2016/2017*

IFMA FOODSERVICE LANDSCAPE

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OPERATOR

	LANDSCAPE		ECONOMICS				OUTLOOK		USAGE BEHAVIOR		
	Locations	Chain[a] / Managed[b]	Operator $ (billions)	Share	Consumer $ (billions)	$ Per Location	Projected Growth (real)	vs. Industry	Scratch	Cash & Carry	Considered Capital Improvements
RESTAURANTS	**648,258**	**43%[a]**	**$125.4**	**58%**	**$415.2**	**$640,486**	**-0.3%**	**weak**	**moderate**	**moderate**	**high**
Total Limited Service	323,040	68%[a]	$72.4	33%	$249.7	$772,969	0.6	average	low	moderate	moderate
Total Full Service	325,218	18%[a]	$53.0	24%	$165.5	$508,889	-1.6	weak	high	moderate	high
RETAIL FOOD	**264,475**	**n/a**	**$24.7**	**11%**	**$59.5**	**n/a**	**3.0%**	**strong**	**low**	**n/a**	**moderate**
Supermarkets	99,958	82%[a]	$12.9	6%	$25.7	n/a	3.8	strong	moderate	n/a	high
Convenience Stores	154,192	36%[a]	$11.1	5%	$31.8	n/a	2.4	strong	low	n/a	moderate
Other Retailers	10,325	n/a	$0.7	0%	$2.0	n/a	1.4	strong	low	n/a	moderate
ON-SITE FOODSERVICE	**336,630**	**n/a**	**$67.1**	**31%**	**$173.0**	**$513,807**	**1.8%**	**strong**	**moderate**	**n/a**	**moderate**
Education	**114,876**	**18%[b]**	**$16.2**	**7%**	**$33.0**	**$287,266**	**0.4%**	**average**	**moderate**	**low**	**moderate**
K-12	110,249	17%[b]	$9.1	4%	$15.1	$136,963	0.1	weak	low	very low	moderate
Colleges and Universities	4,627	42%[b]	$7.2	3%	$17.9	$3,868,597	0.7	average	moderate	low	high
Business and Industry	**11,299**	**65%[b]**	**$4.8**	**2%**	**$12.1**	**$1,070,891**	**1.5%**	**strong**	**moderate**	**low**	**moderate**
Travel and Leisure	**139,815**	**n/a**	**$21.3**	**10%**	**$69.3**	**$495,655**	**2.6%**	**strong**	**moderate**	**n/a**	**moderate**
Recreation	69,206	n/a	$6.5	3%	$21.6	$312,112	2.5	strong	low	n/a	moderate
Lodging	68,110	58%[a]	$13.6	6%	$45.3	$665,101	2.7	strong	high	n/a	high
Transportation	2,499	n/a	$1.2	1%	$2.4	n/a	1.7	strong	low	n/a	low
Healthcare	**50,231**	**60%[b]**	**$11.8**	**5%**	**$25.2**	**$501,682**	**2.1%**	**strong**	**moderate**	**low**	**high**
Hospitals	5,627	17%[b]	$6.6	3%	$16.5	$2,932,291	2.5	strong	moderate	low	high
Long Term Care	15,650	53%[b]	$1.9	1%	$3.1	$198,083	1.5	strong	moderate	low	moderate
Senior Living	28,954	68%[b]	$3.4	2%	$5.6	$193,410	1.3	strong	moderate	low	high
Other	**20,409**	**n/a**	**$13.0**	**6%**	**$33.4**	**n/a**	**1.2%**	**average**	**moderate**	**n/a**	**moderate**
Vending	3,889	n/a	$8.4	4%	$20.9	n/a	1.4	strong	low	moderate	high
Catering	11,108	n/a	$2.4	1%	$8.0	n/a	1.7	strong	high	moderate	high
Military	513	n/a	$1.1	1%	$2.2	$4,255,361	-1.0	weak	moderate	n/a	low
Corrections	4,899	n/a	$1.2	1%	$2.30	$467,442	-1.0	weak	moderate	n/a	low
TOTAL FOODSERVICE**	**1,249,363**	**-**	**$217.2**	**100**	**$647.7**	**$518,385**	**0.6%**	← total industry real growth projected for 2017			

