CULINARY CROSSROADS

How Societal Shifts Are Defining Tomorrow's Dining

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IA | INTERIOR ARCHITECTS

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Some Food for Thought

HumanX by IA Retail is a research initiative to transform retail design by understanding consumer needs and behaviors. Diving into different sectors, we explore industry trends, challenges, and opportunities.

In our second installment, we explore the expansive world of foodspaces and how it's both shaping and being shaped by consumers. A growing industry riddled with complexities and ripe for innovation, dining and ordering out will account for 53 cents of every dollar spent by consumers by 2030. How will eating habits and preferences evolve in the midsts of societal and economic upheaval? And how can retail design react to these shifts both through design and digital-led interventions?

We surveyed over 500 US consumers to find out.

INTRODUCTION

Demographics

In an evolving (and more often than not, saturated) foodspace market, making sense of consumer behaviors and preferences, and it's drivers and influences, is challenging. This led us to consider the societal, environmental and intrinsic choices, behaviors, barriers and enablers of foodspace choices and preferences consumers make.

Unlike traditional research which informs on the state of things, HumanX insights are geared to be future-centered, actionable and practical for our retail clients to leverage. That's why we enrich our research with both academic and design exploration, starting with a large-scale survey analysis and ending with an exploratory design innovation sprint.

CATERING TO GENERATIONS

PAGE 5

To showcase commonalities and differences in what generations want from foodspaces.

REACHING COMMUNITIES

PAGE 15

To assess the difference a region makes in foodspace preferences - viewed through the lens of urban, suburban and rural communities.

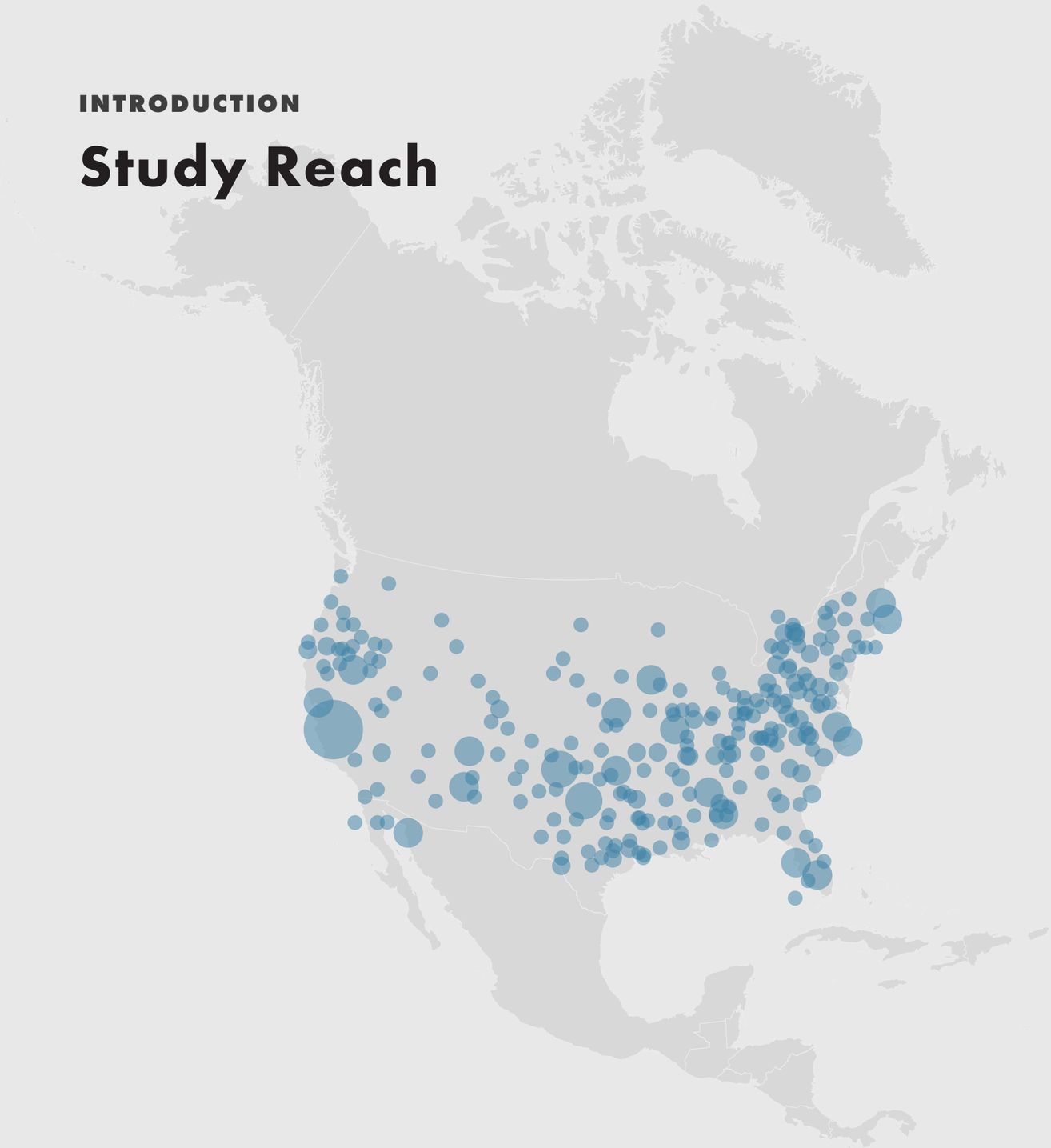
DESIGN INNOVATION

PAGE 21

Our ideas for future foodspaces, brought to life through design sketches and concepts.

