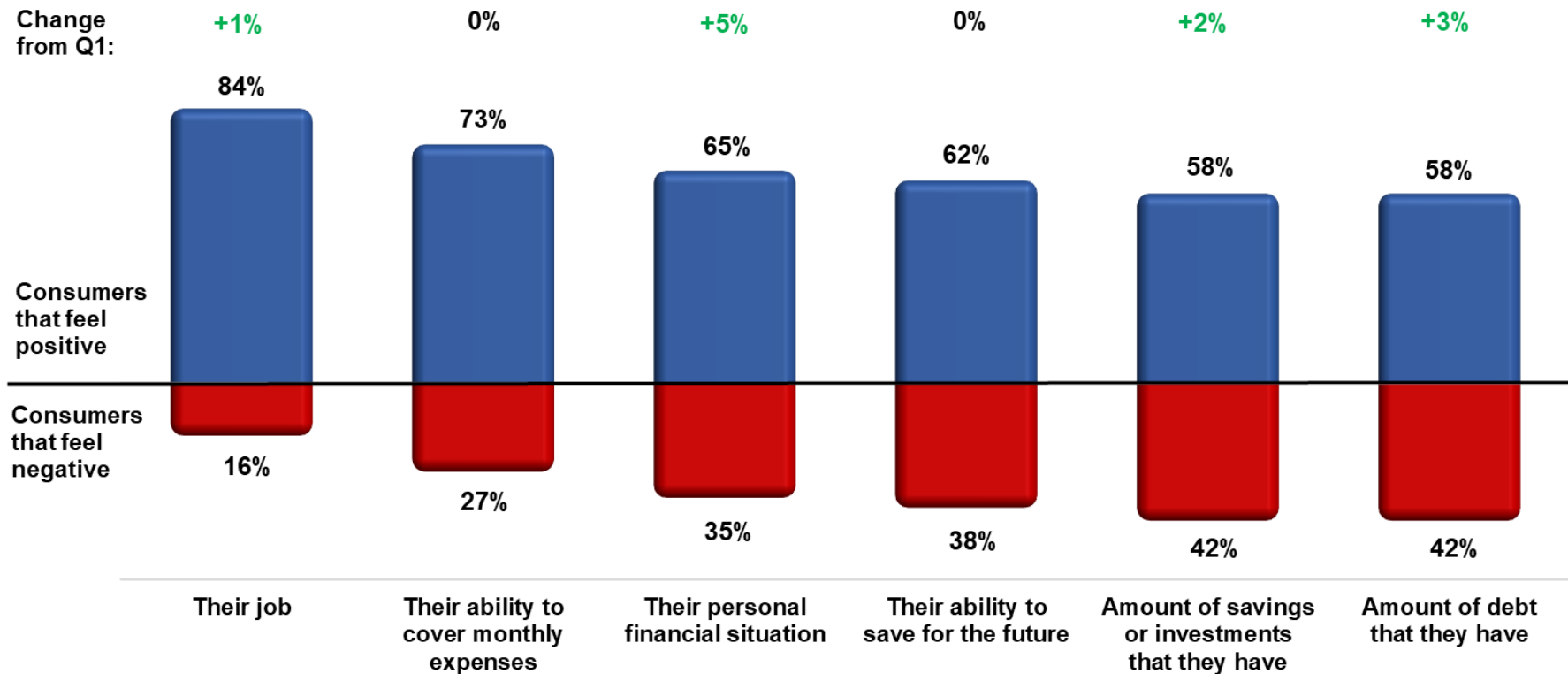


**STATE OF THE
RESTAURANT INDUSTRY
2026**

QUARTERLY CONSUMER INSIGHTS

Consumers remain positive about their personal economic dashboard

