



TheFork's Radar 2027

The Changing Restaurant Landscape

FROM MORE TO MORE MEANINGFUL

2026 expanded what a restaurant could be. In 2027, the strongest signals point towards greater intention: more specific desires, clearer propositions, stronger cultural roots, visible human craft and experiences that adapt more precisely to the diner and the moment.

SIGNALS

38%

of bookings happen
within 3 hours of dining

+29.8%

Cuisine-related users YoY

+16.0%

Setting & Moments users YoY

+6.2%

Dish-related users YoY
vs. +3.1% overall tracked users

5 DINER EXPECTATIONS VALUE

Make my money count.

EXPERIENCE

Make the occasion count.

CONNECTION

*Give us somewhere meaningful
to be together.*

INDIVIDUALITY

*Make the experience work for me,
in this moment.*

GUIDANCE

*Help me find what actually
fits my desire.*

2026 EXPANDED WHAT A RESTAURANT COULD BE.

2027 REFINES WHAT MATTERS MOST

9 RESTAURANT RESPONSES

LIVING INSTITUTIONS

New places are built to belong.

LEGIBLE PLEASURE

The new luxury is knowing why you came.

CHOREOGRAPHED HOSPITALITY

Craft becomes the new theatre.

HYPER-SPECIFIC CULTURES

From world cuisines to cultural precision.

DAYPART FLUIDITY

One address. Multiple moments.

CULTURAL PLATFORM

The restaurant becomes a cultural medium.

TINY TASTES

From meals to moments.

ANALOG VALUE

Human imperfection becomes premium.

INTROVERT DINING

Giving people space becomes hospitality.

HOW TO READ THIS REPORT

THEFORK DATA

Proprietary behavioural evidence from TheFork.

EXTERNAL DATA

Quantitative evidence from identified third-party studies.

DESK RESEARCH

Published market, cultural and industry research.

PROSPECTIVE SIGNAL

Emerging pattern identified through NellyRodi's international restaurant benchmark.

THEFORK INTERNAL DATA

Observed behaviour
and search intent

NELLYRODI FRAMEWORK

Macro expectations
and cultural
interpretation

2027 FORECAST

Prospective Restaurant-
Industry shifts

INSIDE THE CHANGING RESTAURANT LANDSCAPE

1

A NEW ERA OF RESTAURANT DISCOVERY

**SEARCH BEHAVIOURS,
SPECIFIC INTENT AND AI /
SEMANTIC NAVIGATION**

Consumers are making decisions that are more context-driven, conversational, and multidimensional.

2

WHAT DINERS REALLY WANT

**SMART INDULGENCE,
INTENTIONALITY AND SOCIAL
CONNECTION**

They expect the restaurant to foster connections, evoke emotions, provide thoughtful service, open up new horizons, and make enjoyment accessible.

3

THE RESTAURANT OF TOMORROW

**MACRO-TRENDS, SPATIAL
FLUIDITY AND ANALOG
AUTHENTICITY**

Restaurants are responding with specialized concepts, distinctive atmospheres, inclusive hospitality, new value models, improved digital visibility, and a more tailored culinary experience.



1

**A NEW ERA OF
RESTAURANT DISCOVERY**

The background is a solid teal color. It features several large, abstract green shapes. In the top right corner, there is a shape resembling a stylized leaf or a corner of a square. In the bottom left, there is a four-pointed star-like shape. In the bottom right, there is a large, multi-lobed shape that looks like a stylized flower or a fan.

**The restaurant search
is becoming
more *granular* .**

FROM BROAD SEARCH TO SPECIFIC INTENT

The value of an outing is now measured by the intensity of the experience it offers. Restaurant discovery is becoming more specific.

Diners increasingly refine their search through cuisine, dishes, settings and moments - while conversational search begins to offer a new way to express needs that conventional filters do not fully capture.

3,83M, +3%

YoY

Overall tracked users on TheFork

+29.8%

YoY

Cuisine-category users

**FROM BROAD SEARCH
TO SPECIFIC INTENT**

**The growth is not simply in
restaurant discovery, but in the
precision of what diners are
looking for.**



DINERS ARE GETTING MORE SPECIFIC

Specific search behaviours are growing faster than TheFork's overall tracked user base.