INTRODUCTION

Study Reach



This survey aimed to fill gaps in existing research on differences in food space habits and future preferences and provide innovative related ideas. It also explored the impact of generation and community from the expertise and viewpoint of a design and architecture firm.

The survey was issued in April 2024 and received a total of 532 responses.

Respondents were carefully selected to mirror the US census of 2023 in regards to age, gender, ethnicity, household income and location, to allow for generalization of findings to the wider US population.

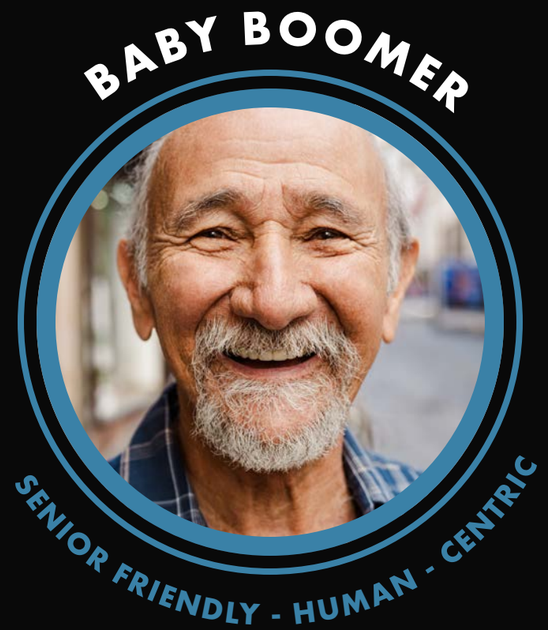
PROFILES

Catering to Generations

Food habits and dining preferences vary by generation, with the roles we take as we progress through life dictating how, where and when we eat.

GEN Z

GEN X



PROFILES

Meet Gen Z

EXPLORATIVE - REBELLIOUS - THRIFTY

KEY TRAITS

"I want to hang out with my friends, listen to good music and eat different types of food, all on a tight budget."

MEET GEN Z

Curious and clued-up, looking for third place hang outs with relaxed vibes.

UNIQUE DIFFERENTIATORS

Most likely out of all generations to want to explore different types of food and eateries in the future. Most concerned with affordability.

KEY TAKEAWAY

Showcasing innovation and variety, both in food and spatial design, with a focus on an ethical and affordable experience.

PROFILES GEN Z

ALTERNATIVE SEEKERS

"Coffee spaces, food trucks, market stands are my main go-to for quick eats."

51% eat from third spaces. (Highest out of all age groups.)

MASHED-UP MEALTIMES

"Eating at 'set' times during the day doesn't make sense to me - I eat when I want."

32% believe set eating times to be old fashioned. (Olive, 2024)

BRANCHING OUT

"I live at home and there's not many choices in foodspaces where I live - I'm looking for variety and excitement."

53% live in suburban environments.

DATING & ROMANCE

"Celebrating date nights with my partner through shared food experiences."

71% want to use foodspaces for dates with significant others.

COZYNESS & COMFORT

"Don't try to be trendy! I want comfortable and open seating , cozy atmosphere good music and good food."

86% see comfortable and cozy seating as a key attractor to visiting foodspaces.

EXPLORATION

"Switch it up please! I want to see different foods and combinations every time I go out to eat."

Gen Z are 21% more likely than the general population to try a new beverage in the course of a month. (Morning Consult, 2023)

REGIMENTED ROUTINES

"Restaurants always having the same approach doesn't do it for me anymore. What's new? What's next?"

68% are bored by a lack of variety and innovation in both menu and design approach.

OVERPRICED OPTIONS

"Better quality for price! Food keeps getting more expensive and the quality keeps getting worse."

86% see lack of value for money as the main inhibitor to dining out. (Highest out of all age groups.)

PROFILES

Meet the Millennials

INCLUSIVE - FAST - FAMILY FRIENDLY

KEY TRAITS

"Make foodspaces inclusive - to families, (neuro)diversities and pressurized living realities."

MEET THE MILLENNIALS

Juggling newfound family life and heightened job commitments, dining out is seen as either a almost-daily cheap routine, or as a rare reward and celebratory escape.

UNIQUE DIFFERENTIATORS

Looking for heightened inclusivity in foodspaces and consideration of all lived realities - think neurodiverse accommodations, family inclusivity and more.

KEY TAKEAWAY

Prioritizing celebratory and special occasion dining and catering to multi-faceted inclusivity.

PROFILES MILLENNIALS

NOSTALGIC COMFORT EATERS

"Pressures in my life are rising and I'm increasingly finding comfort in childhood nostalgia favorites."

73% of Millennials would pay extra to bring back their favorite childhood snacks. (Mondelez, 2022)

ETHICAL CONSUMPTION

"I want to be more socially and nutrient conscious! Macro-nutrients should be listed on menus."

60% of Millenials are willing to pay more for sustainable products in the future. (Deloitte, 2023)

FAMILY DINERS

"I'm at a stage in my life where I'm really having to embrace ultra-easy, family-friendly meals and environments."

55% of Millennials have one child or more. (Pew Research Centre, 2020)

SPECIAL OCCASIONS ONLY

"We are a family of 6 and even McDonald's feels like a luxury at this point - eating out will be reserved for celebrations."

71% plan to 'save' eating out for special occasions only.

INCLUSIVITY

"There are people with sensory issues that would like the experience, just not as overwhelming."

20% of the worlds population are neurodivergent. (Forbes, 2021)

IMPRACTICALITY

"Food is the final stressor at the end of a long day- just need something fast, and quick for me and my kids."

Millenials are three times more likely to order in than their parents generation. (Iron Source, 2020)

ECO-SUSTAINABILITY

"Make the design sustainable and include green [plant life] in decor. Remove single-use anything."

