Industry Insights

A roundup of noteworthy foodservice findings
for the week of May 18, 2026




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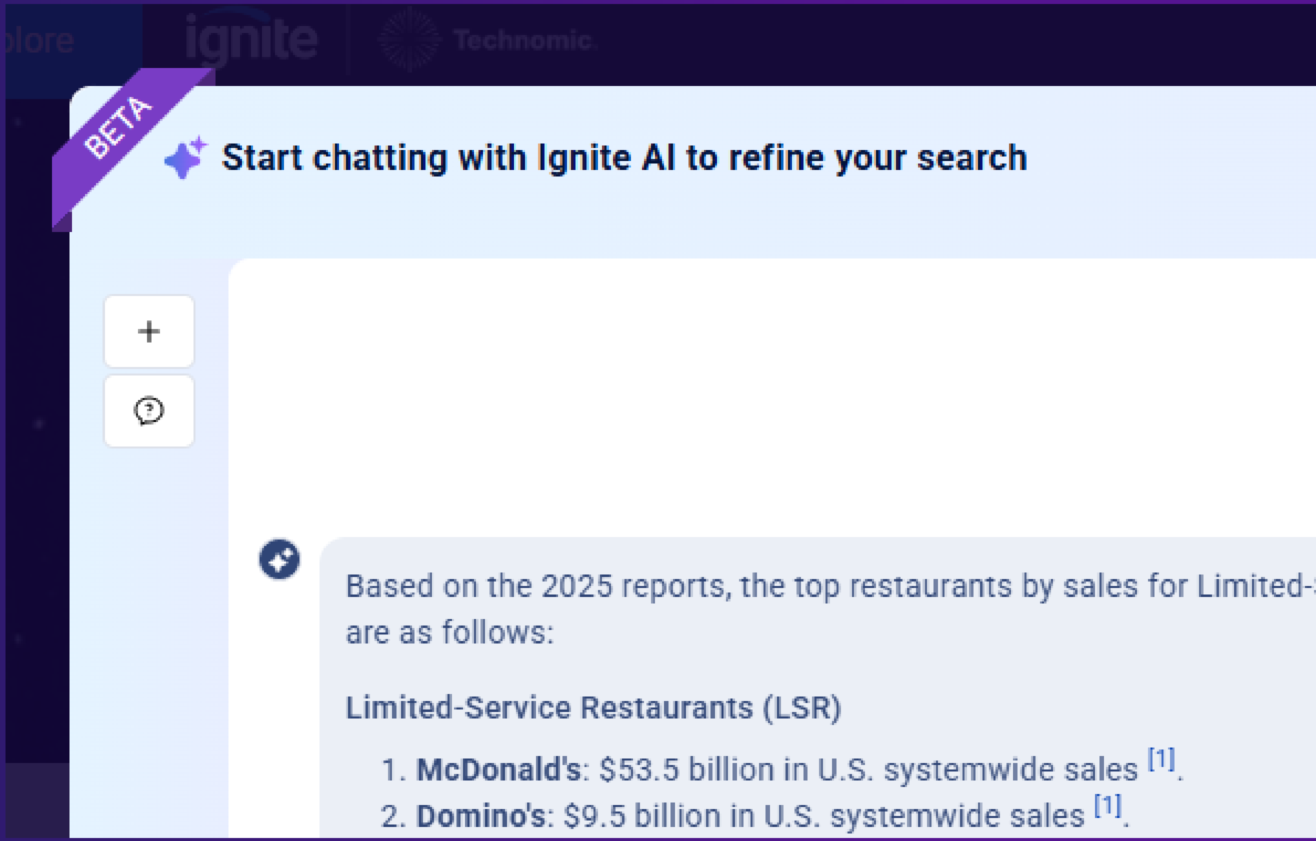


Ignite Company

Chain same-store sales improved in Q1 2026

Cumulative same-store sales for publicly traded chain restaurants rose by 2.4% during Q1 2026, marking the fourth consecutive quarter of accelerating growth, as well the strongest quarterly increase observed since 2023.