Cuisine search

+29.8% YoY

Setting & Moments

+16.0%

Dishes

+6.2%

Overall tracked users

+3.1%

The search can become even more granular: from cuisine to the dish itself. More than

427,000 users

searched using dish categories between March and July 2026.



PRECISION DOESN'T REQUIRE PREMEDITATION

Diners can express increasingly precise preferences while still deciding where to eat at short notice.

38% bookings within 3 hours

18.9% within 1 hour

SEARCH IS MOVING FROM KEYWORDS TOWARDS MEANING

Early semantic-search results suggest greater value when a query contains implicit information about place, atmosphere or experience.

685K AskTheFork landing-screen views since launch

Early signals show stronger restaurant-page exploration, but lower booking conversion

EXPLORATION

74.1% AskTheFork pass-through to restaurant page vs. 67.1% classical search

AskTheFork therefore appears to **drive users further into restaurant exploration.**

BUT BOOKING CONVERSION TELLS ANOTHER STORY

17.4% AskTheFork average daily CVRu vs. 24.6% classical search

AskTheFork is used to **DISCOVER & EXPLORE**
But converts less frequently into bookings

Conversational search is already driving deeper exploration, while its ability to convert exploration into bookings is still developing.

Romantic CTR +11% / CVRu +5%
Osteria CTR +16% / CVRu +2.5%
Trattoria CTR +1% / CVRu +5%
Tapas CTR +1% / CVRu +1.3%
Italian CTR -5% / CVRu -6%
Pizza CTR -4% / CVRu -5%

The background is a vibrant lime green. In the top left corner, there are stylized green leaves. In the top right corner, there is a green four-pointed starburst. In the bottom left corner, there are more green leaves. In the bottom right corner, there is a large, dark green, rounded shape resembling a cloud or a bush. Centered near the top is a dark teal square containing the white number '2'. Below this square is a large, white, rounded rectangular box containing the title text.

2

WHAT DINERS REALLY WANT: 5 DINER EXPECTATIONS

01

SMART INDULGENCE

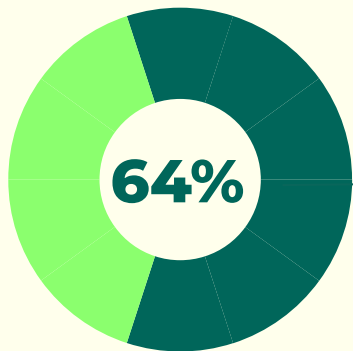
Implication for restaurant:
Make my money count.



OBSERVED BEHAVIOUR

SMART INDULGENCE

Consumers are **becoming more selective**, seeking the **greatest emotional return for every euro spent**. Pleasure is no longer measured by abundance, but **by the value of the experience**. Restaurants are no longer competing on price alone, but on their ability **to deliver exceptional experiences at every level of spending**.



of users who booked between March and July 2026 did so with an offer or menu.

CULTURAL INTERPRETATION

The contemporary diner becomes a value optimiser.

The question shifts towards: Is this worth the money? Is this occasion special enough? Can I access something better within my budget?

Promotions, loyalty advantages and accessible premium experiences become tools for maintaining pleasure under constraint. Value-seeking is not necessarily about spending less. It is about making spending feel worth it.

Implication for restaurants: make the value of the experience visible before the booking, at every level of spending.

MAXIMUM EXPERIENCE, CONTROLLED SPENDING

THEFORK DATA

02

INTENTIONAL PLEASURE

Implication for restaurant:
Make the occasion count.



OBSERVED BEHAVIOUR

INTENTIONAL PLEASURE

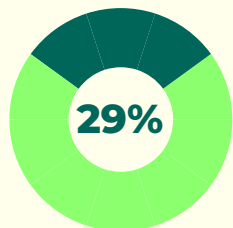
When consumers arbitrate more deliberately, the experience carries **greater expectations**.

When consumers arbitrate more carefully, a **restaurant occasion has to justify money, time and attention**.

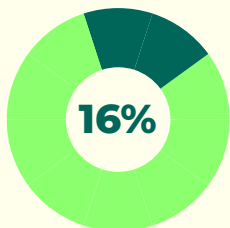
The resulting expectation is **greater experiential return**.

TheFork's broader 2026 research similarly identifies the restaurant as an **increasingly multisensory experience** in which **atmosphere, storytelling, visual impact and culinary quality** participate in the perceived value of the occasion.

