

Retail Practice

# A taste of what's next: Perspectives on the future of restaurants

Automated kitchens, AI-powered hyperpersonalization, and “unbundled” formats are accelerating restaurant reinvention.



**In the years ahead**, diners may start to experience their favorite restaurants in entirely new ways. Restaurant recommendations may start to come from consumers' preferred gen AI platforms, human servers might get a helping hand from robotic food runners, and AI-powered recipe testing could catapult culinary innovation to greater heights. In these five videos, McKinsey experts examine how shifting consumer tastes, emerging technologies, and experimental formats could redefine the restaurant of the future.

An edited transcript of the conversations follows.

## **It's the future. What's on the menu?**

**John Moran:** We're going to see more culinary innovation in the next ten years than we have in the past ten, 20, or even 50 years.

**Alex Rodriguez:** We're already moving to a space where it's not about chicken, per se; it's protein. Right now, it's protein everything. As people continue to lean into science and health metrics, and into what they're looking to get out of their diet, I could see it becoming less about a specific type of protein. It will be about [protein in general](#), including a focus on the source and how clean and effective it is. Consumers may increasingly start speaking in those terms.

**Katharine Mattox:** What will change is how people taking [GLP-1 \[glucagon-like peptide-1\] medications](#) eat. So much of dining at restaurants is about this indulgent, away-from-home moment and shared experiences. Simply saying that goes away because [the quantity of food consumed decreases](#) is too simplistic an assertion. Still, some chains out there are playing around with a GLP-1-focused menu, which may include more protein and smaller portion sizes.

**John Moran:** If you think about the trade-off we've always seen, where people want healthy food that tastes good, we've tended to prioritize the good-tasting part over the healthy part.

There's an enormous opportunity for authentic ethnic cuisines. A lot of people are experimenting with what they call "better for you" concepts now, and we're seeing a lot of progress there. I think about Indian food a lot; there aren't many successful chain Indian restaurants, certainly on the limited-service end. There have been a few, but why doesn't that have the potential to break through in a much bigger way?

## **Personalization, curation, and automation**

**Katharine Mattox:** You'll see the industry moving at almost two speeds, with some brands leaning into a more tech-forward, enabled experience and others not. And that will be part of the value proposition. There will be some restaurants that lean into automation and digital, and that experience will become part of the brand. You may never interact with a server.

**Alex Rodriguez:** Today, your average restaurant is thinking about the food: the quality of it,

whether it's served at the right temperature, is well prepared, and looks good. Well beyond that, you'll have more environmental things: What's the lighting that adapts to my mood? What's the smell or the music that I have in the entire environment? When are people approaching me, and when aren't they? When is it a human versus technology?

**Luis Salcedo:** In 15 years, I don't think you'll have to tell a server your mood explicitly. With intelligence and image recognition, the technology may not be 100 percent accurate, but it will get close to understanding your mood. Whether you're happy or worried about something, if you're exhausted, that's information the restaurants will get.

**Katharine Mattox:** There will be more [personalized and tailored interactions](#). Other restaurants will lean into what makes them different and stand out from a sea of players that are likely using more digital tools in the restaurant: "This actually is handmade; here's the story behind the ingredients, which are traceable," or "We've curated this based on your health goals and the brands that you love. We know all of that about you, so we've created this perfect recipe for you."

**John Moran:** A lot of where the restaurant industry has taken us is standardization. But, increasingly, you can enable people to tailor exactly what they want. With a gen AI feature, it might suggest things you like. We always find consumers like to have curation or suggestions, such as "you might like this," as opposed to a literal menu of "here's every possible option and permutation. Please review and pick something."

**Alex Rodriguez:** We're quickly reaching a point where there may be [agentic-to-agentic interaction](#). I could have my own agentic AI solution that represents me and interacts directly with a restaurant or a group of restaurants to curate my experience. It could book the restaurant, the table I like, and do it all independently. It knows what I want, what I've done in the past, and it can take my input for this particular occasion and can act on my behalf.

**Katharine Mattox:** There are also going to be parts of the restaurant ecosystem that are relatively data-poor. Right now, one of the biggest challenges is that many chains still have customers who pay cash, so they are not identifiable. That will start to change. For restaurants, how do you create the right pulls to get customers to share more information, such as through a QR code that lets them opt in? How do you increase [adoption of a loyalty program](#)? As restaurants shift to these digital channels, more data will be collected over time.

## Food-prep robots and 3D-printed burgers

**Luis Salcedo:** This is not a linear progression; we are in an exponential curve. In the future, everything will be done digitally. On the execution side, [you'll have robotization](#), which will manufacture the product. Once you have the convergence of those two things—digitalization and robotization—it's one plus one equals three. You will see huge productivity gains.

