

The Future of **Hospitality** & **Foodservice**

How evolving human needs and emerging technologies are shaping the next decade of growth and reinvention for the industry.



Foreword

Realizing the future requires bold, responsible leadership...



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The hospitality industry is at a turning point. Shaped by years of disruption – from demand and supply chain volatility to shifting labor dynamics – operators are now navigating a landscape defined by rising costs, intensified competition, and growing operational complexity.

At the heart of this disruption are the people we serve. Coming out of the past few years, guests expect more: quality, personalization, transparency, and experiences that reflect their values and lifestyles. Food and beverages play an integral role, serving as a primary driver in how these expectations are met and exceeded, even as powerful advances in technology continue to both respond to and accelerate these shifts.

The decade ahead will bring profound reinvention. Every part of the value chain – from innovation and customer engagement to operations and workforce – will be reimaged. This isn't just about efficiency. It's about unlocking new ways to create, deliver, and capture value.

This insight report, developed by The Coca-Cola Company in collaboration with Accenture, reflects a shared vision for the future of hospitality – and the evolving role of foodservice within it. Rooted in Coca-Cola's deep industry expertise and Accenture's leadership in technology, it offers an outlook on where the industry is headed and how leaders can move forward with human insight, innovation, and bold ambition.

Charting the course

I.

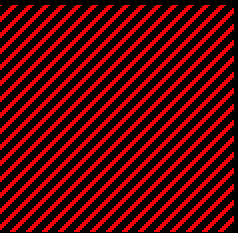
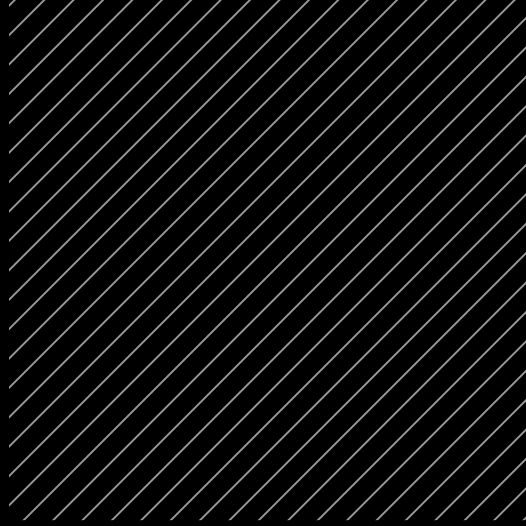
**A growing, global,
and generational
opportunity**

II.

**Forces of disruptive
change reshaping
the industry**

III.

**A leadership
agenda for
tomorrow**



I.

**A growing, global,
and generational
opportunity**

A growing, global and generational opportunity

Billions of new consumers. Trillions in new spend. A global opportunity that will unfold over the next decade is already taking shape...

A perfect storm of demographic and behavioral shifts is creating an unprecedented opportunity for hospitality. Populations are becoming wealthier, more urban, older, and younger – all at once – expanding the scale, diversity, and global footprint of food, beverage, and experience consumption.

At the same time, dining occasions are expanding beyond traditional boundaries. Mealtimes are becoming fluid, digital-first, and seamlessly woven into daily life. Case in point, **53 cents of every food dollar is expected to be spent on foodservice by 2030**, up from 48 cents in 2022, a clear signal of foodservice's rising role in everyday routines and choices.

At the center of this shift is the consumer. Older consumers favor familiar, trusted brands, while younger generations, especially Gen Z, demand experimentation, speed, and digital-first experiences. Their influence is already being felt as **digital food delivery is expected to drive 20% of global foodservice growth by 2030.**

Understanding these human forces is crucial as behaviors become more nuanced and market dynamics evolve. **From how we define value to how we engage with technology, a new era of hospitality and foodservice is emerging**, one shaped by four powerful trends that will define the next decade of growth.

