2025

Restaurant Growth Insights Report

An in-depth analysis of expansion trends and operational performance
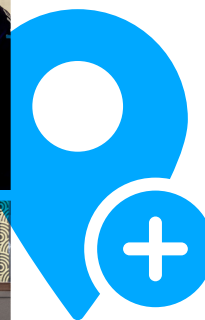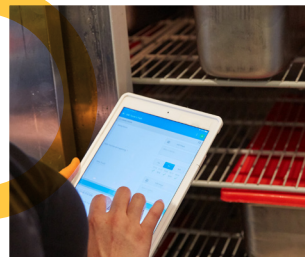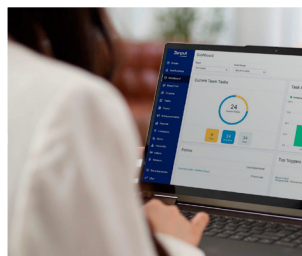
crunchtime × Technomic by informa

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INTRODUCTION

A Data-Driven Look at Multi-Unit Restaurant Growth

If you're leading a restaurant brand today, you know that while growth is still on the table, how you get there looks a lot different than it used to. The rules of the game have changed. Economic pressure, rising costs, labor instability, operational fragmentation, and technology fatigue have reshaped what it takes to expand in today's market, making it harder to scale profitably and predictably. As a result, operators are rethinking how they prepare their people, systems, and vendors to support that growth.

This research report, based on a nationwide anonymous study of more than 300 multi-unit operators, reveals how they're planning for growth, where they're facing friction, and what investments they believe will help future-proof their operations. You'll find key insights into how these restaurant operators are approaching growth today and where they feel confident, from labor management and inventory control to task execution and tech readiness, to where they see opportunity for improvement. Across every chapter of this report, a clear pattern emerges: Operational maturity is becoming the biggest competitive advantage.

AT-A-GLANCE

Key Findings

Growth prevails

Operators plan to open 20% more new locations on average in the next two years than they did in the past two, despite 73% citing economic uncertainty.

Challenges during growth

Attracting and retaining staff, labor costs and scheduling, and inventory management were cited as the most difficult areas to manage during growth.

Investing in growth

Top areas for tech investment to achieve growth goals are task management, inventory management, labor management/scheduling, employee training, and business intelligence.

Visibility gaps

Four in five operators prioritize real-time visibility into operations, but many report low visibility into food cost tracking, food waste, and ingredient usage.

Tech usage

Less than half said their tech stack supported all aspects of the business, both front-of-house and back-of-house.

Vendor support

83% of operators strive to partner with vendors who can support their growth, but 79% face challenges during growth, including cost increases, poor support, and lack of integration.

Forecasting falls short

Operators say their sales forecasts are, on average, only 60% accurate, even though 72% are using some form of tech-based forecasting tools.

Efficient execution

42% of operators report that consistently executing tasks more efficiently impacts growth and profitability by improving guest experience and staff productivity.

Low-performing store challenges

Employee turnover, inconsistent leadership, labor scheduling inefficiencies, food waste, and incomplete daily operational tasks are top challenges in low-performing stores.

80%
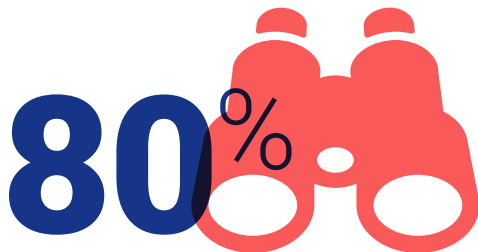
of operators prioritize real-time visibility into ops data, but fewer than half actually have it

QUICK LOOK

Demographics and Methodology

Research Survey Respondents: 304 multi-unit restaurant operators with decision-making authority

- Crunchtime commissioned a quantitative research study in partnership with Technomic

- 300+ restaurant industry professionals, each operating a minimum of 10 US-based store locations, were anonymously surveyed in Spring 2025

- All of the data and findings shared throughout this report have been verified for validity and accuracy by Technomic

RESPONDENTS BY LOCATION COUNT

41%

Small: 10-19 locations

37%

Medium: 20-100 locations

22%

Large: 101+ locations
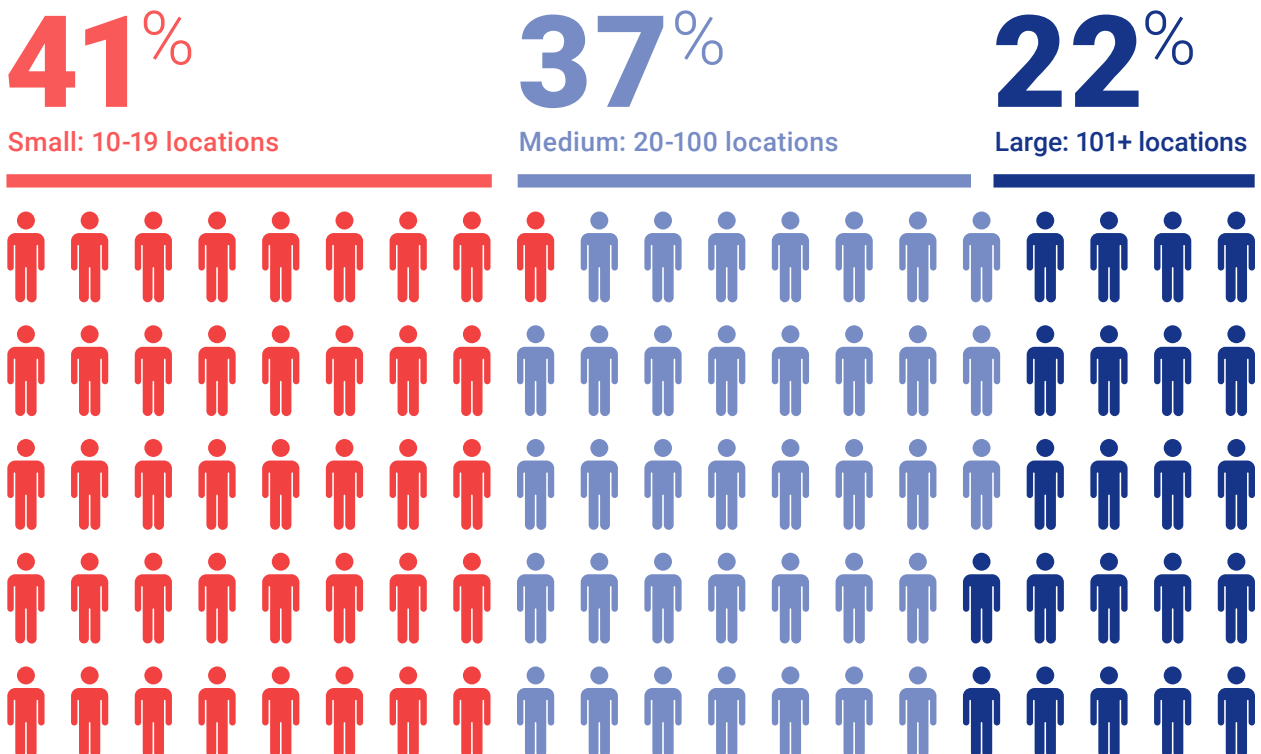
CHAPTER 1

Plans for Unit Growth Prevail Despite Economic Concerns

"When selecting tech services, we made sure to future-proof for room for growth."

