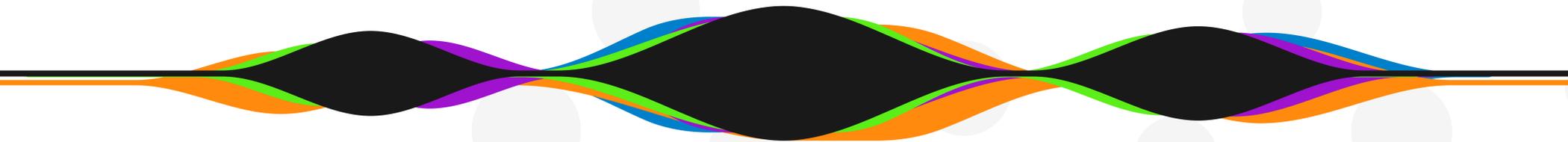




INDUSTRY REPORT

# Restaurantology<sup>®</sup> 2026 Market Pulse

Verified brand movement and software adoption across  
the restaurant industry



## About this Report

The Restaurantology Market Pulse is an annual snapshot of measurable change across the restaurant industry, based on verified brand- and unit-level data from 2025.

This edition is organized into two sections. **Market Dynamics** examines brand growth, contraction, and movement across Enterprise, Mid-Market, SMB, and Independent tiers.

**Software Adoption** examines changes in restaurant technology adoption across the same segments.

## About Restaurantology

Restaurantology is a market intelligence and go-to-market (GTM) platform that helps B2B restaurant technology companies grow with greater precision and confidence. We provide verified data on multi-unit restaurant brands and work directly with go-to-market teams to operationalize those insights across CRM, targeting, and forecasting workflows.

Learn more at [restaurantology.io](https://restaurantology.io).

PART 1

# Market Dynamics

How restaurant brands grew, contracted, and crossed segment thresholds in 2025.

# Overview & Framing

At a market level, 2025 was defined by stability. Most multi-unit restaurant brands did not materially change their footprint year over year. Beneath that surface, however, unit-level movement was uneven, with expansion and contraction concentrated among a relatively small set of brands.

## Methodology

All brand counts, unit totals, and segment assignments reflect verified multi-unit restaurant profiles. Restaurantology re-visits brand websites on a recurring monthly basis to confirm active locations and detect unit-level change.

## Segment definitions

Brands are categorized by their unit count on January 1 and December 31:

- TOP: 2,000+ units
- ENT (Enterprise): 101–2,000 units
- MM (Mid-Market): 21–100 units
- SMB (Emerging): 6–20 units
- IND (Independent): 2–5 units

The pages that follow break down these dynamics across scale and segment, highlighting where growth concentrated, how brands moved between tiers, and which structural patterns held firm despite ongoing unit-level volatility.

# 2026 Structural Snapshot

How brand counts, footprint, and market composition shifted in 2025

## Brand universe

**16k Concepts**

- Returning brands: 13,676
- New brands: 1,453
- Exited brands: 878



Roughly 16,000 multi-unit restaurant brands were active in 2025.

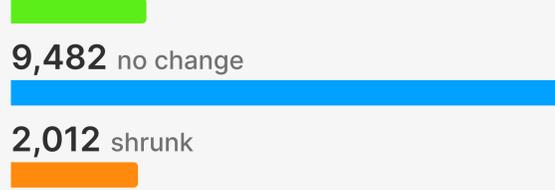
## Brand outcomes

By year-end, most brands were unchanged, with expansion outweighing contraction.

2,182 grew

9,482 no change

2,012 shrunk

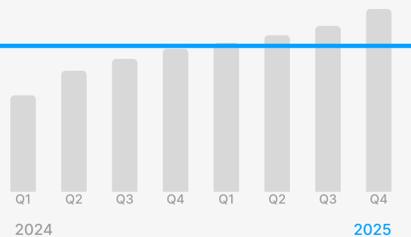


## Market expansion

The multi-unit footprint expanded in 2025 on a like-for-like brand basis.

Year-end net growth

**+7,021 units**



## Growth concentration

The 27 TOP brands accounted for 55% of the market's net multi-unit growth.



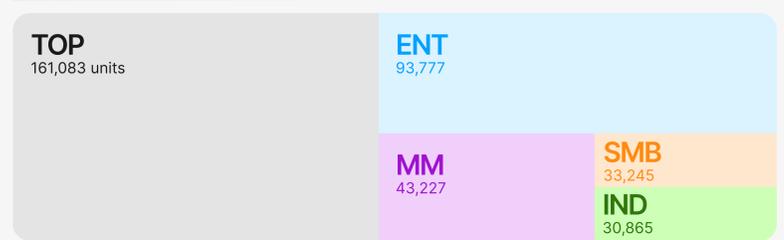
## Brands by tier

Most multi-unit brands cluster in IND and SMB. Very few reach enterprise scale.



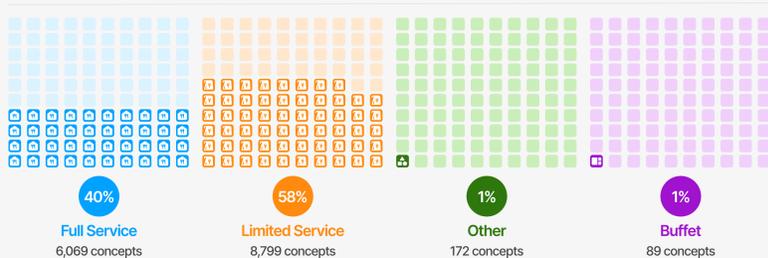
## Units by tier

Enterprise and top brands control roughly 70 percent of all multi-unit locations.



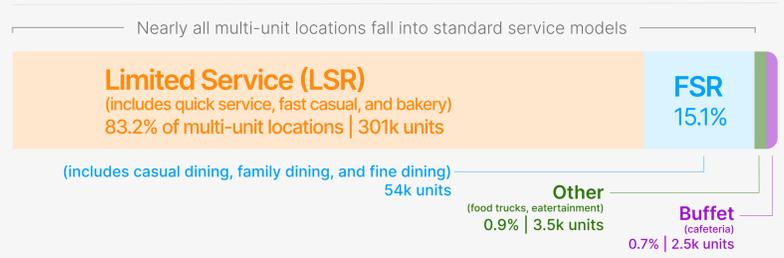
## Brands by service type

The multi-unit brand universe splits primarily between full service and limited service.