+\$18tn

Growth in **middle class** spending by 2030

>40% increase in spending power from 2020 through 2030

60%

Of global citizens are projected to **reside in urban areas** by 2030

1 in 6

Global citizens will be over the age of 60 by 2030

+800m

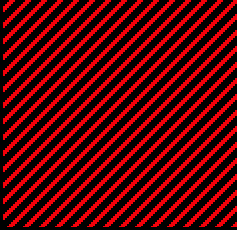
Gen Z consumers will turn 18 by 2030

+700m

Gen Alpha 5 years later

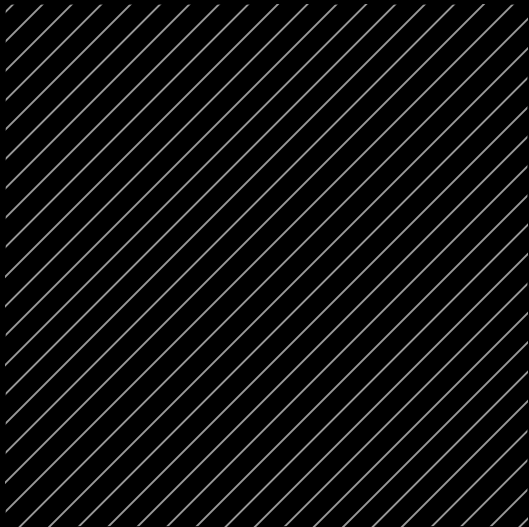
>80% will be in Asia and Africa (with 1 in 3 in India and China alone)

Sources: [Technomic Activate Conference, June 2023](#), [Brookings Institution](#), U.S. Bureau of Labor Statistics Consumer Expenditure Surveys and UN World Population Prospects 2022 (medium scenario), World Health Organization, Accenture analysis.



II.

Forces of disruptive change reshaping the industry

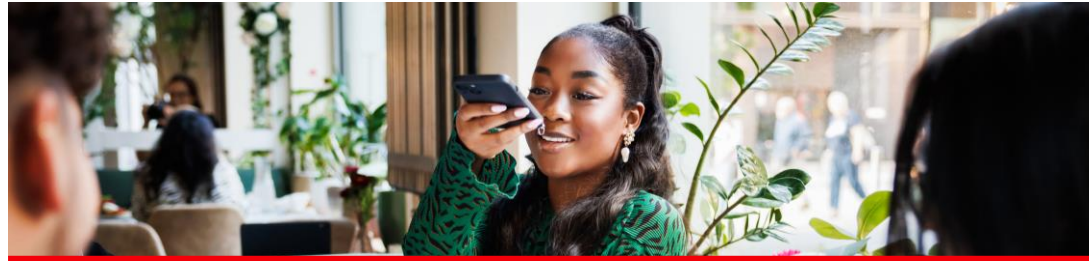


Forces of disruptive change reshaping the industry

We have identified four mega-trends that reveal shifts in people's relationships with the world around them – reshaping how they live, eat and connect – and redefining what that means for hospitality and foodservice.



01 **Value redefined**



02 **The instant influence era**



03 **The great connection**



04 **Tech resetting the grind**

Value redefined

Consumers are more decisive about what value means to them, but that proposition is getting harder to nail down.

52%
are clearer on the value they're looking for from a purchase than they were three years ago.

Source(s): [Accenture Consumer Pulse Research 2024](#); Question: How do you think [decision making] has changed in the last 3 years? (n= 19,050). Accenture analysis of GlobalData

Consumers are redefining what they expect in return for their time, money, and attention. **Nearly 1 in 3 now associate “good value” with high quality (up from last year)** while factors like portion size and convenience are also increasing, often at the expense of price.

This shift is most pronounced among younger generations. Gen Z places the lowest importance on low cost (20%) and prioritizes quality (28%), convenience (22%), and portion size (21%). For them, value is not about paying less, but about getting more of what matters.

The takeaway? **Value is now multidimensional**, marking a fundamental shift in how consumers make decisions, and how foodservice providers must compete: not just on price, but on relevance, experience, and trust.

The value landscape is being reshaped

Consumers are increasingly rethinking which category provides them the best value for their money.

