

The State of Dining and What's To Come in 2023

U.S. Edition



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Right this way

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1. Dining Is Back

2022 was the year that restaurants became, once again, part of everyday life.

On the eve of the initial pandemic-prompted shutdown, now nearly three years ago in March 2020, New York Times restaurant critic Pete Wells penned an [indelible line](#) about how the public spent their last days out on the town, surrounded by food, drink, and people – *I always knew that when the end came, New Yorkers would watch it from a bar*, he lamented.

Well, turns out that when the world reopened, people went right back

to bars — and restaurants: Summer 2022¹ was the busiest season in Resy's history and restaurant events were in high demand. Resy brought iconic Copenhagen restaurant noma to NYC for five nights in May and **20,000** people set a Notify, hoping to snag a table. The Resy Drive-Thru rolled into Brooklyn in September and more than **5,000** people set a Notify. Resy's dinner with Massimo Bottura, during Miami Art Week, sold out in **60 seconds**.

As diners poured back into restaurants, they also returned to support their favorites. In October, Resy had already seated more diners in 2022 than all of 2021. In a Morning Consult poll, diners said that their favorite place for a special occasion meal is a tried-and-true favorite, not a new restaurant or a novel experience.² Restaurants rely on repeat business, so 2023 is a great time to become a regular again.

2. Normal Ain't Normal (For Restaurants)

Diners may be back ... but restaurants are very much still navigating a new normal.

The restaurant industry changed dramatically over the last three years and restaurants have endured a seemingly endless series of storms. At the onset of the pandemic, restaurant staff became frontline workers, and since then, the challenges have only multiplied: food costs have skyrocketed, debts have accumulated, staffing is still limited, and on and on. Are locusts next?

But if we learned anything over the last few years, it's that the restaurant industry is resilient. To cope with these challenges, restaurant operations have changed, and will continue to.

Most restaurants are open less often, with many cutting hours and days of operation — Resy data showed a 10% drop off in restaurant were open on Mondays during a 10-week period in 2022 compared to the same time period in 2019.³ As many restaurants transitioned away from takeout pivots, they instituted shorter menus — easier to execute with smaller staffs and easier to control food costs. Higher prices on many menus — to offset the rising cost of business, to pay staff more, and to make the business sustainable — are also part of the new normal.



3. Where There's a Will, There's a Way

Diners are adjusting habits to get that elusive table.

The combination of people dining out in force again, and restaurants racing to keep up with demand, can make it feel harder to get a reservation especially at top Resy spots — but where there's a will (to dine) there's a way. When looking at Resy users that had accounts in 2019 and are still active on Resy today, twice as many set a Notify in September 2022 compared to September 2019. And those that did set Notifies set more.

People are eating at different hours, too. In 2022, Resy saw a shift in the distribution of reservation times, with 5 p.m. reservations taking about 2% more of the total, compared to the 2019-2021 average.⁵ That may not sound like a lot, but it amounts to hundreds of thousands of reservations.

And sometimes the best meal out is a solo meal out. Whether it's because people feel the itch to get out of their house or escape the office, restaurants are always a haven for connection, community, and a cold one.

In a Morning Consult poll, 41% of U.S. General Population respondents said they would be willing to pay higher prices at restaurants if they knew the staff was treated well. This was even higher for GenZ respondents, with 59% saying they would pay a premium.⁴

59%

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4. Tasting, 1, 2, 3

A new, thrilling era of tasting menus is upon us.

Tasting menus are increasingly looking beyond their traditional French or Japanese roots, as the format has become a prime opportunity for a new, more regionally diverse cohort of chefs to tell a personal story.

Resy's James Beard-nominated columnist [Mahira Rivers](#) wrote about this topic for Resy, touching on the thrilling West African-influenced **Ikoyi** in London and Chicago's modern Filipino standout, **Kasama. Lasita** (Los Angeles), **Hi Felicia** (Oakland), and **Laser Wolf** (Philadelphia) are further examples of chefs pushing form to new places, more akin to bustling, family-style supper clubs than the jewel boxes of the past. It doesn't hurt that, when done well, a tasting menu is more than just an artistic statement; with set food costs and a higher price point, it can also be a smart business model.