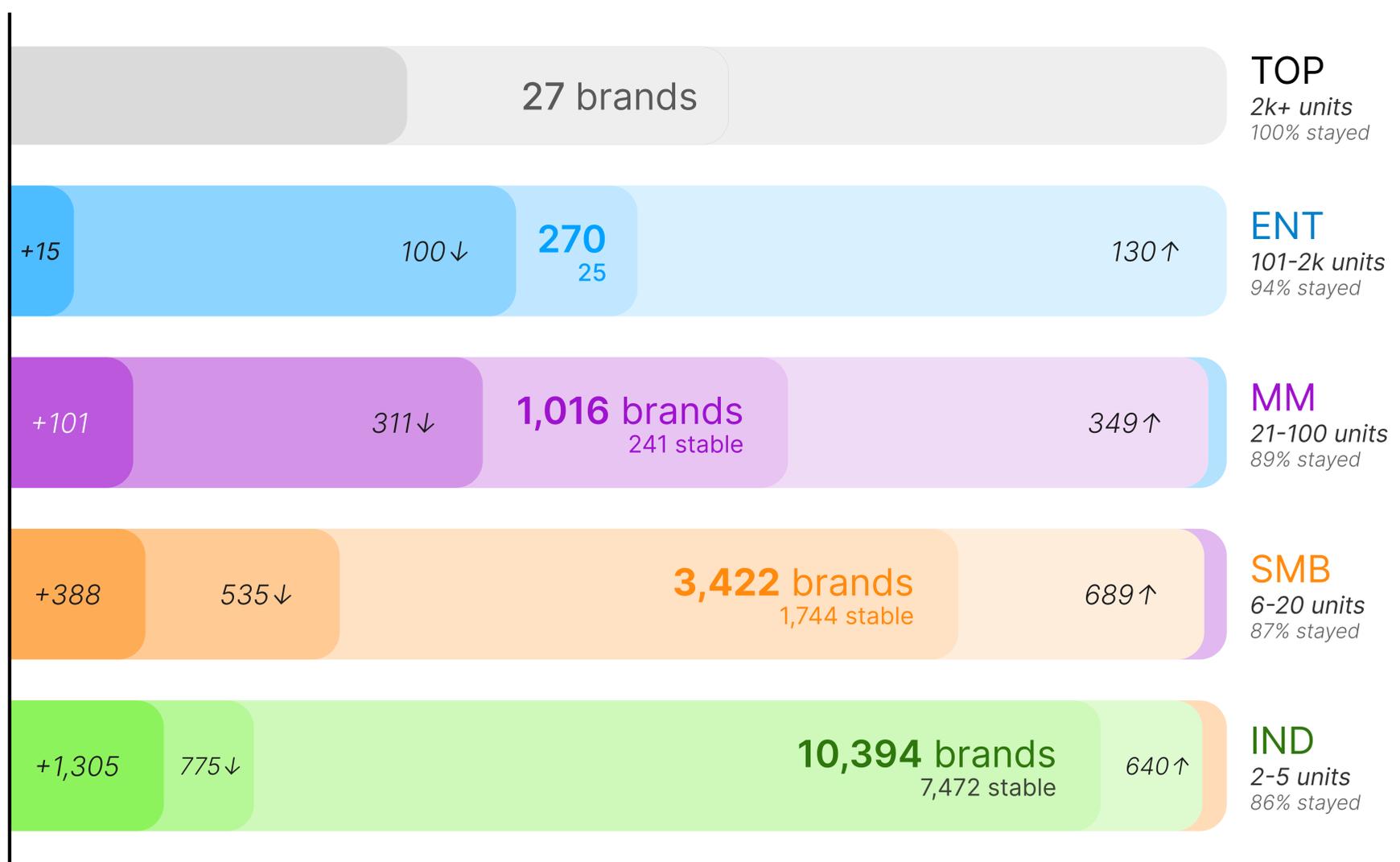
## Units by service type

Limited service brands account for the vast majority of multi-unit locations.



# Segment Composition & Change

Brands that finished 2025 in a particular segment did not always start there. While most remain in the same tier year over year, expansion and contraction within segments is common and materially shapes segment composition.



Entered Shrunk (↓) Grew (↑) Shrunk into

Note: "Entered" includes newly detected brands and upward movers; "shrunk-into" segments are colored by segment of origin.

## Key takeaways

- **Macro stability, micro volatility:** Segments appear stable year over year, but meaningful expansion and contraction occur within those boundaries.
- **No segment is static in practice:** Growth and contraction affect every tier, requiring GTM strategies that adapt to in-segment change rather than fixed segment assumptions.

MARKET DYNAMICS

# Segment Migration

Brands that crossed segment thresholds in 2025, ranked by unit change, selectively highlighted

**MM ↑ ENT**

-  **KPOT BBQ**  
+75 units | +80%
-  **Shah's Halal Food**  
+57 units | +88%
-  **Rosati's Pizza**  
+48 units | +70%
-  **Hangry Joe's**  
+43 units | +57%
-  **Nick The Greek**  
+27 units | +36%
-  **Filiberto's Mexican**  
+27 units | +28%

... of 15 total

Crossed 101+ units

**SMB ↑ MM**

-  **Lucky Strike**  
+61 units | +321%
-  **MilkShake Factory**  
+25 units | +125%
-  **Smalls Sliders**  
+24 units | +126%
-  **The Fresh Monkee**  
+20 units | +182%
-  **Jeff's Bagel Run**  
+20 units | +125%
-  **Layne's Chicken**  
+19 units | +136%

... of 101 total

Crossed 21+ units

**IND ↑ SMB**

-  **Beignets & Brew**  
+15 units | +375%
-  **Beaming**  
+10 units | +250%
-  **San Fernando Coffee**  
+8 units | +400%
-  **Bikanervala**  
+8 units | +160%
-  **Tabla Indian**  
+7 units | +175%
-  **Roni's Mac Bar**  
+7 units | +175%

... of 388 total

Crossed 6+ units

**ENT ↓ MM**

-  **Wahlburgers**  
-78 units | -72%
-  **TGI Fridays**  
-77 units | -48%
-  **Pieology Pizzeria**  
-60 units | -58%
-  **On The Border**  
-55 units | -49%

... of 14 total

**MM ↓ SMB**

-  **Genghis Grill**  
-38 units | -78%
-  **I Heart Mac & Cheese**  
-17 units | -61%
-  **Pinstripes**  
-15 units | -68%
-  **Bertucci's**  
-10 units | -45%

... of 66 total

**SMB ↓ IND**

-  **Sushirrito**  
-6 units | -67%
-  **Margarita's Cafe**  
-5 units | -50%
-  **Aussie Grill by Outback**  
-5 units | -71%
-  **PT PHO Express**  
-5 units | -56%

... of 201 total

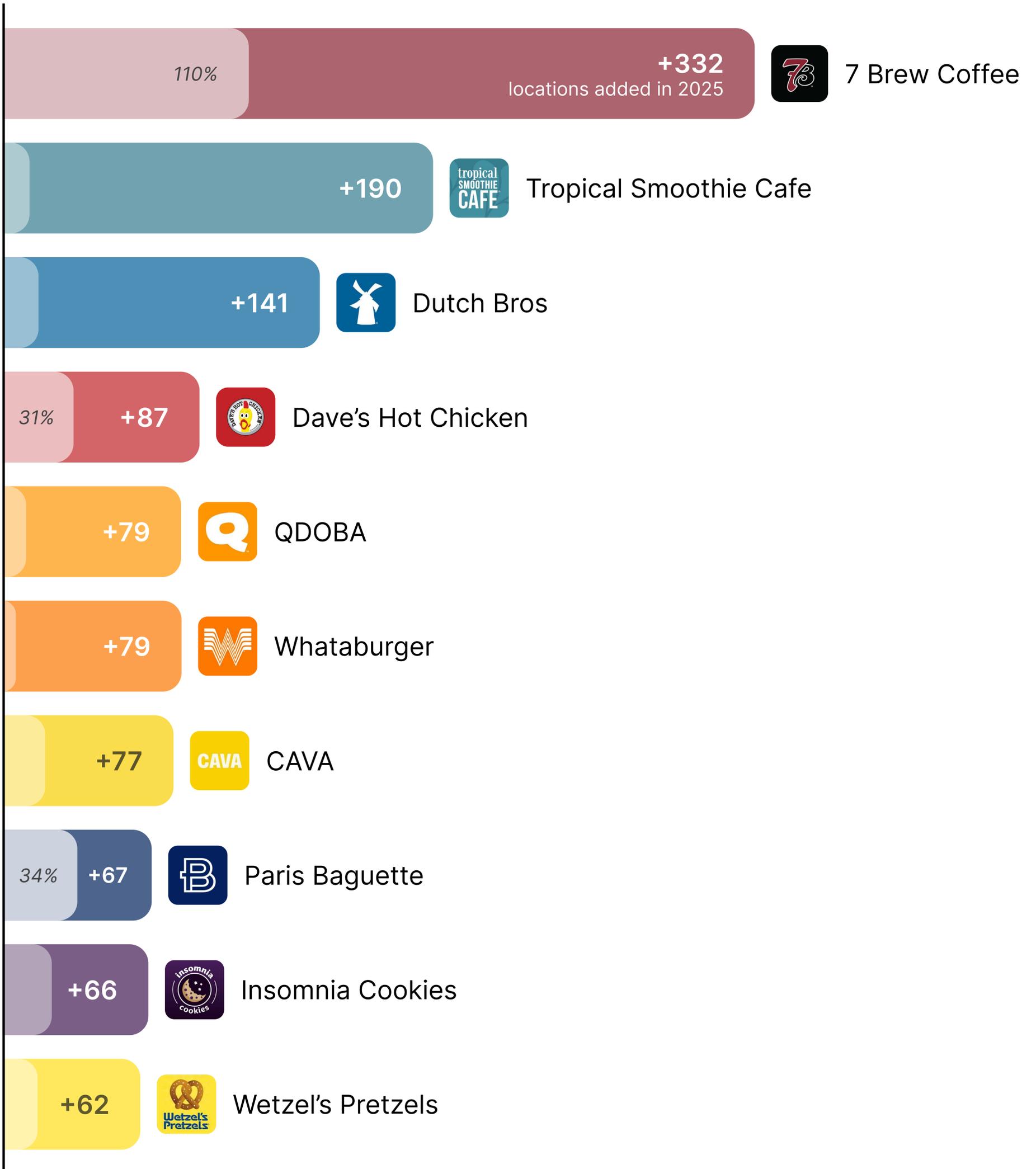
**Exited**

-  **Iron Hill Brewery**  
-19 units
-  **K&W Cafeteria**  
-11 units
-  **The Biscuit Bar**  
-6 units
-  **Opa! Greek**  
-5 units