— Casual-dining operator, 18+ locations

While the economic mood is wary, restaurant brands aren't standing still

Operators surveyed plan to open, on average, 20% more new locations in the next two years than they did in the past two, despite 73% being concerned about the economy's impact on their business, and 75% of those planning to grow admitting expansion has become more challenging now than in previous years. Operators chose inventory, forecasting, and training as the top three areas where technology is most helpful during economic uncertainty.

20%

more new locations planned by operators over the next two years

OPERATIONAL AREAS WHERE TECHNOLOGY IS MOST HELPFUL DURING ECONOMIC UNCERTAINTY

In times of economic uncertainty, which operational areas do you believe technology could be most helpful in improving? Select up to two.

Operational Area	Percentage
Better inventory management and waste reduction	44%
More accurate forecasting of food and labor costs	35%
Improved staff training and onboarding efficiency	28%
More effective menu engineering and profitability analysis	26%
Streamlined reporting and real-time data insights	23%
Automated labor scheduling and shift optimization	17%
Reducing fraud, theft, and compliance risks	17%

86%

agree their growth strategy is driven by a strong focus on operations

83%

strive to partner with vendors who can support their expansion

80%

aim to ensure the right tech is in place before pursuing unit growth

Prioritizing operations-led growth

Though unit growth isn't slowing down, it is evolving. Growth strategies are increasingly operations-led, with a strong emphasis on vendor partnerships. 86% of operators agree their growth strategy is driven by a strong focus on operations, while 80% aim to ensure the right tech is in place before pursuing unit growth. Operators also agreed that growth depends on strong vendor support, with 83% of operators striving to partner with vendors who can support their expansion.

Navigating the complexity of growth

Despite the effort to position themselves for success before opening new doors, 79% of operators who added at least two new locations within the last two years either replaced or added new vendors to better support evolving needs. They cited challenges with tech vendors during growth, including cost increases, poor support, and lack of integration.

The most significant challenges during growth show up in the day-to-day work that keeps restaurants running. 37% of respondents identified attracting and retaining staff as the most challenging operational area during growth, followed by managing labor costs and scheduling. Managing inventory, suppliers, and food/ingredient costs ranked among the third most challenging, underscoring the critical role of inventory visibility and cost forecasting in supporting sustainable growth.

MOST CHALLENGING OPERATIONAL AREAS TO MANAGE DURING GROWTH PERIODS

Which of the following operational areas that contribute to driving profitability/customer experience do you find most challenging to manage during periods of growth? Please read all response options and then select up to three.

37%

40% LSR | 36% FSR

Attracting and retaining qualified staff to support expansion

31%

34% LSR | 28% FSR

Managing labor costs and scheduling

29%

23% LSR | 34% FSR

Managing inventory, suppliers, and food/ingredient costs

29%

29% LSR | 28% FSR

Employee training and development

26%

24% LSR | 27% FSR

Raising brand awareness and executing effective marketing strategies for expansion

23%

23% LSR | 23% FSR

Executing operational tasks

22%

25% LSR | 19% FSR

Forecasting and demand planning for new locations

21%

21% LSR | 20% FSR

Securing reliable vendors/supply chain partners to keep pace with growth

20%

24% LSR | 17% FSR

Access to real-time data and analytics to inform decision-making

What This Means for Unit Growth

Operational maturity is the new growth advantage. Brands that invest in readiness today will scale more successfully tomorrow.

Before asking "How fast can we grow?", operators need to ask:

☐ Are our systems built to scale?

☐ Are our teams aligned and trained?

☐ Can we see what's happening in real time?

☐ Can we manage cost and quality across every location?

☐ Do our vendors support us or slow us down?
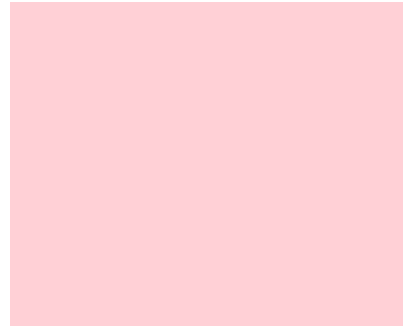
CHAPTER 2

Labor is Challenging and Confidence is Lacking

"Shifting trends and extremely variable weekly allotments make it difficult to staff appropriately as volume fluctuates throughout the year."

— QSR operator, 500+ locations

Labor challenges become even more complex during periods of growth

Only 35% of operators are extremely confident in the effectiveness of their labor and scheduling strategy, and only 31% are extremely confident in their managers' ability to create efficient schedules without over- or understaffing.

59% of operators agree that staffing and labor challenges impact their ability to expand operations, particularly in hiring and retaining qualified staff, managing labor costs/scheduling, and training. 85% of operators consider real-time visibility into labor costs relative to sales as extremely or somewhat important, while 80% rank the visibility into forecasted vs. actual labor with the same levels of importance.

Despite the high importance placed on labor costs and forecasting needs, confidence is lacking

Only 28% of operators are extremely confident in their ability to forecast sales for scheduling employees, only 31% in their scheduling system's ability to balance staff efficiency within the labor budget, and only 33% in their ability to stay within labor budgets each week.

When it comes to reducing labor costs, operators are dealing with a range of everyday challenges, and unpredictability tops the list. 33% rank unpredictable demand fluctuations as the top challenge for reducing labor costs. Right behind that are employee schedule preferences and time-off requests (28%), followed by labor regulations compliance and slow responses to low-productivity shifts (both at 28%). These responses point to common labor management issues like scheduling conflicts, compliance hurdles, and limited flexibility, driving up costs.

ONLY

28%

are extremely confident in their ability to forecast sales for scheduling employees

TOP CHALLENGES IN REDUCING LABOR COSTS

What are the biggest challenges to lowering your labor costs? Select up to five.

33% Unpredictable demand fluctuations

28% Employee schedule preferences/time-off requests

28% Complying with labor regulations

28% Slow response to low-productivity shifts

27% High employee turnover

26% Labor shortages

24% Resistance to forecasted/recommended scheduling changes

23% Unplanned overtime/overtime creep

23% Inconsistent labor cost goals across locations

21% Limited real-time visibility into labor costs

20% Weak enforcement of labor budgets

What This Means for Unit Growth

For brands planning expansion, this labor confidence gap becomes more than an internal issue—it's a growth liability. These pressures compound during expansion, especially when frontline teams and management bandwidth are stretched thin.

