



YUM! BRANDS | COLLIDER LAB

2026 FOOD TRENDS REPORT

WHAT'S NEXT IN DINING



FOOD DOESN'T JUST REFLECT CULTURE - IT DRIVES IT.

As the world's largest restaurant company, at Yum!, we have a front-row seat to what – and how – people eat, order, share and crave. Our partners at Collider Lab translate that data into insight – revealing not just what's trending, but why. This report distills those signals into three key cultural and consumer shifts that will shape how and what we'll eat in 2026. From the rise of emotional economics to the new rituals of control, these are the forces redefining value, pleasure and connection through food.

This report was created in collaboration with our internal strategy agency Collider Lab.

METHODOLOGY

At Collider Lab, we design proprietary research tools and frameworks to help brands decode cultural shifts and uncover emerging consumer trends.

Our insights come from a mix of custom studies, social listening, expert collaboration and cultural analysis to uncover how people eat, drink and connect across different moments. We pair this data with ongoing trend tracking and real-world testing to see what truly resonates.

By combining what people say with what they do, we help brands spot the next big shift and design ideas that meet the moment.

December 2025





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The TLDR

The BIG Picture

Everything, everywhere, all at once — the world feels chaotic, time is racing and control is fleeting.

Consumers can't control the world, but they can control their experience of it, especially through small, sensory, everyday acts – like eating.

In this landscape, we see **The Me-Me-Me Economy**, **Choice Therapy** and **Vibe-Mathing** emerge – three expressions of a deeper desire for agency.

From hyper-personalized meals to hands-on flavor rituals to emotion-driven value choices, consumers are reclaiming control over how and what they eat. They're approaching food joyfully, flavorfully — and, most importantly, on their own terms.

Customization, comfort and cool have become the new soft power moves of modern dining.



The **ME-ME-ME** Economy

Yum!



THE ME-ME-ME ECONOMY

Today's diners are rewriting the rules of eating around independence, comfort and personalization.

Once social foods like pizza and wings are now being reimagined for one. From personal-size pizzas to customizable snack boxes, consumers are embracing meals that reflect their individual tastes — not the group's.

The result? “The Me-Me-Me Economy” in full-swing.

LITTLE LUXURIES FOR SELF-CARE

Our data shows us that solo dining is not about **deal-seeking** – it's about **self-care**. Over half of solo occasions are **premium moments**, falling in the \$10 – \$30+ range and over-index on treats like snacks and beverages.¹

Plus, in an industry built on value, **nearly 70% of consumers report *not* taking advantage of a deal offer** during solo dining moments.

68%

of solo diners **do not** take advantage of a deal offer during solo dining moments.¹

"People like personal pizza because it's a classic reimagined for a single individual – people want things that are smaller and more personalized to them."²

Pizza Hut Customer



IT'S ABOUT ME, EVEN WHEN IT'S 'WE'

Across solo *and* small group occasions, consumers are over-indexing on customization and crave-led choices – showing the need for autonomy persists regardless of whom you’re dining with.^{1, 2}

PIZZA GETS PERSONAL

Among modern pizza product concepts tested in 2025, personal-size pizza was the most successful among Gen Z & millennials.²



Solo orders have grown
52%
From 31% in 2021 to 47% in 2025¹

Made for My Crave
24%
of solo diners were after “something specific I was craving.”¹

Solo orders now make up almost half of eating moments (47%), driven less by the isolation of the early 2020s and more by intentionality – diners want to treat themselves.¹



But the instinct to personalize doesn’t stop at eating alone – 44% of “something I could customize” occasions were solo, while 31% were duos.¹

The takeaway? Personalization is a social norm, not just a solo behavior.

Taco Bell’s “Fan Style” menu lets fans build, name and share their custom orders with the world.

¹ Collider Lab CUO Tracking Study, 2025
² Collider Lab Predictive Market Study, 2025

02

CHOICE

Therapy

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CHOICE THERAPY

After years of living in crisis mode, comfort doesn't cut it anymore. People are craving agency as a coping mechanism for anxiety and being overwhelmed.

Choice Therapy is about reclaiming agency through small, sensory choices, reflecting a world in which control is the new comfort and the smallest decisions can make people feel a little more grounded.

