

# ACSI® Restaurant and Food Delivery Study 2025

June 17, 2025



American Customer Satisfaction Index



## Amid a Challenging Economy, Quick-Service Restaurants Hold Steady for Satisfaction but Full-Service Chains Stumble

The past year has been difficult for restaurants overall as U.S. chain sales grew by just 3.1% in 2024 according to Technomic's Top 500 report. This is less than the 4.1% menu-price inflation rate, which means that customers spent less when adjusted for inflation. Consumers frustrated by high prices shifted from big-name fast food brands to smaller up-and-coming competitors, convenience stores, or just stayed home. Compared to restaurant menu inflation, food-at-home prices were up just 1.2%.

Many of the largest restaurant chains struggled with slowing growth or declining U.S. sales in 2024. Quick-service restaurant ACSI leader Chick-fil-A reported 5.4% sales growth overall, but that was the slowest growth in at least 20 years as the average unit revenue declined slightly. McDonald's U.S. comparable sales grew at just 0.2% as consumer pricing frustration affected sales. Starbucks sales fell 0.5% over service concerns and calls for boycotts. Several other major quick-service restaurants reported declines including KFC (5.2%) and Panera (5.1%).

### FULL-SERVICE RESTAURANTS

82 ▼ -2%

### QUICK-SERVICE RESTAURANTS

79 ◀▶ 0%

### FOOD DELIVERY

74 ▲ +1%

The economic uncertainties for restaurants are continuing into 2025 as the economy has cooled off with gross domestic product (GDP) down 0.3% in the first quarter and consumer spending growing at the slowest rate since mid-2023. Major industry players like McDonald's and Chipotle reported Q1 2025 earnings results that were the worst since the pandemic.

In this challenging environment, quick-service restaurants overall hold customer satisfaction steady at 79. Full-service restaurants decline 2% to an ACSI score of 82, although this remains one of the highest-scoring industries in the Index. The food delivery industry increases satisfaction by 1% to 74 as all three reported companies hold firm or improve.

ACSI results are based on surveys conducted over a 12-month period ending in March 2025. ACSI scores are reported on a 0 to 100 scale.

## Key Takeaways

### FULL-SERVICE RESTAURANTS

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- Customer satisfaction with full-service restaurants declines 2% to 82, a score that remains one of the highest in the Index overall.
- Despite the industry's strong satisfaction, customers perceive less value and are frustrated with their carry-out and delivery experiences.
- Steak preferences remain as last year's coleaders take the top slots: Texas Roadhouse at 84 (down 1%) and LongHorn Steakhouse at 83 (down 2%).
- While Chili's exhibits strong sales growth, the brand's customer satisfaction slumps 3% to 78 as strategic changes to spark growth may have created short-term challenges with new customers coming on board.
- Among full-service chains, the only satisfaction gainers are Applebee's (up 1% to 80), Red Robin (up 3% to 78), and Red Lobster (up 1% to 79) whose new ownership may be driving success.

### QUICK-SERVICE RESTAURANTS

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- Quick-service restaurants keep satisfaction steady at 79 amid declines in foot traffic as customers who remain report consistent experiences compared to a year ago. Chick-fil-A continues to lead the field at 83 (unchanged).
- It is a challenging year for burger chains from an ACSI standpoint, with only Jack in the Box (up 3% to 74) improving satisfaction. At the top, Culver's continues to lead at 78 (down 3%), followed by Burger King at 77 (unchanged).
- With increasing competition from convenience stores for pizza sales, ACSI leadership for pizza chains remains tight with coleaders Papa Johns and Pizza Hut at 79, Domino's at 78, and an improved Little Caesars at 77 whose value message may be resonating with cost-conscious consumers.
- Panda Express jumps 4% to 80 as the chain's training focus may be driving better service perceptions and helping keep quality consistent as the business grows.

### FOOD DELIVERY

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- Customer satisfaction with food delivery rises 1% to 74 as all three reported companies maintain or improve their ACSI scores, including industry leader Uber Eats (up 1% to 75).
- DoorDash (unchanged) and Grubhub (up 3%) are tied for satisfaction at 73. Grubhub's app enhancements appear to be a key factor in its ACSI jump.
- Interestingly, while the food delivery industry improves satisfaction overall, full-service restaurants show considerable erosion in their delivery experience as customers hold the restaurants responsible for problems.

## Study Findings

Customer satisfaction is a driving force that impacts the financial outlook of individual firms and the health of the U.S. economy at large. New results from the American Customer Satisfaction Index (ACSI®) provide customer satisfaction benchmarks for three industries: full-service restaurants, quick-service restaurants, and food delivery. In addition, the ACSI captures consumer opinions about critical elements of the customer experience, tailored specifically to each industry.