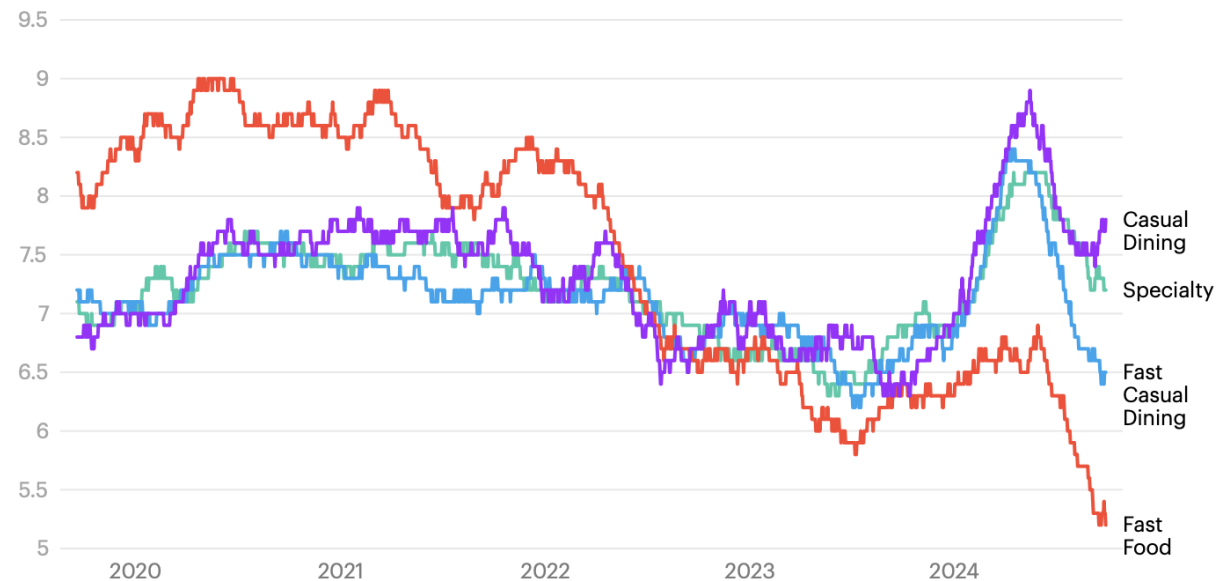
Over the past five years, consumers' shifting definition of value has sparked material changes across the foodservice landscape. As shown in **Figure 1**, consumers are increasingly viewing casual, fast casual, and specialty dining (e.g., pizza, coffee, ice cream) as strong value options relative to fast food – much of that value now defined beyond price.

Texas Roadhouse, now the largest casual dining chain in the U.S., **wins on generous portions and a dining experience that feels premium yet accessible**. Domino's is leaning into menu innovation, with new items like Loaded Tots and Pepperoni Stuffed Cheesy Bread outselling legacy items, **signaling that novelty can be a powerful value driver**.

Other hospitality brands are also stepping into the value race in new ways. Delta Airlines, for example, has partnered with Shake Shack to offer burgers that satisfy first-class passengers, an offering that has become so popular it now accounts for nearly 15% of the 4,500 hot meals prepared daily in its Atlanta flight kitchen. It's a clear signal that value expectations are extending beyond traditional restaurant settings.

Figure 1

How dining perceptions across categories have shifted
US adults' views on value for money across dining types (2020–2024)



Source(s): YouGov; "Which of the following brands do you think represents GOOD/POOR VALUE FOR MONEY?" (US adults); CNBC, Restaurant Business Online, Food Business News, Bloomberg, Accenture analysis.

How might we predict and respond to – what consumers value most, even as that definition keeps changing?

As value shifts from price and low cost, to convenience, quality, and emotional payoff, foodservice providers must learn to move at the speed of expectation.

01

Forecasting emerging trends with AI-driven demand sensing

Scan social media posts, news articles, and search queries to identify the next big trend before it goes viral.

02

Simulating product concepts with digital twins and virtual consumers

Use in-silico modeling to test new ideas, predicting taste, texture, and shelf life before real-world sampling and launch.