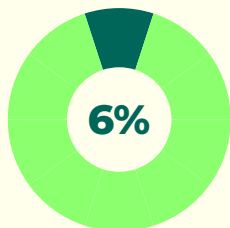
The search data gives us an indirect but interesting indication. Users increasingly specify what they are looking for:



Cuisine users



Setting & Moments



Dishes

CULTURAL INTERPRETATION

When occasions are chosen more carefully with increasingly defined expectations, each one has to deliver more.

The value of an outing increasingly lies in what it delivers: a craving satisfied, a new discovery, a social moment, an atmosphere, a story worth remembering, a sense of having chosen well.

Implication for restaurants: show what the occasion will feel like, not just what is on the menu.

**FROM CHOICE
TO EXPECTATION**

THEFORK DATA

03

SOCIAL BOND

Implication for restaurant:
Give us somewhere meaningful to be together.



SOCIAL BOND

In an increasingly mediated social world, the restaurant retains a powerful role: giving relationships a physical place to happen. Going out to eat provides something fundamentally tangible: a place, a table, a shared duration, a collective ritual

TheFork's 2026 analysis explicitly identifies restaurants as **increasingly important spaces for social encounters, hybrid experiences and shared moments.**

And discovery itself is socialising: TheFork has developed its **Feed** around recommendations from friends and creators, shared lists and reviews from trusted people.

The more social life is mediated through screens, the more valuable places that materialise connection can become.

The restaurant offers a ready-made framework for maintaining relationships. It competes for a role in people's social calendar and gives physical form to friendship, family, romance, belonging... The meal provides the reason to meet; the restaurant provides the infrastructure.

A paradox exists: Digital tools increasingly organise the social occasion but the desired outcome remains deeply physical.

Implication for restaurants: be easy to recommend, and built for being together.

THE TABLE AS A SOCIAL ANCHOR

04

DINING ON MY OWN TERMS

Implication for restaurant:
Make the experience work for me, in this moment.



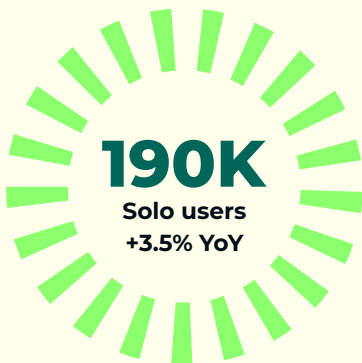
DINING ON MY OWN TERMS

ONE TABLE, MANY REALITIES

There is no longer one default diner configuration.

The same individual can seek very different experiences according to the occasion: *alone today, with friends tomorrow, with family this weekend, looking for value one day, seeking discovery the next.*

Restaurant expectations become increasingly **situational**.



But their specific search behaviours are growing much faster:

- Cuisine search **+47%**
- Dish search **+13%**
- Setting & Moments **+18%**

And: Setting & Moments CVRu
19.2% / +28%

Cuisine growth among solo diners:

- Italian **+68%**
- Japanese **+41%**
- Seafood **+22%**

Solo dining is heterogeneous: eating alone can correspond to different needs, occasions and expectations.

Dining alone can be an intentional restaurant occasion with its own culinary and experiential criteria.

The restaurant historically organised itself around relatively stable formats:

couple / family / group / occasion

The emerging consumer behaves more fluidly.

Hospitality therefore increasingly has to accommodate different versions of the same person.

Implication for restaurants: welcome several versions of the same guest, including the solo diner, with a setting and offer that fit each moment.

THE INDIVIDUAL BECOMES THE UNIT OF HOSPITALITY

05

SEARCH TO INTERPRETATION

Implication for restaurant:
Help me find what actually fits my desire.



SEARCH TO INTERPRETATION ABUNDANCE TO GUIDANCE,

The challenge is shifting from accessing choice to navigating it. TheFork already provides access to tens of thousands of restaurants. Its current public positioning explicitly describes a move from maximising choice towards **using AI, community insights and personal preferences to guide users towards more tailored recommendations**.

- EXPLICIT NEED

« Pizza / Italian » : **conventional categorisation** already works efficiently.

- MORE IMPLICIT NEED

« Romantic / Osteria » : → **semantic interpretation** can potentially capture codes beyond the literal keyword.

