acxion foodservice

ACXION REPORT » Q3 2026

The New Shape of Value in Foodservice

Understanding the new consumer equation behind every foodservice occasion.

The Worth-It Economy

What goes into winning a meal occasion.

Today's foodservice conversation is stuck on value—and rightfully so. Consumers continue to scrutinize spending amid inflation and rising menu prices. But "value" is starting to feel too blunt for the moment we are in. Yes, consumers still care about price, but they are increasingly precise about the kind of value they expect from each occasion.

Some meals need to be fast, familiar, affordable, and frictionless. While others need to feel memorable, social, indulgent, or distinctive enough to justify leaving home.

The winners will not be the cheapest or the most premium brands, but the ones that understand which equation the consumer is using in the moment. The risk sits in the middle, where brands are neither efficient enough for convenience, nor distinctive enough for experience.

What's Inside

01

Why Value is No Longer Enough

Beyond the value equation.

The term “value” is losing strategic usefulness. Every brand claims it, every earnings call leans on it, and every consumer trend gets reduced to price sensitivity. But the real equation is more complex.

Shrinkflation, quality degradation, smaller portions, slow service, bad packaging, or poor order accuracy can all make a meal feel like bad value even if the cost is low.

“Worth it” is more elastic than **“value.”** It allows for money, effort, emotion, quality, and time to coexist.

Beyond the value equation.

The million-dollar question today is:
was the experience worth it?

52% of past 3-month foodservice visitors said their perception of value changed in the past six months.[1]

47% of consumers would prefer the same portion size, with a slight price increase, compared to...

35% of consumers who would prefer the same price with a reduced portion size.[1]

02

Why Home Still Wins Most Meals

The stay-home competition.

At-home eating remains the default, but cravings, fatigue, lack of ingredients, boredom, social plans, and schedule disruption allow restaurants to get their foot in the door.[2] Fuel prices and economic pressure reinforce this dynamic, influencing both intent and behavior.[2,3]

Traffic typically softens when gas prices rise above $3.50 per gallon, with casual and family dining most affected.[4]

Restaurants should offer what home cannot: *ease, novelty, social energy, sensory payoff, or escape.*

Compared with at-home eating, consumers are **3.3x more likely** to eat global cuisines away from home, **2.9x more likely** to celebrate a special occasion, and **2.8x more likely** to try something new.[2]

72% of all meals are sourced at home, even as away-from-home-sourcing ticks up across dayparts.[2]

69% of consumers say they will cook more at home and 61% say they will dine out less because of fuel costs.[3]

03

The Convenience Equation

Reducing decision friction.

Convenience isn't about ease alone. It's about removing friction from the entire decision process. The opposite of convenience is not experience, it's friction. It becomes most valuable when it reduces cognitive load, physical effort, and uncertainty.

What defines convenience:

1. **Speed:** How quickly the consumer gets from need-to-meal
2. **Accuracy:** Whether the order is right the first time
3. **Proximity:** Whether the option is already on the route
4. **Predictability:** Whether the consumer knows what they will get
5. **Digital ease:** Whether the app, kiosk, ordering, loyalty, and pickup flow reduce effort
6. **Portability:** Whether the meal works in the car, at work, at home, or between obligations
7. **Price confidence:** Whether the consumer can order without feeling surprised or punished
8. **Packaging performance:** Whether the meal arrives hot, crisp, intact, and easy to eat

04

The Experience Equation

Experience value is about memory equation.

The headlines make the consumer sound relentlessly cautious. **But the experience end of the market is holding up better than that story suggests.** Consumers are still willing to leave home and spend when the occasion calls for it.

61%

of Americans expect dining out in 2026 to feel more like a special occasion than a regular habit.[5]

45%

Experiential dining increased 45% year over year in 2025.[5]

33%

of consumers are more likely than a year ago to seek out unique, experiential, or premium dining experiences.[6]

Experience value is about memory equation.