03

Scaling innovation faster with AI-powered performance platforms

Track product performance in real time and rapidly scale what works across locations and markets.

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The instant influence era

Consumers continue to stay loyal to brands, but technology is redefining how they interact and engage with them.

75%
are driven to their preferred brand for experiential and emotional reasons.

Source: Accenture Consumer Pulse Research 2025, PYMNTS, The Verge, Electro IQ

Today's consumers are guided, inspired, and persuaded in real time by what they see, scroll, search, and share. **Nearly half (48%) currently rely on digital channels** like social media, brand apps, and search engines for recommendations – matching the influence of in-person word-of-mouth.

Among these, more consumers are being motivated by social. In 2025, **74% of people were influenced by social media to decide where to eat**, up from 50% in previous years. Even more, 22% of guests return to a restaurant because of its social media presence.

At the same time, generative AI (gen AI) is quickly gaining ground as a new tool for discovery. While only 8% of consumers currently cite gen AI as their primary source for foodservice discovery, adoption is accelerating: **40% say they're using gen AI tools more frequently, and over half of active users reported increased usage.**

The nature of the brand relationship is changing

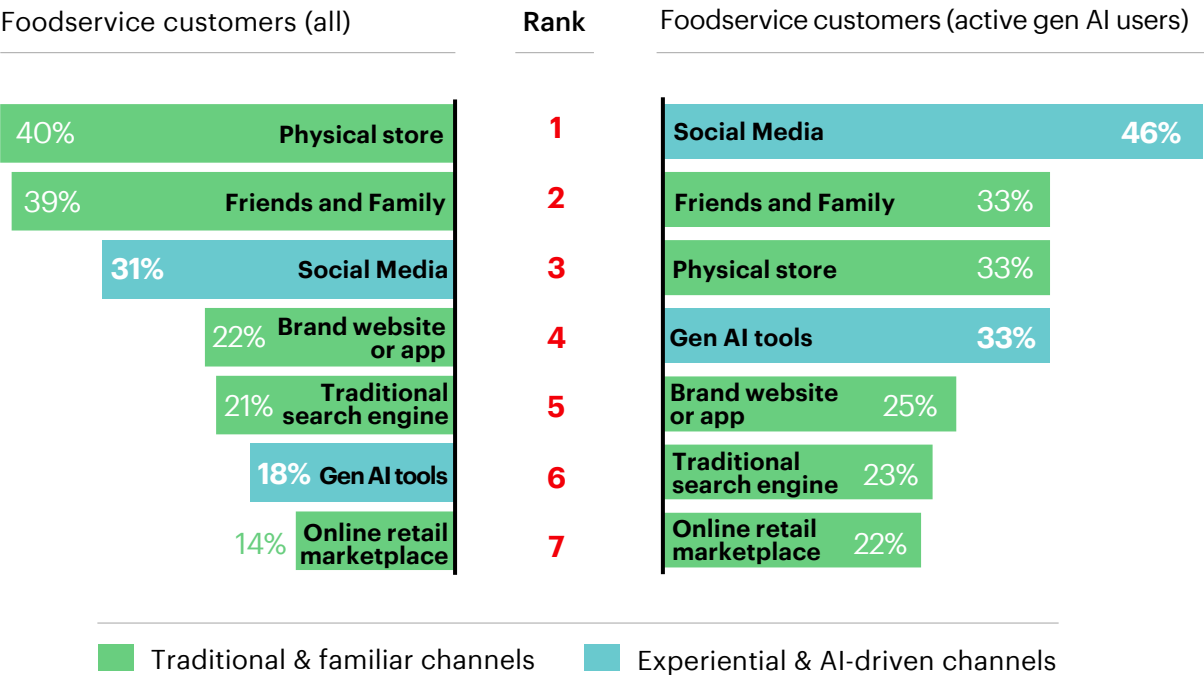
Consumers – especially gen AI users – are relying less on traditional recommendation sources and are increasingly turning to experiential and AI-driven channels for inspiration and guidance.