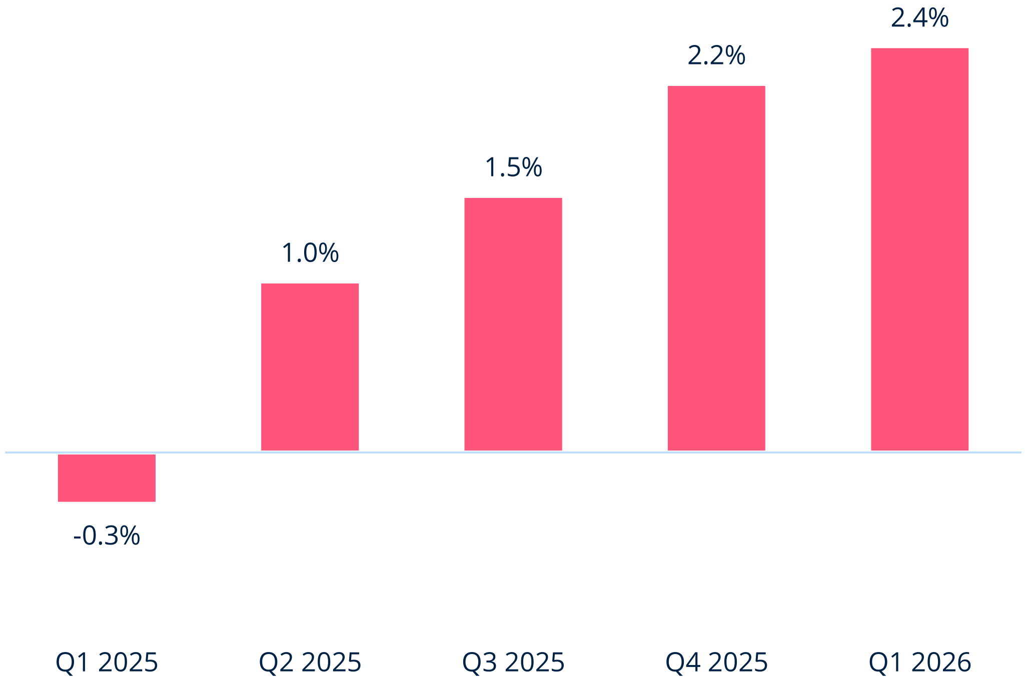
Industry giants Taco Bell and Starbucks helped lift overall chain performance, notching Q1 same-store increases of 8.0% and 7.1%, respectively. Top steakhouse players Texas Roadhouse and LongHorn Steakhouse propelled the full-service segment, as both chains generated same-store sales growth of more than 7% during the quarter.

Take advantage of Technomic's quarterly *Same-Store Sales and Acquisition Tracker* to explore quarterly chain performance trends.

Ignite Company clients: Click here for more

Note: Quarterly average is weighted to account for each company's respective sales volume
Source: Technomic Ignite Company and company investor filings

CHAIN RESTAURANT SAME-STORE SALES
CUMULATIVE CHANGE VS. PRIOR YEAR



Ignite Menu

Mocktail, virgin or alcohol-free drinks?

When it comes to the naming of alcohol-free beverages, we have seen operators resort to a wide-ranging terminology.

Mocktail and virgin continue to be the most common terms used in item names, whereas nonalcohol/nonalcoholic and zero-proof are the most common terms used in item descriptors.

Despite this, we are increasingly seeing operators move away from terms like mocktail and virgin—given the negative connotations associated with them—and moving toward either more straightforward terminology (e.g., zero-proof, alcohol-free, etc.) or more colorful item names.

For example, one approach to naming these drinks is via a fun play on classic cocktail names. Examples include No-jito, Nomarita, Faux-jito, Faux-Loma, Mule'ish, Mock-a-Rita, NAgroni, Nogroni, Mockarita, No-Paloma, Pina No-Lada, Fauxtini and Sans-gria.

Another method is simply menuing an item with no specific terminology or no mention of it having no alcohol, which is in tandem with the greater normalization of these types of beverages on menus. One example is an Apple Ginger Fizz with apple puree, fresh lime juice, ginger beer, soda, mint and candied ginger.

Ignite Menu clients: Click here for more

Source: Technomic Ignite Menu National Food Trends, Q1 2026
Image Source: Shutterstock

Top Five Terms in Item Names

1. Mocktail
2. Virgin
3. Zero-Proof
4. Nonalcohol/Nonalcoholic
5. Alcohol-Free

Top Five Terms in Item Descriptions

1. Nonalcohol/Nonalcoholic
2. Zero-Proof
3. Mocktail
4. Spiritless/Spirit-Free
5. Alcohol-Free

Ignite Consumer

Consumers are redefining value with the overall experience in mind

Atmosphere plays a major role in consumers' value perceptions at restaurants. At both limited- and full-service restaurants, consumers are more likely to associate good value with a quiet and relaxing environment rather than a lively, upbeat setting, signaling a desire to escape their busy routines. A family-friendly setting or music playing at a reasonable volume can contribute to a more comfortable and enjoyable experience.