What defines experience:

1. **Craveability:** Something specific they cannot easily make at home.
2. **Novelty:** New flavors, global cuisines, LTOs, chef collaborations, unexpected formats.
3. **Social energy:** A reason to gather, celebrate, reconnect, or be seen.
4. **Hospitality:** Feeling recognized, cared for, hosted, or given a break.
5. **Atmosphere:** A vibe that makes the trip feel different from eating at home.
6. **Indulgence:** Desserts, beverages, steaks, sauces, sides, appetizers, and add-ons that make the occasion feel bigger.
7. **Story:** A brand, menu, ingredient, creator, or collaboration that gives the meal cultural weight.
8. **Participation:** Build-your-own formats, tableside moments, interactive service, events, pop-ups, or limited drops.

05

The K-Shaped Consumer

The K-Shaped economy is creating two paths to “worth it.”

For constrained consumers, “worth it” feels controlled, reliable, and regret-free. For higher-income consumers, it means experience-rich and distinctive enough to justify the time, money, and trip.

The high end is not immune to economic pressure, but it is selective. **Premium spending survives when it creates emotional or experiential justification.** At the same time, the low end is not simply “cheap”—**constrained consumers still want quality, reliability, dignity, and satisfaction;** they just have less tolerance for regret.

This creates a split occasion strategy: one focused on frictionless frequency, the other on premiumized, memorable dining.

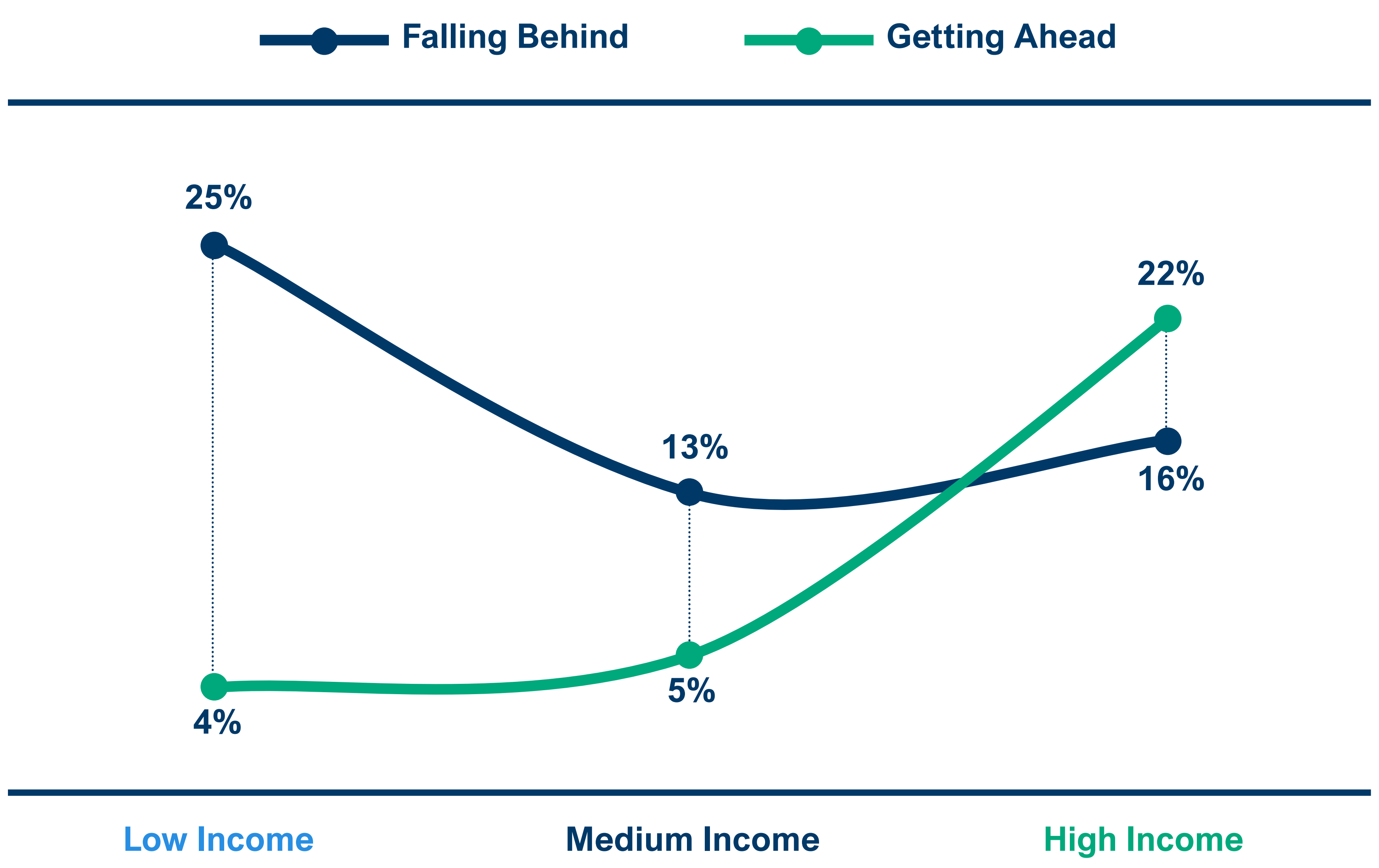
The K-Shaped economy[6]