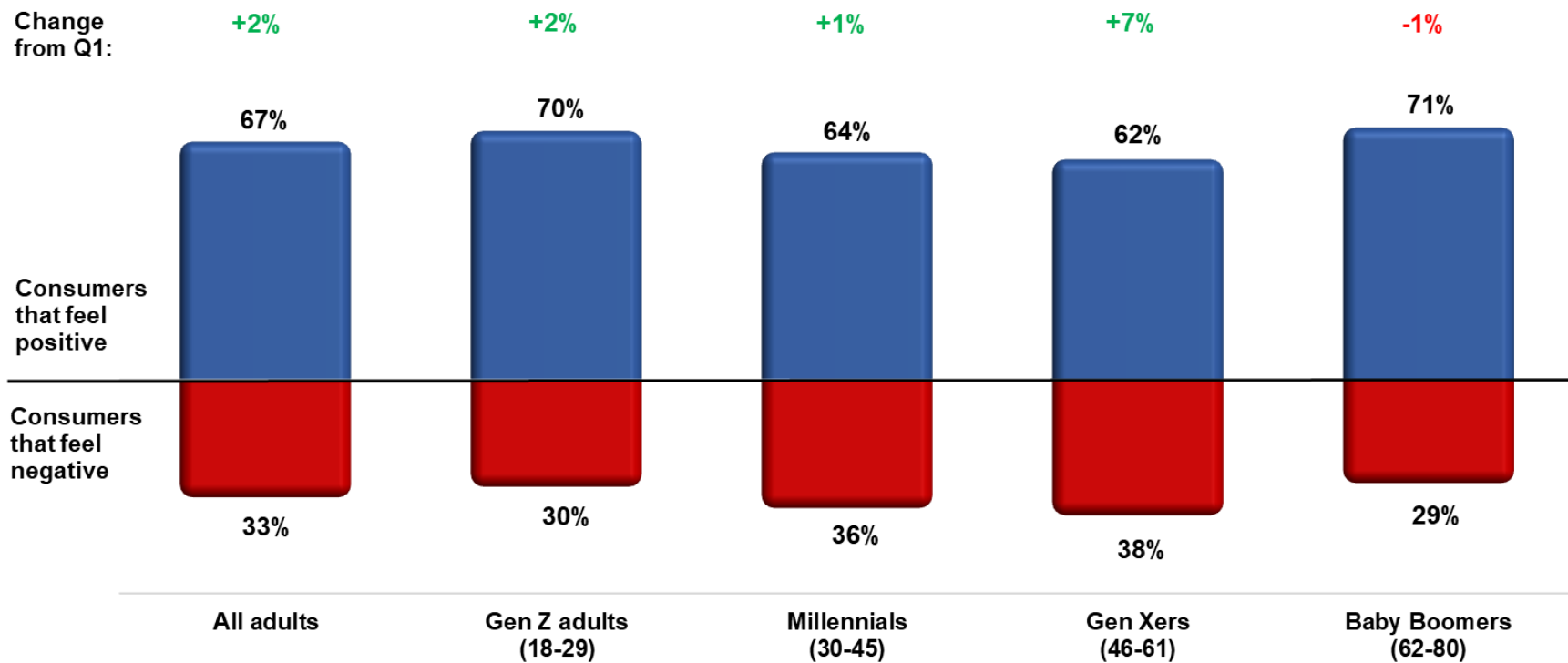
How consumers feel about six measures of financial well-being



Source: National Restaurant Association, Quarterly Consumer Insights – 2026:Q1 and 2026:Q2