## FULL-SERVICE RESTAURANTS

Full-service restaurants stumble this year, sliding 2% to an ACSI score of 82 that nevertheless keeps the industry near the top of the Index overall. Among sit-down venues, Americans still prefer their steaks. Last year's coleaders Texas Roadhouse and LongHorn Steakhouse finish first and second this year at 84 and 83, respectively. Their ACSI success helps explain their business success. While traffic for full-service restaurants declined 0.2% in 2024, Texas Roadhouse and LongHorn Steakhouse increased visits by 7.2% and 4.3%, respectively. Still, both brands score 1%-2% lower than a year ago. While both have tried to shield their customers from inflation effects, customers may be somewhat more critical of the quality they receive as prices increase.

Applebee's closes the gap with the leaders, inching up 1% to 80. While Applebee's faces the same traffic challenges as much of the industry, their "Everyday" value platform may be resonating with customers. As ACSI data confirm, Red Robin's emphasis on menu and food quality is helping drive the chain's 3% gain to 78. Red Robin reported a 3.1% increase in comparable restaurant revenue in the first quarter of 2025.

Chili's has overcome the headwinds facing the industry in a big way. Average unit volumes increased 16% in 2024, with 31% same-store sales growth reported in the fourth quarter. With all that success, Chili's ACSI score is down 3% to 78. Periods of change—even good change—can affect existing customers negatively. Busier restaurants can mean slower service and longer wait times for tables. Yet, underlying data suggests a different problem. Chili's lower satisfaction was largely driven by its carry-out performance during the period when the chain started targeting McDonald's with products and messaging in spring 2024. At that time, changing customer demographics may have brought different customer expectations.

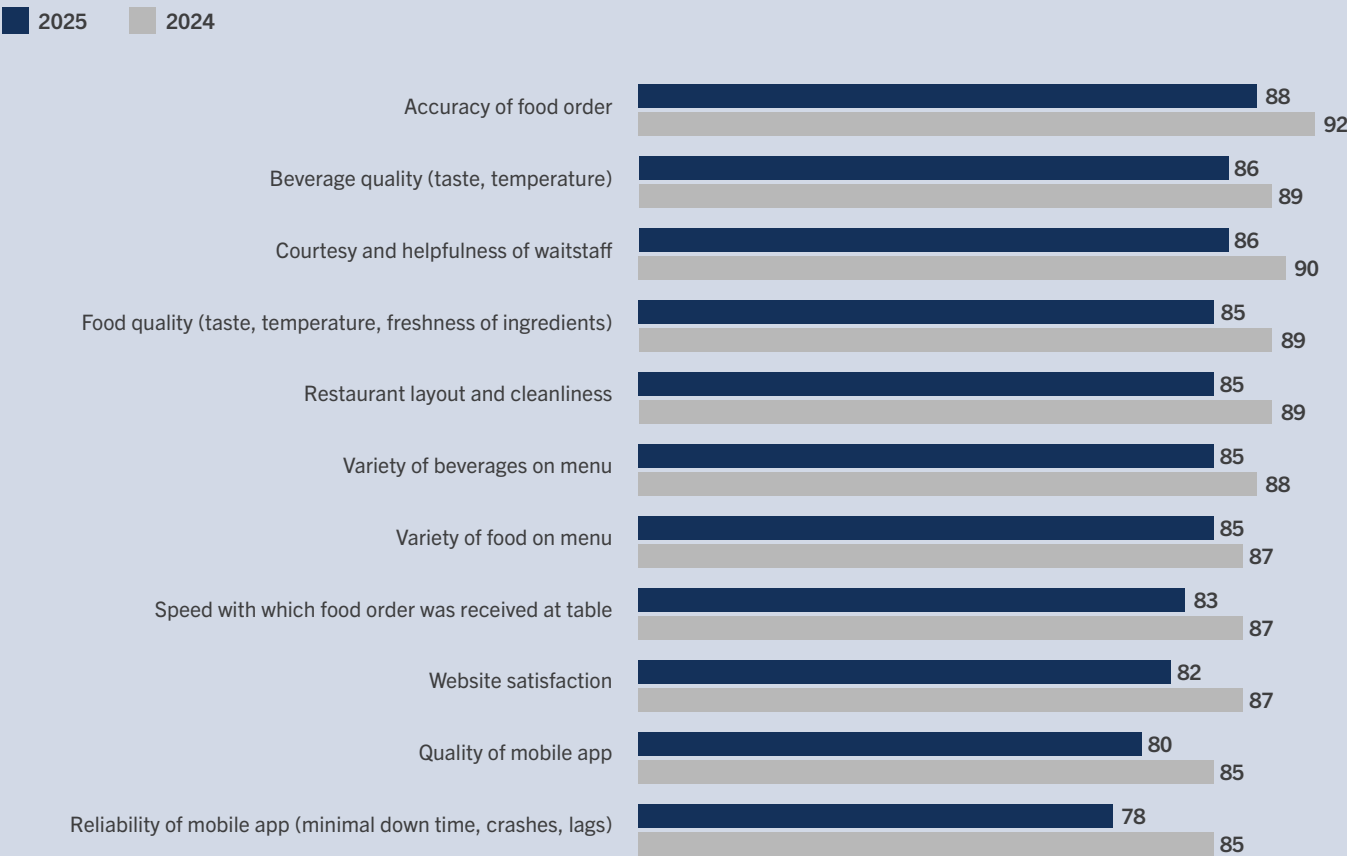
AMERICAN CUSTOMER SATISFACTION INDEX  
**FULL-SERVICE RESTAURANTS**  
0-100 Scale