MARKET DYNAMICS

# ENT concepts by units opened

National brands with 101+ units on Jan 1 and Dec 31, ranked by absolute unit growth in 2025



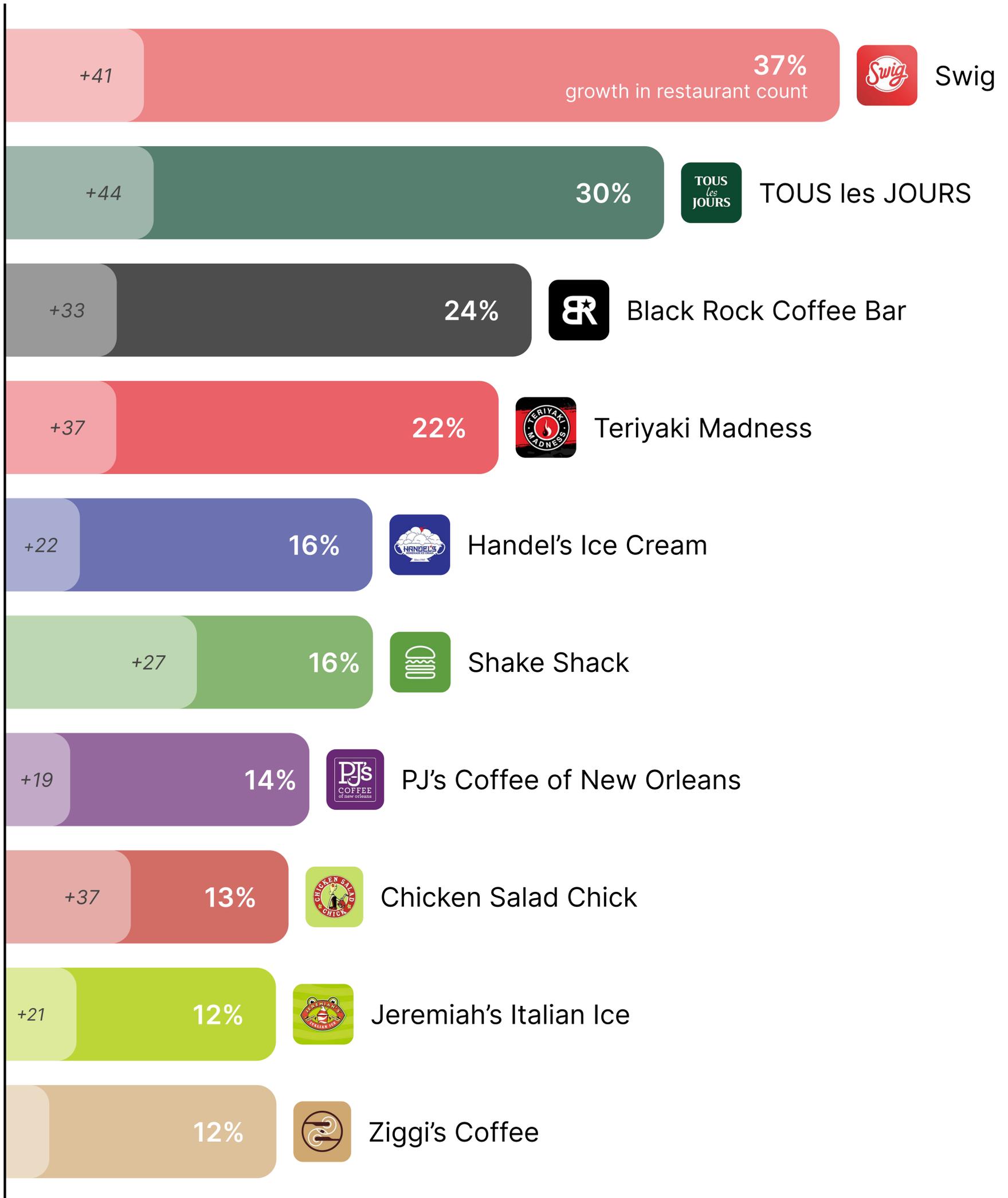
% growth

New units opened

MARKET DYNAMICS

# ENT concepts by unit % growth

National brands with 101+ units on Jan 1 and Dec 31, ranked by unit percent growth in 2025



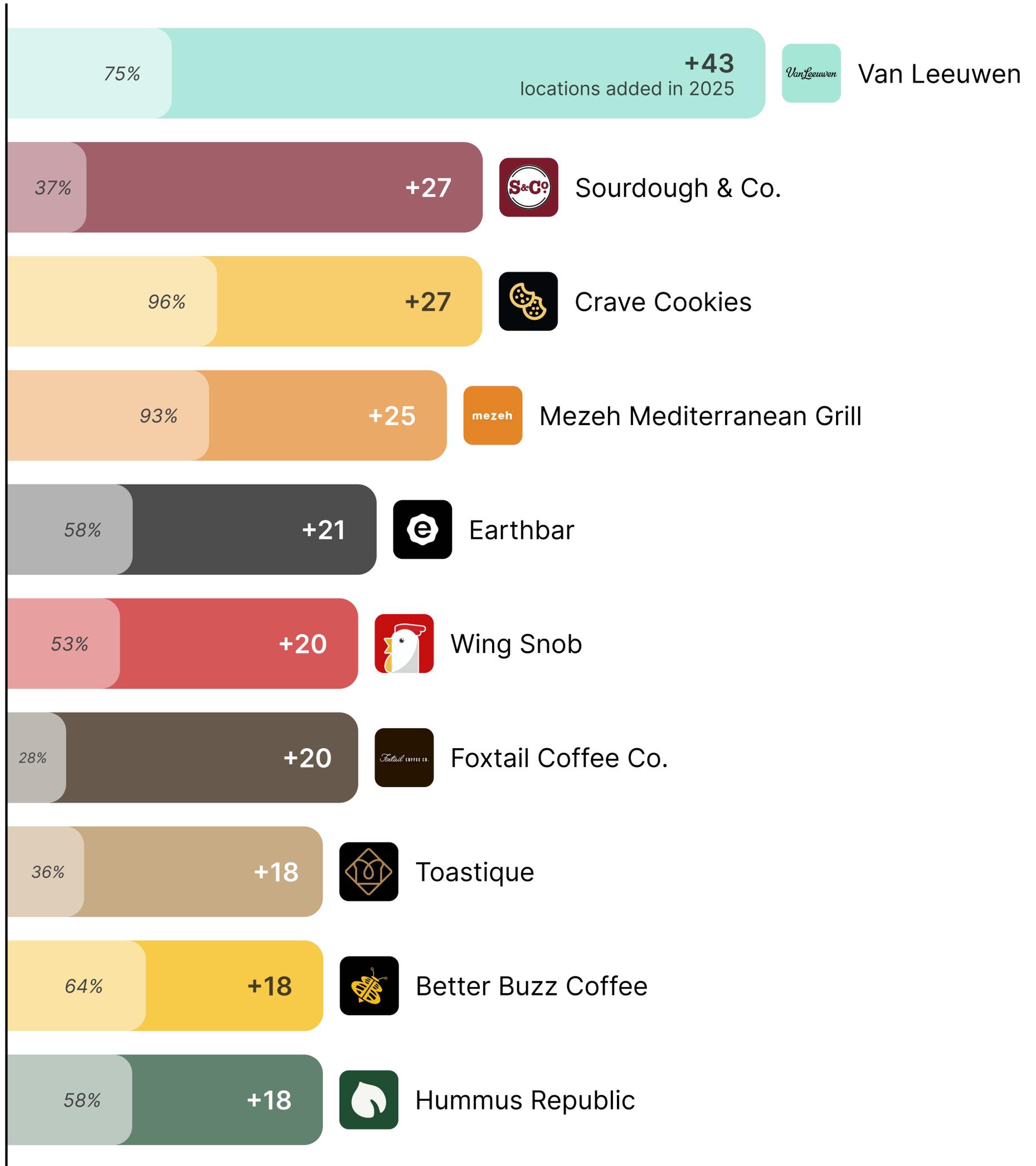
New units opened    % growth

Note: Brands from 'units opened' chart omitted to avoid duplication.