AI's emerging value is therefore not simply giving consumers more options. It is helping translate desire into recommendation.

Today: TheFork data shows diners moving from searching to being interpreted and guided.

Tomorrow: AI could take on part of the search itself, proposing where to go before the diner has even asked.

Implication for restaurants: express your concept in the diner's own terms (mood, occasion, atmosphere), not just a cuisine label, so that search can match you to what people mean.

**AI IS MOVING FROM MATCHING
WHAT WE SAY TO
INTERPRETING WHAT WE MEAN**



THE NEW DINER IS MORE INTENTIONAL

If diners expect more relevance from every occasion, how must the restaurant itself evolve?

FIVE DINER EXPECTATIONS ARE RESHAPING THE RESTAURANT

SMART
INDULGENCE
V
VALUE

INTENTIONAL
PLEASURE
V
EXPERIENCE

SOCIAL
BOND
V
CONNECTION

DINING ON MY
OWN TERMS
V
INDIVIDUALITY

SEARCH TO
INTERPRETATION
V
GUIDANCE

IMPLICATION FOR RESTAURANT

↓
Make my money
count.

↓
Make the occasion
count.

↓
Give us somewhere
meaningful to be
together.

↓
Make the experience
work for me, in this
moment.

↓
Help me find what
actually fits my
desire.

The background is a solid light green color. In the top-left corner, there is a dark green silhouette of a palm frond. In the bottom-left corner, there is a dark green silhouette of a flower with five petals. In the bottom-right corner, there is a dark green silhouette of a cloud. In the top-right corner, there is a dark green four-pointed starburst shape.

3

THE RESTAURANT OF TOMORROW

- 
- LIVING INSTITUTIONS
 - LEGIBLE PLEASURE
 - CHOREOGRAPHED HOSPITALITY
 - HYPER SPECIFIC CULTURE
 - DAYPART FLUIDITY
 - CULTURAL PLATFORM
 - TINY TASTES
 - ANALOG VALUE
 - INTROVERT DINING

LIVING INSTITUTIONS

New restaurants are rediscovering familiar hospitality formats (trattorias, tavernas, bistros, brasseries and bodegas) while building the rituals, regulars and local attachment that turn a place into an institution.

2026 → 2027

REVIVING INSTITUTIONS

→ CREATING TOMORROW'S INSTITUTIONS

Why now

In an unstable cultural environment, familiarity, rootedness and local belonging provide reassurance.

New openings across Europe are reviving culturally familiar formats while positioning themselves as everyday neighbourhood addresses: trattorias, tavernas, brasseries and contemporary bistros.

Diner expectation

CONNECTION : Give us somewhere meaningful to be together.



Clos



Bercaill, Marseille,
Taverne de quartier



Aronde, près de Montpellier,
une cuisine rustique et
moderne, institution de
l'arrière-pays montpelliérain



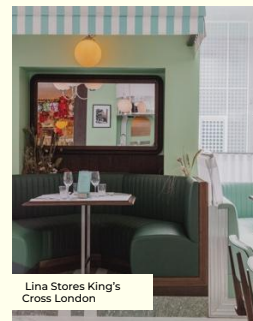
Real Tiborna, Porto



Café Clement - Temple



Kismet, Borough



Lina Stores King's
Cross London



Barra Oso, Barcelone

NEW PLACES ARE BUILT TO BELONG.

LEGIBLE PLEASURE

Restaurants increasingly build their identity around one immediately understandable proposition making focus and specialisation part of their desirability.

2026 → 2027

MORE TO EXPERIENCE > **CLEARER REASONS TO CHOOSE** (One product, speciality or proposition becomes a powerful reason to visit)

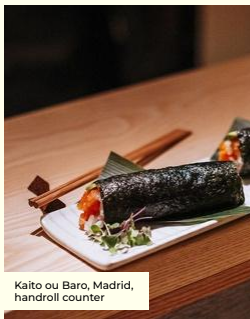
Why now

As restaurant choice expands, clarity reduces cognitive load. More granular desires and increasingly specific search behaviours reward concepts that can be understood — and desired — immediately.