"Music and the vibe inside. If I feel relaxed with a little nice music, it would make me want to come back." —Female, millennial

"Live music is always a good thing at restaurants. Even the radio playing in the background at a low tone can make a restaurant a better experience."—Male, millennial

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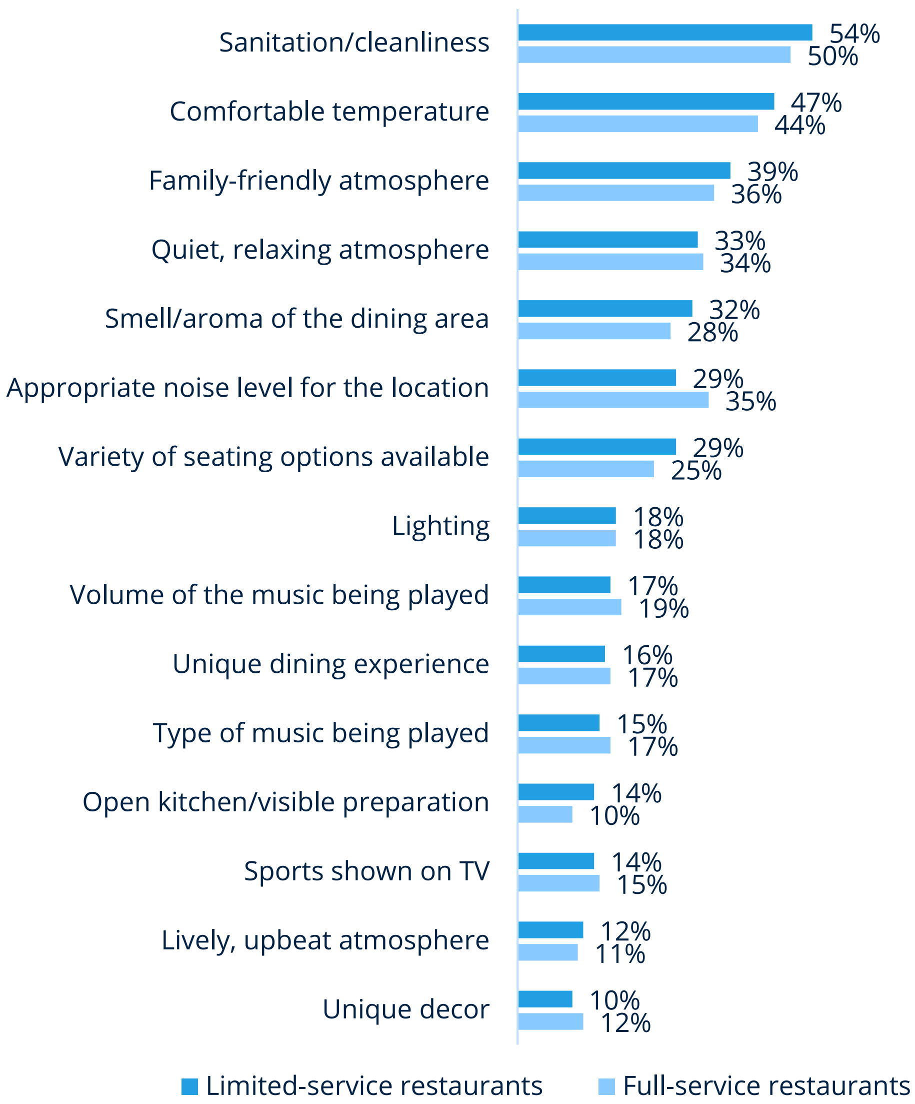
Base: 750 consumers who purchase from limited-service restaurants and 749 consumers who purchase from full-service restaurants
Q: Which of the following attributes related to the ambiance and atmosphere are most important in creating a good value at [insert segment]? Select up to five options.
Source: Technomic 2026 Value & Pricing Consumer Trend Report

AMBIANCE ATTRIBUTES THAT CREATE VALUE



Global Foodservice Navigator Program

Shareable sides and desserts

Technomic Global Foodservice Navigator Program's recent *Global Menu Trend Study* details influential flavours, preparations and industry trends, including the rise of quick-service meals designed for sharing. Below is a closer look at this trend.