BRAND	2024 ACSI	2025 ACSI	% CHANGE
<b>Full-Service Restaurants</b>	<b>84</b>	<b>82</b>	<b>-2%</b>
Texas Roadhouse	85	84	-1%
LongHorn Steakhouse (Darden)	85	83	-2%
All Others	84	82	-2%
Olive Garden (Darden)	83	81	-2%
Applebee's (Dine Brands)	79	80	1%
Cracker Barrel	82	80	-2%
Outback Steakhouse	80	79	-1%
Red Lobster	78	79	1%
Chili's	80	78	-3%
IHOP (Dine Brands)	78	78	0%
Red Robin	76	78	3%
The Cheesecake Factory	78	77	-1%
Buffalo Wild Wings (Inspire Brands)	79	76	-4%
Denny's	76	75	-1%

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As prices increase, customers can become more critical of the quality of products and services. In this case, scores are lower across the board for the full-service restaurant customer experience. Still, the food and service metrics are quite high. Accuracy of food order is the top-rated aspect at 88, while beverage quality and waitstaff performance both score 86. The lowest ratings continue to be related to the digital experience, which also shows the most deterioration. Specifically, website satisfaction drops 6% to 82, mobile app quality erodes 6% to 80, and mobile app reliability tumbles 8% to 78.

AMERICAN CUSTOMER SATISFACTION INDEX  
**FULL-SERVICE RESTAURANTS**  
Customer Experience Benchmarks Year-Over-Year Industry Trends  
0-100 Scale



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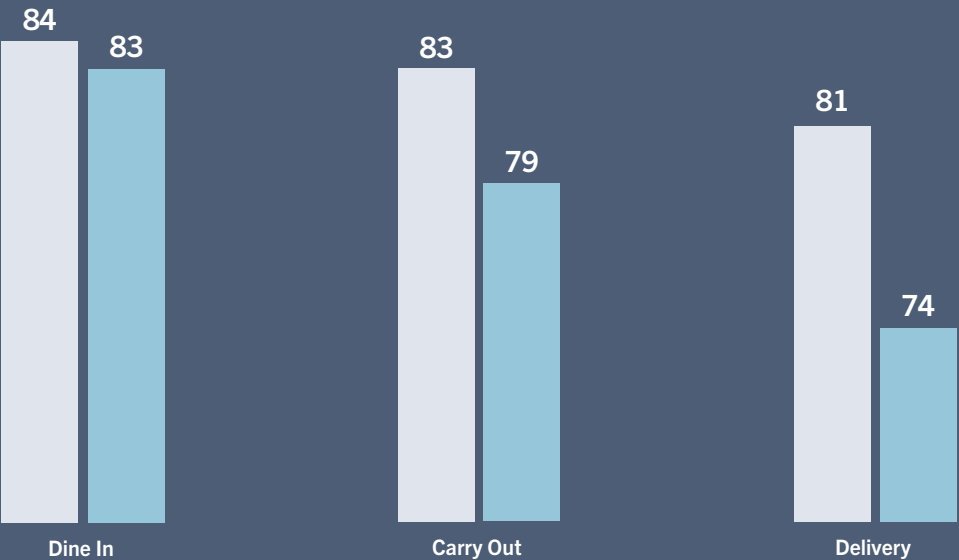
## Customer Satisfaction and the Purchase Experience

Customer satisfaction with full-service restaurants varies significantly depending on the type of purchase experience (dine in, carry out, or delivery). Customers who dine in are by far the most satisfied. Compared to a year ago, the dine-in experience slips slightly but remains strong (down 1% to 83). In contrast, customers are clearly frustrated this year when it comes to carry-out or delivery experiences. Satisfaction tumbles 5% to 79 for carry-out service and plummets 9% to 74 for delivery. The significant erosion in website satisfaction, mobile app quality, and mobile app reliability coincides with customers' increasing dissatisfaction with restaurant carry-out and delivery services.

