



U.S.

2025 DINER TRENDS REPORT



INTRODUCTION



If recent headlines are to be believed, today's diners are dramatically cutting back on restaurant visits and they're blaming everything from higher menu prices to tipflation. **But in reality, the story is a little more complicated.**

As this year's survey of more than 1,500 American diners reveals, consumers *are* indeed paying more to visit and order from restaurants this year – 12.5% more to be exact – but the response to higher prices hasn't simply been a collective cutting back. In fact, the number of people who dine out or order takeout/delivery weekly or more often is actually *up* from the year prior.

Where shifts have occurred is primarily along income lines, with lower income households cutting back, while higher income households have made little to no

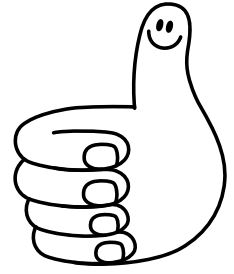
change in their dining habits. There have also been some slight shifts in overall diner habits, including an increased preference for casual/quick service restaurants and more frequent dining during lunch time – both of which tend to be cheaper options than getting dinner at a full service venue.

Despite these subtle shifts, on the whole, the average diner has largely continued to visit and order from restaurants much like they have in previous years (even if they don't love the higher prices). Even tipping habits remained largely unchanged, with more than half of

diners reporting no change in their tipping habits (though they don't love the pressure to tip more either).

All this suggests a relatively resilient average consumer who is increasingly willing to make room in their budget for dining and takeout, and a fairly optimistic outlook for the industry – maybe more so than anyone expected.





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Summary of Key Findings

44%

of diners are ordering takeout/delivery weekly or more often

Takeout/delivery sales unaffected by inflation ■ Even though they're paying more for it, diners aren't willing to give up takeout/delivery.

34%

of households bringing in less than \$50k say they're dining out *less* this year

Lower income diners are most impacted by menu price increases ■ Though dine in sales have remained steady overall, those with less disposable income have cut back to save money.

61%

of in-person diners say they have made *no change* in their tipping habits

Tipflation is real, but diners aren't biting ■ While diners express a frustration with the pressure to tip more, the majority have not actually changed their tipping habits.

21%

of diners typically dine out alone (up from 18% who said the same in 2023)

Solo dining on the rise ■ Grabbing a table for one is increasingly common, especially for younger diners.

62%

of diners say they're motivated to visit a restaurant with a limited time offering (LTO)

LTOs are a big draw for most diners ■ Many diners say they'll make a special trip to a restaurant just to try an LTO.



Summary of Key Findings

50%

of Gen Z and Millennial diners would be more likely to visit a restaurant if it had a MICHELIN Star

Younger diners are seeing stars • MICHELIN Stars (or even Bib Gourmond status) may not matter to every diner, but it definitely does to younger diners.

58%

of diners are comfortable with technology in restaurants

Restaurant tech doesn't scare most diners • Diners welcome tech that will make their experience faster and more convenient (though they have some mixed feelings about AI).



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Dining Frequency

While the number of consumers dining out is on the rise, there are signs inflation is taking a toll on some consumers.



Lower Income Diners Most Impacted by Inflation

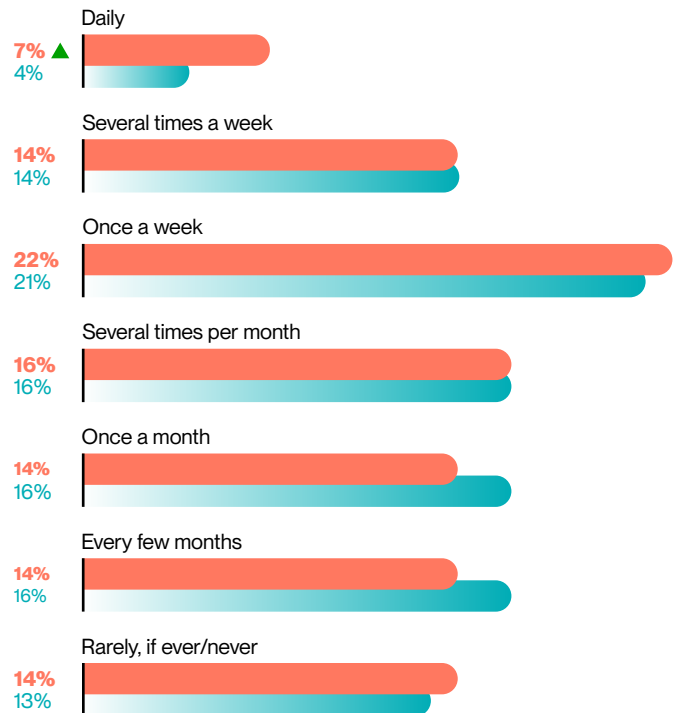
Despite a higher cost of living, it appears as though the average consumer hasn't changed their dining habits all that much. In fact, the number of consumers who dine out weekly or more often was actually up slightly from 39% to 42%.