Food & Non-Alcoholic Beverages | **Key Sources:** Datassential, The NPD Group/CREST®, Nielsen Perishables Group FreshFacts Data, US Government

*Updated February 2017; restaurant numbers are December 2016 thru November 2017; all other numbers are August 2016 thru July 2017

**NOTE: totals may not add due to rounding

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CONSUMER

OCCASIONS

These are the underlying situations in which consumers eat away from home. Occasions shed light on WHY consumers make certain choices, and offer insight on how best to target those motivations.

	Frequency	Average Spend	Annual $ (billions)	Share of Spend
Quick bite	13.0%	$7	$39,856	6.8%
Casual lunch	12.5%	$10	$51,696	8.8%
Family meal	11.3%	$10	$50,298	8.5%
Running errands	11.2%	$7	$33,246	5.6%
Casual dinner	10.9%	$12	$56,154	9.5%
Cheap bite	10.6%	$6	$28,941	4.9%
Dinner on way home	7.6%	$10	$31,773	5.4%
Relaxing at home	7.4%	$8	$27,232	4.6%
Food as fuel	7.3%	$8	$24,377	4.1%
Hold over	7.2%	$6	$18,728	3.2%
Last minute dinner	6.5%	$10	$27,821	4.7%
Hanging with friends	6.0%	$10	$26,111	4.4%
Work break	5.9%	$8	$20,516	3.5%
Morning commute	4.9%	$6	$11,731	2.0%
Road trip	3.9%	$7	$12,450	2.1%
Social gathering	3.5%	$11	$16,289	2.8%
Weekend breakfast	3.1%	$8	$11,415	1.9%
Work lunch	2.8%	$9	$11,165	1.9%
Brunch	2.7%	$10	$11,992	2.0%
Special occasion	2.6%	$11	$12,676	2.1%
Romantic meal	2.4%	$16	$16,744	2.8%
Before event	2.3%	$11	$11,278	1.9%
Festive	1.4%	$11	$6,510	1.1%
Girl's night out	1.4%	$10	$6,083	1.0%
Formal dinner	1.3%	$13	$7,669	1.3%
Co-workers after work	1.2%	$13	$6,420	1.1%
Guy's night out	1.2%	$11	$5,275	0.9%
Impressing someone	0.9%	$14	$5,555	0.9%

Consumer Planning Program

Conducted annually by Datassential, IFMA's Consumer Planning Program research provides an extensive view of both OCCASIONS and EATER TYPES – and their impact on venue and menu selection.

EATER TYPES

Consumers generally belong to one of six distinct eater segments, each defined by a set of shared attitudes and behavior with regard to food away from home.

BASIC EATERS

20% of population | $7.37 average spend

With a no-frills mentality, these consumers "eat to live" rather than "live to eat". Affordability and speed are key motivators.

QUALITY ESSENTIALISTS

21% of population | $9.20 average spend

Quality matters to them, but only to a certain point; it's got to be good, but need not be spectacular. Consistency is key.

PROGRESSIVES

29% of population | $11.02 average spend

Progressives are often foodies with a greater appetite for experimentation; many also favor health-conscious dining.

HEALTH FIRST

13% of population | $12.72 average spend

Progressive attitudes with an emphasis on nutrition and doing / feeling good. Sub-segment under PROGRESSIVES.

FOOD FORWARD

16% of population | $9.51 average spend

Progressive attitudes with an emphasis on trying new things and adventurous eating. Sub-segment under PROGRESSIVES.

EXPERIENTIALISTS

29% of population | $10.08 average spend

It's not just about the food, but rather the entire *experience* – from ambiance and service to kid-friendly options.

ENVIRONMENT DRIVEN

15% of population | $10.47 average spend

Experience-driven with a focus on the environmental aspects of eating out. Sub-segment under EXPERIENTIALISTS.

FAMILY DRIVEN

14% of population | $9.72 average spend

Experience-driven with a focus on good solutions for the family / household. Sub-segment under EXPERIENTIALISTS.