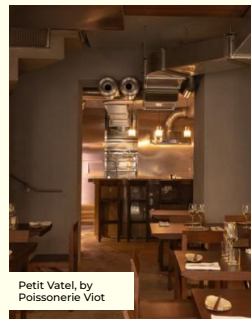
Cuisine-related search behaviour is growing significantly. Early semantic-search results indicate stronger performance for propositions carrying more implicit information such as Osteria or Romantic - than broad categories such as Italian or Pizza.

Diner expectation

GUIDANCE : “Help me find what actually fits my desire.”



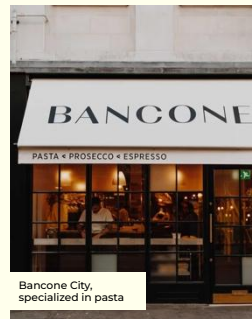
Kaito ou Baro, Madrid,
handroll counter



Petit Vatel, by
Poissonerie Viot



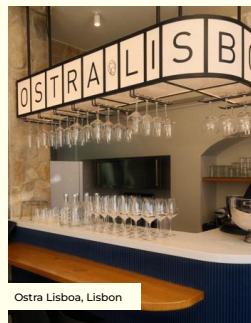
Ocaso, Mozzarella Bar, Porto



Bancone City,
specialized in pasta



Bébé Bob, London



Ostra Lisboa, Lisbon



F de Focaccia, Madrid



La Divine, Lyon

THE NEW LUXURY IS KNOWING EXACTLY WHY YOU CAME.

CHOREOGRAPHE D HOSPITALITY

Open kitchens, grills, counters, ovens and tableside preparation bring the work behind the meal into view. Cooking itself becomes part of the restaurant experience.

2026 → 2027

STAGING THE EXPERIENCE > **STAGING THE CRAFT**

Why now

After years of increasingly elaborate experiential dining, visible expertise offers something more tangible. Gesture, technique and human skill provide both entertainment and proof of quality.

Recent openings increasingly organise the room around the act of making (hand-roll counters, grills, fire cooking, ovens and open kitchens) turning chefs and craftspeople into visible protagonists of the experience.

Diner expectation

EXPERIENCE : "Make the occasion count."



550° Restaurant & Bar, Lisbon



621 ferments, Choux, Amsterdam



Waterhouse, London



Arakel, Genève



Bittikesu



Acme Taco - East London



Du Pain et des Idées Bakery, La Table



Nela, London

GESTURE IS THE MEDIA, CRAFT BECOMES THE NEW THEATRE.

HYPER-SPECIFIC CULTURES

Broad national cuisine categories are giving way to regional traditions, specific techniques and culinary subcultures — Awadhi rather than simply Indian, Tuscan rather than Italian, hand rolls rather than Japanese.

2026 → 2027

EXPLORING CULTURES > **GETTING CULTURALLY PRECISE** (Regions, techniques and culinary subcultures become new markers of authenticity and discovery.)

Why now

Exposure to global food cultures has increased diners' culinary literacy. Familiarity with broad categories creates appetite for deeper, more precise forms of discovery.

Cuisine-category users grew 29.8% YoY, compared with 3.1% growth in TheFork's overall tracked user base, supporting the observation that cuisine-led search behaviour is becoming increasingly important.

Diner expectation

GUIDANCE : “Help me find what actually fits my desire.”



Mantra, Malaysian, Paris



Kolam, Sri Lanka, Paris



Casa Nokiate, Madrid



Oudh 1722 - Borough



Shabestan Lafayette



Khantok, Marseille



Cucina di Toscani, Porto



Donia, London

FROM WORLD CUISINES TO CULTURAL PRECISION.

DAYPART FLUIDITY

Restaurants are becoming more flexible throughout the day, shifting offer, atmosphere and function between coffee, lunch, aperitivo, dinner, drinks and cultural or social programming.

2026 → 2027

HYBRIDITY OF FUNCTIONS >

FLUIDITY OF TIME (The same place changes identity according to the hour and occasion.)

Why now

Dining rhythms are increasingly fragmented across different hours, markets and levels of spontaneity. A more temporally flexible restaurant can respond to several occasions rather than depending on a single meal moment.

"ALL-DAY DINING IS GAINING GROUND".