To grow successfully, labor can't just be managed—it must be strategically enabled. Technology, if adopted and optimized, can help address challenges to reducing labor costs, such as managing employee schedules and more accurate demand/labor forecasting.
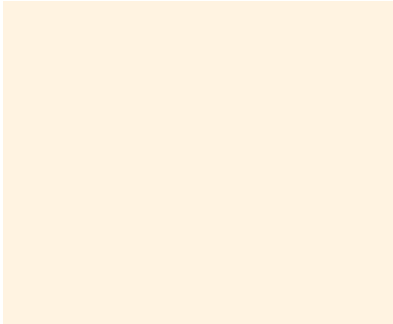
CHAPTER 3

Inventory Control is High Stakes, but Visibility Falls Short

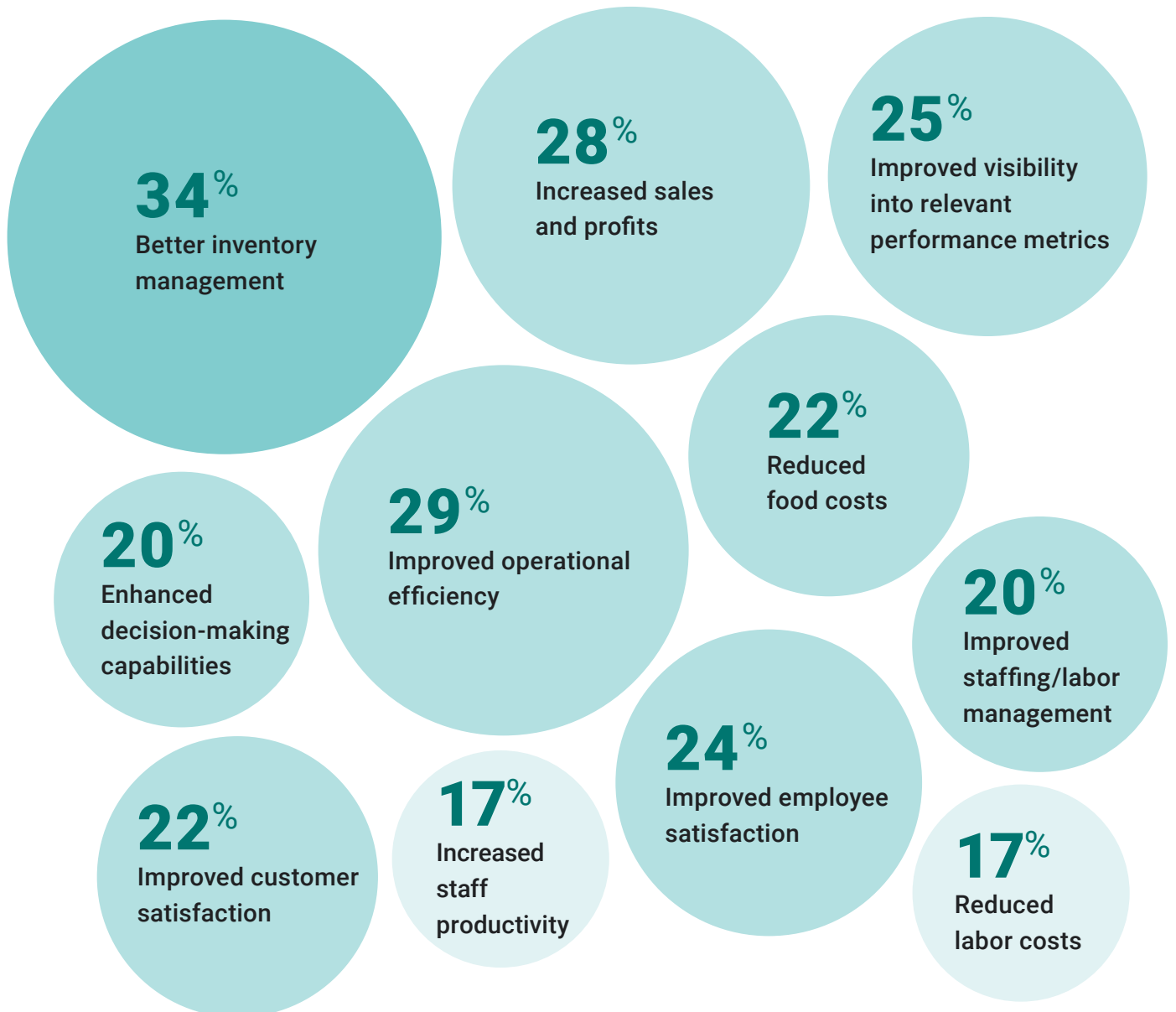"Counting and tracking inventory has always been an issue."

— QSR operator, 50+ locations

The big impact of inventory tech

Operators ranked better inventory management as the most significant impact of tech-driven systems on managing operations. They also ranked inventory management and food cost forecasting as the top two use cases for technology during economic uncertainty, outpacing even labor management and scheduling.

KEY IMPACTS OF TECH-DRIVEN SYSTEMS ON BUSINESS OPERATIONS

What has been the most significant impact of your current tech-driven systems/platforms that are utilized to manage operations on your business? Please select up to three.

34% Better inventory management

28% Increased sales and profits

25% Improved visibility into relevant performance metrics

22% Reduced food costs

20% Enhanced decision-making capabilities

29% Improved operational efficiency

20% Improved staffing/labor management

22% Improved customer satisfaction

17% Increased staff productivity

24% Improved employee satisfaction

17% Reduced labor costs

84% of operators said real-time visibility into inventory levels is extremely or somewhat important, 85% said the same for food cost tracking and margin management, 82% for order accuracy and fulfillment, 81% for waste variance and monitoring, and 79% for ingredient usage trends.

IMPORTANCE OF REAL-TIME VISIBILITY IN OPERATIONAL AREAS

How important or unimportant is real-time visibility (i.e., the ability to access and monitor operational data as it happens) to your operation in the following areas? *Graph below represents both extremely important and somewhat important.*

Area	%
Labor costs relative to sales	85%
Staffing levels and shift adherence	85%
Food cost tracking and margin management	85%
Vendor pricing and purchasing data	85%
Inventory levels	84%
Food safety compliance	83%
Order accuracy and fulfillment	82%
Overtime and compliance monitoring	82%
Waste and variance monitoring	81%
Forecasted vs. actual labor needs	80%
Daily operational task completion	80%
Audit scores and checklist adherence	80%
Ingredient usage trends	79%

Visibility gaps hurt the bottom line

Despite prioritizing real-time visibility into operations, the areas that matter most for controlling costs are blind spots for real-time visibility. Operators report low visibility into food cost tracking, food waste, and ingredient usage, despite these being among the most critical for profitability. Without real-time visibility, operators risk margin erosion, inaccurate demand planning, and weakened vendor leverage.