Gen Xers' economic sentiment improved between Q1 and Q2

Average consumer sentiment across the six measures of financial well-being

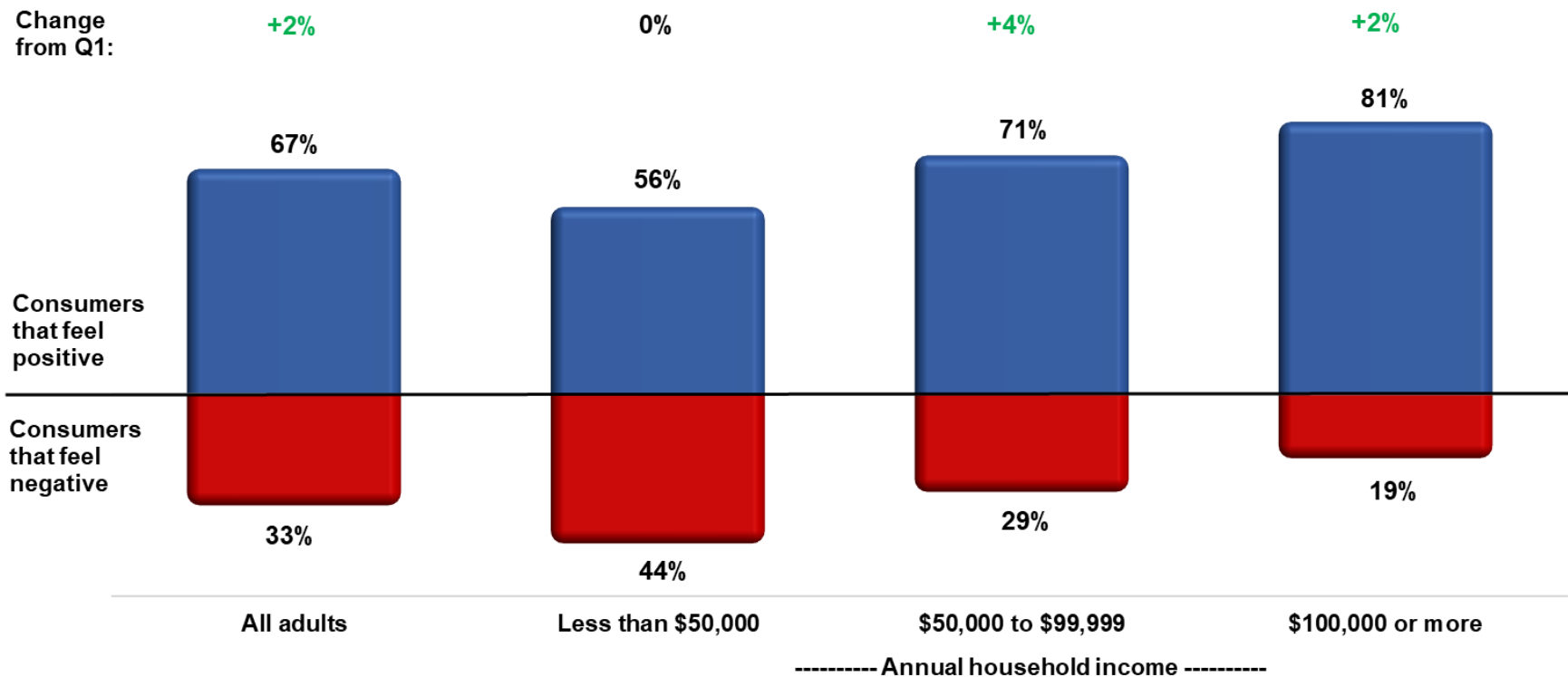


Source: National Restaurant Association, Quarterly Consumer Insights – 2026:Q1 and 2026:Q2

Note: Figures represent average of consumers' feelings about their job, personal financial situation, amount of savings/investments, amount of debt, ability to cover monthly expenses & ability to save for the future.

Higher income consumers feel better about their personal economies

Average consumer sentiment across the six measures of financial well-being

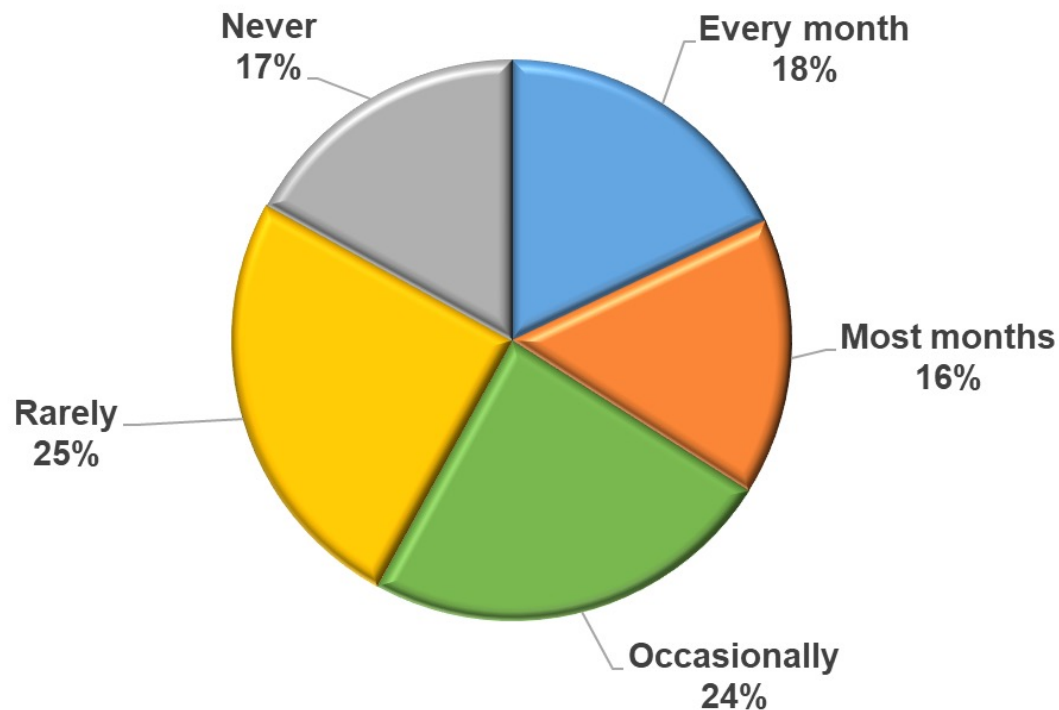


Source: National Restaurant Association, Quarterly Consumer Insights – 2026:Q1 and 2026:Q2