Consumers are eating out across a wider range of dayparts, pushing venues beyond traditional lunch/dinner distinctions towards more fluid formats. NIQ, How Mediterranean On-Premise Is Evolving, 2026

Consumers are increasingly eating out across a wider range of dayparts, pushing venues beyond traditional lunch and dinner services towards more fluid, all-day formats. In France, 19% of consumers say they are now eating out earlier.

CGA by NIQ, Europe's On-Premise 2026 / NIQ Outlet Index 2026

Diner expectation

CONNECTION + INDIVIDUALITY : "Give us somewhere meaningful to be together; When it works for us."



The Social Hub Restaurant & Bar, Porto



Die Tankstelle, Berlin, Zeit Cafe



Frivole, Paris



Tapan Music Hall, Barcelona



Wam, Marseille: bistro and afterwork



Brut de Mer, Amsterdam

**ONE ADDRESS. MULTIPLE
MOMENTS: A PROGRAMMABLE
SPACE.**

CULTURAL PLATFORM

Restaurants increasingly connect food with art, music, fashion, cinema and design. Through programming, collaborations and creative crossovers, the restaurant becomes a platform for cultural participation.

2026 → 2027

CULTURE ENRICHES THE RESTAURANT > **THE RESTAURANT PRODUCES CULTURE** (Restaurants become active platforms for programming, collaboration and creative exchange.)

Why now

Restaurants already function as important physical gathering spaces. Cultural programming gives people additional reasons to return, while allowing restaurants to build communities and identities extending beyond food.

The emerging benchmark spans several models: restaurant × museum, restaurant × cinema, restaurant × music, restaurant × fashion and restaurant × brand universe. The signal lies in the shift from decorative cultural references towards recurring programming and active cultural production.

Diner expectation

EXPERIENCE + CONNECTION: “Make the occasion count. And give us something to connect around.”



Epicurus in Copenhagen, a restaurant and jazz club designed as a multi-sensory experience.



Devo Marseille, dishes up a sultry 1970s mood @Alex Chay



Occasion, Paris, Set against a vintage backdrop, the restaurant breaks the mould with its unconventional cuisine, which focuses on showcasing the ingredients. A cuisine full of surprises, just like the setting itself. A blend of '70s' furniture and items unearthed by these keen second-hand bargain hunters



At the MuCEM, Alexandre Mazzia is developing three complementary formats: a food kiosk, a rooftop street food outlet and a restaurant which integrate catering directly into the cultural institution.



New York, Oberon (New Museum, July 2026): restaurant, contemporary art, OMA architecture and downtown culture under one roof.



Brasserie Europe × Plaza Cinema in Geneva, where food, cinema, culture and a night out go hand in hand.

THE RESTAURANT BECOMES A CULTURAL

TINY TASTES

Snacks, small plates, premium breakfasts and bite-sized indulgences create lighter ways to participate in restaurant culture — without requiring the time, appetite or budget of a traditional full meal.

2026 → 2027

THE FULL EXPERIENCE > **FLEXIBLE INDULGENCE**

(Smaller formats allow diners to decide how much, when and why they participate.)

Why now

Budget consciousness, fragmented schedules and increasingly fluid eating occasions create demand for smaller commitments without sacrificing pleasure or quality.

Diners still want to eat out, without the three-course commitment: 62% of consumers say they are snacking as much as or more than six months ago, as smaller portions and more frequent eating occasions reshape when and how people dine out. VML, Dining diversifies, 2026

Diner expectation

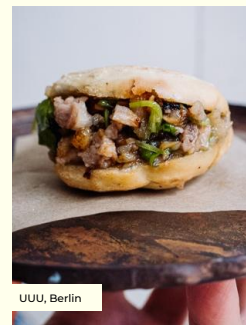
VALUE + INDIVIDUALITY : Make my money count - on my terms."



Elliot's, London



Other, Bristol



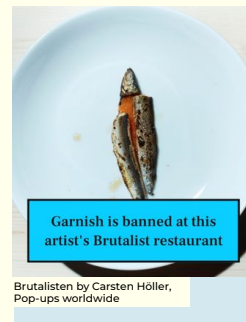
UUU, Berlin



Le Grand Rouge, Marseille



Mineral, Barcelona



Garnish is banned at this artist's Brutalist restaurant

Brutalisten by Carsten Höller, Pop-ups worldwide

FROM MEALS TO MOMENTS.