MARKET DYNAMICS

# MM concepts by units opened

Regional brands with 21-100 units on Jan 1 and Dec 31, ranked by absolute unit growth in 2025

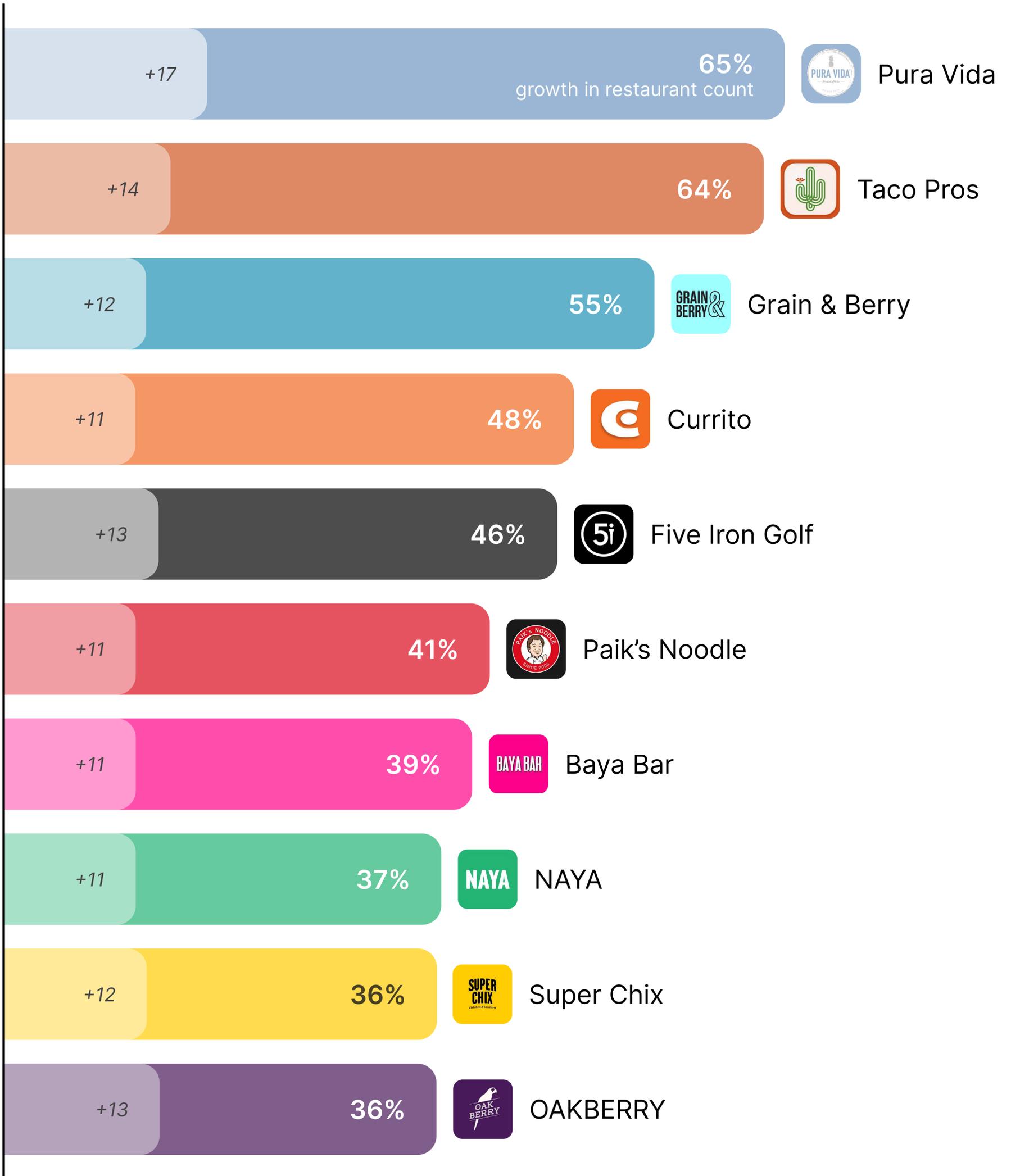


% growth    New units opened

MARKET DYNAMICS

# MM concepts by unit % growth

Regional brands with 21-100 units on Jan 1 and Dec 31, ranked by unit percent growth in 2025



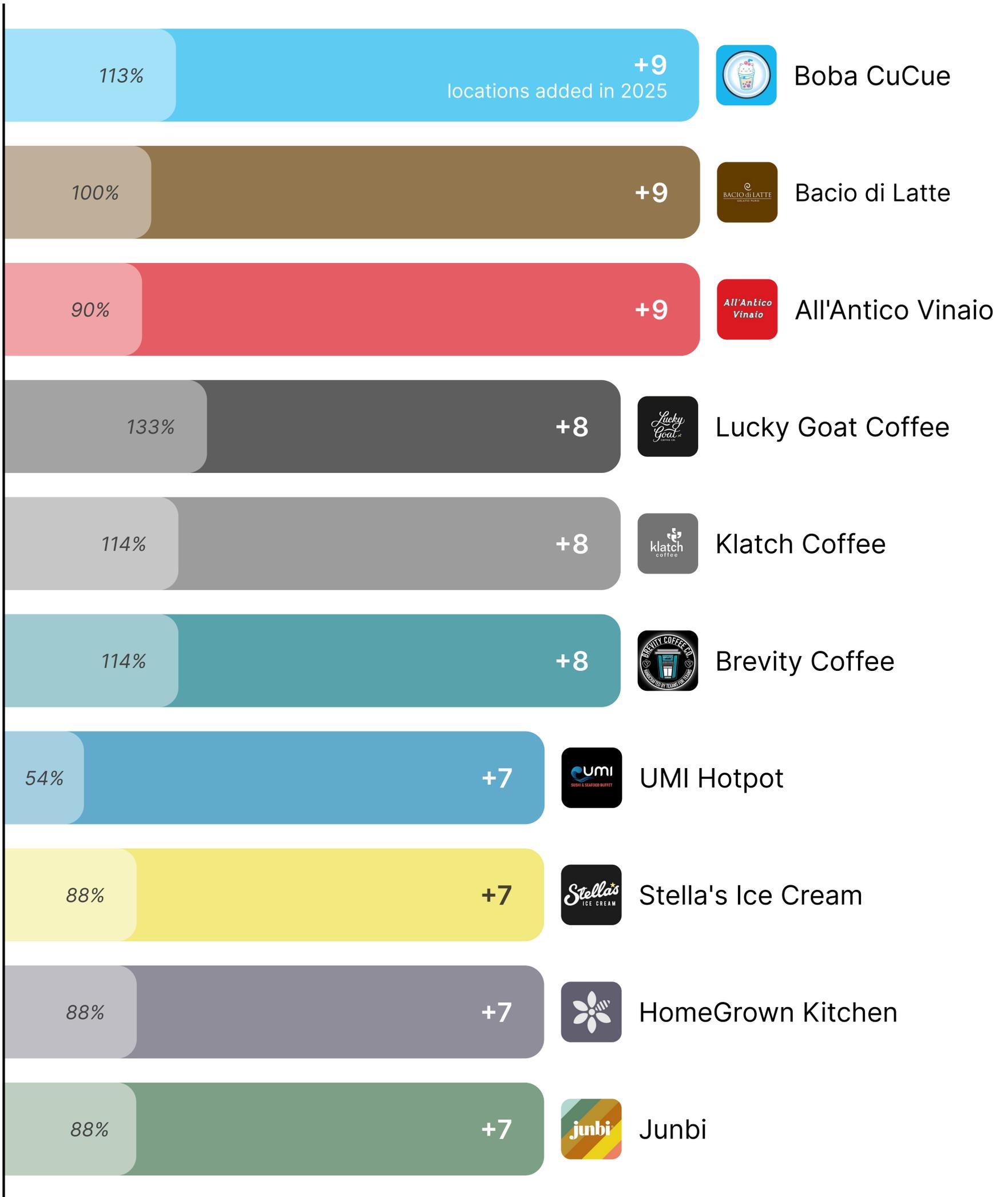
New units opened    % growth

Note: Brands from 'units opened' chart omitted to avoid duplication.

