

# Dining Out in 2020 – US – December 2019

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- Restaurant sales are growing, but FSRs are struggling
- Americans want to cook more often in 2020
- Volatile economic conditions pose a serious risk

Americans' interest in casual and off-premise dining is largely fueling industry growth, leading to a rise in new delivery formats including ghost kitchens along with the faster growth of the LSR segment compared to the FSR segment. In 2020, operators should focus on adding menu options that fit diners' unique lifestyle needs including plant-based, diet-specific and natural ingredients as well as more personalized and convenient ordering options.



"Restaurant sales are predicted to maintain steady growth in coming years but are vulnerable to volatile economic conditions, triggering a decrease in dining out spending."

**- Hannah Spencer,  
Foodservice Analyst**

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Table of Contents

### OVERVIEW

- What you need to know
- Definition

### EXECUTIVE SUMMARY

- Top takeaways
- The issues
- Restaurant sales are growing, but FSRs are struggling  
Figure 1: Total US sales and forecast of restaurants and eating places\* market, at current prices, 2014-24
- Americans want to cook more often in 2020  
Figure 2: Planned dining out behavior for 2020, October 2019
- Volatile economic conditions pose a serious risk  
Figure 3: Restaurant behaviors, October 2019
- The opportunities
- Invest in food quality in 2020  
Figure 4: Areas of concentration for restaurants, October 2019
- Younger diners willing to pay for quality  
Figure 5: Restaurant attitudes, by generation, October 2019
- The majority of consumers prefer casual dining experiences  
Figure 6: Restaurant attitudes, October 2019

### THE MARKET – WHAT YOU NEED TO KNOW

- Restaurant sales continue to grow, but FSRs are growing at a slower rate
- At-home cooking is restaurants' biggest competition
- Gen Z are increasingly important diners

### MARKET SIZE AND FORECAST

- Foodservice industry maintains moderate growth  
Figure 7: Total US sales and forecast of restaurants and eating places\* market, at current prices, 2014-24  
Figure 8: Total US sales and forecast of restaurants and eating places\* market, at current prices, 2014-24

### MARKET BREAKDOWN

- LSR segment growth outpaces FSRs  
Figure 9: Total US revenues and forecast of restaurants and eating places\*, by segment share, at current prices, 2017 and 2019

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: Total US revenues and forecast of restaurants and eating places\*, by segment, at current prices, 2017 and 2019

- **Fast casual sales propel LSR segment growth**

Figure 11: Total US revenues and fan chart forecast of limited service eating places\*, at current prices, 2014-24

Figure 12: Total US revenues and forecast of limited service eating places\*, at current prices, 2014-24

Figure 13: Top 10 fast casual restaurant chain percentage change in sales over prior year, 2018

- **Casual and family dining chain sales contribute to slower FSR segment growth**

Figure 14: Total US revenues and fan chart forecast of full service restaurants, at current prices, 2014-24

Figure 15: Total US revenues and forecast of full service restaurants, at current prices, 2014-24

Figure 16: Top 10 casual dining restaurant chain percentage change in sales over prior year, 2018

Figure 17: Top 10 family dining restaurant chain percentage change in sales over prior year, 2018

### MARKET PERSPECTIVE

- **Home-cooked meals perceived as healthier than dining out**

Figure 18: Attitudes toward healthy dining, December 2018

- **Retailers invest in prepared food delivery**

Figure 19: Prepared food purchase frequency – NET prepared food user groups and any purchase, October 2018-2019

### MARKET FACTORS

- **Economic instability is a threat for operators**

Figure 20: Consumer Sentiment Index, January 2007-October 2019

- **Generation Z comes of age**

Figure 21: Population, by generation, 2014-24

- **Younger Americans are increasingly diverse**

Figure 22: Distribution of population, by generation and Hispanic origin, 2019

### KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Diet-specific menus become table stakes**
- **Operators struggle to bring diners into restaurants**
- **Connecting with canna-fans**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## WHAT'S WORKING

- **Operators personalize menus to meet dieters' needs**  
Figure 23: Dietary preferences, February 2019  
Figure 24: Qdoba Lifestyle bowls
- **Fast food operators go beyond the traditional beef burger**  
Figure 25: Increase in menu item incidence for meat substitutes as an ingredient on QSR menus, Q1 2015-Q3 2019  
Figure 26: Increase in menu item incidence for meat substitutes as an ingredient across restaurant segments, Q3 2015-Q3 2019