49% see sustainable and eco-friendly design elements as a key attractor to visiting foodspaces.

LACK OF TECH INNOVATION

"I want tech to give me great deals, fast service and convenience - always."

39% see lack of tech innovation as a key detractor from visiting foodspaces. (Highest out of all age groups.)

PROFILES

Meet Gen X

SOPHISTICATED - TECH DRIVEN - PRIVATE

KEY TRAITS

"I am looking for privacy, comfort and the 'wow' effect - integrated design and tech needs to personalize my experience."

MEET GEN X

Time-squeezed and care-giving both kids and parents, Gen X are rushed, often daily visitors of foodspaces. Escapism and prioritizing oneself take center stage for this age group looking to maximize joy and prolong health.

UNIQUE DIFFERENTIATORS

Craving digital immersion in indulgent and restorative experiences as a way to escape daily routine and stressors.

KEY TAKEAWAY

Draw this generation in through the promise of quick comfort eats, and bring them back through indulgent, self-nourishing experiences. Privacy, comfort and relaxation are king.

PROFILES GEN X

FREQUENT CONSUMERS

"Time is tight, and most days I just grab food quickly."

75% have visited a quick service foodspace in the past month, and 44% visit foodspaces daily or weekly.

HEALTHY FOOD CHOICES

"I'm looking to eat more seasonally, and focus on fruit and veg that are locally sourced."

69% plan to make healthier food choices when eating out.

STRESSED PARENTS

"I am lacking the rulebook on how to parent my teenager, and take care of my parents."

44% of Gen X raising children report substantial emotional difficulty and stress. (Stylus, 2022)

ESCAPIST JOYS

"I want to escape from my daily stress. Looking for spaces with unique designs that transport me to a whole new place!"

48 is the lowest point in the U-shaped happiness by age curve. (US National Bureau of Economic Research, 2020)

INNOVATIVE DESIGN

"Attractive, interesting and visually stimulating restaurants will always draw me in."

59% of Gen Xers see innovative and visually appealing interior design as a key attractor to visiting foodspaces.

AI INFUSED EXPERIENCES

"I want to see restaurants use technology to make my dining more 'wow', more private, more personal."

29% report that augmented reality menus or interactive digital displays would be a key attractor to visiting foodspaces.

CROWDED SPACES

"Really dislike the buzzy, busy and crammed-in type of restaurants. Give me some space!"

56% of Gen Xers view uncomfortable seating or ambiance as a key deterrent to visiting foodspaces.

LACK OF PRIVACY

"For me, privacy is synonymous with comfort and luxury. Use tech to minimize interactions."

77% of Gen Xers plan to visit foodspaces solely for private outings with friends or family.

PROFILES

Meet the Baby Boomers

SENIOR FRIENDLY - HUMAN - CENTRIC

KEY TRAITS

"Friendlier and human service! Use of tables with chairs for larger people not tight booths. Convenient room for wheelchairs."

MEET THE BABY BOOMERS

The age group most likely to suffer from health conditions, baby boomers are looking to keep in good health and a foodspace environment that cater to disability.

UNIQUE DIFFERENTIATORS

Least concerned with lack of tech innovation or exploring greater culinary variety out of all age groups. Most interested in supporting local, nearby independent businesses.

KEY TAKEAWAY

Cater to this generation through friendly, local and human-centric foodspace interactions. Don't force newness or hyper-tech without purpose, and focus instead on the basics of wayfinding, spaciousness and comfort in design.

PROFILES BABY BOOMERS

CASUAL DINERS

"I live rural and really am just looking for casual spots to eat, close-by."

83% have visited casual dining spaces in the past month.

CROSS-FAMILY DELIGHTS

"I like going to dinner with the whole family - all generations under one table."

87% of baby boomers visit foodspaces as part of a wider family cohort.

Gradual appetite decrease is common as muscle and bone density decrease. (National Library of Medicine, 2014)

ADAPTED FOOD HABITS

"I would also indulge more if there were options for smaller portion sizes...senior menus would be lovely!"

SENIOR-FRIENDLY DINING

"Make food easily digestible, nutrient rich, and lower in sodium."

By 2030, the population of those 65 and over will account for 21% of the total population, up from the current 17%. (Office for National Statistics, 2018)

THOUGHTFUL OF MOBILITY

"I need more comfort - comfy seats, larger booths and room for wheelchairs."

80% view comfortable and supportive furniture as a key attractor to visiting foodspaces.

TECH FOR TECH SAKE

"Stop the technology. Use the savings servers more so they have incentive to provide better service."

41% of Baby Boomers view a lack of human-centric interaction as a key barrier to visiting foodspaces.

83% view convenient layout and ease of navigation within space as a key attractor to visiting foodspaces.

NAVIGATION

"Want ease of moving around - no harsh lighting and plenty of room between tables."

39% least likely out of all generations to want to explore different culinary options in the future.

FORCED NEWNESS

"Don't change things up just because. I want to know what I'm getting before stepping through the door."

THE BIG PICTURE

Intergenerational Snapshot

While generations showcase distinct differentiators, they're united by common threads, no matter the age.

"I REALLY WANT TO KNOW THAT THE FOODSPACES CARE ABOUT ME AS MORE THAN JUST A CONSUMER."

SPACIOUS ENVIRONMENT

TRYING NEW FORMATS

CELEBRATORY EXPERIENCES

STRENGTHEN EXISTING CONNECTIONS

"I'M NOT KEEN ON MEETING NEW PEOPLE. JUST WANT A COZY, PRIVATE SPACE TO TALK TO MY LOVED ONES."

