

Dual Migration & the COVID Pandemic:

Where the Food Industry Goes from Here

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MOVING LESS, BUT HARDLY STANDING STILL

Do restaurants still know where to find their customers?

When the global pandemic was declared in March 2020, one of its most jarring effects was the call for most Americans to shelter in place. Many people confined their work, schooling, and social lives to their homes, and it's probably not hyperbolic to say that millions of plans were at the very least postponed, if not canceled outright, until the world can declare the end of the coronavirus crisis.

With so many people forced to stay put, the Dual Migration trend Datassential revealed in 2018 was knocked off course. Government officials won't know for sure for a while, but the pause in moving might prove temporary. Demand for

relocating appears to be similar to recent levels, according to a nationwide consumer survey from Datassential done in October.

Americans were resettling in up-and-coming cities between the coasts and gentrifying the neighborhoods and suburbs just beyond the country's biggest metro areas. Will they again, and how long until they do?

Millennials approaching adult rites of passage and affluent Boomers beginning to enjoy their golden years drove the Dual Migration pattern. However, the public-health and economic crises resulting from COVID-19 have not spared any region or demographic group.

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While moving patterns have paused, demographic changes keep rolling along. The uncertain present makes planning for the future harder for the foodservice industry.

Data sources can be contradictory and inconclusive, or nuanced at best. Most economic indicators that we can measure—home building and buying, the national unemployment rate, restaurant sales, consumer confidence—fell off a cliff in the early stage of the pandemic and slowly climbed to levels far below their pre-crisis peaks. Numbers cannot definitively show that New York and San Francisco are “over,” but plenty of news stories and anecdotes point to people with means decamping to “Zoom towns” or their families’ homes to wait things out.

Businesses don’t have nearly as much time to wait and see how consumers adjust to the pandemic. They need to know where Americans are going and why, and what they are going to want from their neighborhood food scene.

Fortunately, Datassential is fairly confident that demand for early-stage menu innovation has a predictable migration pattern. Expect new cuisines and menu ideas to spread from city centers to the outlying neighborhoods and suburbs, and to the second-tier cities, where Americans were moving before the pandemic—and where they’re likely to go again.



A SENIOR MOMENT FOR THE UNITED STATES

The aftershocks of the Baby Boom continue to spread. According to the U.S. Census Bureau, the 65-and-older population grew by more than one-third in the past decade. As 10,000 Americans turn 65 every day and join this population, it is projected to grow to 100 million people by 2060.

QUICK BITE: The U.S. median age is rising, led by the Boomers. In 2010, the median age was **37.2 years old**. Last year, it was **38.4**.

Given the sheer size of the generation born between 1946 and 1964, its influence on the country will continue to be felt, even as Millennials, Gen Z, and their juniors combine to slightly outnumber the older cohorts.





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A larger chunk of the U.S. is reaching senior status, revealing several challenges the country will face:

THE WORKING-AGE POPULATION CAN'T KEEP UP: The Census Bureau tracks the working-age population—people aged 16 to 64—and compares it to the “dependent population,” or people 14 and younger plus people 65 and older who are likely to retire. From 2010 to 2019, the dependent population grew four times as fast as the working-age population. Ten years ago, there were 49 “dependent people” for every 100 working-age Americans. By 2019, that number grew to nearly 54 “dependent people” per 100 working-age Americans.

MOST HOMES WEREN'T BUILT FOR THIS: According to the Census Bureau, only about 10% of the 115

million homes in the U.S. are ready to accommodate an aging population. A home is considered aging-ready if it has a step-free entryway, full bathroom and bedroom on the first floor, and at least one bathroom accessibility feature like a built-in shower seat. This varies by region, but the Census Bureau found that the Mid-Atlantic and Great Lakes regions severely lack enough aging-ready housing.

BOOMERS HAVE UNMATCHED POLITICAL CLOUT—FOR NOW: Baby Boomers and their elders made up 38% of all eligible voters just before the 2020 election. Right behind are Millennials and Gen Z, combining for 37%. Over the next decade, national elections could have far different outcomes: By 2030, Millennials and their younger cohorts will account for more than half the population and half of all eligible voters.



PUTTING OFF RETIREMENT

Many Boomers will still be in the labor force for years to come. About three in 10 Americans between the ages of 65 and 72 are still working or looking for work. It bears repeating that each day 10,000 Baby Boomers turn 65, but only about 5,900 people above that age retire per day, according to Pew Research Center.

QUICK BITE: A 2019 survey by the Insured Retirement Institute found that **45% of Boomers had no retirement savings**, and one-third planned to retire at age 70 or older, or to not retire at all.

Much has been written about Millennials' bad timing, having begun their careers around major downturns like the post-9/11 recession and the Great Recession. But if that recent history caused a "failure to launch" for many young Americans, consider that it is also making for a rough landing for older people as they try to retire.