Of course, this is not true across the board. Only 27% of those in households making less than \$50k annually reported dining out weekly or more often, while 64% of those households making \$200k or more said they dined out with the same frequency.

This is unsurprising, as consumers overwhelmingly cited money as the main reason they were dining out less this year. In fact, 45% of those who said they were dining out less this year said that it's because restaurant prices are too high and 32% said it's because cooking at home is less expensive.

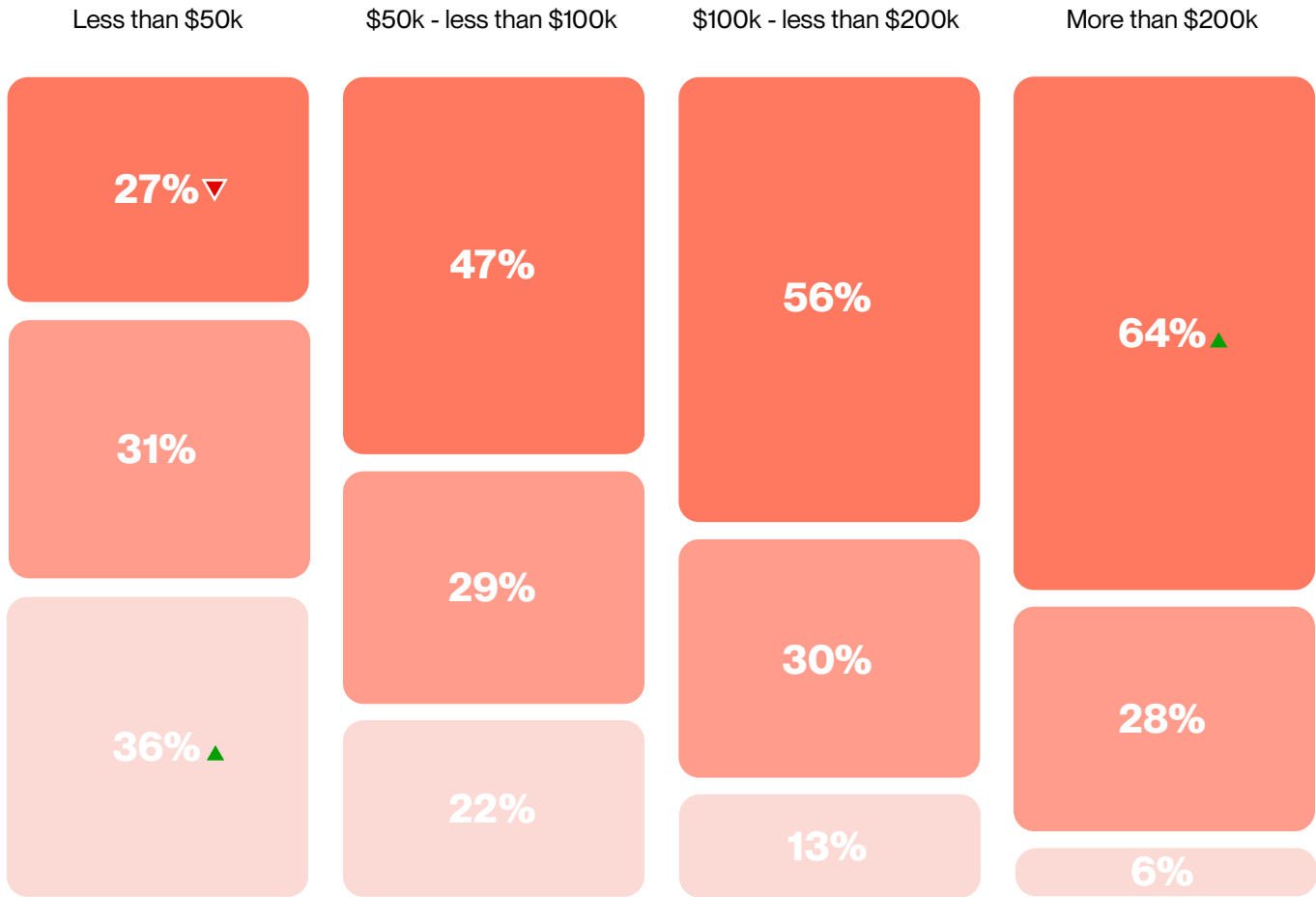
Despite these financial concerns, overall, dining frequency is likely to remain steady well into the rest of 2025, with 58% of consumers saying they don't plan to change their frequency of dining out in the next six months. In fact, 48% of Gen Z and 42% of Millennials say they actually plan to eat out *more often*.