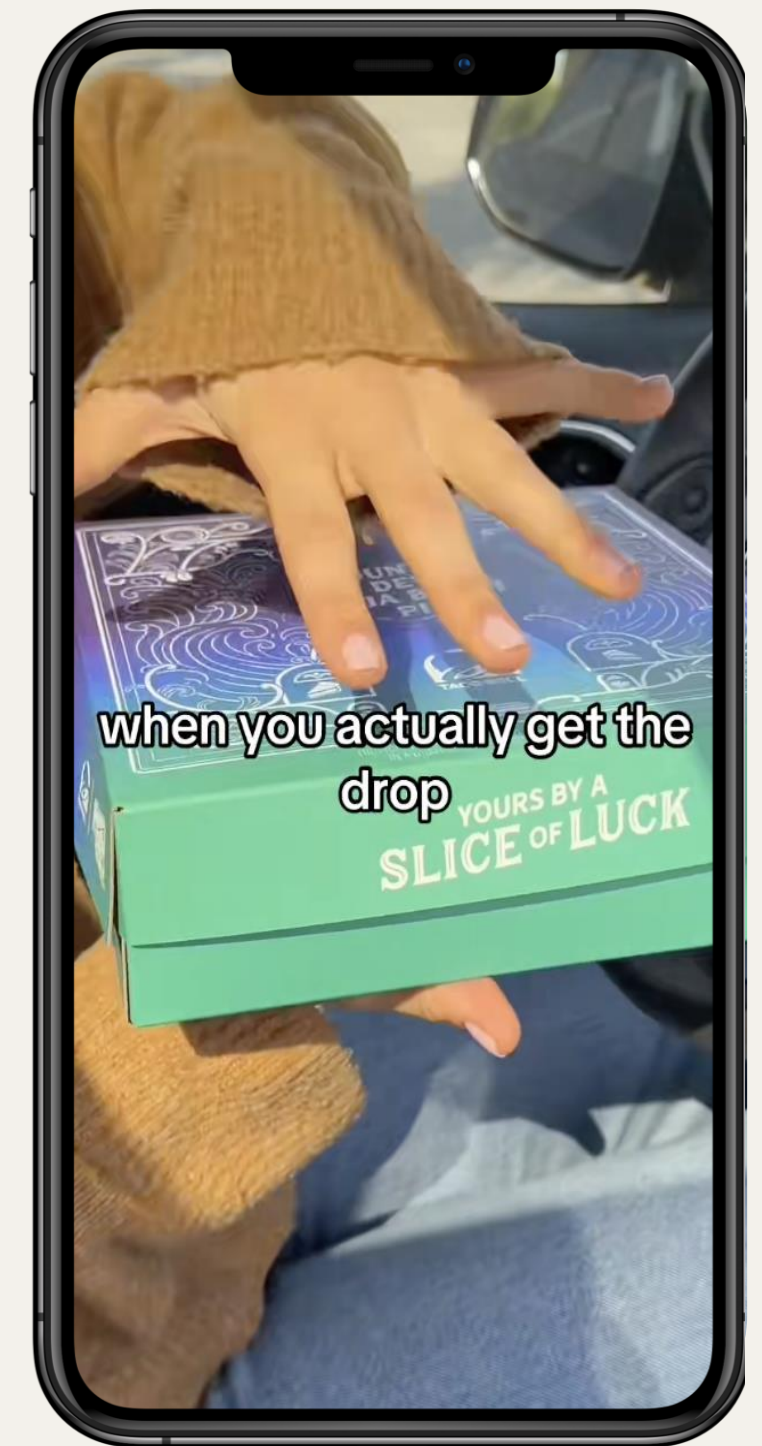


**We're also seeing food become
a form of self-expression and
cultural participation,
especially in solo moments.**

It's no surprise, we're seeing more and more consumers showing off viral food purchases or filming in-car mukbangs on TikTok. **"Something interesting I can talk about or post on social"** over-indexes during solo meals, signaling a desire for products that feel plugged into culture.

#myorder
#wieiad
(what I eat in a day)

That's why **packaging with bright colors and unique illustrations, limited collabs with brands and celebrities, and menu items tied to a cultural moment** (think: music festivals, sporting events or movie launches) consistently outperform other product concepts. These products transform an ordinary meal into an expression of taste and modernity.²



Taco Bell's Baja Blast Pie went viral on TikTok with customers showing off the limited time item.

#eatwithme

"[I like this product because] it's unique and different. **A combination of different sauces in a single box.** It makes it taste differently, and **you can always try another according to your mood or your menu.**"

KFC Customer

BUILD-YOUR-OWN KINDA POWER

**Boxes and curated meal bundles
have become symbols of control.**

They invoke structured abundance in an overwhelming world. They promise limits amid endless options. Variety, but not chaos. Choice, but not decision fatigue.