PRIVATE SPACES

HUMANIZATION & PERSONALIZATION

"I WANT TO KNOW MORE ABOUT WHAT I'M EATING – NUTRIENTS, MACROS, LOCAL SOURCING."

AFFORDABLE AND HIGH QUALITY FOOD

DEEP DIVE

Reaching Communities

Access to foodspaces significantly varies by community, impacting habits, preferences and, above all, expectations.

URBAN

DISTINGUISHED - THRILL SEEKERS

SUB-URBAN

MULTI-GENERATIONAL - LOCAL

RURAL

ACCESS-SEEKERS - AFFORDABILITY

DEEP DIVE

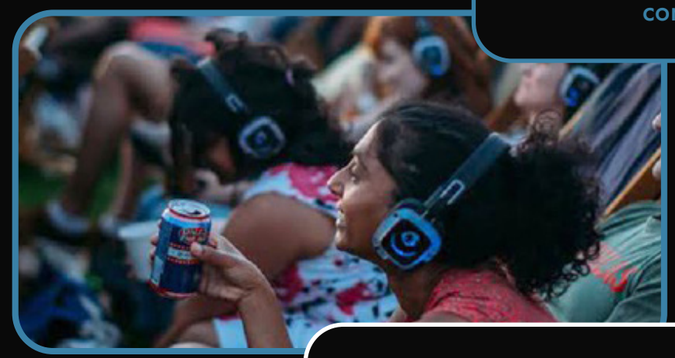
Urban Community

Snapshot Interests

FINE DINERS

"I want outstanding food and an outstanding experience."

42% have visited a fine dining restaurant in the past month. (Highest out of all community profiles.)



THRILL SEEKERS

"New menu items, live entertainment, AI immersion - this is what keeps me coming back!"

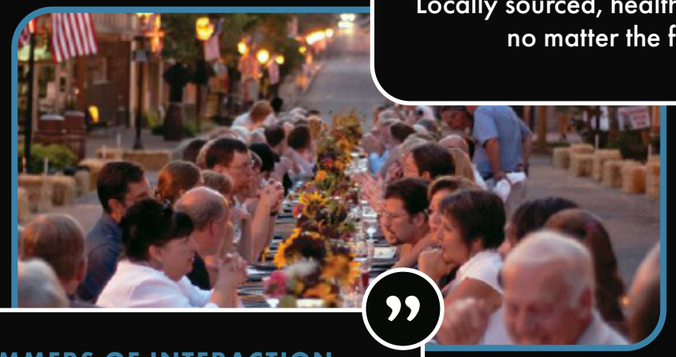
FOOD AS A LIFESTYLE

"Make the space engaging - something I would find out about via TikTok."

27% are looking to eat out for the sole purpose of enjoying special events such as wine tastings, themed dinners, chef collaborations. (Highest out of all community profiles.)

HEALTHY & SUSTAINABLE

"Loving the farm to table concept. Locally sourced, healthier options, no matter the foodspace."



GLIMMERS OF INTERACTION

"I feel lonely in the big city, please don't make everything tech/self service led."

48% see a lack of human interaction as a key barrier to visiting foodspaces (the highest out of all community profiles), pointing towards a growing loneliness epidemic in big cities.

DEEP DIVE

Sub-Urban Community

Snapshot Interests

MULTI-GENERATIONAL

"Looking for restaurants that cater to me, my children and grandchildren!"

PREFERENCES OF AN AGING LIFESTYLE

"I'm looking for foodspaces that are easy to access, close to home, and inclusive in their set-up - I'm in a wheelchair and want to be safe to move around."

24% of suburban consumers are over 60 years old. (Highest out of all community profiles.)

LOCAL SUPPORT

"I want to support my local eateries that aren't trying to be trendy!"

54% are planning to eat out more and invest their money at local foodspaces in the future.

DEAL SEEKERS

"I'm looking for deals, and good reasons to visit a space - happy hour anyone?"

83% see a lack of value for money as a barrier to visiting foodspaces.

RECIPROCAL DINING

"I want more interaction with foodspace operators. Please listen to our feedback on-site!"

DEEP DIVE

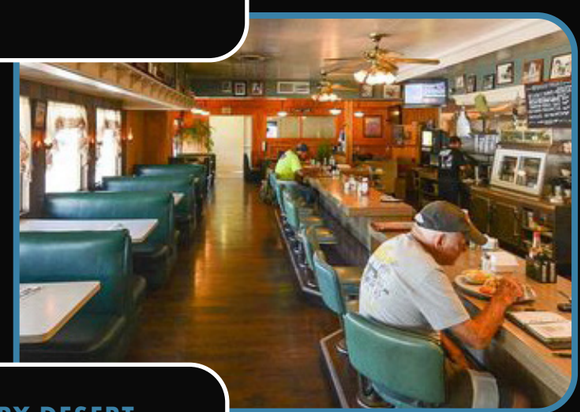
Rural Community

Snapshot

46% earn less than $50,000 a year.

LOWER INCOMES

"Sticker shock has gotten to me. Prices need to be reasonable."



LIVING IN A CULINARY DESERT

"It feels like the only options I have is unhealthy, 'junk' food nearby. I would be open to visit places with more healthy options."

68% plan on choosing healthier options when eating out in the future. (Highest out of all community profiles.)

Interests

CASUAL COMFORT

"Please no more cramped and crowded diners! I want space and comfort when I go out to eat."

88% view cozy seating areas with comfortable furniture as a key attractor to foodspaces

ECO-ACCESS

"No more using single use (disposable) plastics and Styrofoam!"

75% are concerned with limited menu options or lack of variety. (Highest out of all community profiles.)

GREATER VARIETY

"Right now, it feels like every space is the same. Looking for more excitement."