Note: Figures represent average of consumers' feelings about their job, personal financial situation, amount of savings/investments, amount of debt, ability to cover monthly expenses & ability to save for the future.

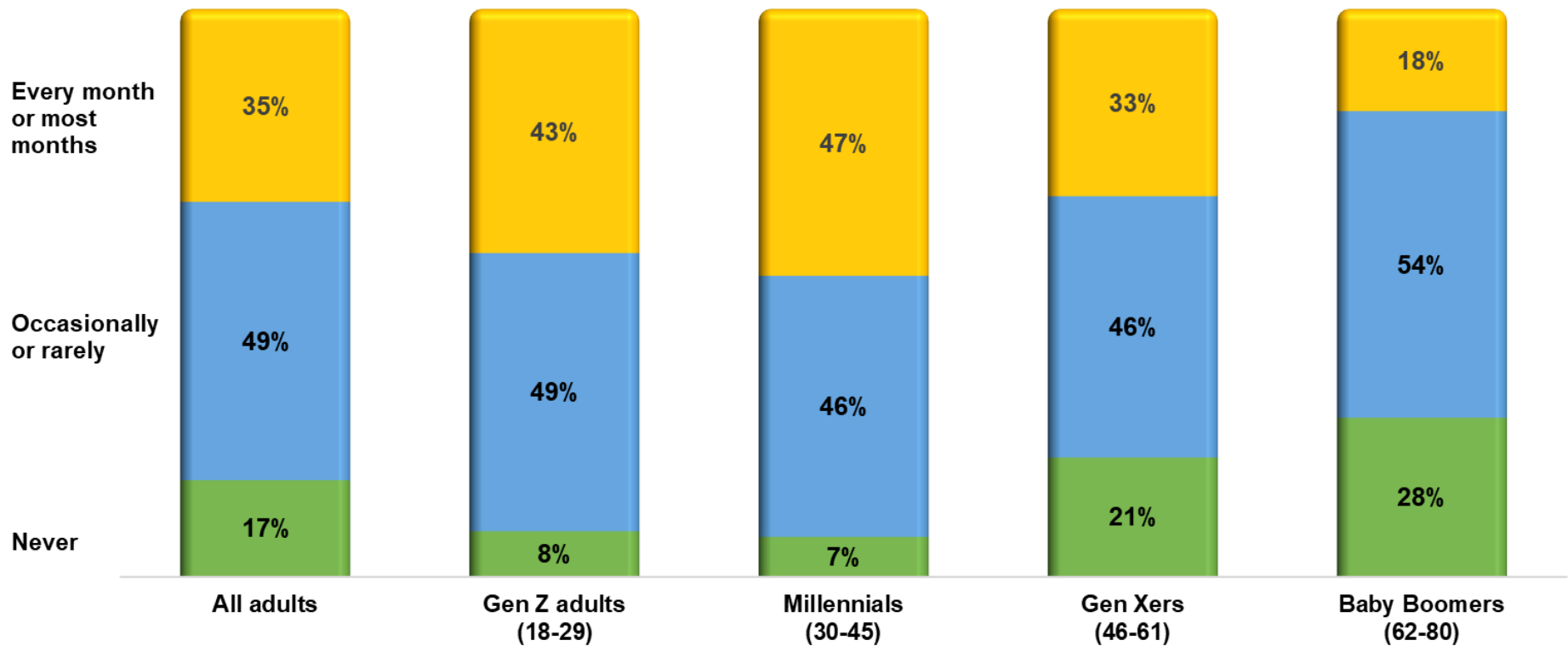
Most consumers outspend their monthly income at least occasionally

How often do consumers spend more than they bring in, on a monthly basis?