Many Boomers withstood huge declines in their 401(k)s, IRAs, and home values in the Great Recession. Yet many also fled to bond funds that grew too slowly due to record-low interest rates, and even more saw their retirement savings and job prospects tumble further during the COVID-19 pandemic. Seniors with the means to help their adult children through these downturns often gave financial support as well.

MIGRATION: NO LONGER JUST FOR SNOWBIRDS

Seniors' reasons for moving during or near retirement vary quite a bit, and increasingly so do their destinations. The latest Census estimates from 2018 showed that Florida still has the most net migration of Baby Boomers of any state, though rising costs for both housing and living there have driven seniors to spread out not just to the rest of the Sun Belt, but also into the Mid-Atlantic, Appalachia, and parts of the Mountain West.

Top States Where Seniors Are Moving

1	Florida	+69,289
2	Arizona	+33,609
3	North Carolina	+14,470
4	Texas	+9,886
5	South Carolina	+8,706
6	Idaho	+6,363
7	Georgia	+5,456
8	Tennessee	+5,251
9	Nevada	+4,830
10	Delaware	+3,588

Source: 2018 American Community Survey, U.S. Census Bureau

Top Metros Where Seniors Are Moving

1	Mesa, AZ	+2,504
2	Spring Valley, NV	+2,494
3	Scottsdale, AZ	+1,572
4	Lakeland, FL	+1,335
5	Corpus Christi, TX	+1,314
6	Denver, CO	+1,288
7	Raleigh, NC	+1,219
8	Tucson, AZ	+1,175
9	North Las Vegas, NV	+1,108
10	Tulsa, OK	+1,076

Source: 2018 American Community Survey, U.S. Census Bureau

In urban and suburban markets, retirees (and near-retirees) are looking for options beyond traditional senior-living villages. This is driving demand for everything from luxury condominiums in major cities to amenity-rich housing in walkable neighborhoods in city perimeters and inner-ring suburbs. Indeed, some of the cities with the largest net migration of Americans 60 and older are suburbs of Phoenix, Las Vegas, and Tampa.



TROUBLE LEAVING THE NEST

Even before the COVID-19 pandemic's effects on moving and migration trends, young adults had been showing less mobility than their counterparts in previous years. According to the Census Bureau's Current Population Survey, fewer than 10% of Americans changed addresses in 2018-2019. Millennials, now part of the younger age cohorts that typically move the most, drove that record low.

These overall migration declines have been consistent since the highs of the post-World War II period, when as many as 20% of Americans would change their residence in a given year. But within the past few years, before COVID likely put many moving plans on hold, challenges that tend to keep people in place hit Millennials and Gen Z especially hard.

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QUICK BITE: In a recent survey of 2,000 young adults conducted by TD Ameritrade, **nearly 75% of younger Millennials (ages 24 to 29) said they are concerned the pandemic will impact their finances.** Over half (57%) said the pandemic halted their plans to be financially independent.

Underemployment and higher costs for housing tend to pressure people's ability to move, and it also leads young people to postpone life milestones that give momentum to migration, like getting married, having children, and buying a first or new home. Housing is just one major cost that can feel unsustainable or unattainable for young people. The burdens of student loan debt and child care also add up.

Coronavirus added a public-health crisis and an economic downturn to all of these long-term trends. As a result, slightly more than half (52%) of adults ages 18 to 29 lived with parents at home in July 2020, up from 47% the previous February, according to Pew Research.



WHERE ADULthood IS BEGINNING

Every five years, the U.S. Census Bureau's American Community Survey updates where Americans are moving and where they are leaving. From 2013 to 2017, the 25-to-34 age cohort included the youngest Millennials in the country, many of whom were trying to land first jobs, start families, and buy property. Here's a look at the most recent data available for states and cities gaining and losing the most young adults.

Top States Where Young People Are **Moving**

1	Texas	+32,398
2	Washington	+18,174
3	Colorado	+16,156
4	Oregon	+7,542
5	Arizona	+5,742
6	Nevada	+5,665
7	Florida	+5,459
8	North Carolina	+3,835
9	Tennessee	+3,559
10	Georgia	+3,355

Top States Where Young People Are **Leaving**

1	New York	-37,217
2	Illinois	-17,884
3	New Jersey	-7,100
4	Massachusetts	-6,353
5	Alaska	-6,038
6	Pennsylvania	-5,210
7	D.C.	-4,092
8	Wisconsin	-3,743
9	Ohio	-3,318
10	Mississippi	-3,130

Source: 2018 American Community Survey, U.S. Census Bureau

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Top Metros Where Young People Are **Moving**