Frequency of Going Out to Eat YoY 2023 2024



Frequency of Going Out to Eat by Household Income

● Once a week or more often
 ● Several times per month or more often
 ● Every few months or rarely, if ever










20%

of Gen Z are going out to eat daily






53%

of loyalty program members are going out to eat weekly or more often

Reasons Consumers are Going Out to Eat Less Than Last Year

-  Restaurant prices are too high **45%**
-  Cooking at home is less expensive **32%**
-  Friends/family are also dining out less **6%**
-  Other **6%**
-  Service fees are too high **4%**
-  Quality of the experience has diminished **4%**
-  Too much pressure to tip **3%**

Frequency of Going Out to Eat Compared to Last Year

 Significantly more 10%	Total Eating Out More: 25%
 Somewhat more 15%	
 No change 46%	
 Somewhat less 17%	Total Eating Out Less: 28%
 Significantly less 11%	

“I would say I’m dining out more. I live in New York City, so dining out is a way to socialize. I’m also going out to lunch more now because I have to go into the office more frequently. So I’m often going out just to get away from my desk – not just for lunch, but for breakfast too.”

(Female, 31, New York City, NY)



Expected Frequency of Going Out to Eat in the Next 6 Months



Demand for Takeout/ Delivery Outpaces Demand for Dine In

Like last year, it seems that the demand for takeout/delivery has slightly outpaced the demand for dining in. In fact, 28% of consumers say they are ordering takeout/delivery *more* frequently than last year. Moreover, 44% of consumers reported getting takeout and delivery weekly or more often, which is up from 43% who said the same last year. When asked why they opted

for takeout/delivery over eating out, the number one reason was wanting to enjoy a meal from the comfort of home, followed by ease and convenience – two trends that seem to be a holdover from the pandemic and appear unaffected by inflation.

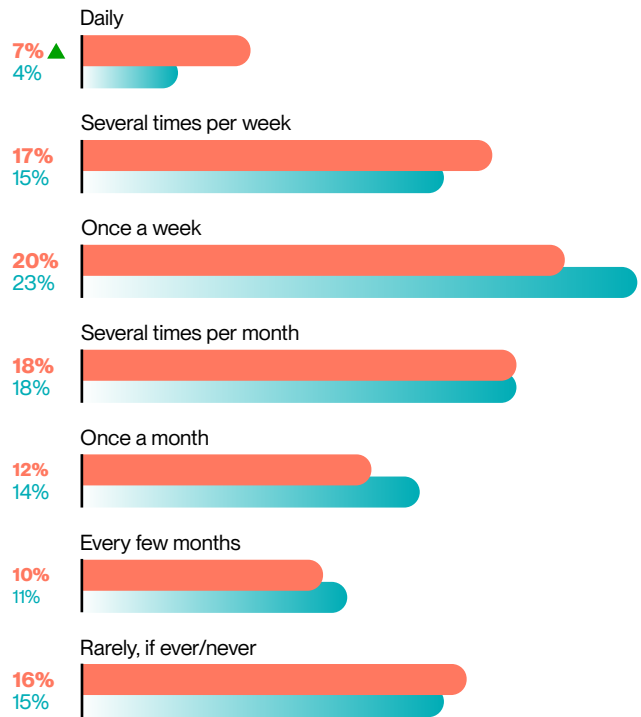
However, there are some subtle shifts in consumer habits that suggest not everyone is ordering more. Households making less than \$50k ordered takeout/delivery far less frequently than their wealthier peers. Price appears to be the biggest reason some cash-strapped consumers are

cutting back, with 36% saying cooking at home is less expensive and 31% saying restaurant prices are too high. 15% also pointed to high delivery fees.

So while some consumers have indeed changed their takeout/delivery habits, the average diner has not. This is a trend that is likely to persist well into 2025, as 59% of consumers surveyed say they don't plan to change their frequency of ordering takeout/delivery in the next six months. Gen Z is one exception, with 50% saying they actually plan to order takeout/delivery *more often*.