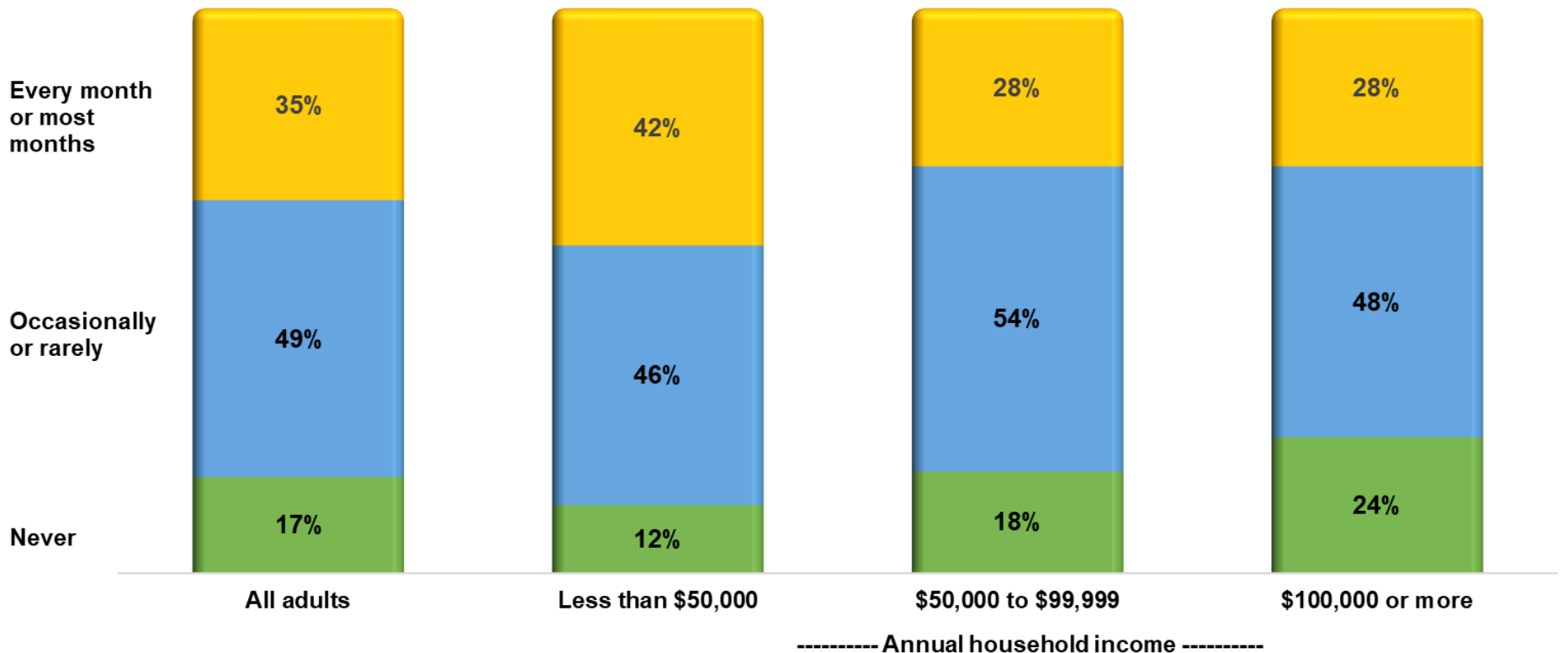
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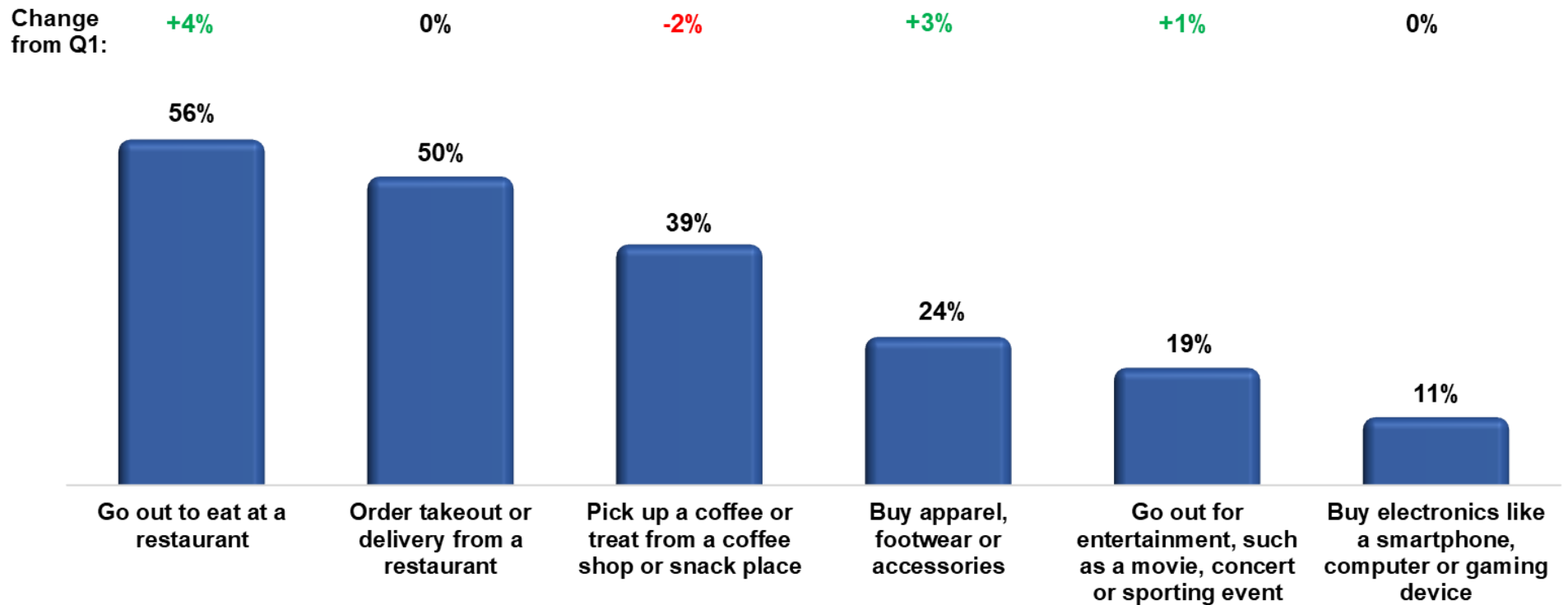