1	Houston	+14,767
2	Denver	+12,667
3	Dallas	+12,665
4	Seattle	+11,244
5	Austin, TX	+8,933
6	Charlotte, NC	+8,024
7	Portland, OR	+7,203
8	Riverside, CA	+6,849
9	Phoenix	+6,682
10	Nashville	+5,742

Top Metros Where Young People Are **Leaving**

1	New York City	-37,648
2	Los Angeles	-18,722
3	Chicago	-13,757
4	San Diego	-7,080
5	Miami	-7,000
6	Boston	-3,358
7	Philadelphia	-2,681
8	New Orleans	-2,274
9	Milwaukee	-2,213
10	Washington, D.C.	-2,168

Source: 2018 American Community Survey, U.S. Census Bureau



THE GREATLY EXAGGERATED DEATH OF THE CITY

So far, official government data can't point definitively to an exodus from the largest U.S. cities during the pandemic.

Census Bureau data showed that population growth in the largest American cities had stagnated in the second half of the last decade. Experts from the Brookings Institution pointed to the long economic recovery and favorable housing market that allowed Millennials to find jobs and homes in parts of the country outside the major coastal cities, which were not available to them during the height of the Great Recession.

It's hard to know how coronavirus accelerated or dampened that trend. Unofficial sources of information, like numbers shared from moving companies or websites listing

apartments for rent, indicated a nuanced picture. The "Coronavirus Moving Study," released in October by MyMove, an official media partner of the U.S. Postal Service, found that 15.9 million Americans filed change of address forms from February to July 2020. This was a 4% increase from the same period in 2019.

Interestingly, the growth in change-of-address requests showed a 2% increase in permanent moves and a 27% increase in temporary moves, making long-term shifts in population from coronavirus harder to project. The biggest spikes for requests for temporary mail forwarding occurred in March and April, a time when many urban residents sought to quarantine with family in less densely populated areas.

WHERE DID EVERYBODY GO?

While it's true that United Van Lines reported more moves out of New York City and San Francisco than moves into those huge, expensive coastal cities, the company was not relocating every customer to the suburbs, as one might guess. In fact, between May and August, the most common moving destination from San Francisco was a tech hub on the West Coast with expensive real estate: Seattle. Right behind were Austin and Chicago, according to United Van Lines' data.

Former New Yorkers' top destinations were Los Angeles, Atlanta, and three mid-sized markets in Florida (Tampa-St. Petersburg, West Palm Beach, and Orlando), United Van Lines said.

MyMove's coronavirus study, on the other hand, showed that the cities which gained the most movers in the first six months of the pandemic were located within 100 miles of major population centers. Six of the 10 most moved-to markets were in Texas (see right).

Authors of MyMove's study noted, however, that cities' net losses far outnumbered smaller markets' gains. "It's more likely that residents relocating from cities didn't move en masse to Texas," they wrote. "Rather, they spread out to smaller areas across the country."

10 Most Moved-To Markets During the First 6 Months of the Pandemic

1	Katy, TX
2	Richmond, TX
3	Frisco, TX
4	East Hampton, NY
5	Georgetown, TX
6	Leander, TX
7	Cypress, TX
8	Cumming, GA
9	Riverview, FL
10	Meridian, ID



THOUGH MOVING PATTERNS ARE IRREGULAR, THE DUAL MIGRATION MODEL PERSISTS

Two years ago, Datassential's analysis of Census information yielded the model of Dual Migration, in which Boomers and Millennials (the two largest generational cohorts in American history) were converging in the same living areas, notably city perimeters and amenity-rich suburbs. Many up-and-coming cities in the Sun Belt, from Orlando and Nashville to the Research Triangle around Raleigh, North Carolina, were benefiting from these patterns as well.

How these generations overlapped and intermingled with Generations X and Z usually broke down along socioeconomic lines.

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Economic activity, including relocations, will slowly recover in the coming year once coronavirus is better controlled. The country's biggest cities are far from vacant, and the growing trade areas will still be adjusting to new citizens with different demands. Real estate developers and restaurateurs should prepare for an eclectic demographic profile wherever they go, but according to Datassential's model, they can target the following groups:

IN CITY CENTERS: affluent Millennials, early-career Gen Z (the oldest members of that cohort are turning 23 years old in 2020), and the wealthiest Boomers. In most cases, these are households without children, except in the case of the wealthiest Millennials that have started families.

IN URBAN, INNER-RING SUBURBS: a similar mix of Millennial households from the city perimeters, but looking to afford home ownership, as well as slightly less affluent Boomers who want a little more space without sacrificing amenity-rich, walkable areas.

IN EMERGING CITY PERIMETERS: less affluent Millennials (single professionals, childless couples, and families) and Boomers opting to live outside downtown areas (though some could afford city-center accommodations).