AMERICAN CUSTOMER SATISFACTION INDEX  
**FULL-SERVICE RESTAURANTS**  
ACSI by Purchase Experience

0-100 Scale

2024 2025



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## QUICK-SERVICE RESTAURANTS

Overall, customer satisfaction with quick-service restaurants is stable at an ACSI score of 79 with some movement among the reported chains. Industry leader Chick-fil-A (unchanged at 83) reported 5.4% U.S. sales growth overall in 2024, but that was the slowest growth in at least 20 years as the average unit revenue declined slightly. Brands like Wingstop and Raising Cane's are increasing in popularity, putting pressure not only on Chick-fil-A but also KFC, which saw U.S. sales down 5.2% in 2024. KFC, whose satisfaction tumbles 5% to 77, faces competitors who are adapting to shifting preferences more quickly. According to ACSI data, customer assessments of both menu variety and food quality for KFC have declined substantially. The third reported chicken chain Popeyes (up 4% to 75) looks to build on gains by rolling out its "Easy to Run" initiative to standardize processes, improve order accuracy, and reduce wait times.

### AMERICAN CUSTOMER SATISFACTION INDEX

#### QUICK-SERVICE RESTAURANTS

0-100 Scale

BRAND	2024 ACSI	2025 ACSI	% CHANGE
<b>Quick-Service Restaurants</b>	<b>79</b>	<b>79</b>	<b>0%</b>
Chick-fil-A	83	83	0%
All Others	83	82	-1%
Panda Express	77	80	4%
Starbucks	80	80	0%
Arby's (Inspire Brands)	80	79	-1%
Panera Bread	80	79	-1%
Papa Johns	79	79	0%
Pizza Hut (Yum! Brands)	79	79	0%
Culver's	80	78	-3%
Domino's	79	78	-1%
Dunkin' (Inspire Brands)	77	78	1%
Burger King (RBI)	77	77	0%
KFC (Yum! Brands)	81	77	-5%
Little Caesars	75	77	3%
Chipotle	77	76	-1%
Subway	74	76	3%
Five Guys	78	75	-4%
Popeyes (RBI)	72	75	4%
Wendy's	76	75	-1%
Jack in the Box	72	74	3%
Sonic (Inspire Brands)	76	73	-4%
Taco Bell (Yum! Brands)	73	73	0%
Dairy Queen	74	72	-3%
McDonald's	71	70	-1%

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Other noteworthy score changes this year include Panda Express (up 4% to 80) jumping into a second-place tie with Starbucks (unchanged). The chain’s documented focus on training shows in its strong performance on service quality and value. This will be important for maintaining quality as Panda Express continues to open restaurants. Little Caesars (up 3% to 77) improves ratings for food and service quality since the introduction of Crazy Puffs and continues its strong performance for value. Five Guys (down 4% to 75) falters as value perceptions drop after a post went viral about pricing last year.

McDonald’s (down 1% to 70) continues to struggle in the rankings, remaining in last place for satisfaction. The chain’s new efforts to speed up R&D to drive faster technology and menu changes may provide benefits going forward.

### Customer Satisfaction by Restaurant Type

Most of the reported quick-service restaurant brands fall into one of four categories (burgers, chicken, pizza, and coffee/bakery-cafe) that represent the most appropriate competitive sets for many of them.

Culver’s (78) is the top performer in the largest category, burger chains. The quality of both its food and service resonates with customers. As new CEO Julie Fussner looks to continue entering new markets, maintaining those strengths will be important. A planned new loyalty program is expected to benefit customers in existing locations as well. The second-place chain Burger King (77) is now leaning into a family-first marketing strategy to drive retention.

Chick-fil-A (83), the top industry scorer, continues to lead the chicken category by a wide margin. This will be a challenging category as the competitive set continues to grow thanks to Americans’ increasing preference for quick-service chicken, which enjoyed an annualized growth rate of 7.2% from 2019-2023.

Papa Johns and Pizza Hut (both 79) share the pizza chain lead, just ahead of Domino’s (78). Both Papa Johns and Domino’s are leveraging technology to improve operations. Also close behind, Little Caesars (77) is the only pizza chain to show an ACSI increase in 2025 as the satisfaction gap narrows in this category. Menu changes at Little Caesars, combined with their value proposition, help drive the increase. Competition will remain intense. Pizza demand stays strong but growth has slowed and the competitive set is evolving as convenience stores look to win more of this business.