Generative AI users are bringing new expectations to foodservice discovery, favoring personalized, real-time channels like social media and AI tools over traditional sources such as physical stores, brand websites, and search engines (Figure 2). This shift reflects a broader move toward contextual, on-demand decision-making.

What’s also changing is how people are searching. **Over 60% of generative AI users look for highly specific prompts**, like solving for immediate needs (“what’s open for late-night delivery”), chasing viral trends (“viral TikTok taco near me”), or searching for specific product features (“fast food places with vegan options”).

Platforms like Google are evolving to meet this demand. For example, a user searching for specific restaurant-related queries, may now see results by meal type, user sentiment, or dining features, instantly narrowing the based on real-time context, while also **raising the bar for brands to show up with the right content, at the right moment, to stay relevant.**

Figure 2
How foodservice customers get purchase recommendations and advice
Top 3 guidance sources for all customers vs. active gen AI users, global



Note: Active gen AI users defined as those who use gen AI tools at least weekly for personal or professional use
Source(s): [Accenture Consumer Pulse Research 2025](#); Q71. Of the sources you selected in the previous question, where do you go first when looking for recommendations and advice on [category 2]? foodservice (n=1,410 all consumers; n = 566 active gen AI users). Social media is an aggregation of three options, gen AI is an aggregation of two options: platform tools like Chat GPT, and those owned by retailers / brands; [PYMNTS](#), [The Verge](#)

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How might we deliver real-time relevance that adapts to each consumer, at the speed of their intent?

As consumer engagement shifts from linear to multi-faceted, foodservice providers must learn to meet consumers in their moment – across platforms, moods, and life triggers.



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The great reconnection

Consumers are seeking real-world connection, but where (and why) they show up looks different.

47%

have spent more time hanging out with friends in real-life than the past 12 months.

Source(s): Accenture Life Trends 2025, US Foods, Sevenrooms Restaurant Trends and Diner Expectations, ARF Financial, The Associated Press

After years of digital saturation, consumers are rediscovering the joy of dining out to connect. According to US Foods' Diner Dispatch survey, **55% prefer dining at restaurants in 2024, up from 43% in 2023**, driven by the desire to socialize.

This trend is strong among younger generations, with a third of US millennials dining out more than five times a month, seeking elevated experiences like brand activations and exclusive menu items. **Two-thirds of younger consumers prioritize restaurants that offer something experiential.**

However, solo dining is also on the rise, seen as a form of self-care. **Solo dining reservations in the U.S. increased by 29% since 2022**, and in Japan, the concept of "ohitorisama" has grown from 18% in 2018 to 23% in 2023-24.