“Those experiences feel like opportunities to challenge assumptions — including my own — of how certain cuisines should present themselves. It feels right to see every cuisine translated into something as special and story-driven as a tasting menu.”

— Resy columnist **Mahira Rivers** on the new era of tasting menus.

5. Familiar Faces

Blockbuster sequels are coming to your town.

Look at pop culture right now and you'll see an era where successful intellectual property is replicated through sequels (and prequels): Star Wars, Top Gun, Game of Thrones. The same is true in the restaurant world.

In 2023, spinoffs will dominate big markets. **Pastis** is heading to Miami and DC. Major Food Group continues its tear in Miami (**Contessa**, **Dirty French**), Dallas (**Carbone**, **Sadelle's**), New York (**Torrise**), Boston (**Parm**), and beyond. Mashama Bailey opened **The Grey Market** and **Diner Bar** in Austin, while Michael Solomonov has brought **K'Far** to New York City (after opening **Laser Wolf Brooklyn**), Daniel Boulud is going to Los Angeles, Thomas Keller is importing **Bouchon** to Miami... we could go on.

Have you noticed Miami is in a lot of these? Resy's restaurant footprint in Miami quadrupled from September 2017 to 2022, and continues to grow with newly-opened hot spots like **Walrus Rodeo** and **Contessa** now bookable on Resy. South Florida continues to be white hot for high-profile sequels, and it's not just out of towners making moves, as many of the city's essential homegrown restaurants are expanding their footprints in the new year as well.



Still More Sequels on our Radar

- » Now open in Austin: **Este**, the seafood-centric sister to Suerte
- » Now open in DC: **Bar Spero**, from Johnny Spero of Michelin-starred Reverie
- » Coming soon in the Bay Area: **Moro**, a dose of Moroccan cuisine pioneer Mourad Lahlou (Aziza, Mourad) in Wine Country
- » In New York, look no further than Rockefeller Center: **Lodi** by Ignacio Mattos (Estela, Altro Paradiso), **Le Rock** by Riad Nasr and Lee Hanson (Frenchette), **Naro** by Junghyun “JP” and Ellia Park (Atomix, Atoboy), **Jupiter** by Jess Shadbolt, Clare de Boer, and Annie Shi (King), **Fieldtrip** by JJ Johnson

6. Al Fresco, All Day, All Year

Outdoor dining is still here — and probably not going away.

What will this winter bring? Will diners still bundle up to dine in heated yurts? Will restaurants still staff their outdoor structures? We're betting that many — but certainly not all — al fresco tables will forge through the long winter to

spring, with operators hoping that the combination of extra tables and diner demand will boost their bottom lines through the winter months, which traditionally slow down after the holiday rush.

Fun Fact

In New York City alone, Resy found 113 different names that restaurants gave their outdoor tables. The most common labels were Outdoor, Patio and Sidewalk but there were also Heated Chalets, Secret Gardens, and of course, our sweet, sweet beloved Yurts.⁶



7. Roll Models

Omakase is still going strong. But temaki is the new darling.

America can't get enough beautiful sushi. Omakase restaurants continue to proliferate, cementing themselves as staples of American fine dining thanks to the public's continued appetite and a pandemic-friendly business model (small space, limited staff, higher price point).

But the omakase trend has sprouted a new branch: restaurants dedicated to both traditional and modern temaki, a.k.a. handrolls.

Established hits like New York's **Nami Nori** and Los Angeles's **KazuNori** have sparked a new wave of these specialists across the country (while expanding themselves): Places like **Sukeban** in New Orleans, **Handies Douzo** in Houston, **Yama** in Nashville, and **Handroll Project** and **Yonsei** in the Bay Area. Like omakase restaurants, temaki restaurants represent efficient business models, and more importantly for the public, they are delicious, affordable, novel, fun,

experiential, and well, Instagram-friendly. Plus, versions of handrolls are popping up in unexpected places, oftentimes flecked with caviar, as at **Nashville's June**, New York's **Sixty Three Clinton** and San Francisco's **Ernest**. Look for temaki to continue its charge onto more non-sushi menus.