MARKET DYNAMICS

# SMB concepts by units opened

Emerging brands with 6-20 units on Jan 1 and Dec 31, ranked by absolute unit growth in 2025

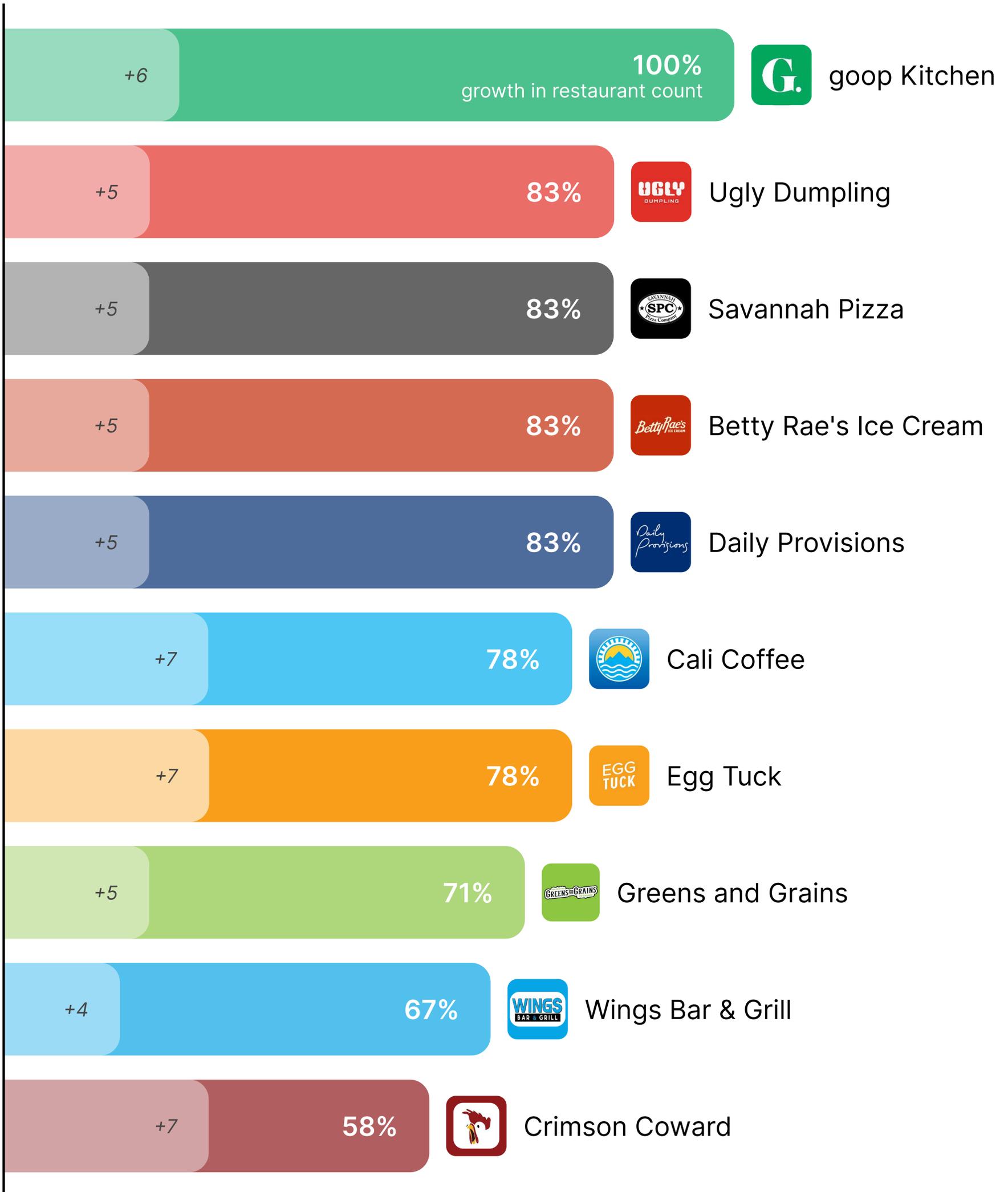


% growth    New units opened

MARKET DYNAMICS

# SMB concepts by unit % growth

Emerging brands with 6-20 units on Jan 1 and Dec 31, ranked by unit percent growth in 2025



New units opened    % growth

Note: Brands from 'units opened' chart omitted to avoid duplication.

PART 2

# Software Adoption

How restaurant brands implemented, expanded, and replaced core technology in 2025.

# Overview & Framing

At a technology level, 2025 saw continued digitalization across the restaurant industry.

The average multi-unit restaurant website now has 3.9 detectable technologies, up 0.2% from 2024.

## Methodology

All technology detections reflect verified software fingerprints identified on multi-unit restaurant websites. Restaurantology tracks these detections monthly by analyzing website code, third-party integrations, and publicly visible tech implementations.

## Categories tracked

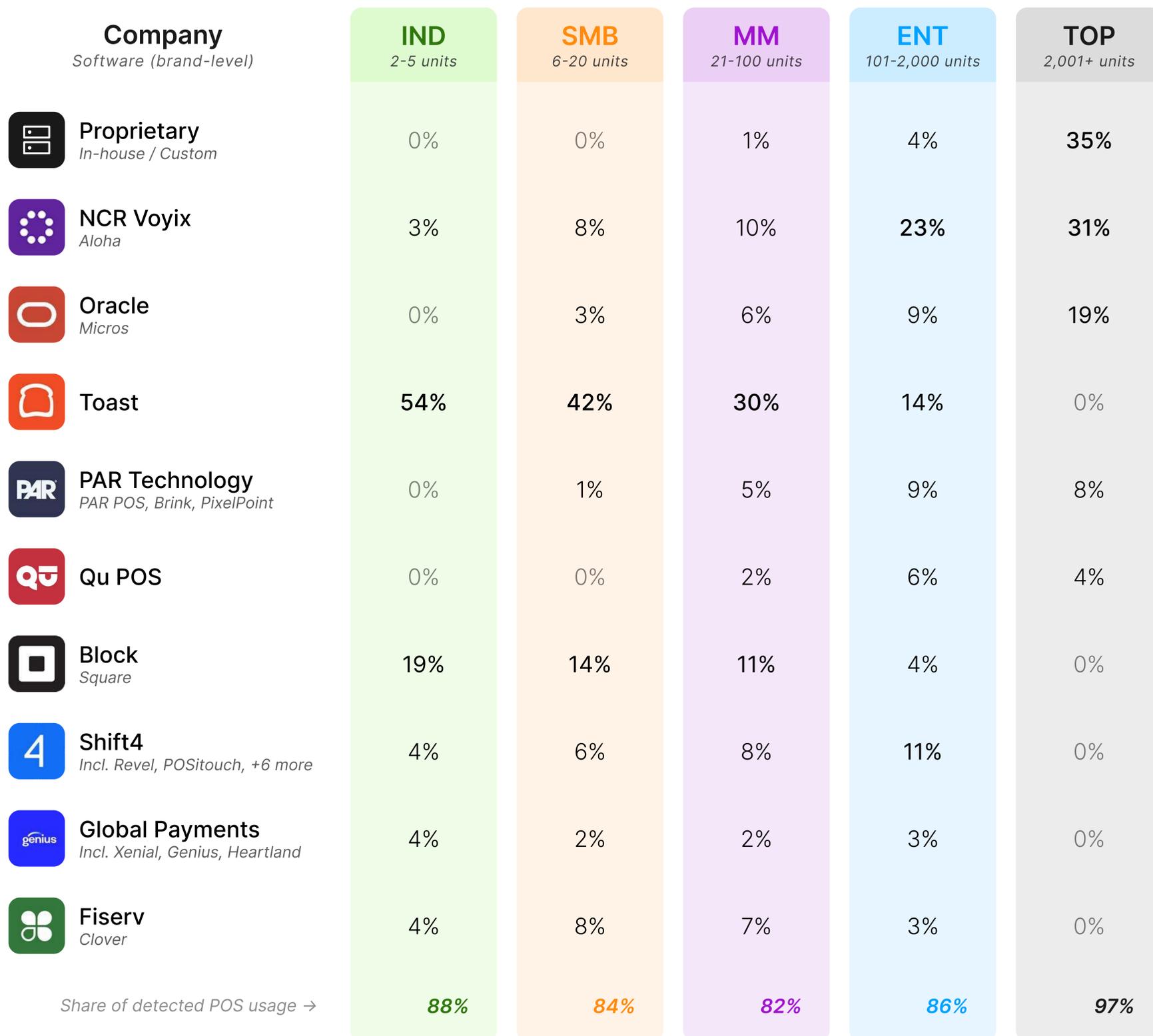
This section examines adoption trends across five key restaurant technology categories:

- POS (Point-of-Sale): Transaction systems and in-store ordering platforms
- Loyalty: Guest-facing rewards programs
- Guest Feedback: Review aggregation and sentiment analysis tools
- Website Platforms: Content management systems and site builders

The pages that follow break down which technologies gained or lost market share in 2025, how adoption varied by segment, and which providers are expanding into new tiers.