ANALOG VALUE

Handwritten menus, handmade graphics, personal photography, tactile materials and visible craft bring signs of human authorship back into the restaurant.

2026 → 2027

ANALOG FEELS NOSTALGIC > **ANALOG FEELS HUMAN**

In an AI-saturated environment, visible human authorship becomes a signal of care and value.

Why now

Generative AI makes polished visual production increasingly accessible. As digital perfection becomes ubiquitous, irregularity, physicality and evidence of the human hand become more distinctive.

Across emerging restaurant concepts, handwritten graphics, personal photography, tactile materials and visibly handmade details are being used to signal human authorship in contrast with increasingly frictionless digital / AI aesthetics.

Diner expectation

EXPERIENCE : “Give me something that feels real.



In the Age of AI, the Analog Restaurant Feels Radical

Some restaurants are leaning into handmade touches, as AI-generated food photos and flyers become commonplace



**HUMAN IMPERFECTION
BECOMES PREMIUM**

INTROVERT DINING

A quieter form of hospitality is emerging through smaller rooms, secluded booths, acoustic comfort, physical separation, greater autonomy and more discreet service ; Allowing diners to control their level of social interaction.

2026 → 2027

MORE SOCIAL INTENSITY > **MORE SOCIAL CONTROL**

(Guests gain greater control over privacy, stimulation and interaction.)

Why now

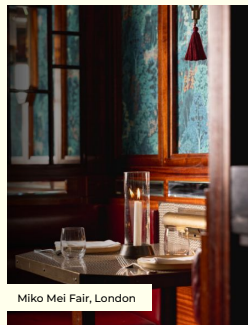
The growing importance of restaurants as social infrastructure also creates demand for different modes of participation. Being social does not always mean wanting maximum exposure, stimulation or interaction.

Hospitality is beginning to design for different levels of social intensity.

A growing set of restaurant concepts is experimenting with smaller rooms, secluded booths, acoustic comfort and more discreet service — giving guests greater control over privacy and interaction.

Diner expectation

INDIVIDUALITY : “Make the experience work for me, in this moment.”



“Restaurants can have smaller tables, set up partitions between seats, or create dedicated quiet areas for people to eat alone or use their smartphones without judgment”

Rose Ho
Content creator,
@therooftedoor

GIVING PEOPLE SPACE BECOMES AN ACT OF HOSPITALITY.



LIVING INSTITUTIONS

New places are built to belong.

LEGIBLE PLEASURE

The new luxury is knowing exactly why you came.

CHOREOGRAPHED HOSPITALITY

Craft becomes the new theatre.

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From meals to moments.

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Human imperfection becomes premium.

INTROVERT DINING

Giving people space becomes an act of hospitality.



2026 EXPANDED WHAT A RESTAURANT COULD BE.
2027 REFINES WHAT MATTERS MOST.

FROM MORE TO MORE MEANINGFUL

2026 was largely a year of growth: more sensations, experiences, formats, culture and technology.

2027 seems to be ushering in a phase of refinement: greater cultural precision, clarity, visible craftsmanship, familiarity, repetition and integration into everyday life.

**More specific.
More legible.
More rooted.
More crafted.
More human.
More considerate.**





THANK YOU

SOURCES & METHOD

THEFORK DATA — Proprietary behavioural evidence from TheFork.

EXTERNAL DATA — Quantitative evidence from identified third-party studies.

DESK RESEARCH — Published market, cultural and industry research.

PROSPECTIVE SIGNAL — Emerging pattern identified through NellyRodi's international restaurant benchmark.

ABOUT THIS REPORT

TheFork Restaurant Trends 2027 combines proprietary behavioural data from TheFork with cultural analysis, desk research and prospective trend forecasting by NellyRodi. The report is designed to identify emerging shifts in diner expectations and explore how these may shape the restaurant landscape in 2027.

THEFORK DATA — BEHAVIOURAL EVIDENCE

TheFork proprietary data is used to identify observed behaviours across restaurant search, discovery and booking. Depending on the analysis, indicators include search behaviour, booking lead times, dining times, offer usage and other platform interactions. Data presented in the report refers to the specific periods and markets indicated alongside each analysis. TheFork data describes behaviour observed on the platform. It should not, on its own, be interpreted as evidence of the motivations behind that behaviour or as representative of the entire restaurant market.