Frequency of Ordering Takeout/ Delivery YoY 2023 2024



64%

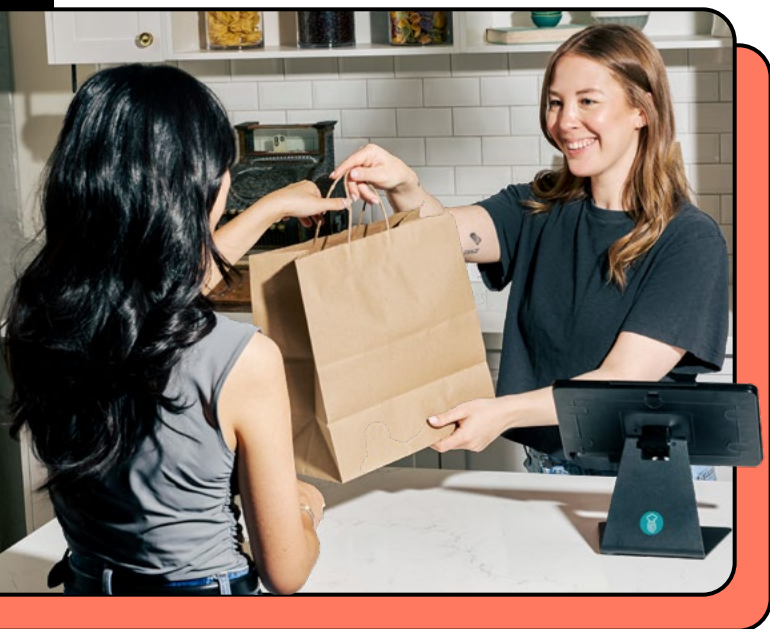
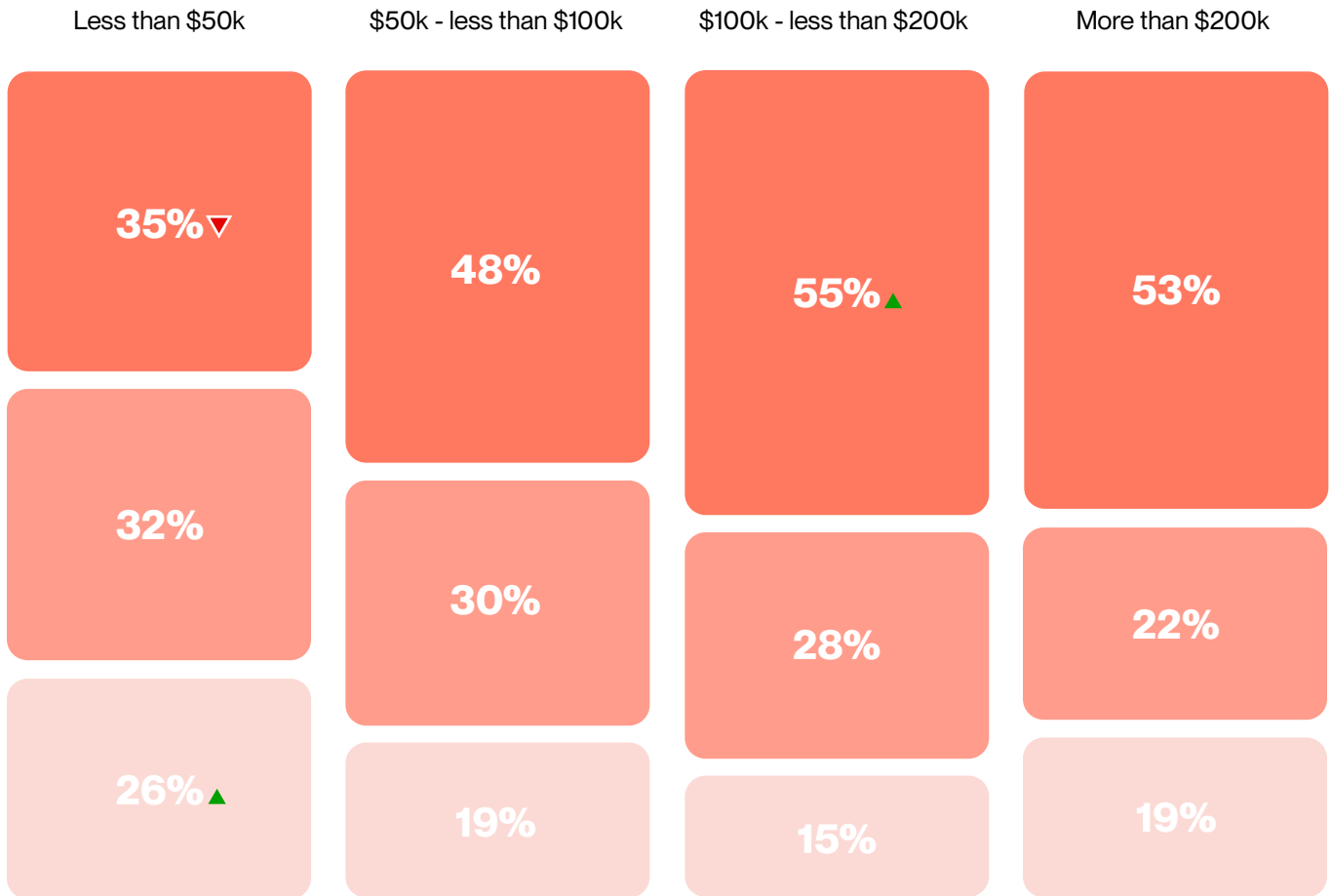
of Gen Z are getting takeout/delivery weekly or more often