# POS: Market Structure by Segment

POS adoption is highly segmented by brand scale, with legacy systems entrenched at the top and modern cloud platforms dominating the middle of the market.

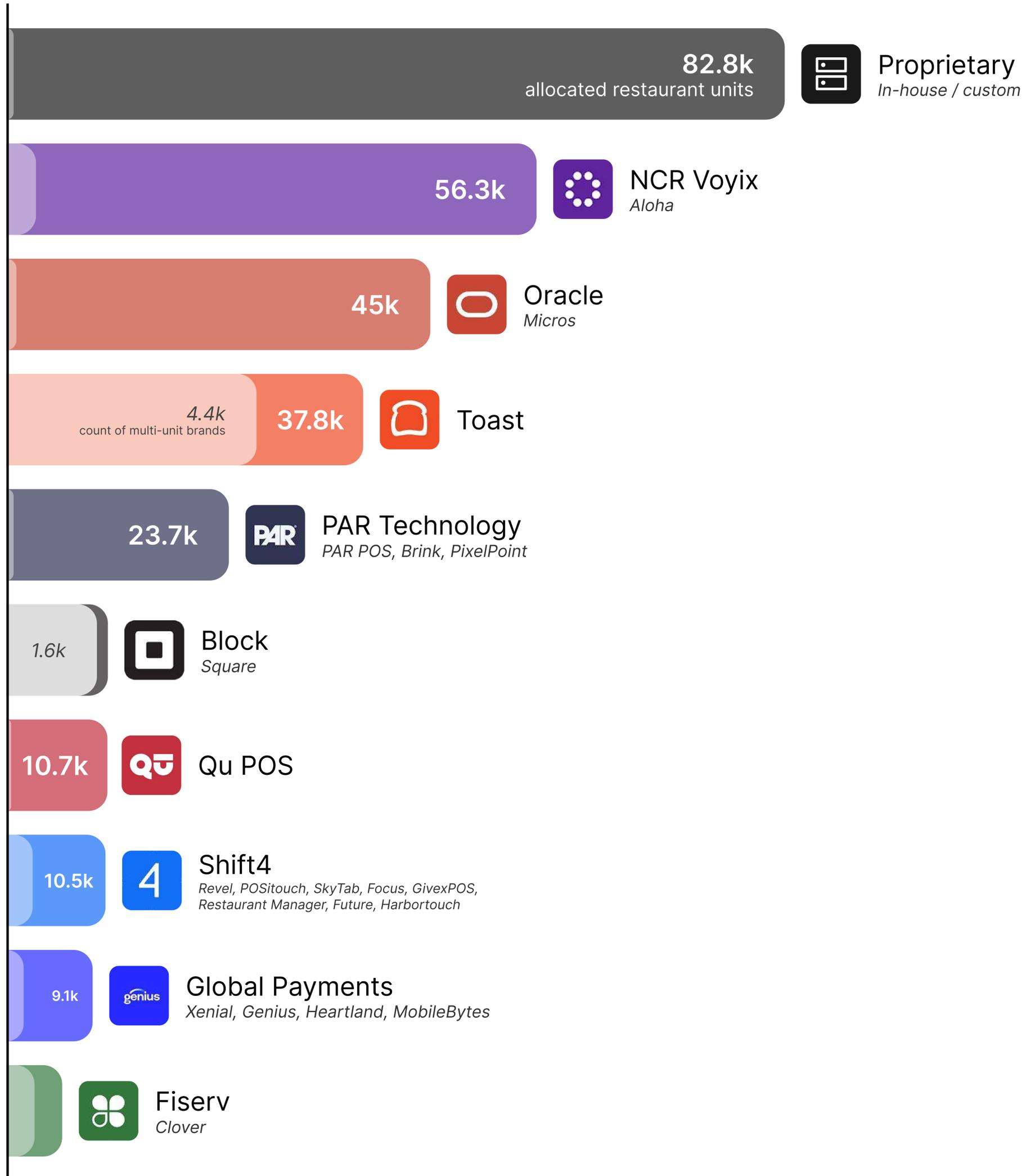


## Key takeaway

POS is not one market. Adoption patterns diverge sharply by brand scale.

# POS: Leaders by Multi-Unit Installs

Point-of-sale detections ranked by allocated multi-unit restaurant locations.



Count of multi-unit brands    Allocated restaurant units

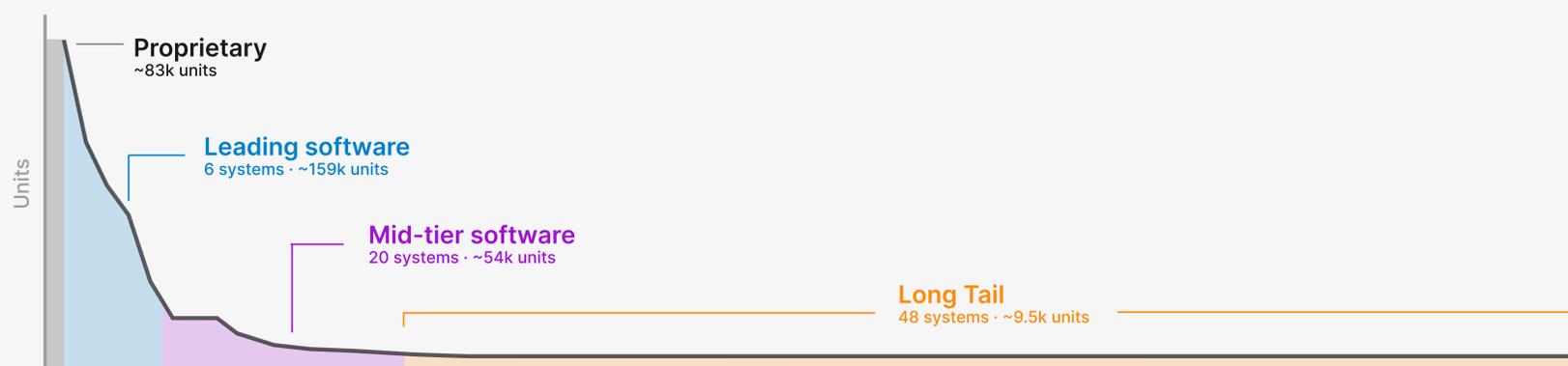
*Detections based on 15,000+ verified multi-unit restaurant brands in the U.S. and Canada. Includes both web and phone confirmations as of December 2025. Restaurant units may be allocated across multiple POS systems.*

# POS: Beyond Multi-Unit Leaders

Beyond the leading platforms, POS adoption spreads across dozens of smaller systems.

## Fragmentation

Cumulative unit coverage declines rapidly as additional POS systems are included.



## Mid-tier platforms

Recognizable POS systems that sit between market leaders and the long tail.

 <b>PDQ POS</b> Enterprise-focused deployments	 <b>HungerRush</b> Pizza-focused franchises	 <b>TouchBistro</b> Regional-focused adoption
 <b>TRAY</b> Enterprise-focused deployments	 <b>SpeedLine</b> Pizza-focused franchises	 <b>SpotOn</b> SMB-led expansion

*These platforms appear consistently by unit count, but collectively account for a modest share of total POS adoption.*

## POS long-tail

Additional POS platforms observed beyond the leading and mid-tier groups.

ABCPOS	CBS NorthStar	IntouchPOS	onePOS	Smile Dining
Adoluna	Celerity POS	KwickMENU	OrderCounter	Snackpass
Adora POS	Chowbus	Lavu	Ordersnapp	Snappy
Agilysys InfoGenesis	Cluster POS	Lightspeed	Otter	Thrive
Aldelo	Crisp	LINGA	PizPos	Tonic
ArrowPOS	Dripos	Maitre'D	Posnet	Touchpoint
Arryved	EmaginePOS	MenuSifu	QuickPOS	Upserve
AST POS Aura	FoodTec	Microworks Prism POS	RPOWER	Volante
Auphan	GEMpos	MobiTreat	Silverware POS	
Cake	HonorPOS	MYR POS	Squirrel	

# Restaurant Loyalty Landscape

Purpose-built loyalty has consolidated around a small set of category leaders, each winning within distinct segments. Down-market, adoption still skews toward POS-native guest marketing rather than full loyalty programs.