60% HH $100K+

20% HH $59-100K

20% HH < $50K

Current Financial Situation



The middle is in the danger zone.

The middle-income consumer and **middle-market restaurant** are both exposed: not enough price advantage to be everyday convenience, not enough distinction to be a special occasion.

QSR's, Quick Service Restaurants, are being pressured by C-stores and Casual Dining value platforms. Casual dining is trying to defend experience while reaching toward QSR-adjacent price points on select entry offers so it can escape the mushy middle.

Fast casual must justify higher checks with quality, customization, health, or brand affinity. Family dining is vulnerable when gas, budget pressure, and habit pull consumers home.

The mushy middle warning signs.

A brand may be stuck in the middle if:

- Guests mention price more than craveability
- Digital ordering adds steps instead of removing them
- Dine-in does not feel meaningfully different from takeout
- Off-premise quality collapses in the bag
- LTOs feel promotional but not memorable
- Loyalty feels transactional but not personal

EXAMPLES OF BRANDS STAYING OUT OF THE MIDDLE:

Casual dining value platforms competing near QSR price points: Chili's, Applebee's, and similar options blur traditional segment boundaries.

Eatertainment and experiential dining: Puttshack, Topgolf, F1 Arcade, Flight Club, and similar formats attach foodservice to an activity.

Premium coffee and beverage rituals: coffee shops as small indulgence and affordable premium.

C-stores as meal access: lower-friction, lower-commitment foodservice for time- and budget-constrained consumers.[7]

06

The Spectrum Advantage

Convenience and experience are pulling apart, but they are not opposites.

The advantage goes to brands that understand where they sit on the spectrum and then borrowing the right lessons from the other end without diluting the core promise.

What convenience can learn from experience:

Craveability drives repeat behavior more than speed alone.

Packaging carries the brand experience.

77% of consumers say high-quality packaging makes them view a restaurant more positively.[8]

Digital can feel personal, not just efficient.

Reordering, relevant rewards, and remembered preferences make convenience feel intentional.

Small rituals build loyalty.

Favorite sauces, beverage routines, app-only drops, and reliable pickup can become emotional habits.

What experience can learn from convenience:

The experience starts before the dining room.

Reservations, waitlists, menus, parking, and arrival flow are already part of the occasion and should be frictionless.

Friction kills special occasions.

Long waits, slow payment, unclear pricing, and poor pacing weaken the payoff.

Tech should clear the way for hospitality.