IN TRADITIONAL SUBURBS: more affluent Boomers who wanted to remain in the homes they have owned (often outright) for years, less affluent Millennial families looking to own or rent a home near good commuting options, and non-white families moving out (or being priced out) of rapidly gentrifying city neighborhoods.

DOES THE PANDEMIC MUDDLE MIGRATION TRENDS?





COVID MOVES THE NEEDLE, JUST NOT BY MUCH

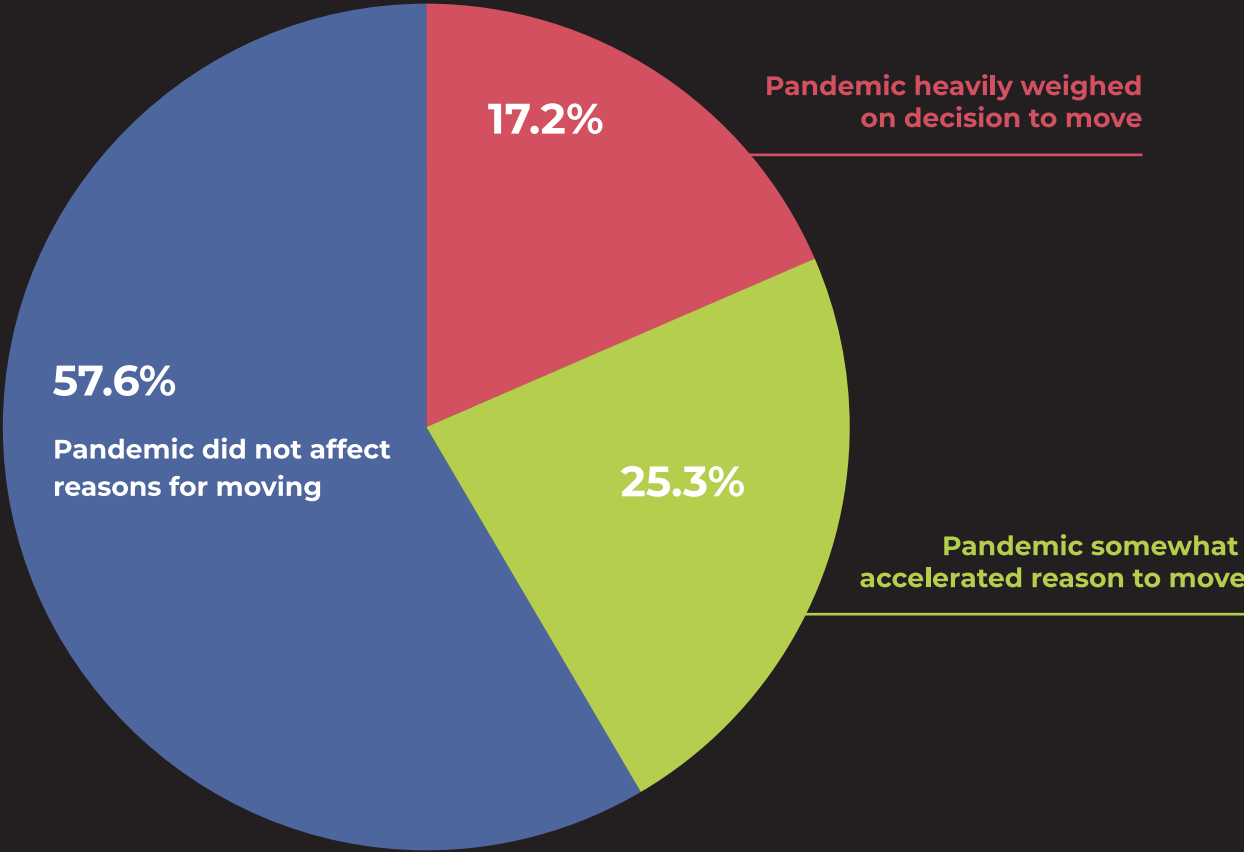
When the coronavirus pandemic reached a tipping point in mid-March 2020, many Americans were forced to stay home. Yet plenty of people still chose to call somewhere else home and move—COVID might have accelerated or decelerated plans for some people, but it did not bring migration to a halt everywhere.

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In October 2020, Datassential conducted a survey with 1,000 US consumers, including 335 who had moved to a permanent residence within the past two years. The study found that, of the 115 respondents who had moved in the past six months (since the start of the pandemic), nearly three in five (57%) said the pandemic did not affect their reasons for relocating. One in four indicated that the pandemic likely accelerated their reasons for moving, and 17% said it factored heavily in their very recent move.

Interestingly, when consumers were asked if they wanted to move or were considering it, only one person in three responded yes. About two in five people from the Gen Z and Millennial generations were thinking of moving, compared with one in three Gen Xers and only one in five Boomers.

To what extent did the COVID-19 pandemic affect your reasons for moving?