71%

of Boomers order in instead of dining out because they want to enjoy their meal at home

**Frequency of Ordering Takeout/
Delivery by Household Income**

Once a week or more often Several times per month or more often Every few months or rarely, if ever



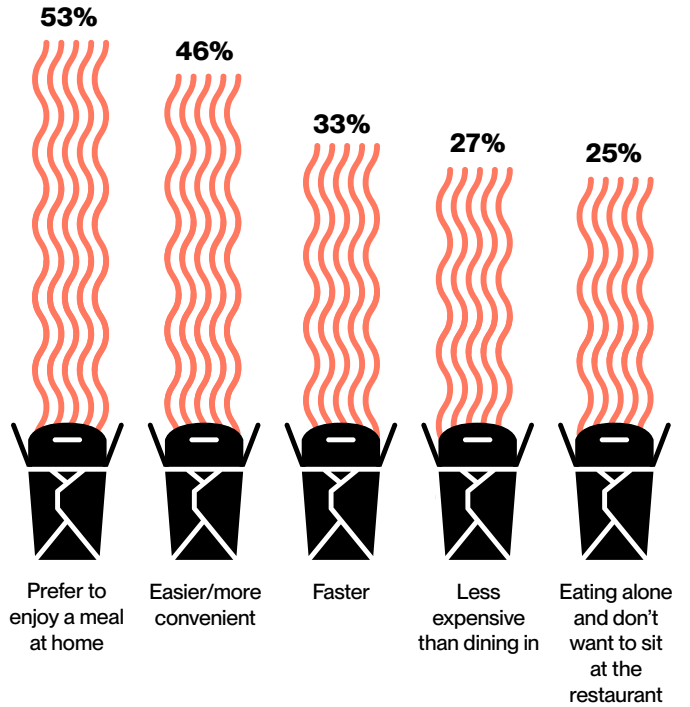
“I’m getting delivery less often compared to last year because there are so many fees. I’m more of an Uber Eats person and now there’s the restaurant fee, a delivery fee, and an expedited fee. So by the end of it, what normally would’ve been a \$14 salad, I’m now paying \$23 for. That’s why I’ve stopped doing it as much – it’s not worth the benefit of it being delivered.”

(Female, 31, New York City, NYC)

Reasons Consumers are Ordering Takeout/Delivery Less Than Last Year



Top Reasons Diners Choose Takeout/Delivery Over Dining In





“We’re definitely getting takeout and delivery more often. Our lives have gotten busier — we have a two-year-old now — and it seems a lot of the time we have dinner planned, but then it’s suddenly 8:00 p.m. and we still haven’t started cooking. So it becomes a lot more convenient to just grab some takeout. I think a lot of restaurants have done a good job with their apps so you can order exactly what you want, place your order, and then pick it up curbside. It’s become really efficient, so that makes the takeout process a lot easier for us.”

Male, 27, Dallas, TX



Our Takeaways

While the majority of diners have continued dining in and ordering takeout/delivery, minor changes can help to keep cash-conscious consumers coming in and time-starved consumers ordering more.

- ✔ Embrace the high-low menu to cater to those who might be looking for more budget-friendly options
- ✔ Offer takeout – not just delivery – to cater to those who want to eat at home, but skip all the fees
- ✔ Optimize delivery for speed, accuracy, and convenience to cater to increasingly busy diners, like young families



Spending Habits

Average check size is up, but that doesn't mean tips have risen with it.

\$54 is the average spend when dining in

Average Check Sizes are Up, But Tips are Not

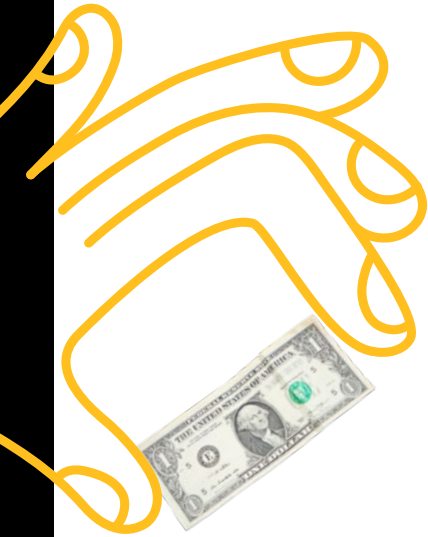
After years of menu price increases, it's no surprise that average check sizes are up again. This year, diners reported spending \$54 on average when eating out at a restaurant – up from \$48 in 2023. Millennials and Gen X were the biggest spenders, reportedly spending \$58 on average, while Gen Z reported spending the least (just \$46 on average).