Nearly 60% of global consumers say they order meals to share or split with family and friends. This includes about two-thirds of Latin America and Middle East restaurant-goers.*

About half of global consumers also say they order from foodservice specifically to socialize, with consumers in Europe and Asia especially likely to do so.**

In response, chains are emphasizing shareable sides, snacks and desserts as fun on- and off-premise experiences. Chains are positioning these LTOs as chances to indulge in nostalgia and youthfulness, as well as fun social experiences.

Splitable sides are often rolled out as jumbo-portioned fries or nachos, while mini entrees like sliders—sliders themselves a growing trend—are increasingly seen on menus made for sharing. Sweets are commonly billed as an excuse to celebrate with friends and family, offering new visit occasions for chains that consumers may not otherwise choose for dessert occasions.

Global Navigator clients: Click here for more

Source: *Q: Now, for which of the following do you order food or beverages from restaurants or other dining locations? Select all that apply.
*Source: Technomic August 2025 consumer survey
**Q: For what type of occasions do you order food from restaurants or other foodservice locations? Select all that apply.
**Source: Technomic February 2026 consumer survey
Image Source: Taco Bell India Instagram

IGNITE AI PROMPT OF THE WEEK

In each Industry Insights, we ask Ignite AI a top-of-mind industry question and share the answer with you. Copy and paste our prompt or write your own to answer your industry questions in our Ignite.

What are Gen Z's favorite convenience-store brands? Answer by providing the top-rated brands for overall visit satisfaction. Show how Gen Z's top-box ratings compare to the consumer average

Technomic Ignite clients: Click here for more

Source: Technomic Ignite AI

Key Takeaways

1. Buc-ee's is the undisputed Gen Z leader in top box satisfaction, achieving near-universal satisfaction across generational lines.
2. Allsup's/Yesway and United Dairy Farmers show the sharpest Gen Z preference uplift. These brands are regional operators, suggesting younger consumers in those local markets have a strong affinity that the overall population has not fully matched, presenting a meaningful loyalty opportunity.
3. For Family Express, in particular, the near-parity, top-box scores indicate that, while Gen Z assigns "excellent" ratings slightly more frequently, the overall experience resonates broadly across age groups, a sign of balanced operational execution.

Top Five C-Store Brands Rated by Gen Z Overall Satisfaction
TOP BOX SHOWN=EXCELLENT

Rank	Brand	Gen Z Top Box %	Overall Top Box %
1	Buc-ee's	76.5%	75.8%
2	Allsup's & Yesway	67.4%	53.5%
3	Alltown	67.1%	64.6%
4	United Dairy Farmers	64.2%	52.8%
5	Family Express	63.6%	60.2%

Inflation drives value-focused dining

Value is top of mind when choosing where to eat, with nine in 10 consumers saying value plays an important role. This means rising prices pose a threat to foodservice traffic, as 83% of consumers say they notice increasing prices at restaurants and a majority (63%) are cooking at home more as a result.

In response to rising prices, nearly half of consumers (45%) plan to visit restaurants less often over the next 12 months, and 38% say they will actively seek out more deals and promotions. Price sentiment remains strained, with just 29% believing current restaurant prices are reasonable, compared to 40% who disagree. In addition, half of consumers (50%) are concerned that tariffs could push prices even higher, emphasizing ongoing price-sensitivity and uncertainty. Guests are adjusting their spending in various ways, with some cutting back on certain mealparts. Alcohol beverages, a high-margin category, is the most likely to be skipped due to high prices, which could threaten operators who rely heavily on the bar to drive profit. Promotions and specials, such as BOGOs and value menus, will be key to getting customers in the door.

Get more data-driven insights on the retail foodservice space, including consumer attitudes, behaviors and perspectives with the Technomic *2026 Value & Pricing Consumer Trend Report.*

Learn more about Consumer Trend Reports

Source: Technomic 2026 Value & Pricing
Image Source: Shutterstock

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Global Foodservice Navigator
Understand the global industry, from menu trends to consumers, in 25 markets.
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Technomic by informa

Since 1966, we have produced in-depth research focused on the foodservice industry.

We provide insights into consumer, industry and menu trends in the U.S., Canada and 23 markets around the world.

Our team of experts helps leaders in the industry make complex business decisions, set strategy and stay ahead of the curve.

Have questions?
Reach out to us today.

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