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In which type of area do you want to live?(n=330 people considering moving)

	Total	Gen Z	Millennial	Gen X	Boomer
Urban	38%	41%	48%	34%	19%
Suburban	37%	33%	33%	40%	42%
Rural	25%	26%	19%	26%	40%

To what extent is the COVID-19 pandemic affecting
your reasons to move or stay put? (n=1,000)

	Total	Gen Z	Millennial	Gen X	Boomer
Greatly impacts	17%	23%	28%	12%	8%
Impacts	20%	23%	25%	18%	14%
Does not impact	63%	55%	46%	70%	78%

Younger generations unsurprisingly showed more appetite to live in cities, though one in three Millennials and Gen Zers expressed a preference for moving to the suburbs. For Boomers interested in moving, twice as many (40%) said they would like to move to the country than to a new city dwelling.

For most consumers (63%), the pandemic did not weigh heavily on whether they wanted to move or stay put. That was much more the case for Gen X and the Boomers.

SO WHAT DOES MAKE PEOPLE WANT TO MOVE RIGHT NOW?

The most popular reasons for wanting to move are fairly timeless, no matter the economic or public-health situation, Datassential's October survey found. The most popular reason overall is to get more living space, followed by wanting more affordable housing and a change of scenery. The Dual Migration path toward second-tier cities and the interwoven rings of city perimeters and urbanized suburbs often satisfy those reasons for moving.

Wanting to live somewhere more exciting is still a common secondary reason for living somewhere new, and that is where targeted restaurant development can meet growing demand in dozens of markets around the country.

Gen Z Top Reasons for Wanting to Move	
I want more space	24%
I want more affordable housing	24%
I want to live somewhere more exciting	24%
I need a change of scenery	20%
I want to move in with a partner	20%
I don't like the cost of living / taxes here	15%
I don't like the social / political situation here	13%
I want to move closer to family	11%

Gen X Top Reasons for Wanting to Move	
I want more space	34%
I need a change of scenery	25%
I don't like the cost of living / taxes here	21%
I want more affordable housing	19%
I don't think it's safe where I live	14%
I want to live somewhere more exciting	13%
I don't like the social / political situation here	12%
I want a better school district for my children	11%

Millennial Top Reasons for Wanting to Move	
I want more space	32%
I want more affordable housing	20%
I need a change of scenery	18%
I don't like the cost of living / taxes here	17%
I want to live somewhere more exciting	15%
I want a better school district for my children	14%
I want to move in with a partner	10%
I want to move closer to family	10%

Baby Boomer Top Reasons for Wanting to Move	
I want more space	30%
I want to move closer to family	26%
I want more affordable housing	25%
I need a change of scenery	19%
I don't think it's safe where I live	19%
I don't like the cost of living / taxes here	17%
I don't like the social / political situation here	17%
I want to live somewhere more exciting	15%



THE RECOVERY LANDSCAPE

The pandemic threatens the survival of restaurants in a very real way. A report by the New York State comptroller estimated that one-third to one-half of New York City's 23,650 restaurants and bars could permanently close as a result of COVID-19, absent major relief from the government.

QUICK BITE: Datassential's Firefly database found in a late-September update that urban markets still had the highest rates of restaurant closures compared to pre-pandemic levels. **Nearly one in 10 (9.7%) urban restaurants were closed as of September 23**, compared with 7.2% of suburban and 6.2% of rural restaurants.

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Urban markets are where many early-stage culinary trends start, often in independent restaurants built around global cuisines. Consider how concentrated ethnic restaurants are in urban locations, as opposed to the suburbs or rural communities. According to Datassential's Firefly database, restaurants serving ubiquitous foods like burgers, barbecue, and pizza have a fairly even spread across urban, suburban, and rural markets (see right). Restaurants focused on emerging cuisines have a different story.

	URBAN	SUBURBAN	RURAL
Burger	35.0%	38.8%	26.2%
Barbecue	30.9%	40.0%	29.1%
Pizza	36.8%	37.8%	25.4%
Indian	60.6%	32.2%	7.2%
Vietnamese	65.6%	29.2%	5.2%
Middle Eastern	69.1%	25.9%	5.1%



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Across the country, the restaurant industry may soon look different by service segment.

Fortunately, restaurants have begun to open during the COVID era, albeit at a slower rate than before the pandemic. Compared with the rate at which brand new restaurants debuted in 2019, the industry is at about 25% of that pace in 2020, meaning only one restaurant is opening in the time it normally took four new eateries to open.

