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# The James Beard Foundation serves up insights independent restaurants can depend on

The annual Independent Restaurant Industry Report, developed in collaboration with Deloitte, pulls clarity out of the unpredictability of the sector.

# INDEPENDENT RESTAURANTS KNOW ALL TOO WELL: YOU NEVER KNOW WHAT THE NEXT DAY, HOUR, OR MINUTE WILL BRING.

## THE SITUATION

Independent chefs and restaurant owners balance on a knife-edge. If a fridge breaks, a supplier raises prices, an illness knocks out staff for a week, there are no safety nets and few second chances. Day by day, hour by hour, owners and operators confront unexpected challenges and rely on intuition and grit to invent solutions as they go.

That position also means that independent restaurants can be on the cutting edge of the industry. They feel shifts sooner and more sharply, and they can experiment with menu concepts, pricing strategies, and staffing methods more nimbly than larger restaurant chains or groups. And when it all comes together? Magic. The kind of experience that seems only ever to exist in those moments of connection around a table, amid crumpled napkins, scattered plates, drained glasses, and full stomachs.

For nearly 40 years, the [James Beard Foundation](#) has been a leading champion for independent chefs and restaurants creating those moments. The Foundation leads education, programming, and the annual James Beard Awards® to amplify the work of chefs and owners to support a thriving, resilient independent restaurant community.

Several years ago, the James Beard Foundation reflected on the state of the industry and recognized a significant data gap: Independent operators' unique voices weren't represented in research that covered the wider food and beverage industry. As a result, information about the unique needs of independent restaurants was anecdotal rather than systematic, limiting owners' and operators' abilities to anticipate challenges and the Foundation's ability to measure the effectiveness of its own programming. The James Beard Foundation resolved to uncover the forces shaping the industry and to provide solutions and support to a community that's often shouldering it all alone.



# THE SOLVE

The James Beard Foundation started by crafting and deploying a survey to uncover insights from independent chefs within its network. However, as the organization compiled the findings into its first annual Independent Restaurant Industry Report, it realized this quantitative data didn't fully capture the complexity of the sector. To achieve its ambitious goals, the Foundation wanted to augment its own resources and research experience to develop the next version of the report.

The Foundation turned to Deloitte as a trusted collaborator with extensive research capabilities, food and restaurant industry experience, and national reach to enhance the report. Together, the team drew on the Foundation's culinary community relationships and industry events and Deloitte's research recruiting specialists and nationwide networks to gather participants across diverse geographies, business models, and ownership types.

Deloitte and James Beard Foundation teams traveled to cities around the country, bringing chefs together for roundtable discussions to explore commonalities and contrasts in experiences that provided nuance to the research. Informed by this qualitative exploration, the team developed a more

extensive, targeted survey to put numbers to the anecdotal accounts. Further qualitative interviews then deepened the themes and examples from chefs. As the team expanded the number of cities and roundtables, Deloitte introduced Generative AI tools to help synthesize the data and increase the breadth of research without sacrificing depth or speed.

James Beard Foundation wanted to push the Independent Restaurant Industry Report even further to support chefs with solutions to the challenges they had identified. Drawing on the deep sector experience of its [IndustryAdvantage™](#) approach and the chef interviews, Deloitte helped develop recommendations in forward-looking "What Restaurants Can Do" sections to help chefs and owners navigate the landscape revealed by the report.

A RESEARCH APPROACH THAT BALANCES  
**ANALYTICAL RIGOR, EMPATHY, AND**  
**KNOWLEDGE OF WHAT'S NEXT**

# THE IMPACT

In the two years since Deloitte has been assisting the James Beard Foundation with ongoing insights as a service, each annual Independent Restaurant Industry Report has expanded upon the last. By integrating human narratives with data-driven findings, the publication delivers a more detailed and authentic view of the industry and centers the voices of independent operators to inform action and inspire change.

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**The James Beard Foundation** can now directly track the effectiveness of its programming by comparing industry data year over year. The organization has shifted to a more data-driven approach for stakeholder engagement, serving as not just a passionate advocate, but a trusted advisor to the industry.

**Independent chefs and restaurant owners can** access a single, credible source to understand industry trends rather than relying on hunches or anecdotes. They can reference clear benchmarks to inform decisions around pricing, workforce well-being, menu innovation, and operational resilience. Through the conversations fostered by the report, the independent restaurant ecosystem is becoming more connected, informed, and empowered as a community.

**The food and restaurant industry as a whole, along with media, lawmakers, and diners, can** understand the voices of independent operators who in many ways serve as the test kitchen for new trends and approaches. Actionable insights about independent restaurants also inform decision-making across the greater industry ecosystem—for suppliers of ingredients, credit cards offering dining rewards programs, local boards of tourism and trade, everyone who plays a part in bringing people together around the table.



MEANINGFUL INSIGHTS AND COMMUNITY RELATIONSHIPS  
CAN INFLUENCE THE WAY INDEPENDENT RESTAURANTS  
SERVE FOOD FOR GOOD.

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**Explore Deloitte's latest thinking on the restaurant and food industry**

# LET'S CONNECT.

Do these challenges sound familiar?



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