The tight competition between Starbucks (80) and Panera Bread (79) reflects close performance in food and beverage quality, as well as the in-store and service experiences. The former will focus heavily on its beverages for growth while the latter looks to the value proposition and new product development. The value proposition at Dunkin’ (78) keeps the brand close as well.

### AMERICAN CUSTOMER SATISFACTION INDEX QUICK-SERVICE RESTAURANTS ACSI by Restaurant Type

0-100 Scale

BRAND	ACSI 2025
BURGER CHAINS	
Culver's	78
Burger King (RBI)	77
Five Guys	75
Wendy's	75
Jack in the Box	74
Sonic (Inspire Brands)	73
McDonald's	70
CHICKEN CHAINS	
Chick-fil-A	83
KFC (Yum! Brands)	77
Popeyes (RBI)	75
PIZZA CHAINS	
Papa Johns	79
Pizza Hut (Yum! Brands)	79
Domino's	78
Little Caesars	77
COFFEE/BAKERY-CAFE CHAINS	
Starbucks	80
Panera Bread	79
Dunkin' (Inspire Brands)	78

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### Customer Satisfaction Leaders by Region

Given the regional nature of the business for some quick-service restaurant brands, the ACSI is reporting its first-ever geographic results by region. Chick-fil-A and Starbucks show broad appeal across regional markets. Chick-fil-A shows strength in much of the country with first-place finishes in the Midwest (tied with Culver's at 82), South (84), and West (82). Starbucks is a top-two performer in three of the four regions: first in the Northeast at 80, second in the South (tied with Pizza Hut at 82), and second in the West (81).

As previously mentioned, Culver's gives a strong performance in the Midwest (tied for first) and Pizza Hut gets a second-place berth in the South. Burger King and Domino's finish second in the Northeast at 78. Satisfaction levels are lower in the Northeast than in other parts of the country. The Northeast-leading score of 80 for Starbucks would not have been in the top two for any of the other three regions.

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QUICK-SERVICE RESTAURANTS

ACSI Leaders by Region

0-100 Scale

BRAND	REGIONAL ACSI 2025
NORTHEAST	
Starbucks	80
Burger King	78
Domino's	78
MIDWEST	
Chick-fil-A	82
Culver's	82
SOUTH	
Chick-fil-A	84
Pizza Hut	82
Starbucks	82
WEST	
Chick-fil-A	82
Starbucks	81

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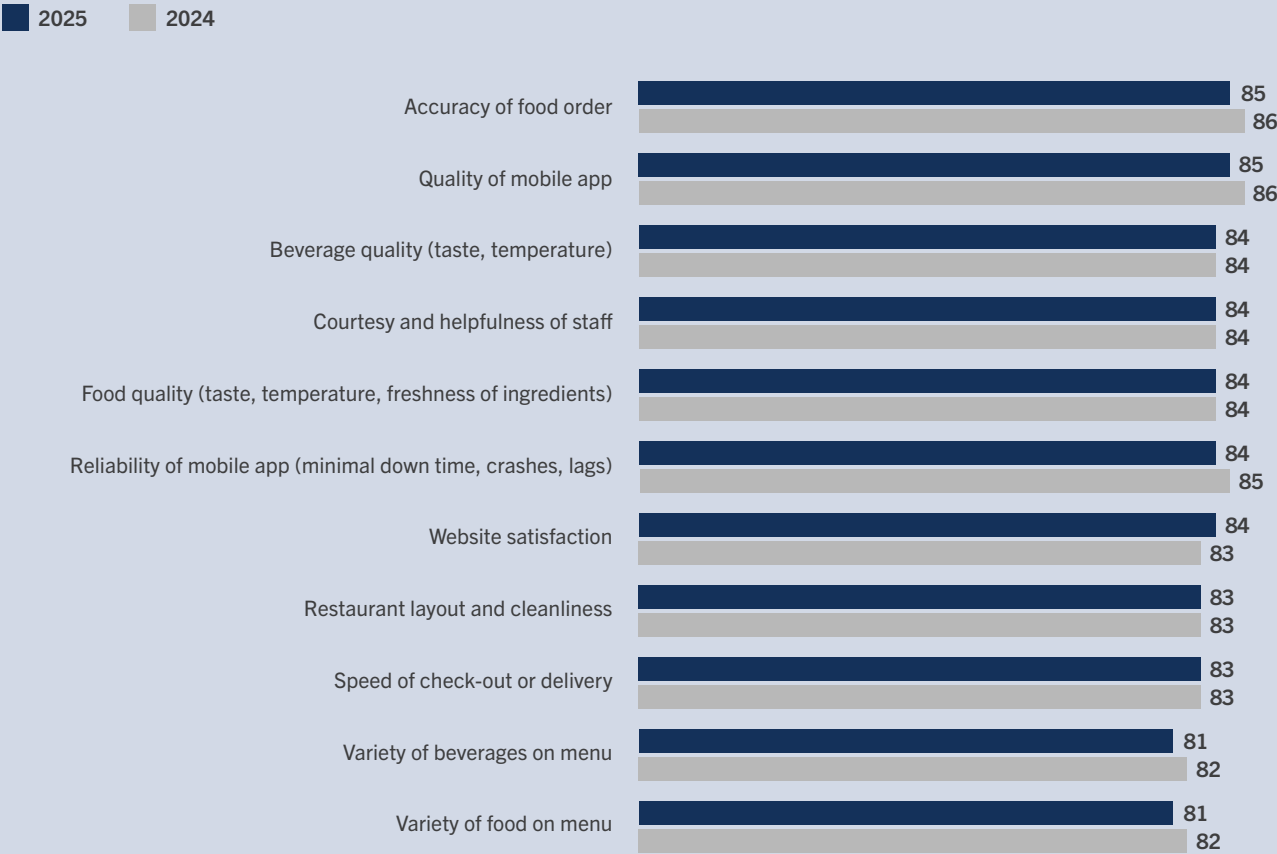
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As with customer satisfaction, the customer experience for quick-service restaurants is similar to a year ago. Across the entire customer experience, every aspect receives a score of 81 or higher. Accuracy of food order and quality of mobile app lead the way at 85, both down 1% year over year. Mobile app reliability is 1% lower at 84, matching beverage quality, staff courtesy and helpfulness, food quality, and website satisfaction (the only metric to increase in 2025).