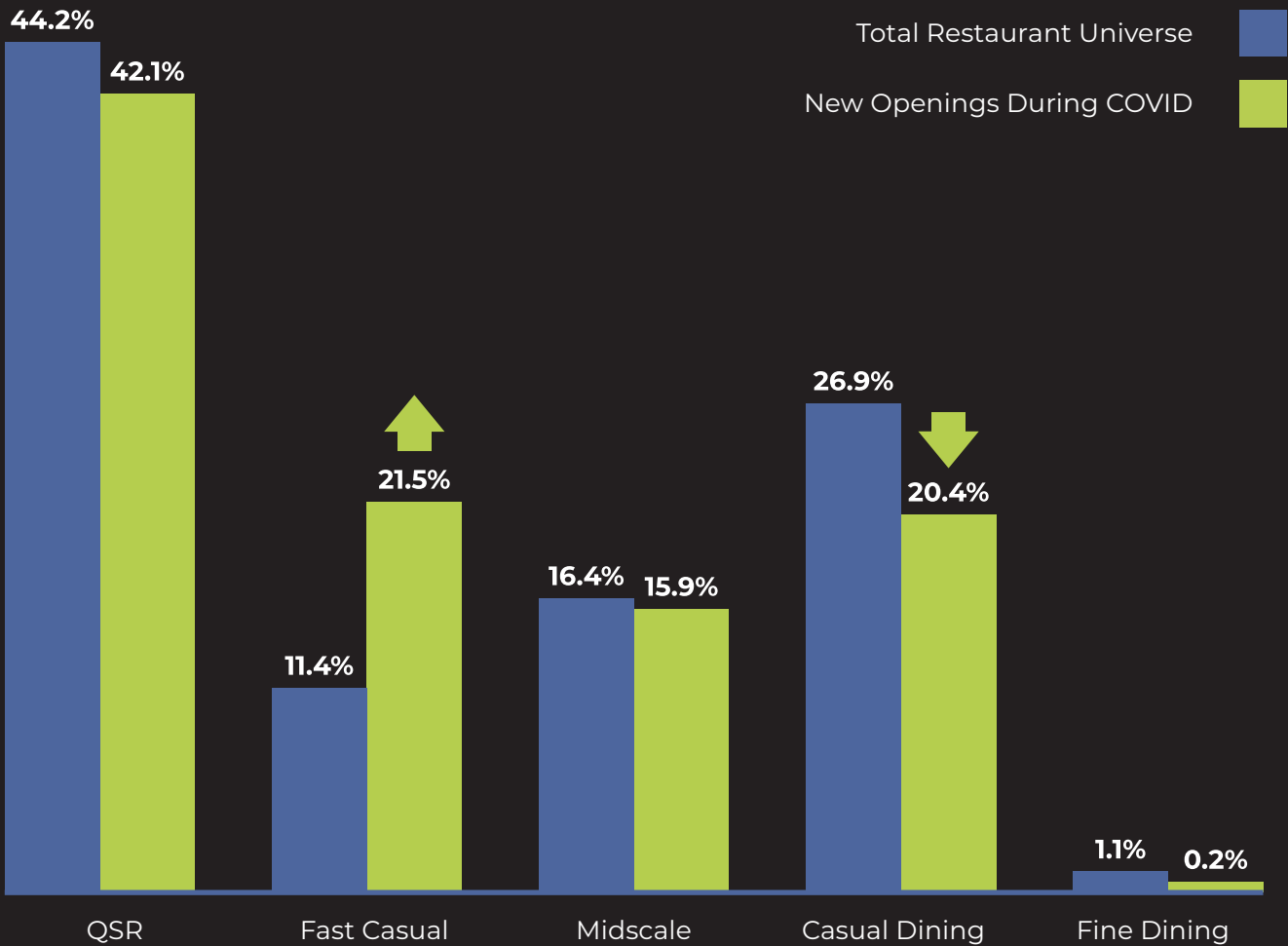
The early stages of recovery from coronavirus have been most beneficial to the fast-casual segment so far. The chart on the next page compares the total universe of restaurants in the U.S. with the restaurants that have opened since the onset of the pandemic.

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Of all the restaurants to open since mid-March, 21.5% are fast-casual eateries. That's up significantly from fast casual's total penetration of all restaurants, at 11.4%. Conversely, the casual-dining segment is off its historical opening pace. More than a quarter (26.9%) of all restaurants today are classified as casual dining, but they have accounted for only 20.4% of recently opened restaurants.

Quick service remains the segment with the most total restaurants (44.2%) and the most recent total openings in the COVID era (42.1% of all new restaurants).

Midscale's rate of new openings (15.9%) is not far off from its total makeup of industry locations (16.4%), and fine dining still has the fewest number of total locations (1.1%) and made up the fewest new restaurants to open (0.2%).



INNOVATION GOES ONE WAY

Culinary trends often start in city centers, which are high-density markets with a lot of chef-driven, independent restaurants. Cities' diverse populations support ethnic restaurants and global cuisines, giving them a foothold in the U.S. restaurant industry and seeding the future popularity of ingredients (think of sriracha) and global menus (like Thai food or Indian food).