IND SMB MM ENT TOP

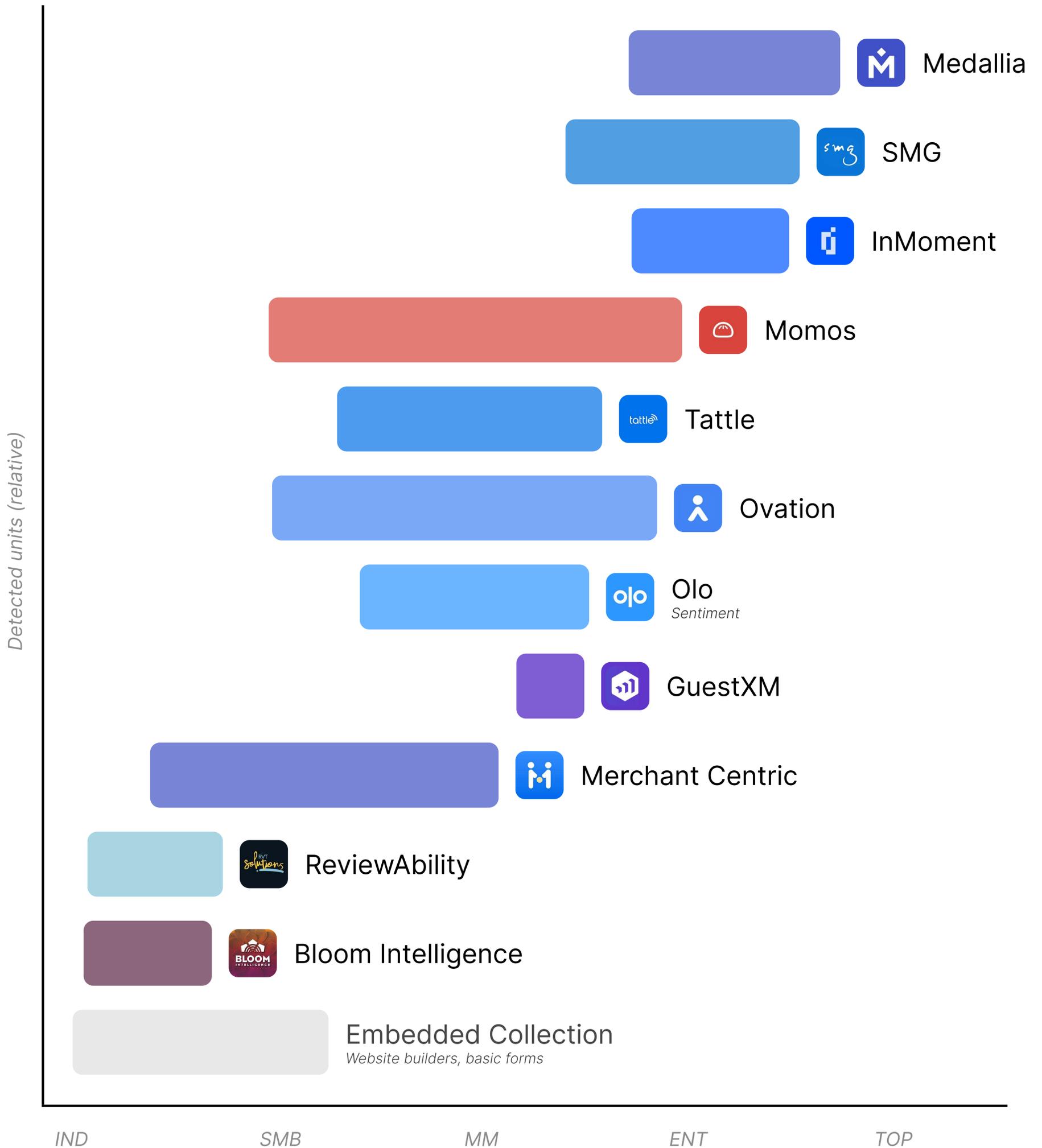
Ranked by multi-unit locations (unit count) among brands with loyalty detected on the brand website. Shares reflect detected coverage, not total market penetration.

## Key takeaways

- **Consolidation via acquisition:** Category leaders continue to expand through M&A, accelerating scale and adding complementary capabilities across segments.
- **Order-level data as a prerequisite:** Modern loyalty depends on deep order integration, enabling item- and basket-level targeting rather than standalone loyalty offerings.

# Feedback Platforms by Segment

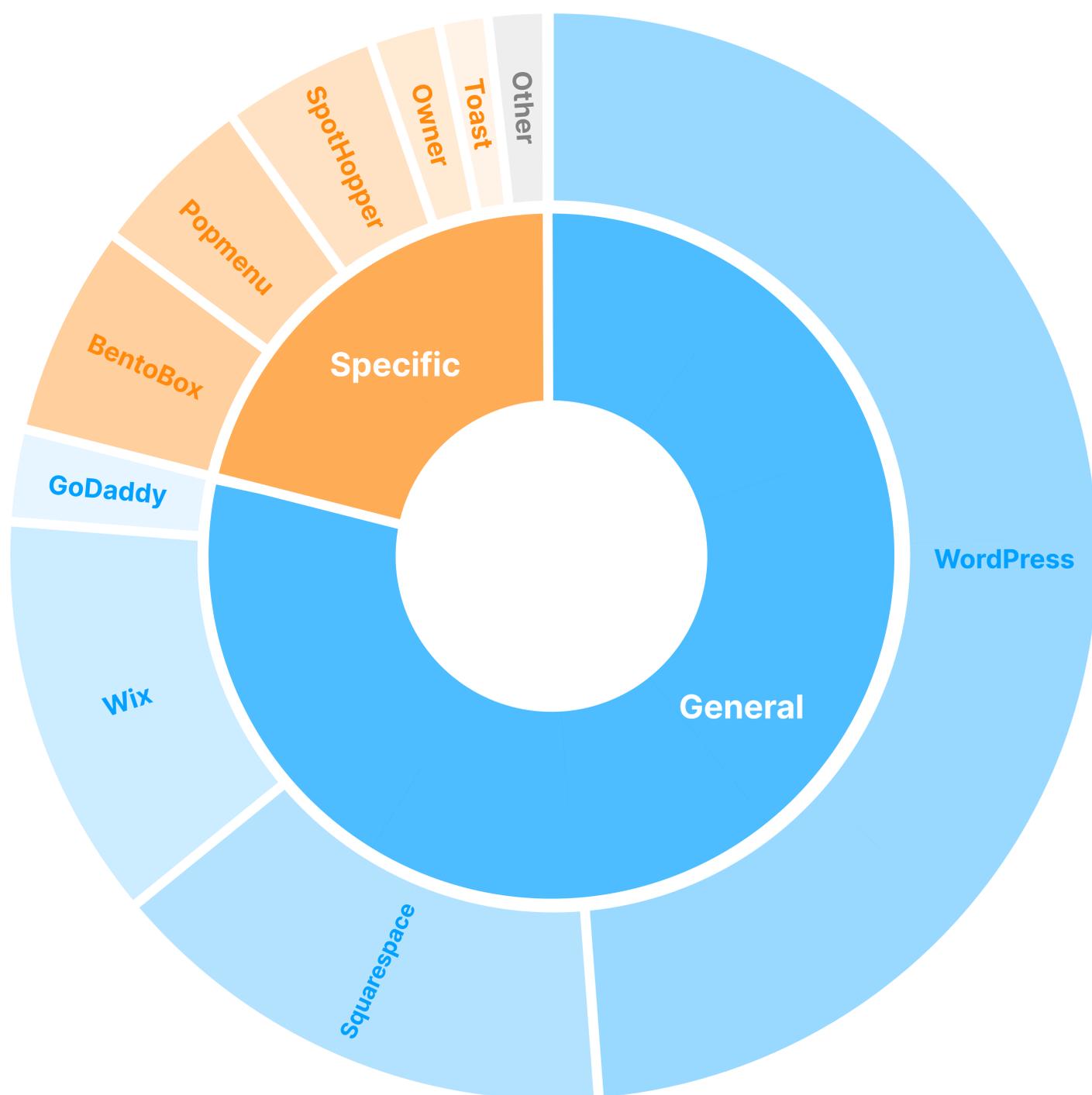
Across multi-unit brands, feedback software clusters by brand scale.