Maintaining or improving this performance will be critical for holding onto business as inflation has forced customers to look for fast food alternatives from convenience stores and supermarkets.

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**QUICK-SERVICE RESTAURANTS**  
Customer Experience Benchmarks Year-Over-Year Industry Trends  
0-100 Scale



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## FOOD DELIVERY

Customer satisfaction with the food delivery industry is critical as the market continues to expand and create opportunities at a projected growth rate of 6% this year. Despite a 1% ACSI gain to 74, the food delivery industry still lags well behind full-service restaurants (82) and quick-service restaurants (79). Customer satisfaction with the group of smaller food delivery services falls 3% to 77. This score still outpaces the larger brands: Uber Eats (up 1% to 75), DoorDash (unchanged at 73), and Grubhub (up 3% to 73). Grubhub made a number of improvements to its app, including enhanced homepage personalization, a new wallet feature that makes it easier for customers to view their credits, and a priority delivery option. Customers are responding positively as ACSI data show that mobile app satisfaction for Grubhub has improved significantly this year.

Satisfaction continues to vary based on the customer’s reason for using the service. Those looking for convenience (for example, work schedule, spending time with family, or group events) are more satisfied than those ordering due to need (for example, health, not having a vehicle, lack of time, or not wanting to drive). Customers using the service for family time or group events generally perceive higher value. Gamers report the lowest level of satisfaction and greater frustration with the ordering process.

### AMERICAN CUSTOMER SATISFACTION INDEX FOOD DELIVERY

0-100 Scale

COMPANY	2024 ACSI	2025 ACSI	% CHANGE
<b>Food Delivery</b>	<b>73</b>	<b>74</b>	<b>1%</b>
All Others	79	77	-3%
Uber Eats	74	75	1%
DoorDash	73	73	0%
Grubhub	71	73	3%

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While prices remain the lowest-scoring part of the food delivery experience, scores have improved somewhat with fairness of food prices and fairness of taxes and service fees both up 3% to 71. Mobile app and website satisfaction both improve 1% to 83 and 82, respectively. The mobile app increase for the industry is largely due to Grubhub’s app improvements.

The challenge for the industry is that the end results lag the ease of ordering (80). The lower scores for food temperature (up 1% to 74) and order accuracy and accuracy of quoted delivery times (both unchanged 75) are consistent with customers’ frustration with full-service restaurant delivery.