But while diners are spending noticeably more, most of them say they haven't increased how much they tip. In fact, many diners expressed significant frustration about the pressure to tip more. Perhaps fueled by this frustration, more than half (61%) of diners say there has been *no change* in their tipping habits this year.

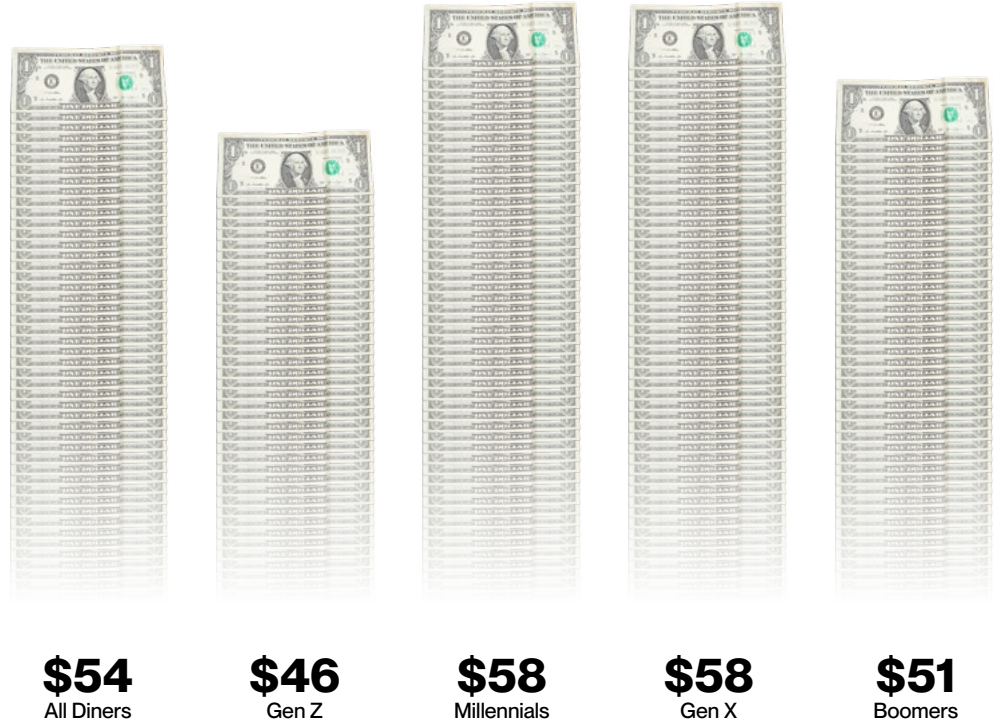
And while 30% said they *have* increased the amount they tip, the majority of this group is made up of Gen Z diners, who tend to tip less to begin with. In fact, Gen Z diners tip just 13% on average when dining in, which is lower than the 16% average dine in tip and far less than the 18% average tip Boomers are leaving.

In other words, tips haven't increased much more than the expected societal amount of 15%.