But eventually, people living for the city grow up, start families, and move to the gentrifying neighborhood or the suburbs. They take their fondness and their demand for trend-forward menus and restaurants with them.

Restaurant operators trying to prepare for an eventual post-COVID landscape should think strategically about where to target expansion, to markets rich

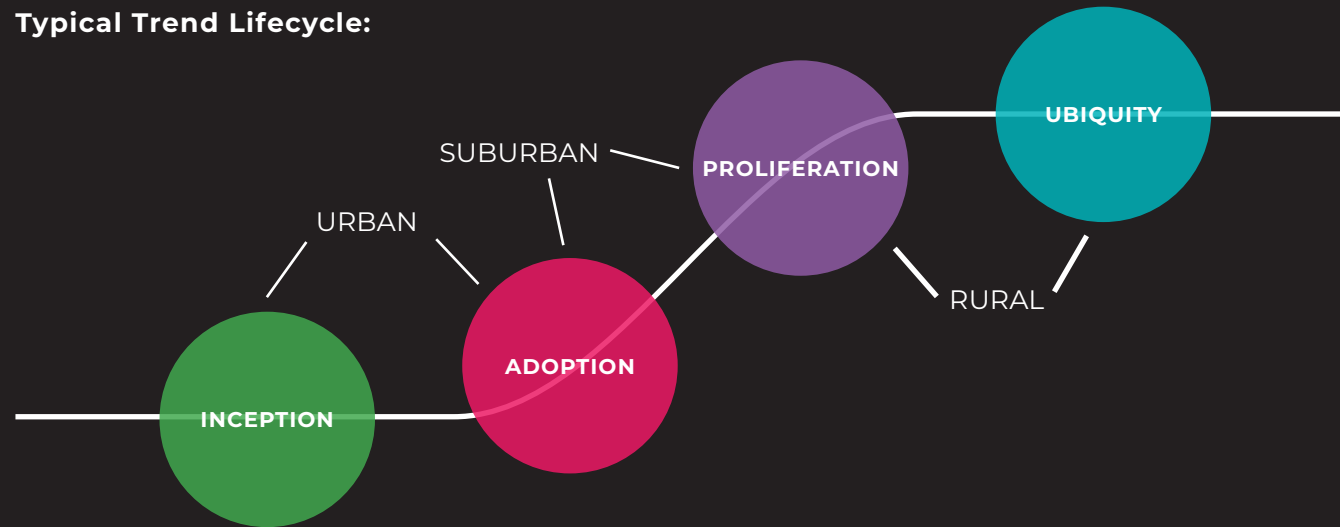
in upwardly mobile, newly arrived customers: rapidly urbanizing suburbs and city-perimeter neighborhoods.

They also should develop their menus to leverage early-stage trends in the local market. The Menu Adoption Cycle, Datassential's methodology for tracking culinary trends from their Inception stage all the way to Ubiquity, often maps neatly on a continuum from urban to suburban to rural markets.

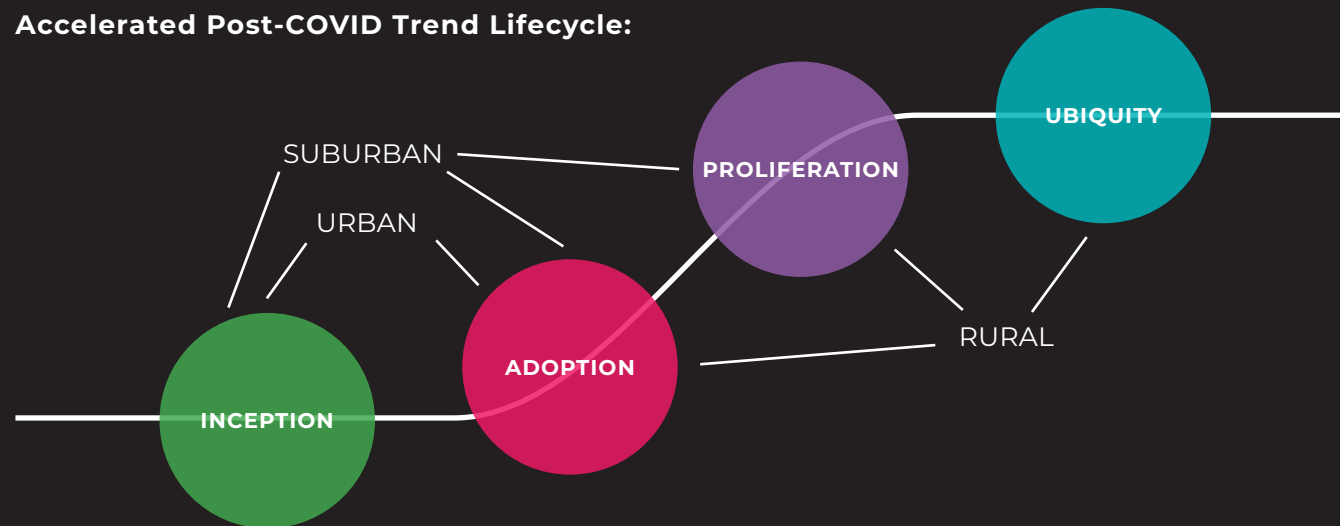
The next big flavor or dish first appears in the Inception stage—high-end cocktail bars and white-tablecloth city center restaurants. Typically, as it progresses to the Adoption stage—trendy restaurants and specialty retailers—this is still mostly occurring in first-tier cities but starting to spread to smaller cities and major suburbs.