NELLYRODI — CULTURAL INTERPRETATION

NellyRodi's cultural framework is used to interpret behavioural signals within broader shifts in consumer aspirations, lifestyles and attitudes towards food, hospitality and social experiences. These interpretations provide cultural context to observed behaviours; they should not be read as conclusions derived solely from TheFork data.

DESK RESEARCH — EXTERNAL EVIDENCE

The report draws on selected third-party studies, industry publications, restaurant concepts and market examples to contextualise and corroborate emerging shifts. External quantitative findings are attributed to their original source. Restaurant examples are used as qualitative illustrations of a trend and do not constitute quantitative evidence of its prevalence.

2027 FORESIGHT — PROSPECTIVE SIGNALS

The 2027 trends are prospective interpretations developed by NellyRodi through the convergence of TheFork behavioural signals, cultural research, external evidence and an international benchmark of emerging restaurant concepts. They represent directional forecasts rather than predictions of universal consumer behaviour.

WHAT DO I WANT TO EAT?

Cuisine has become the strongest gateway to specific restaurant discovery.

More than 1 million users searched through a cuisine category between March and July 2026

ASIAN +142%
MEDITERRANEAN +65%
ITALIAN +59%
JAPANESE +21%
INDIAN +12%

Cuisine is becoming a primary search language: diners increasingly start with the type of food they want, rather than the restaurant itself.

WHAT EXACTLY DO I WANT?

Restaurant search can move from category to craving.

The search can become even more granular:
from cuisine to the dish itself.

More than **427,000 users**
searched using dish categories between
March and July 2026.

PIZZA +3.0%
SUSHI +12.9%
BARBECUE +10.4%
SEAFOOD PLATTER +4.3%
PAELLA +28.6% // 27.6% CVRU

“I want paella”

“I want pizza”

The restaurant is increasingly discovered through the specific object
of desire diners already have in mind.



WHAT ELSE MATTERS AROUND THE MEAL?

Restaurant search also incorporates criteria beyond cuisine and dishes.

402,646 users used TheFork's **Setting & Moments** categories between March and July 2026.

✦ +16.0% YoY

But this category should not be read as a single homogeneous trend.

It combines different types of criteria: setting, occasion, meal format and use case. Criteria beyond food are becoming a significant part of restaurant discovery but their trajectories differ sharply.

OUTDOOR DINING +70.9%

BUFFET +20.8%

BRUNCH +8.9%

HOTEL RESTAURANT -13.3%

ROMANTIC -6.3%

Consumers are using a broadier repertoire of criteria, with very different dynamics depending on the specific need.



PRECISION OVER PREMEDITATION

Dining decisions are becoming more precise, while remaining highly spontaneous.

38% of bookings happen within 3 hours of dining
18.9% happen within the last hour

PORTUGAL 21.4% <1h
UK 15.4% >1 week

Diners can know exactly what they want without knowing long in advance when or where they will have it. Restaurant choice is becoming more intentional in its criteria, while remaining highly spontaneous in its timing.

The challenge is therefore to be relevant at the exact moment desire turns into decision.

Diners are becoming increasingly precise in their preferences, while a significant proportion of bookings are still made shortly before the dining occasion.



FROM KEYWORDS TO MEANING

Semantic search appears most useful when a query carries meaning beyond a simple food category.

Early results from TheFork data suggest that semantic search is most valuable when a query expresses an intention, atmosphere or experience that goes beyond a simple food category.

Romantic	CTR +11% / CVRu +5%
Osteria	CTR +16% / CVRu +2.5%
Trattoria	CTR +1% / CVRu +5%
Tapas	CTR +1% / CVRu +1.3%
Italian	CTR -5% / CVRu -6%
Pizza	CTR -4% / CVRu -5%

TWO TYPES OF SEARCH:

- EXPLICIT REQUEST

(Italian, Pizza)

The desired category is clear and easily matched through conventional filters.

- MORE IMPLICIT REQUEST

(Romantic, Osteria, Trattoria)

The term potentially carries additional information about the type of place, codes, atmosphere or experience expected.

These early signals suggest that semantic search may create more value for queries requiring interpretation, while conventional search remains effective for explicit and easily categorizable food requests.

The emerging role of AI search is therefore not simply to match keywords, but to interpret what users may mean beyond the words they type.