Operators say on average their sales forecast accuracy is only

60%

Sales forecasting accuracy falls short

Despite being one of their top priorities, operators say their sales forecasts are, on average, only 60% accurate, even though 72% are using some form of tech-based forecasting tools and 70% are extremely/somewhat confident in their ability to forecast sales for employee scheduling, ingredient purchasing, and demand planning. This gap between confidence and actual performance highlights a critical disconnect: Operators trust their tools, but the outcomes are still faulty. This suggests that even with tech in place, the tools aren't being used effectively, or challenging conditions are making it hard for forecasts to keep up.

What This Means for Unit Growth

As brands grow their store count, systems that track and manage food costs at scale are becoming mission-critical, not only for profitability but also for forecasting, vendor negotiation, and menu optimization. Whether expanding from 10 to 50 locations or 100 to 500, brands that prioritize inventory control are better equipped to grow without compromising profitability. This shift represents not just a cost strategy but a foundational part of their growth readiness.

Inventory management remains one of the most influential but under-leveraged drivers of profitability and consistency. No longer just a back-office chore, inventory management is a top-tier growth enabler. But while operators recognize its value, many are still falling short when it comes to forecasting accuracy, leaving significant opportunity on the table. With only 60% accuracy reported in sales forecasts, improving forecasting could unlock better purchasing, smarter scheduling, and ultimately, stronger margins.

Consistent Execution Can Unlock Stronger Performance

"As we got busier and had more things to pull focus and need attention from the staff, execution of those tasks naturally was more challenging."

— Fast-casual operator, 18+ locations

Core operational challenges in low-performing stores

Operators said their top challenges in lower-performing stores are high employee turnover, inconsistent leadership, labor scheduling inefficiencies, high food waste, and failure to complete daily operational tasks.

MOST COMMON ISSUES IN LOWER-PERFORMING STORES

To the best of your knowledge, what issues or challenges are consistent across the lower-performing stores in your organization? Select up to five.
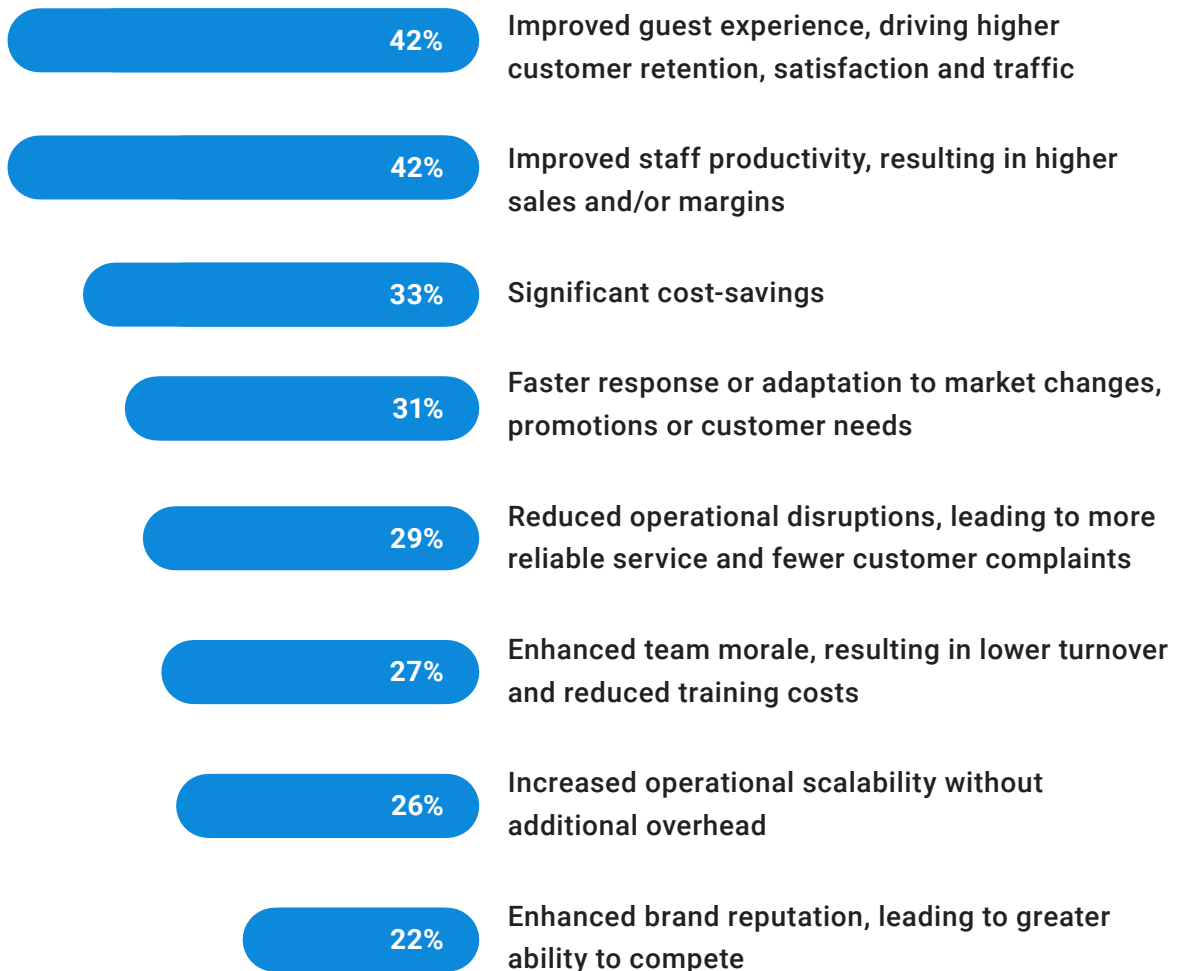
	OVERALL	LSR	FSR
High employee turnover	**29%**	28%	30%
Weak or inconsistent store leadership	**26%**	24%	27%
High food waste	**25%**	22%	26%
Labor scheduling inefficiencies	**22%**	28%	18%
Failure to complete daily operational tasks	**21%**	22%	21%
Difficulty hiring qualified management staff	**21%**	22%	20%
Poor inventory accuracy and stockouts	**19%**	17%	20%
Lack of adherence to standard operating procedures	**19%**	13%	24%
Low employee productivity	**18%**	15%	21%
Inability to adapt to food cost increases and/or fluctuations	**18%**	16%	19%
Inconsistent and ineffective training/skill development	**17%**	22%	14%
Excessive overtime and labor cost overruns	**17%**	19%	16%
Inefficiencies in ordering and vendor management	**17%**	16%	18%
Limited visibility into store performance metrics	**15%**	16%	14%
Poor communication between teams	**15%**	16%	14%

Consistent execution can unlock measurable business outcomes

Daily SOPs, food safety checks, and brand standards may seem operational, but their impact is financial. 42% of operators said better task execution would directly improve guest experience and increase customer retention, 42% said it would improve staff productivity and lead to higher sales and profit margins, and 31% said it would allow them to adapt faster to promotions or market changes.