Foot traffic is no longer guaranteed, it's earned

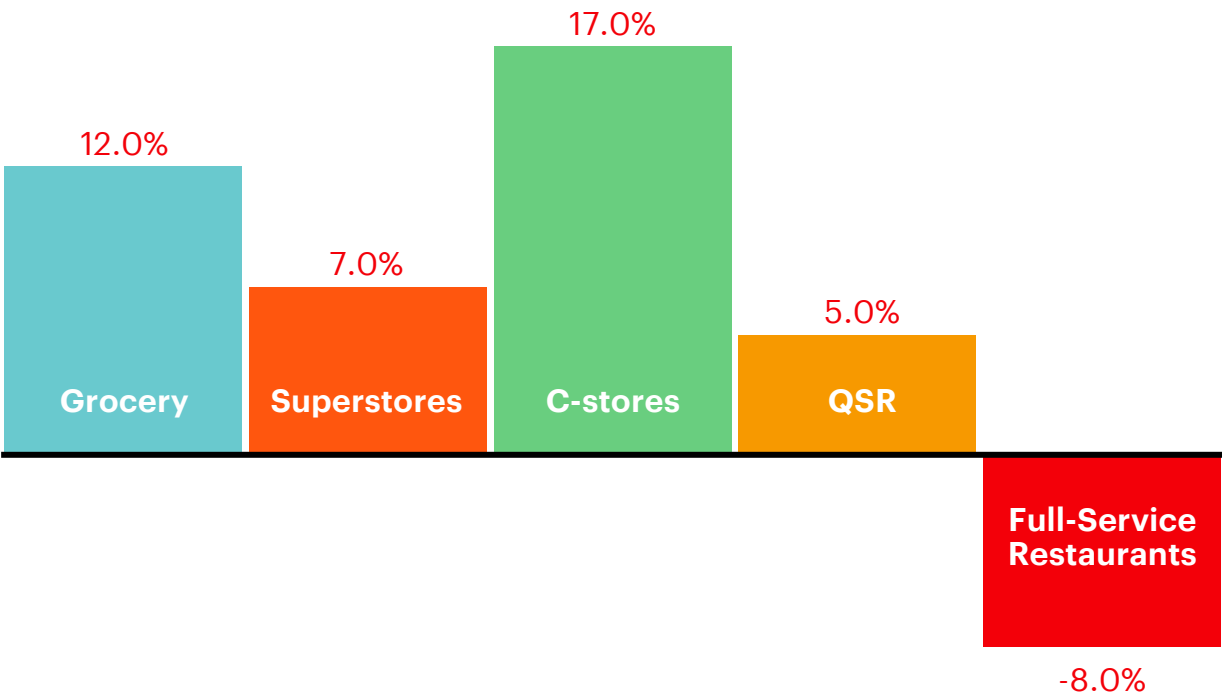
Consumers are more selective about when they go out, where they go, and what makes it worth the effort.

Consumers are still showing up, but they're no longer doing it out of habit. As **Figure 3** shows, **foot traffic patterns are fragmenting across foodservice formats**, and restaurants must work harder to justify the trip. Even as fast food sees modest gains, visits to full-service venues are slipping – not because demand is gone, but because expectations are higher.

The bar is higher not just for the product, but for the total experience. From pre-visit digital interactions to post-visit offers, consumers expect a seamless journey: engaging content or incentives to drive the visit, a high-quality in-store or off-premise experience (e.g., curbside takeout, drive-thru), and follow-up that keeps them coming back.

Chili's provides a great example of a response. In addition to promoting viral deals and LTO's through social media, **the brand is tapping into AI-powered capabilities to analyze anonymized guest data, serve targeted offers, better understand visit patterns, and tailor marketing messages**, all of which continue to drive increased engagement and repeat visits.

Figure 3
Nationwide (US) retail and foodservice visitation trends over time
Changes in foot traffic between 2019 – 2024.



Source(s): Placer.ai, Brinker International Q3 2024 Earnings Transcript, [FSR Magazine](#), Accenture analysis

How might we anticipate customer needs, remove friction, and re-earn loyalty – one visit at a time?

As reasons for visit intent become more comprehensive, foodservice providers must earn every interaction by offering timely, differentiated experiences that make every trip worthwhile.

Interpreting customer patterns to tailor offers by location

Use AI to analyze past purchases, loyalty activity, and local traffic data to optimize offers and product mix by channel.

Monitoring service quality with AI-powered customer care

Use smart service monitoring to trigger personalized alerts or outreach when expectations aren't met.

Enabling smarter interactions through intelligent platforms

Leverage smart kiosks and mobile tools that remember past orders, surface relevant suggestions, and drive repeat business.

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Tech resetting the grind

Workers see the promise in technology, but they need support, not just tools.

70%

want to build new skills, but only a third feel supported by their employers.

Source(s) [Food Industry Executive 2024](#), [Yooz](#), [Microsoft](#), [Teamsense](#)

Hospitality jobs are rapidly evolving due to automation, personalization, and higher guest expectations, but the digital tools meant to support this shift are not always paired with the training and support needed to build real confidence among staff.

The disconnect is clear: **only 34% of workers say they are given enough time to learn new technologies before being expected to use them.** For frontline employees, this challenge is even more pronounced – **55% say they had to adapt to new tools ‘on the fly’ with no formal training**, and **only 14% report receiving any AI-related upskilling.** Without the right support, even well-intended digital tools can feel like added stress rather than helpful solutions.