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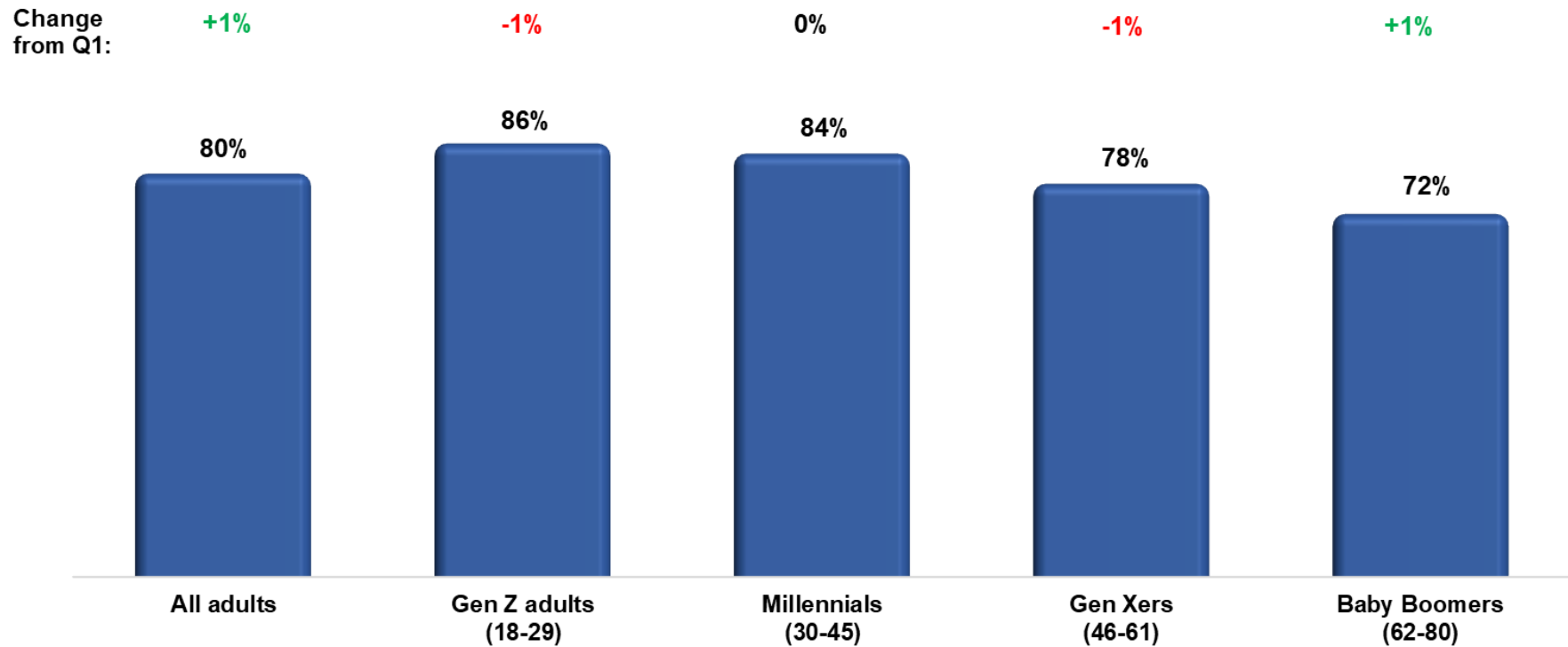
Restaurants are the top discretionary purchases for consumers