**IMPACT OF CONSISTENTLY EFFICIENT TASK EXECUTION
ON LONG-TERM GROWTH AND PROFITABILITY**

If your locations could consistently execute operational tasks more efficiently, how would that impact your organization's long-term growth and profitability? Select up to three.

42%   **Improved guest experience, driving higher customer retention, satisfaction and traffic**

42%   **Improved staff productivity, resulting in higher sales and/or margins**

33%   **Significant cost-savings**

31%   **Faster response or adaptation to market changes, promotions or customer needs**

29%   **Reduced operational disruptions, leading to more reliable service and fewer customer complaints**

27%   **Enhanced team morale, resulting in lower turnover and reduced training costs**

26%   **Increased operational scalability without additional overhead**

22%   **Enhanced brand reputation, leading to greater ability to compete**

83% of operators agreed it is extremely/somewhat important to have real-time visibility into food safety compliance, 80% into daily operational task completion and audit scores/checklist adherence, and 79% into equipment maintenance tracking.

ONLY

38%

have real-time visibility to audit scores/checklist adherence

## There is a lack of complete visibility into task execution across stores

Though operators recognized that consistent task execution drove measurable outcomes across guest satisfaction, staff performance, and profitability, only 49% reported complete real-time visibility into food safety compliance, 38% into audit scores/checklist adherence, 36% into daily operational task completion, and 35% into equipment maintenance tracking. Without real-time dashboards, audit tools, or performance tracking, it's hard to improve what you can't see.

What This Means for Unit Growth

Operational execution is no longer a soft metric—it's a growth driver. To scale without slipping, brands that invest in tech-enabled task execution, auditing tools, food safety systems, and real-time dashboards are better positioned to deliver consistent experiences every day in every store.

But it's not just about having the tools, it's about having visibility across the entire system. Real-time insights into what's happening at every location help operators spot issues faster, ensure accountability, and make smarter decisions that protect both the guest experience and the bottom line.

Task execution is how brand promises are delivered every day. Execution isn't a single checkbox—it's the backbone of consistency, compliance, and customer satisfaction.
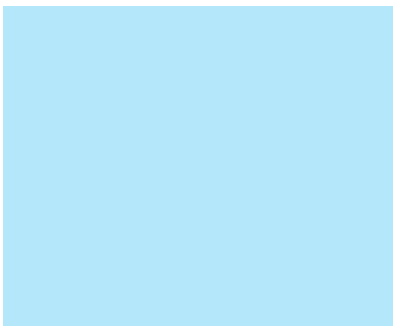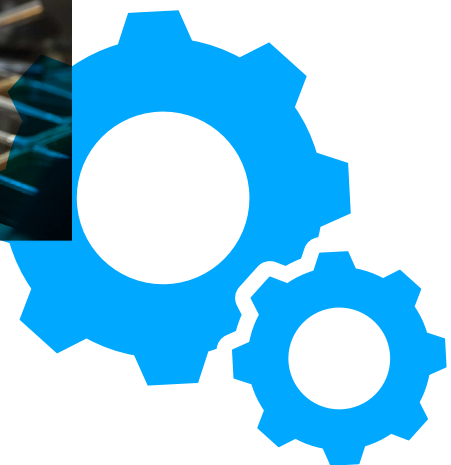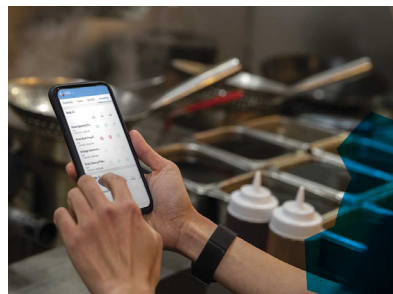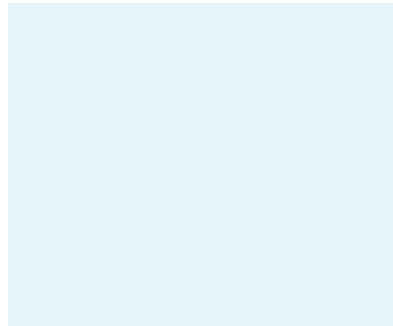
CHAPTER 5

Unit Growth Puts Tech Readiness to the Test

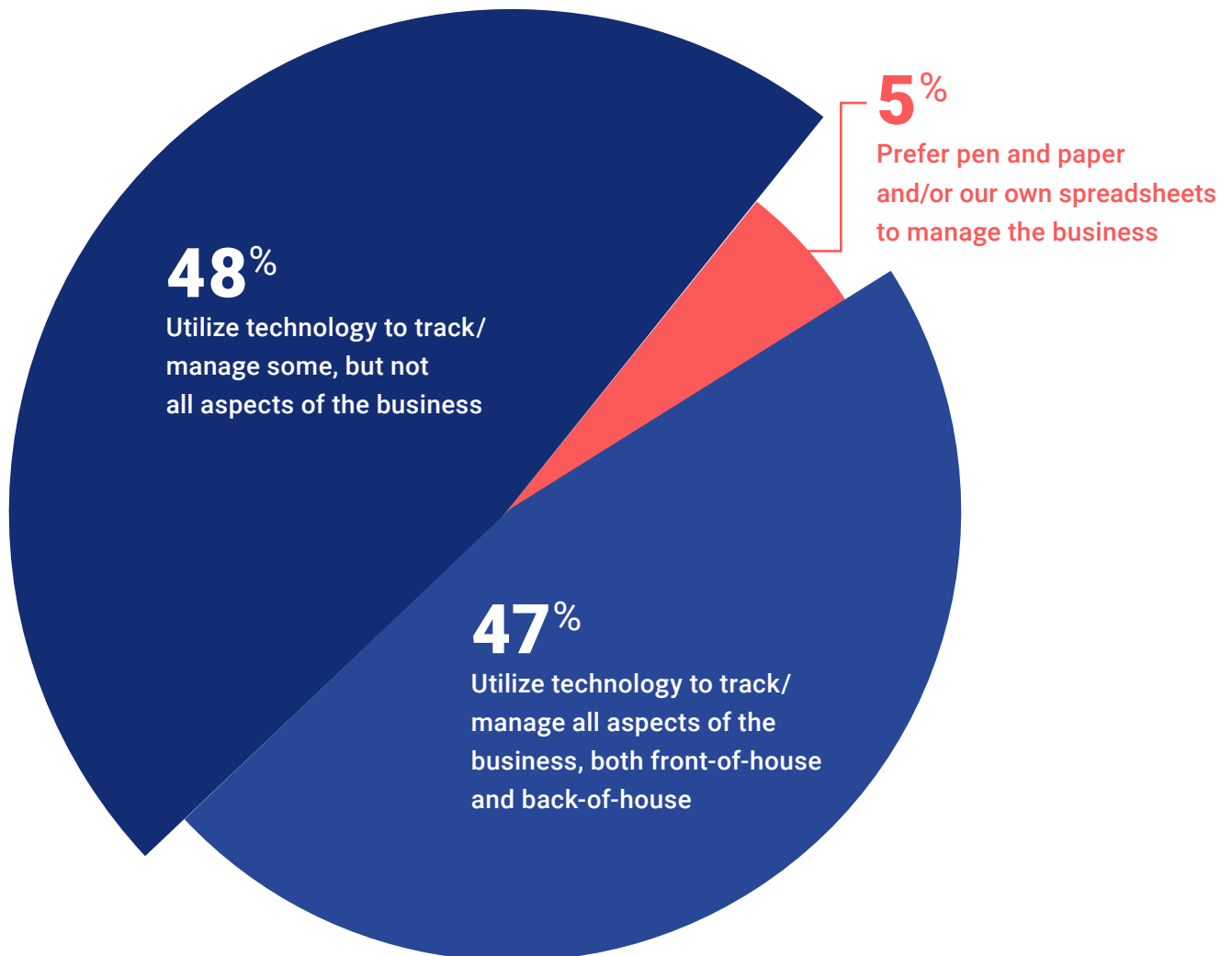"We outgrew vendors as our needs expanded with more locations."