The goal is not less human service, but fewer administrative pain points.

The infrastructure behind frictionless dining.

The convenience-versus-experience divide is also showing up in restaurant technology mergers & acquisitions. Recent deals suggest investors are betting on the infrastructure that removes friction across the full guest journey—from ordering and payment to reservations, loyalty, delivery, and guest recognition.

Olo taken private by Thoma Bravo

Thoma Bravo acquired Olo for roughly $2.0B, taking private a digital ordering platform used by 750+ restaurant brands and supported by 400+ integration partners. The signal: direct ordering, payments, integrations, and guest data are becoming critical infrastructure for frictionless foodservice.[9]

DoorDash expands from delivery to commerce

DoorDash announced two major 2025 acquisitions: Deliveroo for ~$3.9B and SevenRooms for ~$1.2B. Deliveroo expands global delivery reach; SevenRooms adds reservations, waitlists, table management, CRM, and guest engagement.[9,10]

Seamlessness is becoming the differentiator.

The future tech stack is evolving beyond speed to eliminate the friction guests notice most: waiting, re-entering information, uncertain pickup times, awkward payment, disconnected loyalty, and generic hospitality.

The competitive advantage won't belong to restaurants or delivery apps alone, but to **whoever creates the smoothest path from craving to memory.**

07

About Acxion Foodservice

About Acxion Foodservice.

Acxion Foodservice is a trusted partner to foodservice manufacturers seeking smarter ways to grow. Acxion brings together sales expertise, culinary innovation, data-driven insights, and modern marketing capabilities to help clients reach operators more effectively and convert demand into measurable results. Powered by proprietary intelligence platforms and deep distribution relationships, Acxion delivers practical, end-to-end solutions that uncover opportunity, accelerate revenue, and enhance performance at every level of the foodservice ecosystem.

Learn more at acxion.com

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ACXION™ GAME CHANGER PRO

What's new at Acxion?

GameChanger Pro is our next-generation CRM built for the way Acxion sells today. It puts product information, distributor codes, trends, menu ideas, call logging, and Media Hub tools into one mobile-first platform, helping sellers move faster and respond in the moment.

With our AI interface, delivering instant answers and AI helping organize field photos and generate client-ready reporting, GameChanger Pro turns everyday activity in the field into sharper insights and better follow-through. Over time, it becomes more than a CRM—it becomes a smarter selling platform and business intelligence system that helps us save time, improve conversations, and create advantage for our clients and our teams.

Want to learn more about Acxion?

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Kevin is a foodservice leader with 35+ years of experience in business development and growth strategy, leading manufacturer partnerships and enterprise initiatives across the industry.