THE BIG PICTURE

Inter-Community Threads

Across urban, suburban and rural locations, commonalities running deeper than economic and lifestyle differences prevail.

FRUSTRATIONS AROUND LACK OF VARIETY

"RESTAURANTS NEED TO STEP UP THEIR GAME, WITH GROCERY PRICES RISING. CREATE EXPERIENCES THAT DRAW ME IN AND WILL MAKE ME WANT TO RETURN."

EATING OUT AS A NEAR-DAILY HABIT

"EVEN THOUGH I LIVE RURALLY, I GO OUT TO EAT QUITE A LOT ... WOULD BE MORE IF THERE WAS MORE VARIETY."

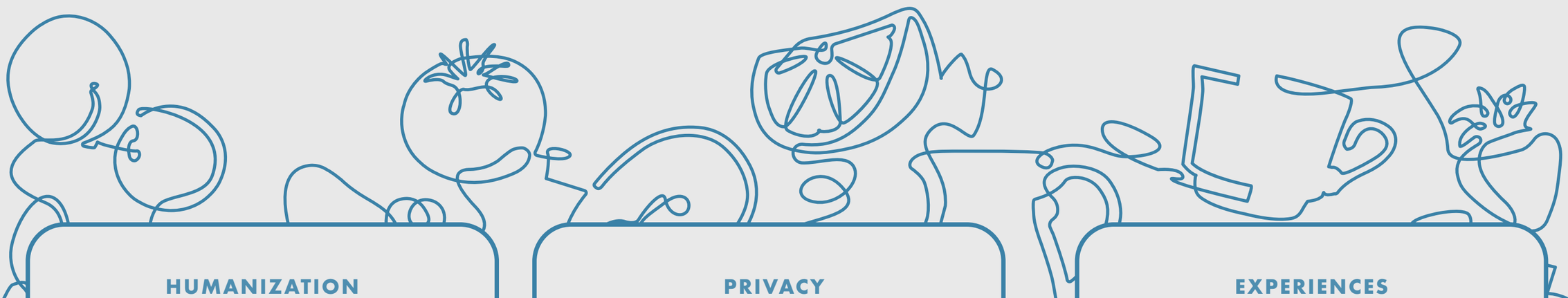
"PLEASE GIVE US MORE OPTIONS - WHERE I LIVE THERE IS NOT MUCH VARIETY EVEN IN THE SURROUNDING CITIES."

GOING OUT AS A CELEBRATION AND REWARD

COMMON THREAD

At a Glance: Human Truths

Across generations and communities, three core drivers of foodspace experience emerge.



HUMANIZATION

"I really want to know that the foodspaces care about me as more than just a consumer."

Consumers across the board are asking foodspaces to focus on human-centric interactions. Friendly, personal interactions and being seen and recognized in the foodspaces visited is becoming important in an increasingly isolated society.

Contrastingly, the role of tech is not to replace human interaction, but to personalize and 'wow' through AI integration.

PRIVACY

"I'm not keen on meeting new people. Just want a cozy, private space to talk to my loved ones."

Responses continuously highlighted the role of foodspaces in strengthening existing connections, opposed to creating new relationships.

Correspondingly, privacy and comfort in design was brought up repeatedly, with a desire for zoned, private spaces no matter the type of foodspaces visited.

EXPERIENCES

"Restaurants need to step up their game, with grocery prices rising. Create experiences that draw me in and will make me want to return"

For many, the cost-of-living crisis has impacted their priorities around consumer spending.

To draw in customers, foodspaces need to create new, enaging and inclusive experiences and attractors for entry.

DESIGN IDEATION

How might we design for the human truths of foodspaces—humanization, privacy and experiences?

How can these be scaled according to foodspace type?

What is the role of analog / technology in fostering foodspace experiences?

How can we leverage technological innovation to enhance the customer experience?

DESIGN IDEATION

Analog Experiences

REDUCED PORTION SIZE
SATISFIED NOT FULL

Offering the right balance of quality and quantity to provide customers with a sense of both nutritional and financial value, ensuring a satisfying dining experience.

BIOPHILIC IMMERSION
NATURE'S PATTERNS

A connection through tangible aspects of materiality, natural light, and plant life, as well as through abstract patterns of mystery and fascination, creating a calming environment.

TACTILE EXPERIENCES
ANALOG OVER DIGITAL

Creating dining environments that focus on rich, tactile experiences over purely digital ones, enhancing the sensory engagement and overall ambiance.

LOCAL/SEASONAL MENU OFFERINGS
COMMUNITY ENGAGEMENT

Variety that keeps things fresh while supporting local producers, creating a synergy that connects the business to a customer's sense of home and community.