## WHAT'S STRUGGLING

- **On-premise dining is on the decline**

## WHAT TO WATCH

- **Ghost kitchens offer even more delivery options**
- **Cater to canna-curious consumers or risk losing them**  
Figure 27: Cannabis statements, July 2019

## THE CONSUMER – WHAT YOU NEED TO KNOW

- **More Americans visit LSRs and are doing so more often**
- **Gen Zers are increasingly important diners**
- **Prioritize natural and high-quality ingredients**

## RESTAURANT VISITATION

- **Nearly all Americans have dined out in the past three months**  
Figure 28: Restaurant visitation in the past three months, October 2019
- **LSR visitation is more habitual**  
Figure 29: Restaurant visitation frequency, October 2019
- **More than half of Millennials visit coffee/tea shops at least weekly**  
Figure 30: Restaurant visitation frequency, Net – Once a week or more, by generation, October 2019
- **Hispanic consumers are top restaurant-goers across segments**  
Figure 31: Restaurant visitation frequency, Net – Once a week or more, by race and Hispanic origin, October 2019  
Figure 32: QSR concept interest, by race and Hispanic origin, February 2019

## PLANNED DINING OUT BEHAVIOR FOR 2020

- **Two in five consumers plan to cook at home more in 2020**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Figure 33: Planned dining out behavior for 2020, October 2019

- **Parents want to cook more often**

Figure 34: Planned dining out behavior for 2020, October 2019

- **Young generations are digitally savvy diners**

Figure 35: Planned dining out behavior for 2020, October 2019

Figure 36: Delivery and pickup motivators– Any agree, by generation, September 2019

## RESTAURANT BEHAVIORS

- **Dining out visitation is vulnerable to changing economic conditions**

Figure 37: Restaurant behaviors, October 2019

- **Gen Z spending more on dining out, but are also most likely to cut back on dining to save**

Figure 38: Restaurant behaviors, by generation, October 2019

- **A variety of delivery options can meet parents' need for convenience**

Figure 39: Restaurant behaviors, by parental status and gender, October 2019

## RESTAURANT ATTITUDES

- **Half of consumers prefer more casual dining experiences**

Figure 40: Restaurant attitudes, October 2019

- **Frequent FSR customers are willing to spend more for plant-based options**

Figure 41: Restaurant attitudes, by restaurant visitation frequency segmentation, October 2019

- **Younger consumers willing to pay for quality, but aren't satisfied with current options**

Figure 42: Restaurant attitudes, by generation, October 2019

## MENU ITEM INTEREST

- **Diners prioritize quality ingredients**

Figure 43: Menu item interest, October 2019

- **Frequent FSR customers are more interested in meatless options**

Figure 44: Menu item interest, by restaurant visitation frequency segmentation, October 2019

- **CBD-infused menu items appeal to younger consumers**

Figure 45: Menu item interest, by generation, October 2019

- **Gen Zers expect more transparency**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 46: Menu item interest, by generation October 2019

## PLANT-BASED MENU ITEM MOTIVATORS

- **Health is the primary driver for repeat plant-based purchases**

Figure 47: Plant-based menu item motivators, October 2019

## AREAS OF CONCENTRATION FOR RESTAURANTS

- **Consumers want operators to concentrate on food quality in 2020**

Figure 48: Areas of concentration for restaurants, October 2019

- **Asian and Hispanic consumers are most interested in more authentic international cuisines**

Figure 49: Areas of concentration for restaurants, by race and Hispanic origin, October 2019

## APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Fan chart forecast
- Consumer survey data
- Consumer qualitative research
- Mintel Menu Insights
- Abbreviations and terms
- Abbreviations

## APPENDIX – THE MARKET

Figure 50: Total US sales and forecast of restaurants and eating places\* market, at inflation-adjusted prices, 2014-24

Figure 51: Total US sales and forecast of limited service eating places\*, at inflation-adjusted prices, 2014-24

Figure 52: Total US sales and forecast of full service restaurants, at inflation-adjusted prices, 2014-24

Figure 53: Distribution of generations by race and Hispanic origin, 2019

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.