datassential's 2020 trend predictions for your company. PLUS, we'll give you early access to our 2021 trend predictions at the end of the year.

QUARTERLY TREND WEBINARS

Join Datassential for a lunch-time overview of the latest trends, exclusively for Ahead of the Trends package subscribers.

RECAP REPORT

At the end of the year, we'll bring together the coolest trends, concepts, and ideas we covered in our TrendSpotting series and organize them into relevant chapters, complete with summaries and insights on what it all means. Plus, we'll send it to you as a PowerPoint file, ready to insert into your own decks and presentations.

TWO TICKETS TO FOODSCAPE

Ask anyone who has attended – there's nothing like it. Datassential's Foodscape experience immerses you in the futuristic ideas that will transform the industry. Plus, your tickets will include spots on our always sold-out trend immersion tours.



PACKAGE OVERVIEWS

2020 AHEAD OF THE TRENDS PACKAGE

- 12 issues of Dine Around
- 12 issues of Creative Concepts
- 12 issues of On the Menu
- 12 issues of International Concepts
- 6 issues of World Bites
- 4 TIPS trend reports
- 12 issues of FoodBytes
- Special Edition: 100 Trends & Ideas (exclusive to subscribers)
- 4 quarterly trend webinars (exclusive to subscribers)
- Virtual 2020 Trend Predictions presentation (in-person options also available)
- 10 TrendSpotting Recap Report PowerPoint decks (exclusive to subscribers)
- 2 tickets to Foodscape 2020 with trend immersion tours
- Early access to Datassential's 2021 trend predictions

2020 FOODSERVICE PRO PACKAGE

- Complete PULSE Foodservice Expert subscription package:
 - 2020 PULSE Market Overview Report
 - 2020 PULSE Topical Report
 - 12 Monthly Operator Sentiment Reports
 - Access to the 2019 PULSE Topical Report
- 14 Segment Detail Reports
- 2020 Firefly 500 Report

COMPLETE YEAR OF TRENDS PACKAGE

- 2020 Ahead of the Trends Package
- 2020 Foodservice Pro Package

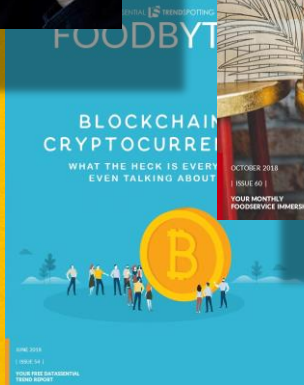
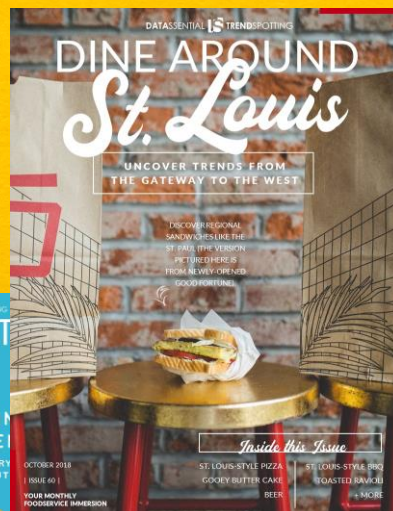
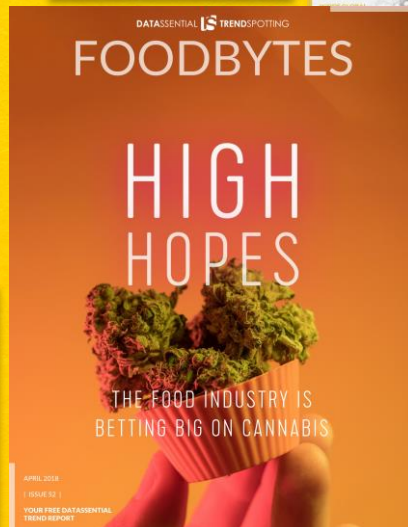
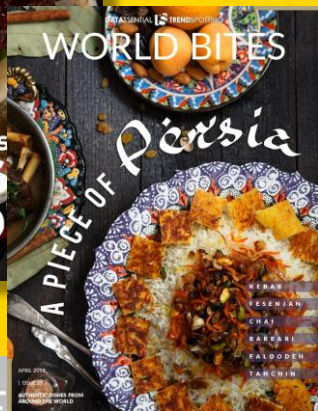
SUPPLEMENTAL ADD-ON OPTIONS

- Datassential-led trend immersion tours and ideation sessions
- Custom trend magazines for internal or external distribution
- Virtual brainstorming sessions with the Datassential team
- In-person trend or topical presentations

CONTACT YOUR DATASSENTIAL BUSINESS DEVELOPMENT MANAGER

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DATASSENTIAL **IS** TRENDSPOTTING

Firefly 500 Report

The inaugural **Firefly 500 Report** reframes the industry's big picture. Get more than the typical performance metrics. Understand the potential of the largest restaurant chains by integrating their numbers with insights from Datassential's dynamic platforms.

1

Get in on the ground floor.

The Firefly 500 Chain Restaurant Report ranks the industry's most significant players by unit count, showing which brands are winning the competition for real estate, star franchisees, and investor interest. By tracking unit growth and its effect on chains' sales and AUVs, you can identify the next category killer or the next killer category.

2

Get the numbers in context.

The Firefly platform powers the collection of sales and location data for the Firefly 500, but it's not the only Big Data application behind our insights. Operator data from the PULSE service, combined with consumer findings from SCORES and BrandFingerprints, measure the impact of the latest menu and operations moves for chains.

3

Get everything faster.

Purchasers of the report receive an iDEA Tool for segment-level reporting and lead generation, as well as expanded chain profiles in SNAP! Access new and upgraded metrics like chains' sales and unit growth figures, top metro markets, menu composites, and more.



Firefly 500: By The Numbers

**\$308.95
billion**

in annual sales among
Top 500 chain brands.

232,228

locations in the United
States among the 500
largest brands.

-0.7%

decline in unit count for the Full-Service
Restaurant segment.

While the Buffet and Pizza
sectors contracted units
significantly in 2018, there
were some standout
segments, including Sports
Bars, Seafood and Steak
restaurants, and Ethnic-
cuisine brands.

Salad-Healthful led all Limited Service segments
in unit count growth in 2018.

Salad-Healthful

10.6%

Coffee

4.2%

Mexican

3.7%

Asian

3.3%

Chicken

2.4%

Bakery-Café

2.3%

54%

of operators said
adding third-party
delivery was
incremental to
sales.



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