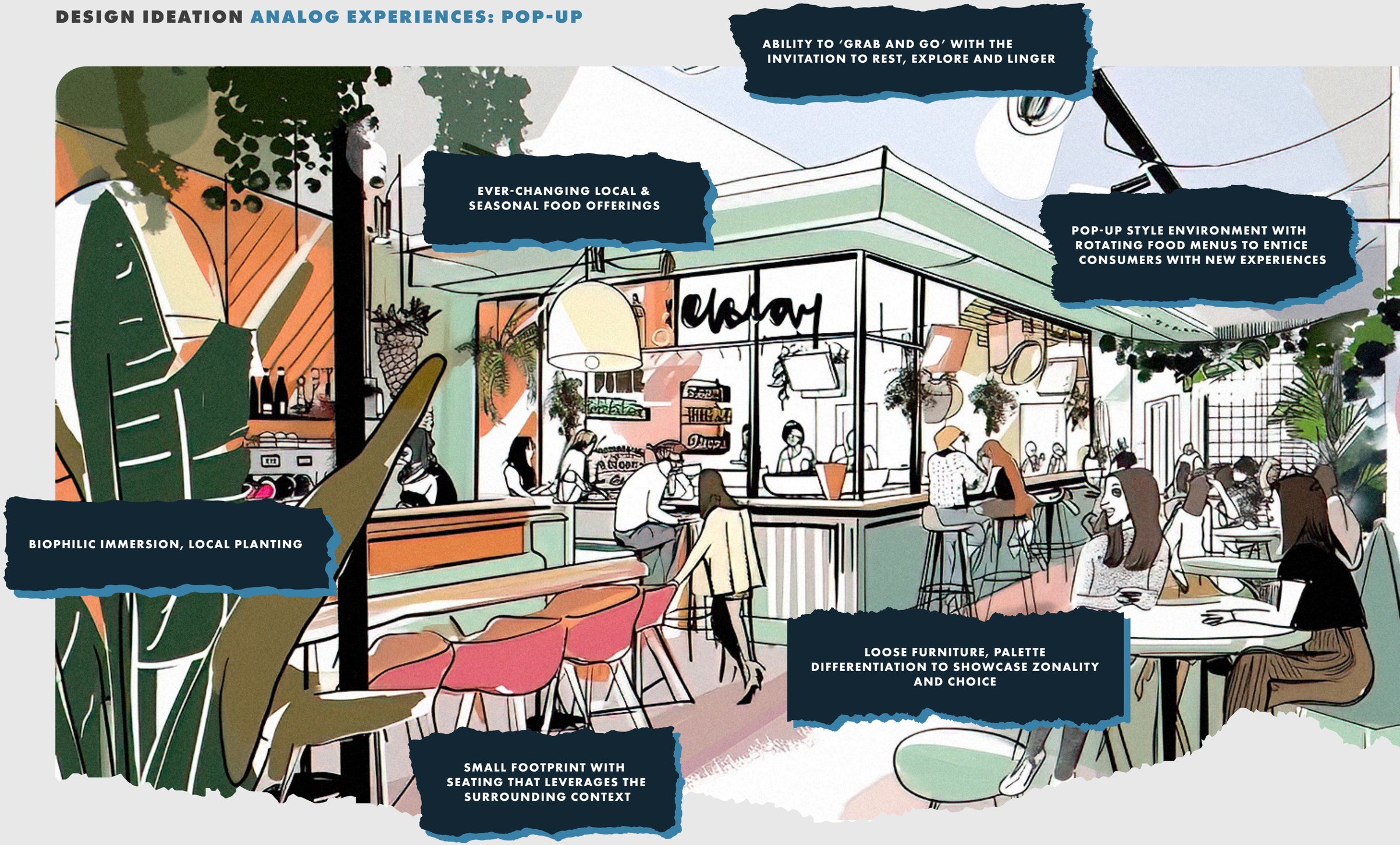
HOSPITALITY CENTRIC
THE HUMAN TOUCH

Understanding cultural trends to better anticipate customer needs and convey a sense of belonging. Subtle sensory notes offer a complete and personal experience.