Average Spend When Going Out to Eat by Generation



Average Tip When Going Out to Eat by Generation



Average Tips for Dine In

7% No tip

8% Less than 5%

13% 5-9%

16% 10-14%

22% 15-19%

27% 20-24%

4% 25-29%

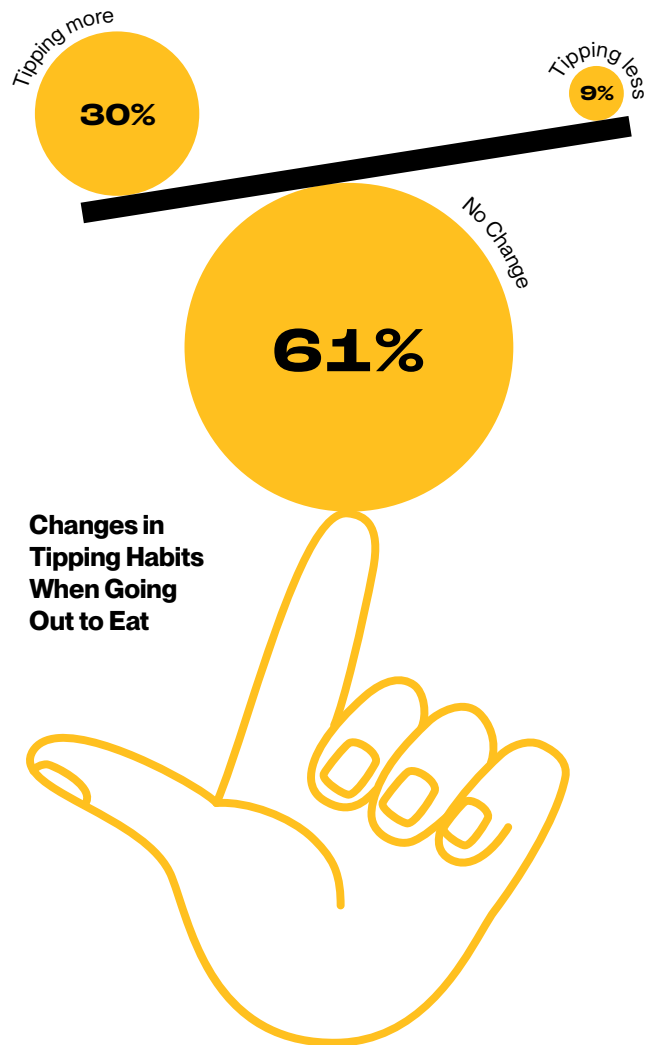
4% More than 30%

16%

is the average tip when **dining in**

#1

reason diners are tipping more: they say they are generally satisfied with the service/ experience



\$
38

is the average spend on **takeout/delivery**

Takeout/Delivery Tips Remain Small

Similar to dine in, the average spend on takeout/delivery also increased this year, rising to \$38 on average, which is up from \$31 in 2023. While takeout/delivery still appears to be a cheaper alternative to dining in, it's clear that prices have also gone up significantly for off-premise orders.

What hasn't seen much of an increase is the average tip for takeout/delivery orders, with 64% of diners reporting that they've made *no change* in how much they tip for takeout/delivery. On average, diners tip just 13% for takeout/delivery orders, with nearly half of all consumers (47%) saying they tip less than 15%. And while tip sizes were fairly consistent across all age groups, Gen Z diners were once again the smallest tippers, tipping just 12% on average for takeout/delivery orders.

When asked about their takeout/delivery tipping habits, most diners report that a generous tip (or sometimes any tip at all) is not warranted when there's no server taking their order, bringing their meal, or clearing their plate.

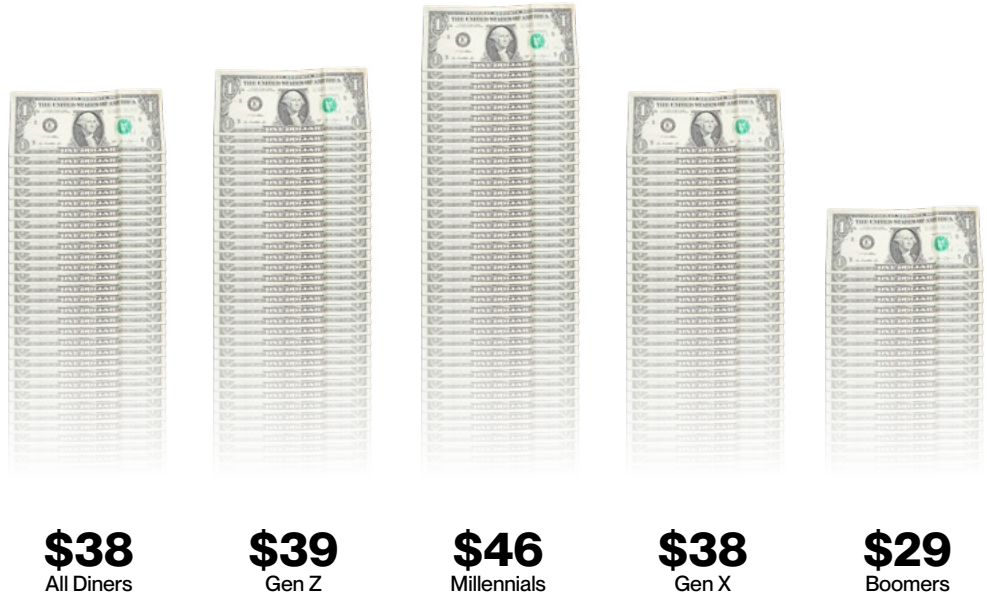


“I don’t feel as obligated to tip if I’m doing takeout since there’s no server involved. I’m going to the restaurant and I’m getting the food myself, so that brings things down from a cost perspective.”