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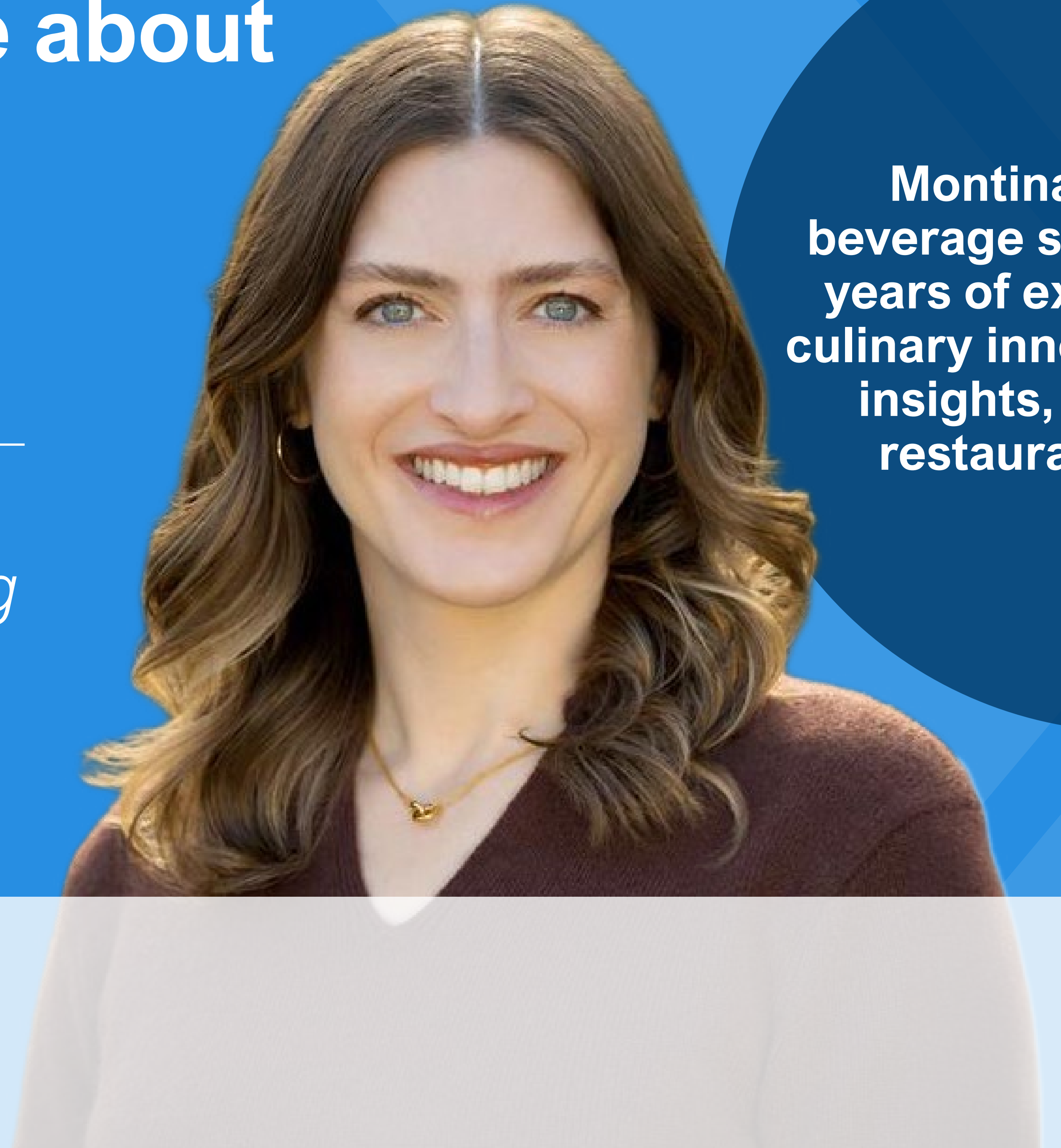

Montina is a food and beverage strategist with 12+ years of experience across culinary innovation, consumer insights, marketing, and restaurant operations.

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Thank you.

[1]Datassential Elevate Experience: The Value Equation Trade-Offs that Shape Dining Decisions (June 2026)
[2]Datassential Pantry Priorities & Plate Disruptors (Elevate Huddle May 2026)
[3]Datassential Hotshot Report: Impact of 2026 Gas Prices (May 2026)
[4]Blackbox Intelligence: March 2026 Monthly Second Helping (March 2026)
[5]OpenTable 2026 Diner Report
[6]Datassential Navigating the STEEP Terrain: Macro Forces Defining the Next Era of Foodservice (June 2026)
[7]Datassential Packaging Perspectives June 2026
[8]Thoma Bravo, Thoma Bravo Completes Acquisition of Olo, Inc.; Thoma Bravo, Olo Enters into Definitive Agreement to be Acquired by Thoma Bravo
[9]Nation's Restaurant News, DoorDash Expands Global Reach with $3.9B Deliveroo, $1.2B SevenRooms Acquisitions
[10]Restaurant Dive, DoorDash to Buy SevenRooms for $1.2B

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