To improve the work experience, leaders must focus on creating environments where technology supports both the task and the person, making each shift more manageable, meaningful and sustainable. **AI-powered solutions, like intelligent assistants or agents, are expected to further accelerate this transition.**

The modern restaurant org chart is being rewired

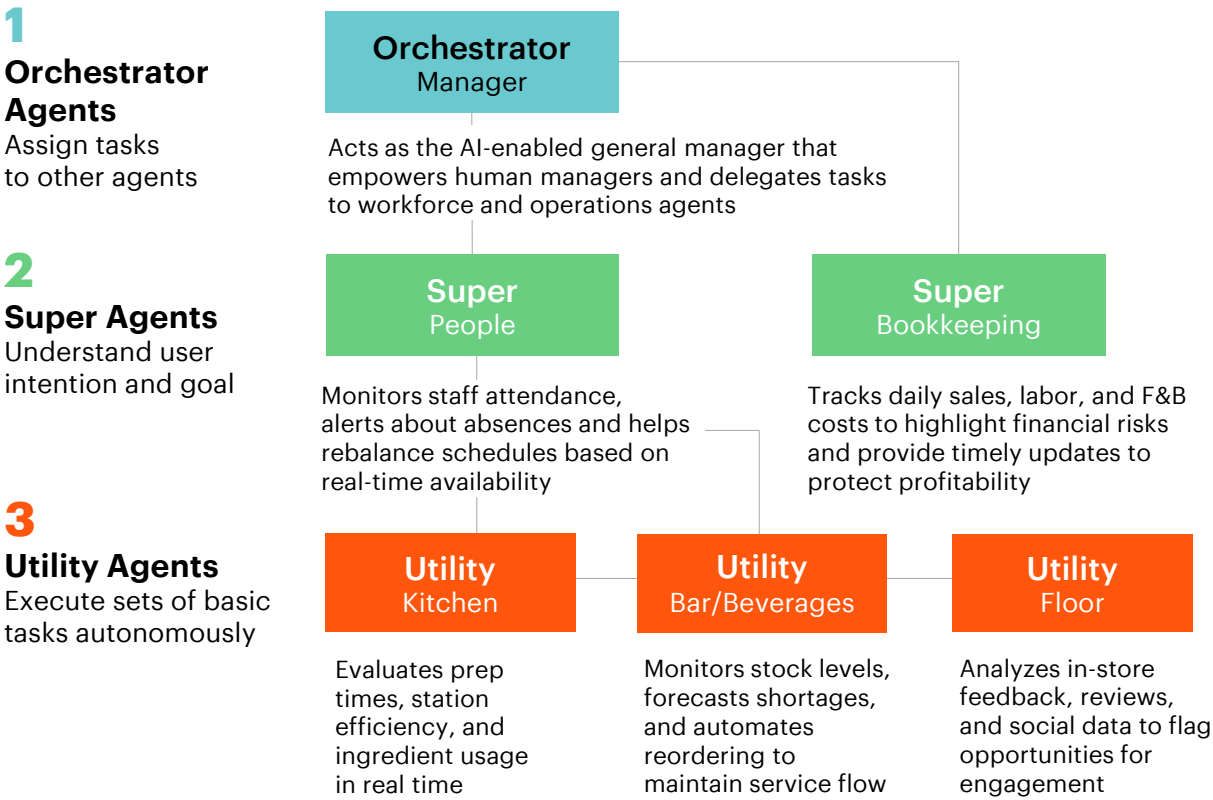
AI is introducing a new layer of intelligence across foodservice operations, augmenting day-to-day tasks and giving people more time to do what humans do best.

More foodservice providers are experimenting with AI – and more recently agentic AI – to enhance employee support while simultaneously optimizing store-level operations. Unlike traditional generative AI, which only produces content or answers prompts, **agentic systems act as "virtual team members,"** handling tasks like scheduling, cost management and analyzing guest feedback.