8. Prime Destinations

Whether old school or modern, steakhouses remain synonymous with special occasions.

With their sultry lighting and decadent offerings, steakhouses still hold a singular place for diners who are looking for a fancy night out. In fact, more diners say they seek out a steakhouse for a special night out than a tasting menu restaurant or a hot new restaurant.

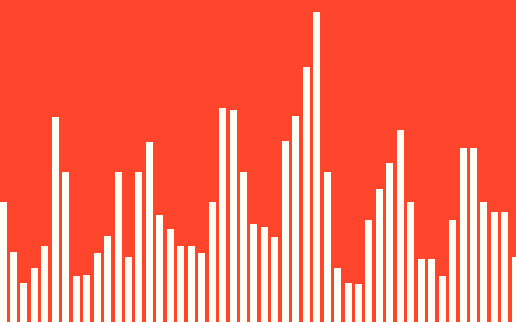
Just as exciting is the way that the steakhouse genre has received a makeover. **COTE**, which now has locations in New York and Miami, has given it a Korean interpretation. In Los Angeles, **Dear John's** and **American Beauty** are redefining classic chops and

salads through a modern California lens. This generational dichotomy is especially evident in the New York steakhouse, where old school and new school seem to be thriving alongside each other as some of the most popular restaurants overall. Consider **4 Charles Prime Rib**, the exclusive supper club that remains one of perennial, most sought-after restaurants on Resy (set those Notifies!). On the other side of the steakhouse spectrum, you've got the granddaddy of them all, **Peter Luger's**, which continues to attract regulars and first-timers.

31%

In a Morning Consult poll, **31%** of U.S. General Population adults said a steakhouse is the ideal place for a special occasion dinner, compared to **15%** who would opt for an interesting new restaurant or **9%** for a fine dining experience. This was even more dramatic among GenXers, **43%** of which said a steakhouse is the ideal place for a special occasion dinner.⁷

Can you spot the day this Resy restaurant got TikTok famous?



9. Tik... Tik... Boom

Resy can confirm that, yes, TikTok does have an impact.

They are called influencers for a reason. When it comes to where diners are finding new restaurants, in a Morning Consult poll, 43% of GenZ respondents cited TikTok as their main online discovery platform.⁸ (NB: Word of mouth remains the top overall.)

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10. This Must Be The Place

Restaurants will reclaim their role as the essential place for special occasion celebrations, and for everyday celebrations.

Here's the thing: The pandemic reminded so many people how important restaurants are to communities. Ultimately, dining is about being together with people, supporting them and being supported by them.

In a Morning Consult poll, diners were split on what a special night out means, suggesting there is no single clear definition. For some, it was dinner and show. Others didn't need entertainment — just dessert would suffice. However, nearly everyone agreed that dining out is the important part, with 93% of

respondents saying they believe dinner is a necessary component of a special night out.⁹

When we want to celebrate — whether with a loved one, a group of co-workers, or even alone at a counter — we go to restaurants.



¹ Summer 2022 is defined as June through September 2022

^{2,4,7&9} This Morning Consult poll was conducted between September 21st - September 28th, 2022 among a sample of 1001 General Population Adults and 166 American Express Card Members. American Express Card Members are defined as using an American Express card at least once every 6 months for personal reasons. The interviews were conducted online, and the General Population data was weighted to approximate a target sample of Adults based on gender, educational attainment, age, race, and region. General Population results from the survey have a margin of error of plus or minus 3 percentage points. American Express Card Member results from the survey have a margin of error of plus or minus 8 percentage points.

³ Between September 22, 2022 and October 31, 2022 (10 weeks), an average of 53% of active Resy restaurants logged completed reservations on Mondays compared to 63% in the same 10-week time period in 2019.

⁵ In 2022 (as of December 1), Resy saw a shift in the distribution of reservation times, with 5 p.m. reservations taking about 2% more of the total, compared to the 2019-2021 average.

⁶ The number of restaurants located in Miami using Resy OS in September 2022 was four times the number of restaurants in Miami using Resy OS in September 2017