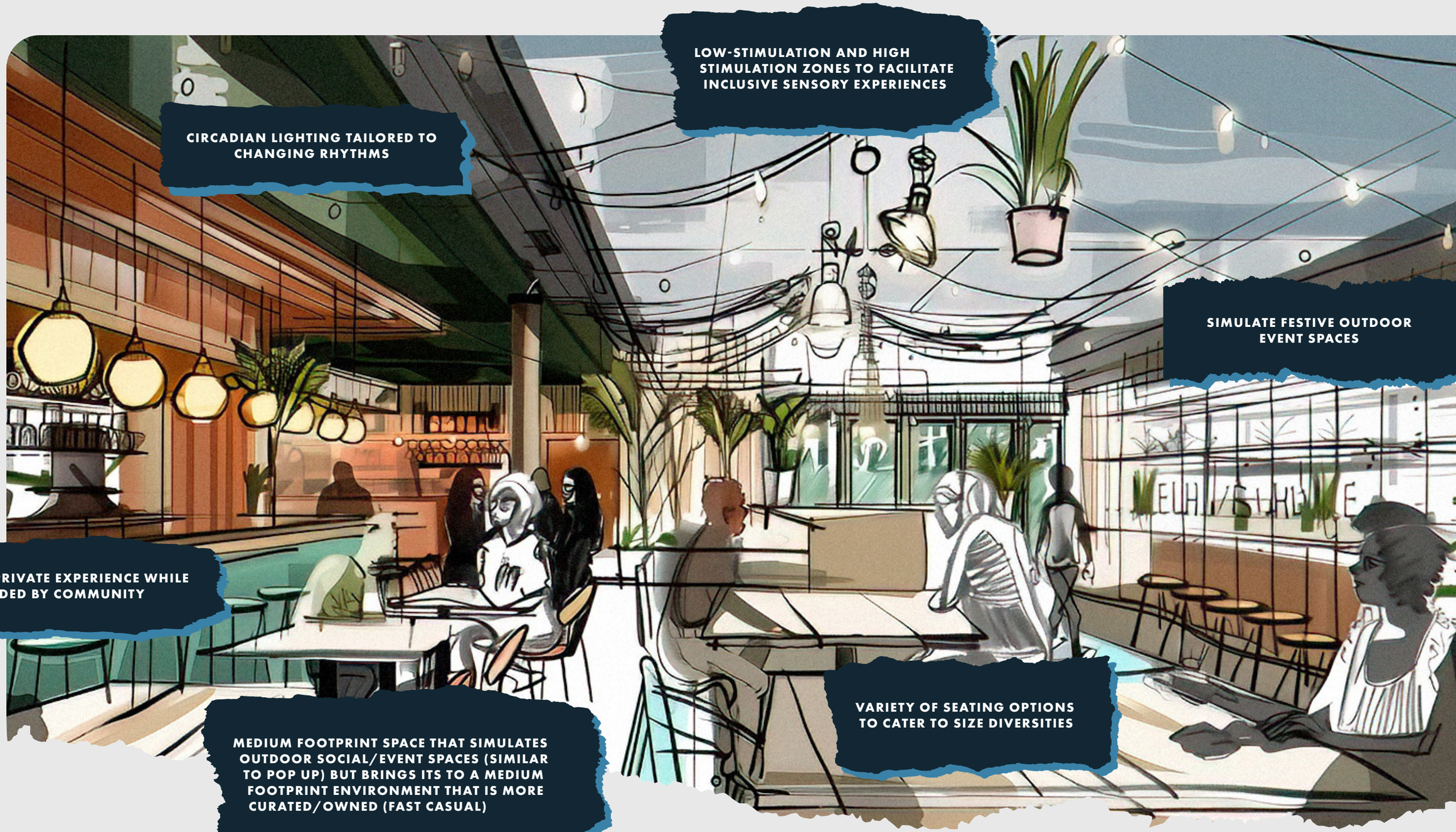
EXCLUSIVITY & ACTIVITY ZONING
SUPPORT NEURODIVERSITY

Designing dining spaces with zones tailored for different activities and preferences, including quiet areas, to support inclusivity and comfort for all guests.

DESIGN IDEATION ANALOG EXPERIENCES: POP-UP



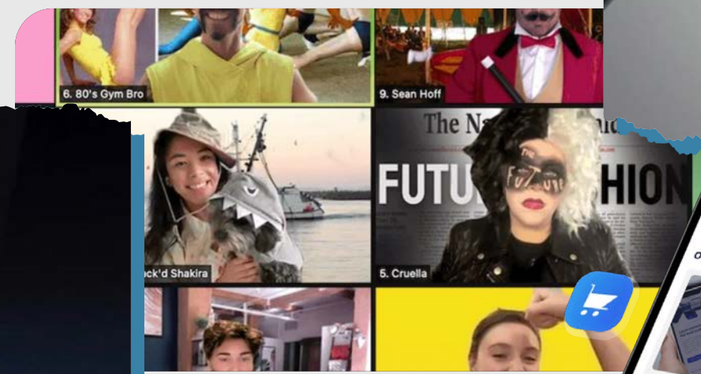
DESIGN IDEATION ANALOG EXPERIENCES: FAST CASUAL

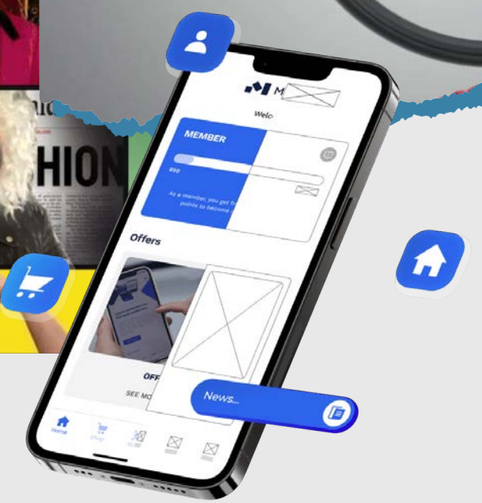


DESIGN IDEATION ANALOG EXPERIENCES: FINE DINING

DESIGN IDEATION

Digital Experiences





GENERATIVE ENVIRONMENTS
TRANSCENDENT MOMENTS

Allow diners to immerse in exotic destinations and surreal locations that defy reality. Leverage real-time generative AI to create bespoke visuals that are everchanging, offering something new each visit.

AI NUTRITIONIST & HEALTH TRACKER
PERSONALIZED WELLNESS

Persistent multimodal assist that uses AI vision to provide health tracking and dietary recommendations, ensuring every meal supports specific lifestyle and dietary goals.

AUGMENTING REALITY
DINING IN THE METAVERSE

Leverage new display technology like transparent and holographic displays to bring menu items to life like never before, wowing customers with an augmented build-your-own-meal interface.

VIP ACCESS & LIVE EVENTS
SURGE EXPERIENCES

Activate spaces with entertainment like DJs, podcast booths, author signings, live music, and TED Talks. Leverage parallel scheduling to maximize off-peak times and blend generational audiences.

IN-APP EXCLUSIVE BONUSES
TAILORED PERKS

Offer personalized perks and exclusive offers through an app that learns your dining preferences, providing customized rewards and experiences that enhance loyalty and satisfaction.