Bars indicate the observed range of brand sizes where each platform is detected. Based on website detections; presence reflects usage signals, not depth of integration. Some enterprise platforms may be white-labeled; some mid-market platforms may operate outside the primary website.

# Growth Platforms Compete

Across ~12k multi-unit restaurant websites, adoption remains dominated by general-purpose platforms, while restaurant-specific growth platforms continue to expand down-market.

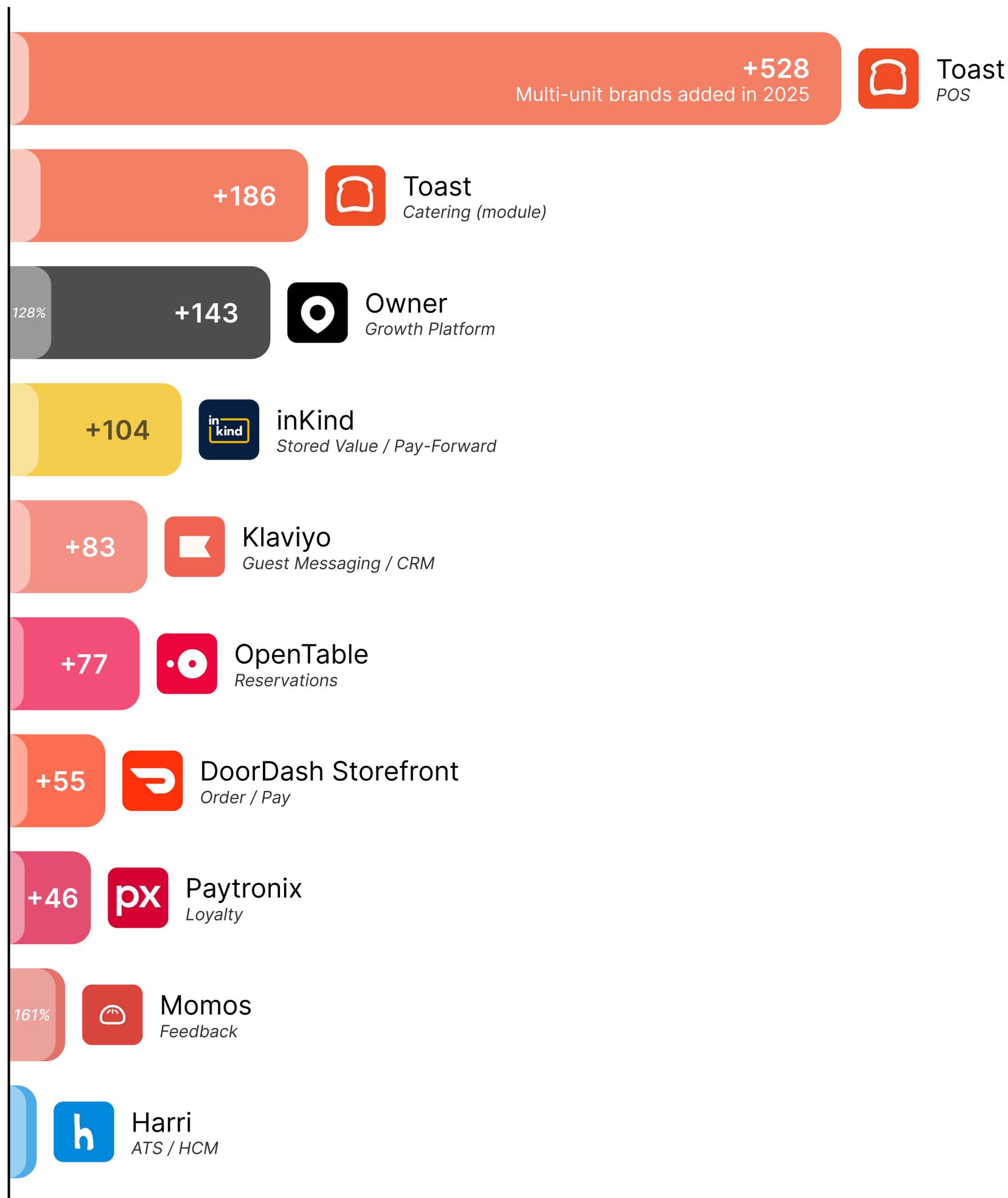


## Key takeaway

In 2025, restaurant-specific platforms grew 2x faster than general-purpose platforms, driven by native integrations with POS and online ordering systems.

# 2025 Category Growth Leaders

Top vendors by absolute multi-unit brand additions, by category



% YoY growth Brands added (2025)

Growth reflects detections on multi-unit websites between Jan and Dec 2025. Results reflect observed adoption; categories differ in baseline penetration.

PART 3

# GTM Takeaways

How to turn market intelligence into revenue execution.

# Why Data Matters More in 2026

As restaurant markets become more fragmented and competitive, successful teams are grounding strategy in observable market signals rather than assumptions. Data-backed approaches reduce guesswork and make GTM decisions easier to defend, measure, and adapt.

## **Clearer Account Focus**

Current market data helps teams concentrate effort on brands that are actively expanding, not just those that appear large.

## **Actionable Market Size**

Bottom-up visibility turns the market into a defined set of real, targetable accounts rather than abstract estimates.

## **Grounded Competitive Context**

Understanding which technologies are in use across the market informs smarter targeting and positioning decisions.

## **Measurable ICPs**

Data-backed ICPs rely on attributes that can be observed and evaluated consistently at scale.

## **Credible Coverage Planning**

Territory decisions improve when they reflect where target accounts actually exist and cluster.

# Operationalizing Market Data

Once market data is reliable, teams can operationalize it across core GTM workflows, from CRM structure to forecasting and coverage.

## Enrich Your CRM

Verified brand, unit, segment, and tech stack data flows directly into the CRM to support accurate segmentation, scoring, and account ownership.

## Build Dynamic Account Lists

Market intelligence powers account lists that update as brands grow, migrate segments, or change technology, rather than going stale over time.

## Align Territory Planning with Market Reality

Territories are designed using actual account density and growth concentration instead of static geography or legacy assumptions.

## Refine Your ICP Using Conversion Data

Closed-won performance is analyzed against segment, growth, and tech attributes to continuously validate and refine ICP definitions.

## Improve Forecasting Accuracy

Pipeline and forecasts are modeled by brand tier, growth trajectory, and market signals rather than broad averages or top-down assumptions.

Restaurantology provides verified brand, unit, and tech stack data for 15,000+ multi-unit restaurant concepts, updated monthly.

Appendix

# Definitions & Notes

# Industry Definitions

## Basic definitions

- **Brand:** A multi-unit restaurant concept tracked as a single entity
  - **Unit / location:** An individual restaurant location associated with a brand
- 

## Segment tiers

- **Top (TOP):** 2,001+ locations
  - **Enterprise (ENT):** 101-2,000 locations
  - **Mid-Market (MM):** 21-100 locations
  - **Emerging (SMB):** 6-20 location
  - **Independent (IND):** 2-5 locations
- 

## Service type taxonomy

- **Full service (FSR):** Includes casual dining, family dining, and fine dining
- **Limited service (LSR):** Includes quick service, fast casual, and bakery
- **Buffet:** Includes cafeteria
- **Other:** Includes

# Detection Notes

## Unit counts and brand movement

- Unit counts reflect verified multi-unit restaurant locations associated with a brand at the time of measurement.
  - Year-over-year movement captures net change in active locations and may include openings, closures, acquisitions, divestitures, or rebranding.
  - Unit-level changes are validated through recurring review of brand websites and other corroborating signals.
- 

## Interpreting rankings and comparisons

- Rankings reflect relative position within the measurable universe, not total market penetration.
  - Comparisons across segments highlight structural patterns, not guarantees of performance at the individual brand level.
- 

## Software detection boundaries

- Software adoption reflects detectable signals observed on restaurant brand websites, integrations, and publicly visible implementations.
  - Detection indicates presence, not contract status, contract length, or depth of usage.
  - Some enterprise deployments may be white-labeled, centralized, or off-site, and may not surface consistently at the brand level.
- 

## Technology presence vs. prevalence

- **Presence:** Whether a technology is detected at a brand. Presence may be inferred from observable signals.
  - **Prevalence:** How widely a technology is deployed across a brand's locations. Prevalence cannot be inferred unless unit-level signals are available.
-

**Written by:** Grant Gadoci

**Questions or feedback?** [hello@restaurantology.io](mailto:hello@restaurantology.io)

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