— QSR operator, 500+ locations

Technology is ingrained in restaurant ops, but gaps remain

95% of operators utilize technology to manage all or some of their business, and 98% see benefits from using technology, but only 47% said their tech stack supported all aspects of the business, both front-of-house and back-of-house. 36% of operators said they gave more priority to ops-focused tech systems compared to other initiatives over the last two years.

UTILIZATION OF TECHNOLOGY SYSTEMS IN MANAGING OPERATIONS

To what degree does your organization utilize technology systems to manage operations? Select one.

48% Utilize technology to track/ manage some, but not all aspects of the business

5% Prefer pen and paper and/or our own spreadsheets to manage the business

47% Utilize technology to track/ manage all aspects of the business, both front-of-house and back-of-house

Tech adoption does not always equal optimization

42% said their tech stack is only somewhat optimized to support their growth, while 7% said it is not optimized to support their growth at all. Among operators who had added locations recently, 79% faced vendor-related issues. A majority of operators who encountered vendor issues during expansion ended up switching or adding providers to fill functionality gaps. This gap suggests that while many operators have functional systems, few have optimized ones. The tools that are in place aren't always delivering the real-time guidance or accuracy that scaling brands need.

42%

said their tech stack is only somewhat optimized to support their growth
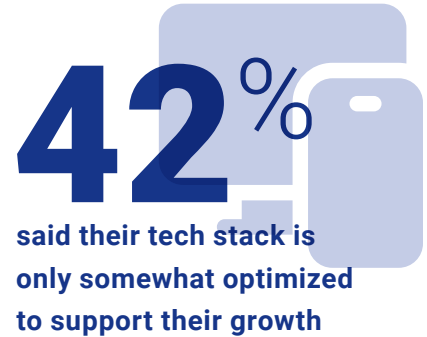
Planned tech investments to enable unit growth

Restaurant operators are focusing their tech investments on key growth enablers like task management, food safety, and inventory control, with around 60% planning or having invested in these areas. Labor management and employee training follow closely, showing the ongoing emphasis on workforce optimization. Business intelligence tools are also popular, indicating a need for more visibility into operational data. This reflects a clear industry trend toward leveraging technology to support location growth and operational efficiency.

## COMPLETED OR PLANNED TECH INVESTMENTS FOR ACHIEVING ORGANIZATIONAL GROWTH GOALS

Which of the following technologies have you invested in or do you plan to invest in to support your organization in achieving growth goals? Select all that apply.

59% Task management, auditing, food safety and compliance

52% Inventory management

50% Labor management and employee scheduling

49% Employee training and development

49% Business intelligence, reporting and analytics

43% Payroll

33% Accounting

What This Means for Unit Growth

Growth exposes weaknesses. Technology shouldn't be a barrier to scale—it should be the engine behind it. But most restaurant brands are still stuck in disconnected, incomplete ecosystems. Fixing that is not optional for organizations with big growth aspirations.

These are no longer future-state investments. Operators planning future expansion say a fully optimized, integrated tech stack is now a requirement, not a nice-to-have. And, you don't just need a tech vendor, you need a partner who scales with you.
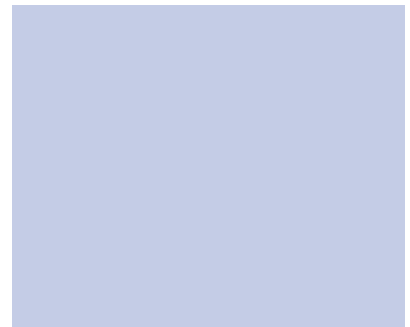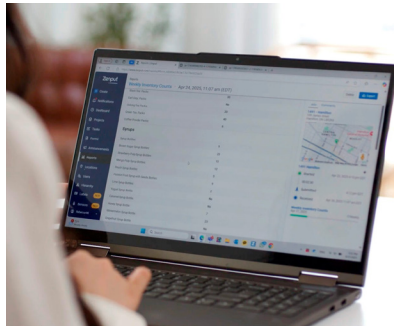
CONCLUSION

Sustainable Growth Starts with Strong Operations

What this research shows is clear: Sustainable growth starts with strong operations. The old way of growing fast and fixing later doesn't work anymore. Operators are rethinking the role of technology, execution, and visibility across every shift and store. They're acknowledging the importance of putting systems, standards, and solutions in place before they scale. And they're viewing technology as a strategic asset, not a support function.