Across Global QSR testing, Build Your Own and Cravings Box concepts **consistently outperform purely convenience-led ideas** because they give consumers the power to design their perfect meal.¹

Consumers are also gravitating toward products with custom spice levels, flavor flights, interactive shaking or dusting components (where *they* control the seasoning), dippable desserts and customizable beverages.¹



72%

positive sentiment for "Build Your Own Taco" concepts.³

48%

of "something I could customize" occasions cost \$20+ indicating people are willing to spend a little more to get it their way.²

7%

Taco Bell saw 7% same-store sales growth in Q3 2025 thanks to increased traffic from products like the Luxe Box.⁴

¹ Global Innovation Database, 2025

² Collider Lab CUO Tracking Study, 2025

³ Collider Lab Youth Culture Study, 2025

⁴ Yum! Earnings Report, Q3 2025

TAKING CONTROL WITH SAUCES

The rise of sauce rituals, seasoning tweaks and flavor customization isn't just about taste. In a world that feels increasingly pre-determined, the ability to choose "extra spicy" or "sauce on the side" scratches a deeper itch.

In moments of stress, **saucers act as emotional pick-me-ups.** Consumers are more likely to use sauces to amp up their day, with sauces being **2.4x** more likely to bring excitement to an occasion compared to other food items.

4,000+

There are more than 4,000 ways to order from Saucy, Yum! Brands' new restaurant concept, giving customers a different flavor experience with every visit.

2.4x

Consumers say sauces are 2.4 times more likely to bring excitement to the everyday compared to other food items.¹

Dipping for Dinner
52%

of saucing occasions happen between 5-9pm.¹

71%

of the top-performing concepts in KFC's menu testing were sauce-specific, and **34%** said sauces made the brand feel modern and new.²

"Adding and shaking sauce is a fun element for younger customers and allows you to control the amount of flavor you want."

KFC Customer



03

VIBE -mathing

Yum!



VIBE-MATHING

Forget memorizing value deals or clipping coupons, today's consumers calculate worth in a completely different way. **It's not logic — it's vibe-mathing.**

Call it irrational, but we're in an era of emotional economics. Amid rising costs and endless choices, younger customers are constantly performing tiny vibe checks, deciding not just what to buy, **but how it makes them feel.**

THE COST OF CRAVE

In a time when the cost of everything from eggs to streaming subscriptions has become dinner party conversation, price is a cultural pain point.

People are hyper-aware of what they're spending *and* what they're getting in return.

In this environment, the QSR value equation still begins with affordability – but it doesn't end there.

21%

Consumers continue to seek out low price points – from value menus to bundled meal deals, with 21% of consumers looking for something “cheap and affordable” on their last visit. ¹

62%

of consumers say a good value means “something cheap and affordable.” ²

“Lots of people are struggling for money at the moment. **People want to save money but don't want to give up little treats.**”

Taco Bell Customer

Drive-Thru Deal Hunters

47%

of value-seeking occasions are happening in the drive-thru ¹



To truly move the needle, consumers are looking for more than just a low price – **they’re seeking a dopamine hit that breaks them out of their routine.**

COOL

“Is very cool” is now the No. 1 attribute driving category momentum for QSR brands (followed by “has food I crave”).¹

Value today lives at the intersection of logic and emotion. Consumers will always care about cost, but they’re increasingly motivated by how a purchase makes them feel.

Products that deliver affordability **plus a sense of everyday luxury** – something premium, customizable or craveable – hit the sweet spot.²

68%

of QSR afternoon snacking occasions happen on a weekday.¹

1/4

of 18-29 year olds said their last visit to a QSR was a special occasion.¹

FEEL GOOD

Specialty beverage occasions over-index in indulging in feel good moments.²



¹ Collider Lab CUO Tracking Study, 2025
² Global Innovation Database, 2025

DOPAMINE DRINKS: EMOTIONAL ADD-ONS

We're seeing modern beverages emerge as the **ultimate vibe-math purchase** – a low-stakes indulgence with a high emotional return.

From **flavor mashups** to **customizable add-ins**, drinks have become a form of self-expression and small-scale luxury.

They don't just stand alone; **they elevate whatever they're paired with, turning an ordinary meal or snack into a treat-yourself moment.** In the new value equation, a fun beverage can spark joy, aesthetic satisfaction or a brief escape from the everyday.

600 million

Taco Bell has sold over 600 million beverages in 2025 so far – a **16%** increase from 2024.¹



62%

of all 2025 Taco Bell orders have included a beverage.¹

61%

of specialty beverage occasions include order customizations like toppings, flavor shots or dietary preferences.²

43%

of specialty beverage purchases are stand-alone (no food added).²

¹ Taco Bell Press Release, 2025

² Collider Lab Global Beverages CUO, 2024

Today's consumers are doing their own kind of math, **balancing cost against emotion, logic against joy.**

Moments that offer **emotional uplift** – a small reward, a mood boost or a dopamine hit – outperform routine “quick and easy meals.” Consumers are willing to trade up for **small joys** that enhance a meal moment, with sweets, snacks, sauces, frozen treats and specialty beverages all indexing high for perceived value.¹

1 Collider Lab Value Innovation Study, 2024



The brands that win will master the **Vibe Equation: delivering affordability that feels good and connects emotionally.**



THANK YOU.