Percent of consumers who did the following activities during the past week



Consumers' restaurant usage held up between Q1 and Q2

Percent of consumers who went out to eat at a restaurant, ordered takeout or delivery from a restaurant, or picked up a coffee or treat from a coffee shop or snack place during the past week



Consumers' restaurant usage held up between Q1 and Q2

Percent of consumers who went out to eat at a restaurant, ordered takeout or delivery from a restaurant, or picked up a coffee or treat from a coffee shop or snack place during the past week

Change from Q1:

+1%

+2%

-1%

0%

80%

72%

84%

90%

All adults

Less than \$50,000

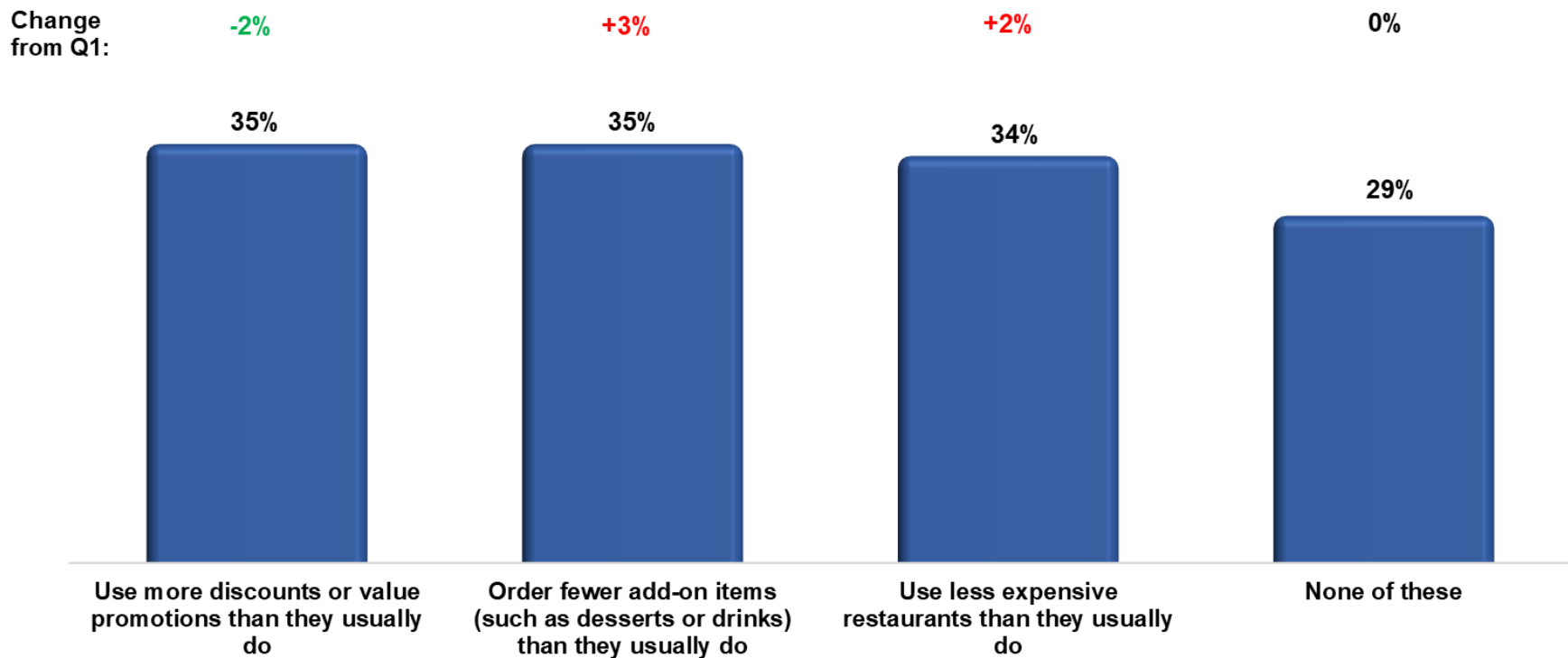
\$50,000 to \$99,999