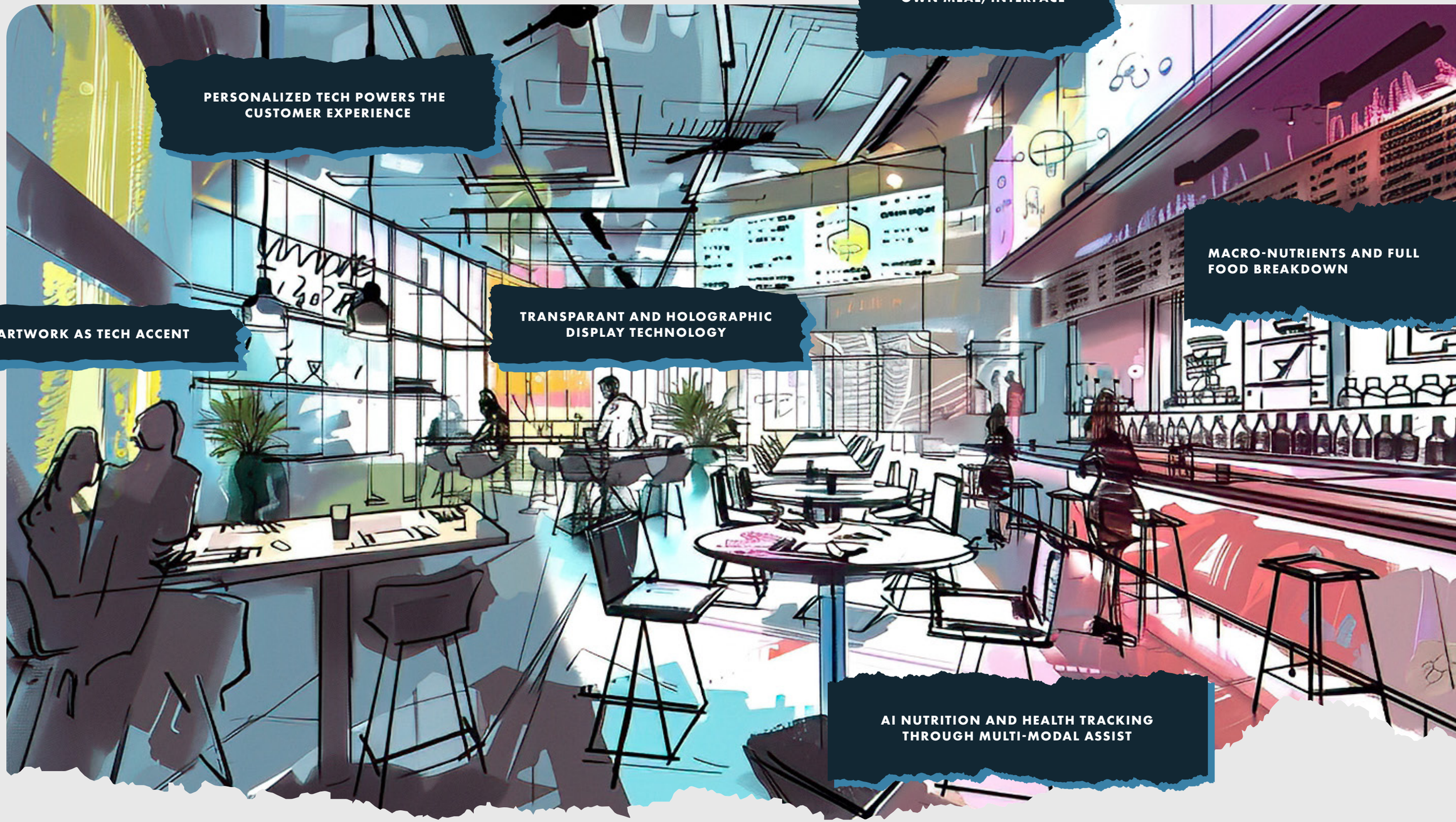
SYNCHRONOUS DINING
AN ALTERNATE DINE-MENSION

Connect various restaurant locations through a shared virtual dining room, including those with takeout or catered events. Build connection and loyalty through communal “family” dinners.

DESIGN IDEATION DIGITAL EXPERIENCES: POP-UP

DESIGN IDEATION DIGITAL EXPERIENCES: FAST CASUAL

DESIGN IDEATION DIGITAL EXPERIENCES: FINE DINING



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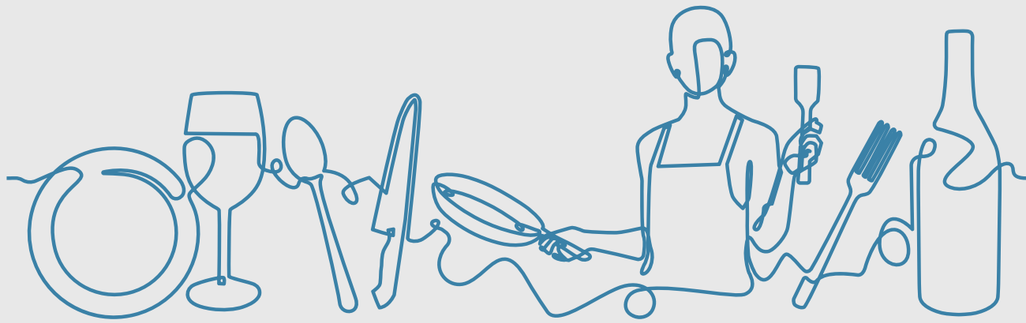
Futurescape: Pioneering the Next Bite

The food and beverage sector is at a crossroads, facing an unprecedented evolution in consumer needs and demands. This evolution is multifaceted, influenced by shifts in individual preferences, generational differences, changing family structures, and broader community dynamics. To stay relevant, brands must deeply understand these evolving habits, needs, and aspirations. This requires a comprehensive approach to consumer research, focusing not only on immediate preferences but also on long-term trends and underlying motivations.

Food spaces of all formats can respond to the need for evolution by considering the purpose of place, and in what shape it enhances the future truths of consumer food space needs - humanization, privacy and experiences. Stepping into the power of both human and digital can help facilitate the journey.

Adapting to these trends also means recognizing the importance of regionality and specific consumer requirements. What works for a trendy urban cafe in New York may not resonate with a family-oriented diner in the Midwest. Each brand must scale and flex its offerings to suit the local culture, preferences, and economic realities of its target market.

Ultimately, the ability to navigate these complexities and meet consumers where they are will determine the success of food and beverage brands in this dynamic landscape. By embracing future needs and tailoring their approach to regional and individual consumer needs, brands can create meaningful and lasting connections with their customers.



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