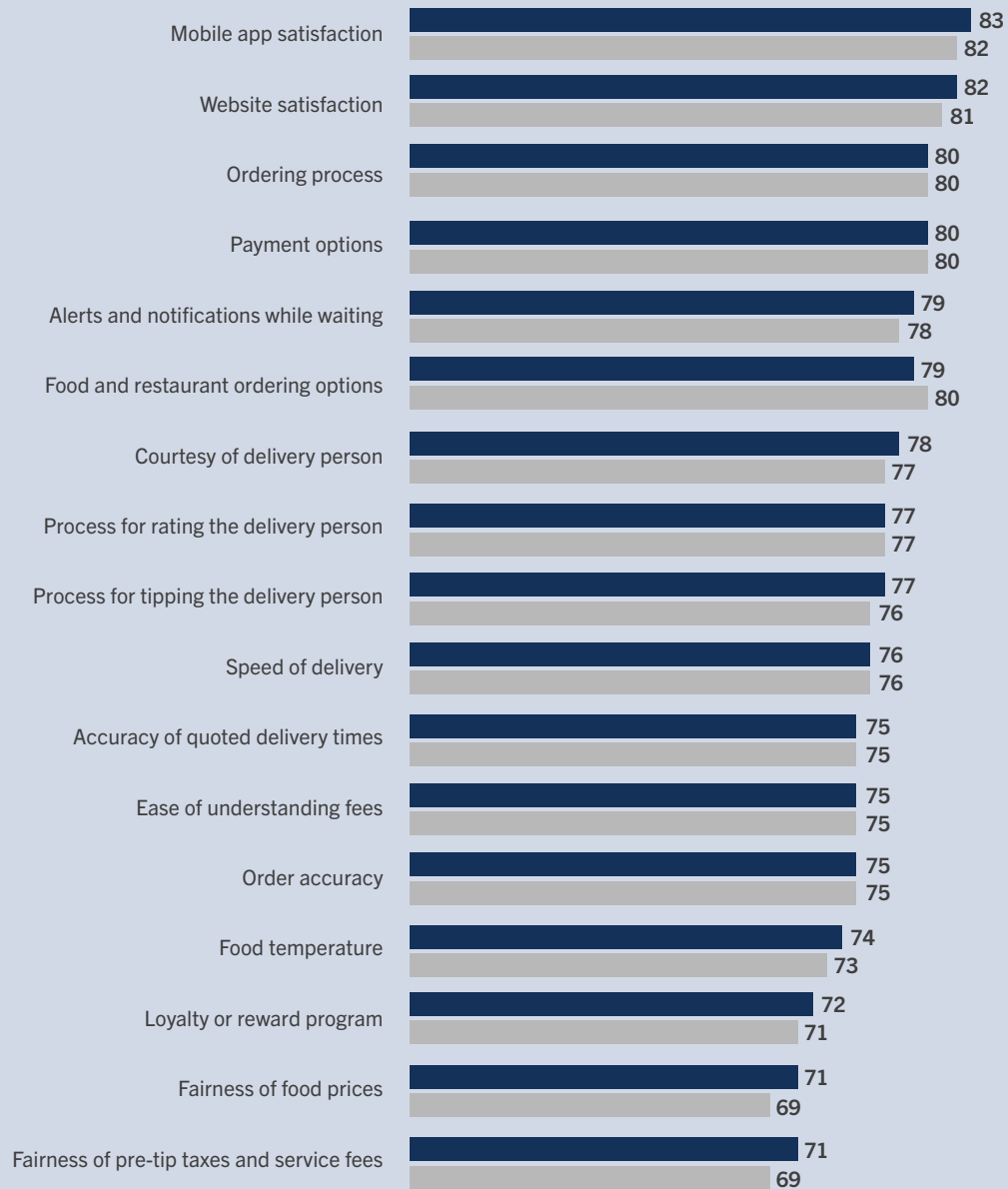
# AMERICAN CUSTOMER SATISFACTION INDEX

## FOOD DELIVERY

### Customer Experience Benchmarks Year-Over-Year Industry Trends

0-100 Scale

2025 2024



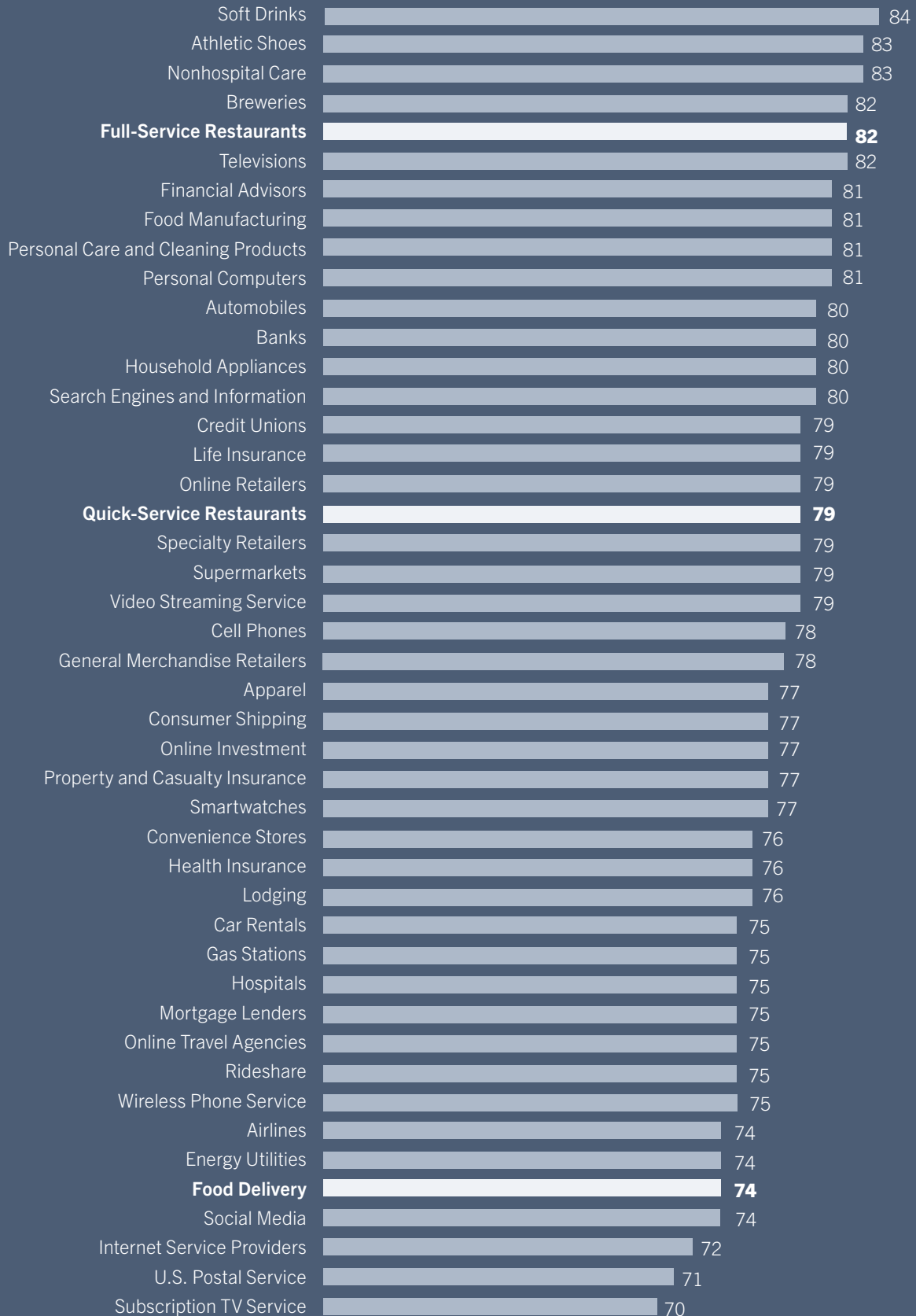
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## Customer Satisfaction Benchmarks by Industry

0-100 Scale



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## Methodology

The **ACSI Restaurant and Food Delivery Study 2025** is based on 16,381 completed surveys. Customers were chosen at random and contacted via email between April 2024 and March 2025. Customers are asked to evaluate their recent experiences with the largest companies in terms of market share, plus an aggregate category consisting of “all other”—and thus smaller—companies.

ACSI survey data are used as inputs to the Index’s cause-and-effect econometric model, which estimates customer satisfaction as the result of the survey-measured inputs of customer expectations, perceptions of quality, and perceptions of value. The ACSI model, in turn, links customer satisfaction with the survey-measured outcomes of customer complaints and customer loyalty. ACSI clients receive confidential industry-competitive and best-in-class data on all modeled variables and customer experience benchmarks.

## About ACSI

The American Customer Satisfaction Index (ACSI®) is a national economic indicator of customer evaluations of the quality of products and services available to household consumers in the United States. The ACSI uses data from roughly 200,000 responses annually as inputs to an econometric model for analyzing customer satisfaction with approximately 400 companies in about 40 industries and 10 economic sectors, including various services of federal and local government agencies. ACSI results are released throughout the year, with all measures reported on a scale of 0 to 100.

ACSI data have proven to be strongly related to several essential indicators of micro and macroeconomic performance. For example, firms with higher levels of customer satisfaction tend to have higher earnings and stock returns relative to competitors. Stock portfolios based on companies that show strong performance in ACSI deliver excess returns in up markets as well as down markets. At the macro level, customer satisfaction has been shown to be predictive of both consumer spending and GDP growth.

## Contact Information

For more information regarding this study, the restaurant and food delivery industries, and how the ACSI can help your company harness the power of customer satisfaction to improve your bottom line, visit [www.theacsi.org](http://www.theacsi.org) or contact:

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