Taco Bell is currently exploring the use of virtual restaurant managers to monitor crew attendance, recommend shift adjustments, and optimize labor hours – all while integrating into existing systems and processes. **The goal is not to replace managers, but rather help them,** freeing up time from routine tasks so they can focus on leading teams, elevating service, and creating a better workplace for everyone.

Figure 4 illustrates how these agents can be layered into restaurant operations in a networked, role-based model.

Figure 4
Reimagining restaurant operations with Agentic AI



Source(s): Accenture, [Forbes](#), [New York Post](#)

How might we empower workers to lead, learn, and grow – alongside the AI agents now working beside them?

As AI and emerging technologies integrate into frontline processes, brands and operators must reimagine these roles to amplify human potential, not just automate them.



Upskilling teams with AI-driven training platforms

Personalize learning paths to help workers become more productive, confident, and capable –faster.



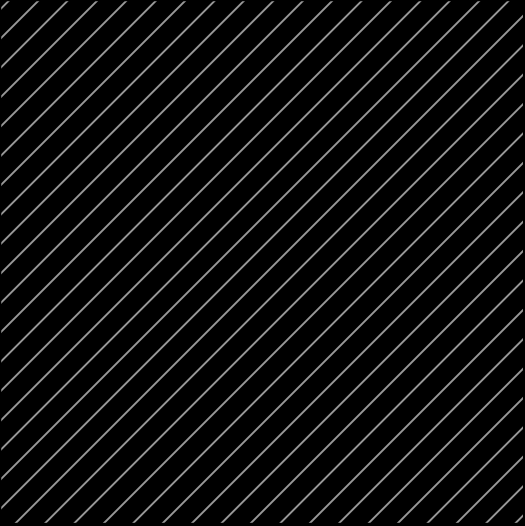
Enhancing service with smart kitchen systems

Leverage smart equipment to guide staff decisions and streamline workflows in real time.

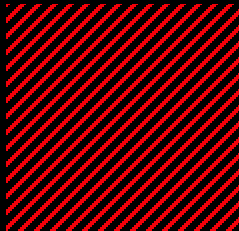


Equipping the frontline with a unified digital hub

Provide instant access to tools, insights, and support, all in one place, to empower day-to-day operations.



A leadership agenda for tomorrow



A leadership agenda for tomorrow

Across this piece, we've explored how evolving human needs and accelerating technological change are reshaping consumer decision-making and brand engagement – nowhere more visibly than in foodservice.

In this pivotal moment, CEOs have a unique opportunity to shape the future – by setting a clear vision, moving with purpose, and building with intention. It's not just about keeping pace; it's about exploring new possibilities. Here's how they can get started:

01 Creating value through human insight

CEOs are starting to ask some big questions: Where are we really making a difference in people's lives today, and are we moving fast enough to meet their expectations tomorrow?

Leading organizations are using behavioral insights to rethink every aspect of the hospitality experience – from how they present their brand to how they engage customers and deliver services. This means recalibrating growth strategies around what people will value next – not just what drives short-term margin – to ensure relevance, resonance, and long-term impact.

02 Becoming tech-driven by design

AI, generative AI, and emerging technologies are no longer edge experiments; they are becoming hospitality's new competitive edge.

Companies that are gaining traction are those where CEOs are actively championing these technologies as central to their business strategy. They are using AI to enhance decision-making, speed up service, and transform how their teams operate, all while ensuring that these technological advancements complement and enhance the human touch that is essential to the hospitality experience.

03 Intensifying cross-domain collaboration

The complexity of today's business environment demands collaboration, not isolation. The most forward-thinking CEOs are building deeper partnerships across the value chain to drive innovation, share capabilities, and collectively strengthen the industry.

This involves co-investing in shared platforms that enable more efficient operations, developing common skill frameworks for an AI-driven workforce, and treating partners as co-creators of growth, rather than just commercial entities.

The Moment Is Now. The next decade of hospitality will be defined by leaders who have a clear vision, build with purpose, and are ready to reimagine what's possible – and it all begins today.

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