**Xin Huang:** At chain restaurants, you might walk in and find robots right now. They are starting to have robots cook—they premix everything and then start cooking. They’re still working on the quality [of the output]. The taste [of the meals they make] isn’t the same as what a real cook can do yet. But for certain restaurants, people really enjoy the technology experience. It can be a value proposition, and people could go there to enjoy the fact that a robot is cooking for them.

Some chain hot pot restaurants in China have moved to driverless vehicles or no-human kitchen or preparation work. They are pushing a lot of the costs into the supply chain and trying to maximize space at the front end so there are more seats and tables for consumers.

**John Moran:** Technology can improve food quality, freshness, and safety. If you think about what’s happening with the [digitization of the supply chain](#)—understanding where your food comes from, how fresh it is, making sure it’s not contaminated, and it fits the right allergy restrictions and dietary requirements—you can have much better traceability. A lot of people and restaurants don’t know where the food in front of you came from. I think you can better control that, experiment more, and get fresher, safer, healthier food more quickly, so people can know what they are putting in their bodies.

**Katharine Mattox:** We have some restaurants that use 3D printing more often for common garnishes and personalized elements. What could make 3D printing really powerful is if you say, “I’m going to input ten things, and this is my perfect burger, and I want this exact custom blend and sauce.”

**Alex Rodriguez:** Players that have [well-organized data and well-functioning systems](#) are going to be able to move ahead much quicker.

## Restaurant work reimagined

**Katharine Mattox:** You will still have humans, but they will be supervising and monitoring all the signals you have if you have a [fully automated back of house](#).

The burning platform for many restaurants is going to be around data and labor. Restaurants can’t continue to take prices at the same levels, so they’re going to have to start innovating and pulling from other areas, and labor is the next big bucket.

**John Moran:** Restaurants are still a very dirty business. If you’ve ever worked somewhere that has a deep fryer and you’re trying to transport hot oil back and forth, people slip and fall, it’s dangerous and hot, and, frankly, a little gross. How can you automate these things to make them more efficient and safer?

**Alex Rodriguez:** Think about repetitive work that needs to happen that has no customer interaction whatsoever—chopping, preparing, and cooking ingredients, for example. If you can get those things off employees’ plates, you can refocus them on what they do best: connecting

emotionally, providing hospitality, and spending time with the consumer.

Restaurants, like many other companies, are going to have to recruit based on that emotional connection with the consumer. Increasingly, companies are having to [evolve their talent acquisition](#) plan to find people who are good at what artificial intelligence is not. Some players out there are starting to get ahead of that now.

**Katharine Mattox:** It could be that restaurants adopt better demand forecasting tools, enabling them to adopt a more flexible labor model. In some markets where demand is high, you handle delivery yourself and don't pay aggregator commissions. In other markets, you know you need to turn that on because it doesn't make sense for you to have a driver who is part of your labor model.

**Luis Salcedo:** In 15 years, for the most senior roles and managerial positions, the way to develop people will be through shadowing. It will require shadowing someone who is really playing the role; I may get some specific task and overview in a supervised way, but training will be different from how it happens today.

## No dining room, no problem?

**John Moran:** I'm a big believer that what we're seeing right now is what we call the "unbundling" of restaurants. We think about restaurants as a collection of activities that traditionally used to happen in the same place, but that's all come apart. You can order ahead, look at menus, get food delivered to you, consume it somewhere else, and pay through an app or another channel, which could be a different experience entirely. Those things don't have to coincide. There are a lot of interesting service models around that.

**Xin Huang:** The hardest part to get right is the [delivery and being cost-effective](#). I was in Shenzhen, on the 40th floor of a building. I opened the curtain and saw a couple of drones flying by, each carrying a cup of coffee. After you go for a run in a remote area, if you want coffee or tea, you can order it as takeout, and a drone will deliver it within 30 minutes.

I see restaurants trying that, and there's excitement around it. There are still cost components to overcome, and it may not be major yet, but I think people will start trying that.

**John Moran:** You can have a model where you order digitally on your phone, for example, but you still have someone bring you the food. That way, it feels more elevated, like a full-service experience, but it isn't a full experience. You don't need a full waitstaff.

**Xin Huang:** Companies are starting to look into whether they need a storefront. Within a city, there may be a couple of client-facing restaurants to establish that offline experience. But to improve its online service, the restaurant might create a "dark kitchen" with no front of house.

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How you're using digital information can actually help you make better decisions about where to open storefronts. For example, when some tea and coffee companies in China open new stores, they don't just look at historical demographic data. They first look at how many people are placing online orders in an area, then know the population is there, and then open a shop. First, they establish online, and once enough people order takeout in that area, they will start to open the shops there. It's a different way to open restaurants compared with traditional decision-making.

**Katharine Mattox:** You're going to see more insurgent small-brand concepts that pop up. Maybe some of them are even supported in the same kitchens as big, branded players. This will be a way to capture demand in the moment for some viral concepts and innovations.

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This article was edited by Alexandra Mondalek, an editor in the New York office.

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