Whether it's tightening up labor forecasting, improving visibility into food costs, or ensuring consistency through better task execution, high-performing brands are investing in systems that make growth repeatable and scalable. Because with the right tools, teams, vendors, and insights in place, unit growth becomes more than possible—it becomes profitable and consistent.
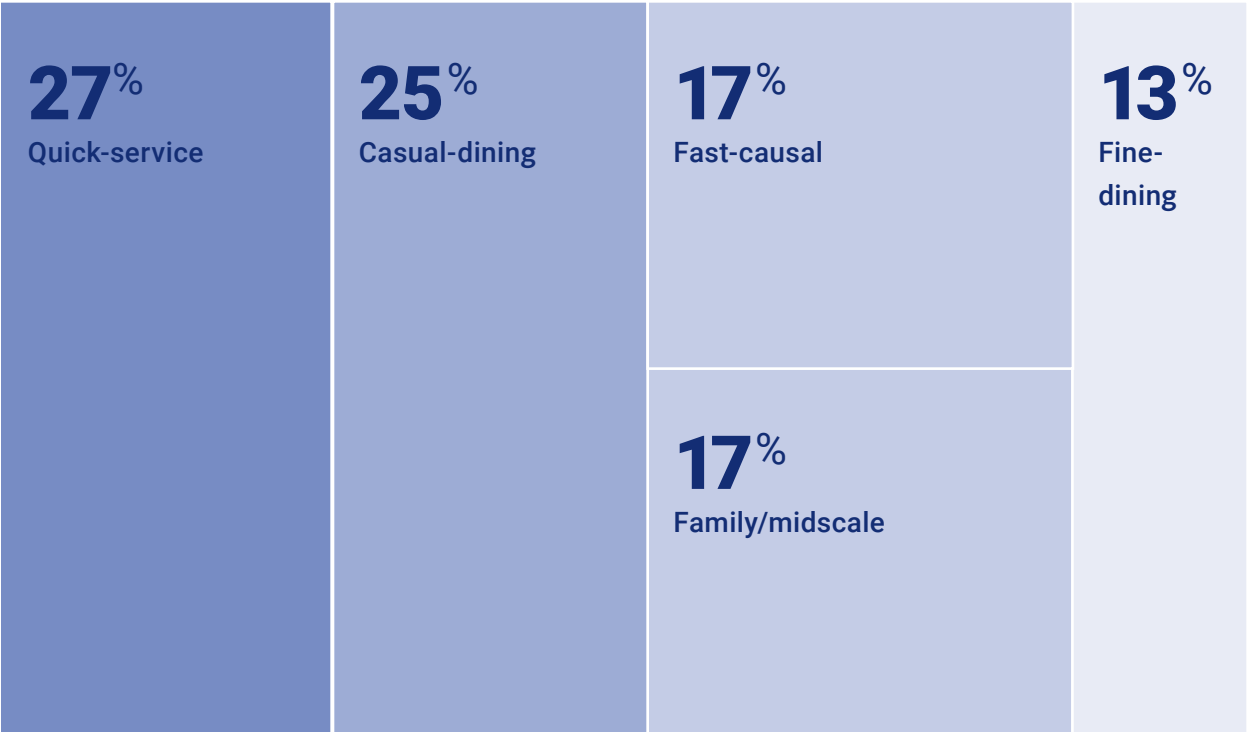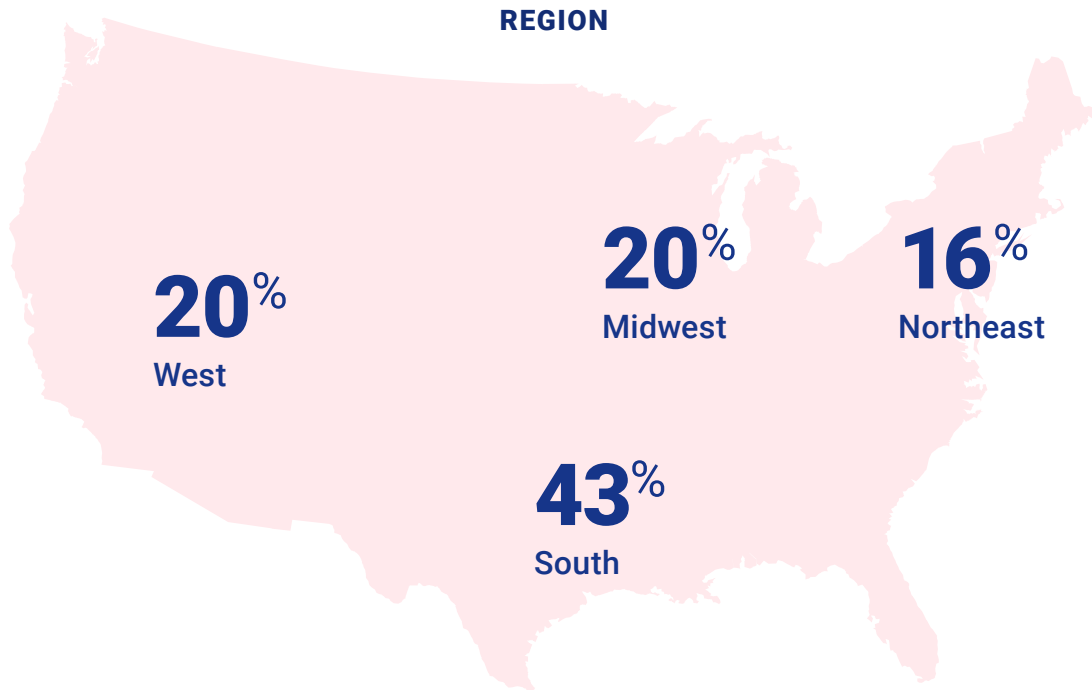
Demographics and Methodology

To capture the current state of multi-unit restaurant growth, we wanted to hear from operators themselves. Crunchtime commissioned a quantitative research study in partnership with Technomic. 300+ multi-unit restaurant operators with decision-making authority for systems and ops were anonymously surveyed in Spring 2025, each operating a minimum of 10 US-based store locations. Respondents consisted of owners, executives, and directors with decision-making authority or influence across quick-service, casual-dining, fast-casual, family/midscale, and fine-dining restaurants. All of the data and findings shared throughout this report have been verified for validity and accuracy by Technomic.

RESTAURANT SEGMENT

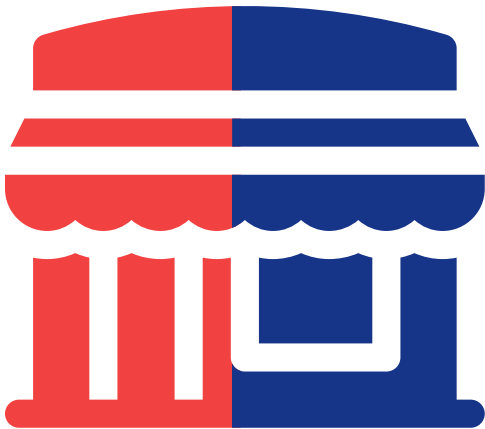Base: 304 U.S. restaurant operators. *Please note, percentages may be rounded.*