\$100,000 or more

----- Annual household income -----

Consumers report changes in restaurant spending behavior

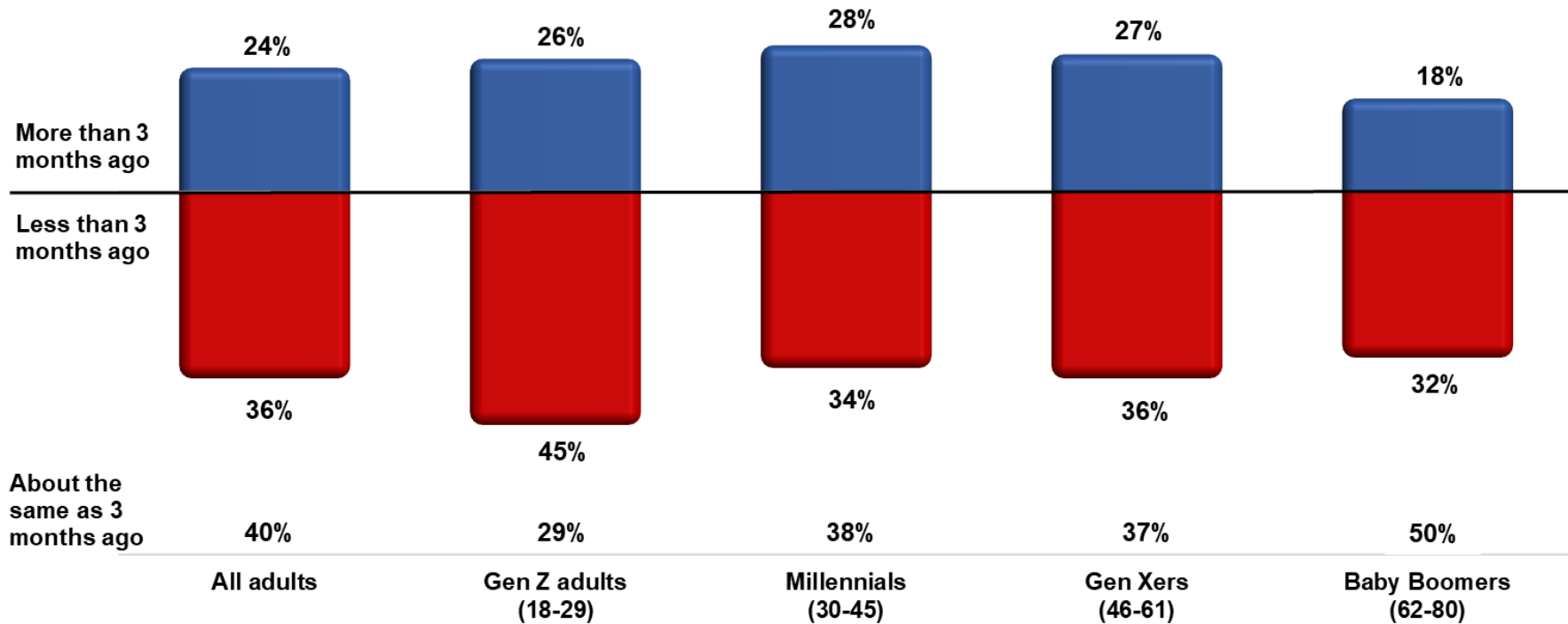
Consumers' reporting of actions they took during the last three months



Source: National Restaurant Association, Quarterly Consumer Insights – 2026:Q1 and 2026:Q2
 Base: Consumers who used restaurants during the past three months.

Consumers report their restaurant spending

Consumers' reporting of their current spending at restaurants – including going out to eat and ordering takeout and delivery – compared to three months ago



Source: National Restaurant Association, Quarterly Consumer Insights – 2026:Q2
 Base: Consumers who used restaurants during the past three months.