Typical Trend Lifecycle:



Accelerated Post-COVID Trend Lifecycle:



CONTINUED...

The Proliferation Stage typically is a hinge point where a culinary trend starts straddling suburban and some rural markets, as it starts being menued by chain restaurants and carried by mainstream grocery chains. The Ubiquity stage means precisely that: The trend is found at virtually all retailers or restaurants, from urban to rural.

Culinary trends will follow the people, spreading from the city centers further out into the places ideally suited for Dual Migration. Look for more Inception-level ingredients, flavors, and trends in suburban markets. Further up the MAC curve, Adoption-level trends will increasingly migrate to rural markets as well, speeding up the cycle of exposure and shortening the growth period for many new “it” flavors.



KEEP IT MOVING

The Dual Migration model is by no means inevitable, with a pandemic making the present so uncertain. However, these patterns had momentum before the coronavirus crisis, and even a once-in-a-lifetime pandemic can't stop the way trends move through the zeitgeist. In fact, the pent-up demand being built during COVID could speed up the spread of trends across the Menu Adoption Cycle and the country.

On the next page we've laid out some action items to think about.

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GET FAST OR GET LEFT BEHIND:

Since the onset of the pandemic, fast casual has grown much faster than its historical rate (and quick service keeps chugging along as the industry's biggest segment) because it is suited to this fluky moment in history. As off-premise strategies like delivery, drive-thru, and takeout become life-savers for restaurants, fast-casual brands are leaning into those strengths by redesigning stores to allow for more takeout or to add drive-thrus. Even casual-dining and upscale restaurants are pivoting to carryout or adding fast-casual-like elements to stores.

LIVE ON THE EDGE: There are interwoven areas where the liveable city neighborhoods meet the dynamic suburbs that feel more like the cities just a (convenient) commute away. This is the sweet spot attracting upwardly

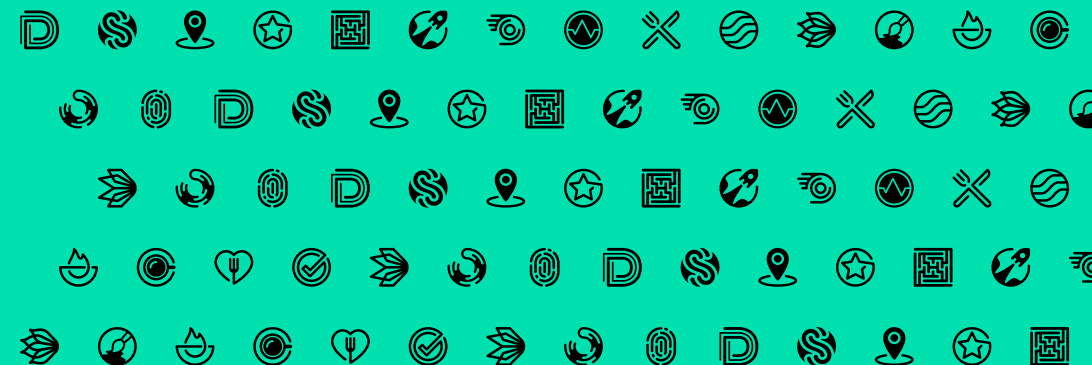
mobile households of active, growing families or affluent seniors. There could still be affordable commercial real estate (especially after the pandemic shakes out), and there will definitely be an environment packed with potential guests. The key to success is to bring the early-stage tastes and ingredients from the trendy restaurants in the city before the competition does.

BUT DON'T STOP THERE: Investigate the second-tier cities without the seven-figure populations and the farther out towns that are home to more young consumers than you would think. New ideas and global flavors are poised to move faster across the Menu Adoption Cycle than ever before. That will propel them from urban to suburban to rural markets much faster, so there could be a great enough reward to justify the risk of pioneering something new.



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18 S. Michigan Ave, 9th Floor
Chicago, IL 60603
(312) 655-0622