27% Quick-service

25% Casual-dining

17% Fast-causal

17% Family/midscale

13% Fine-dining

REGION

20% West

20% Midwest

16% Northeast

43% South

PRIMARY ROLE

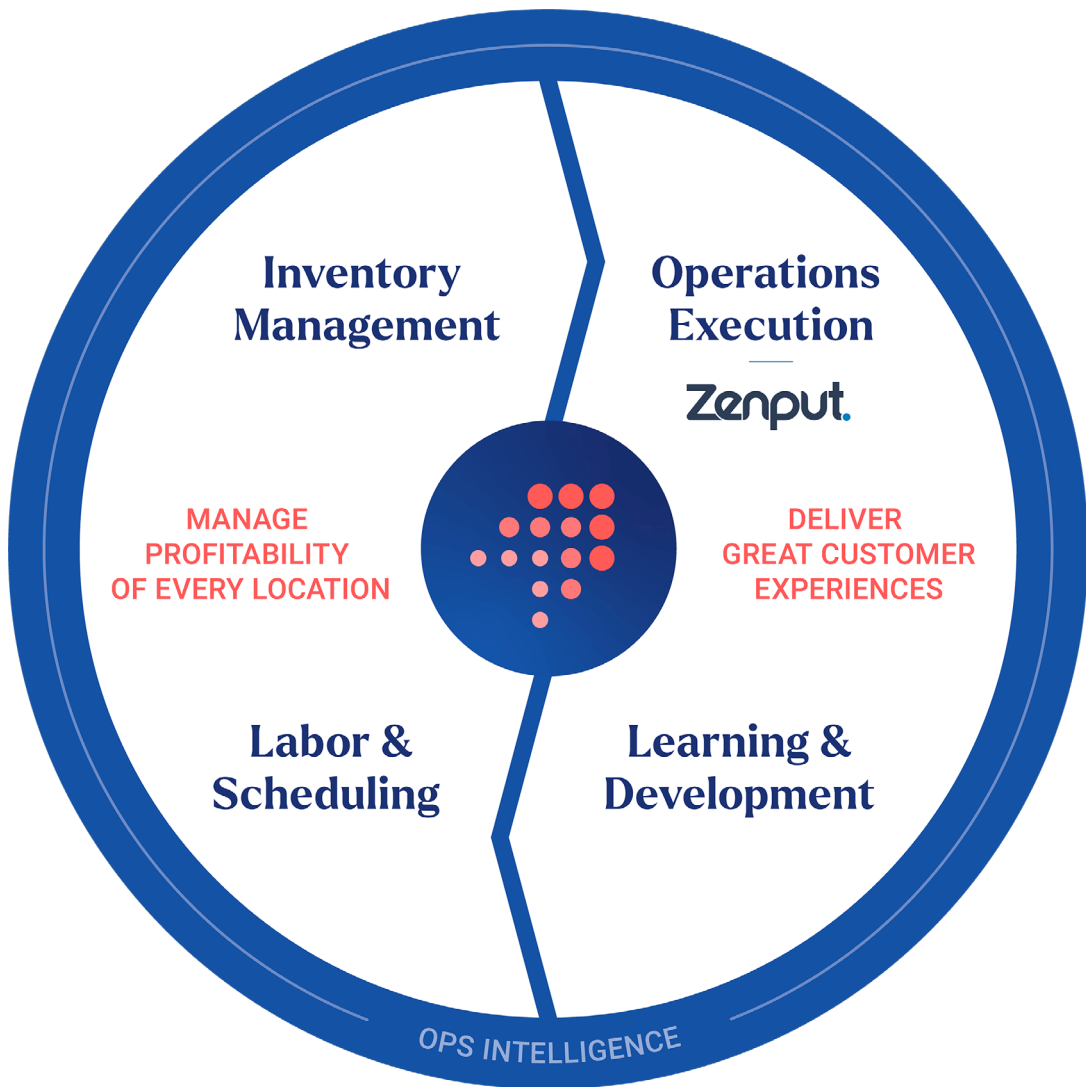| Role	%
General manager/manager	30%
Food and beverage VP/director/manager	17%
Owner/operator	14%
Operations VP/director/manager	13%
Culinary/kitchen director/manager	9%
President/CEO	4%
IT officer/VP/director/manager	4%
Purchasing/procurement	3%
Training & development VP/director/manager	3%
Business strategy	1%
Human resources VP/director/manager	1%

CHAIN TYPE

43% Franchised location of a chain

57% Part of a chain, corporate-operated

Inventory Management

Operations Execution

Zenput.

MANAGE PROFITABILITY OF EVERY LOCATION

DELIVER GREAT CUSTOMER EXPERIENCES

Labor & Scheduling

Learning & Development

OPS INTELLIGENCE

About Crunchtime

Crunchtime is how the world's top restaurant brands achieve ops excellence in every location. Crunchtime software is used in over 150,000 locations in 100+ countries to manage inventory, staff scheduling, learning and development, kitchen automation, food safety, operational tasks, and audits. Crunchtime enables customers, including Chipotle, Culver's, Domino's, Dunkin', Five Guys, and P.F. Chang's to control food and labor costs, and deliver great guest experiences.

Crunchtime Editorial Team

Dana Farese

Dana is Crunchtime's senior manager of content marketing, focused on amplifying the brand's presence in the restaurant technology space through impactful storytelling and multi-channel outreach. Dana joined Crunchtime via the acquisition of Zenput in 2022, and continues to bring a unique blend of strategic vision and hands-on execution to drive high-impact campaigns while championing Crunchtime's core values and culture.

Cindy Poulos

Cindy brings 30+ years of marketing and product management experience to Crunchtime. As senior director of marketing, she leads the team responsible for executing campaigns and content initiatives, leveraging her broad expertise in marketing products and services of fast-growing technology companies. Cindy joined Crunchtime via the acquisition of DiscoverLink in 2021, where she served as vice president of marketing for eight years.

About Technomic

Technomic Inc., an Informa Connect company, was founded as a management consulting firm in 1966. Since then, Technomic's services have grown to encompass cloud-based B2B research tools, consumer and menu trend tracking and other leading strategic research and analytic capabilities, to prioritize and size business opportunities. Our clients include food manufacturers and distributors, restaurants, retailers and multiple other business verticals aligned with the food industry that are looking to make informed decisions to support their business growth. Visit Technomic at www.technomic.com.

Technomic Research Team

Donna Hood Crecca

Donna leads Technomic's adult beverage and convenience-store practices, founded its cannabis practice, and leads custom engagements for clients, including assessments of consumer, operator, and category assessments, providing actionable insights and recommendations. She began her career as a business journalist, first leveraging and then guiding industry research to identify emerging trends and drive compelling content, before joining Technomic more than a decade ago.

Anne Mills

Anne is a senior director of research and insights at Technomic, where she manages syndicated and custom projects leveraging a variety of quantitative and qualitative research methodologies. She began her career in the industry, focusing on consumer trends in foodservice, and has broadened her expertise to include industry research with operators and suppliers. Prior to joining Technomic, Anne conducted marketing research primarily in the healthcare industry.

John Williams

John is a Manager of research and insights at Technomic, where he has spent the past three years leading both custom and syndicated research initiatives. His work focuses on the foodservice industry, with expertise in c-store foodservice, distributor intelligence, and mixed-method consumer and operator storytelling. He brings a strategic lens to every project, blending qualitative and quantitative insights to help clients make smarter, faster decisions.

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