(Male, 27, Dallas, TX)



Average Spend When Ordering Takeout/Delivery by Generation



Average Tip When Ordering Takeout/Delivery by Generation



13% is the average tip for **getting takeout/delivery**

Average Tips for Takeout/Delivery

29% No tip

13% Less than 5%

17% 5-9%

16% 10-14%

12% 15-19%

7% 20-24%

2% 25-29%

3% More than 30%



Changes in Tipping Habits When Ordering Takeout/Delivery



#1

reason diners are tipping less: they say they simply can't afford to tip more



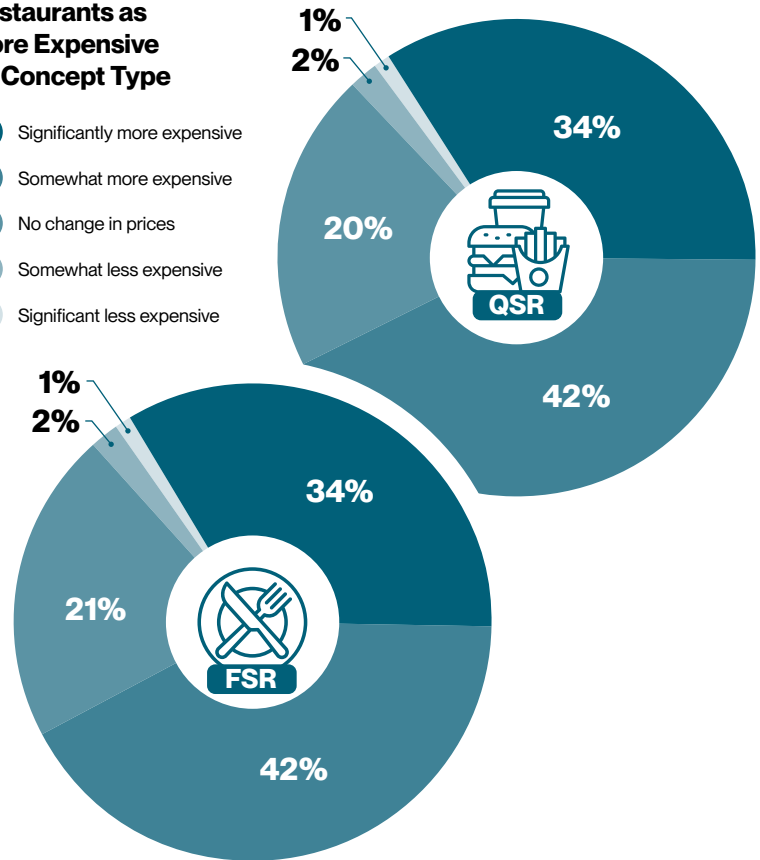
Both FSRs *and* QSRs Perceived as Increasingly Expensive

With diners spending more on both dine in and takeout/delivery this year, it's understandable that they perceive restaurants as more expensive. In fact, a whopping 77% of diners said they think QSRs have gotten more expensive in the past year and 76% think FSRs have become more expensive. Interestingly, Boomers are much more likely to say restaurants have become more expensive. For instance, 87% of Boomers say QSRs have become more expensive while just 65% of Gen Z diners said the same.

With rising costs in mind, it appears as though some diners have made some changes to try to keep costs down. 20% report ordering fewer dishes, 17% say they're visiting QSRs more often than FSRs, and 12% say they're ordering less alcohol. In other words, while cost may not be stopping consumers from visiting their favorite restaurants, it is impacting the choices they make once they arrive.

Perception of Restaurants as More Expensive by Concept Type

- Significantly more expensive
- Somewhat more expensive
- No change in prices
- Somewhat less expensive
- Significant less expensive



Ways Diners Have Responded to Higher Prices

- ✓ Ordering fewer dishes
- ✓ Visiting QSRs instead of FSRs
- ✓ Ordering less alcohol

“Dining in has definitely gotten more expensive and I guess it has changed my habits. If it’s a special occasion or a place I really want to try, then I don’t think about price that much. But, for example, if it’s a situation where family is in town, I’d take them to a nice, quiet pizza spot near me just because I want to be more price sensitive with a larger group coming in from out of town. It’s very situational.”

(Female, 31, New York City, NY)



“It’s definitely higher food prices all around. A lot of times, if you go on Google Maps, you can see pictures people have posted of a restaurant’s menu from three years ago and you can see what the prices used to be. It’s a bad habit I have, but I like to go back and see how much food prices have increased, and sometimes that’s a little frustrating.”

Male, 27, Dallas, TX



Our Takeaways

With restaurant bill sizes on the rise, diners are making subtle changes to keep costs down, including keeping their tips unchanged.

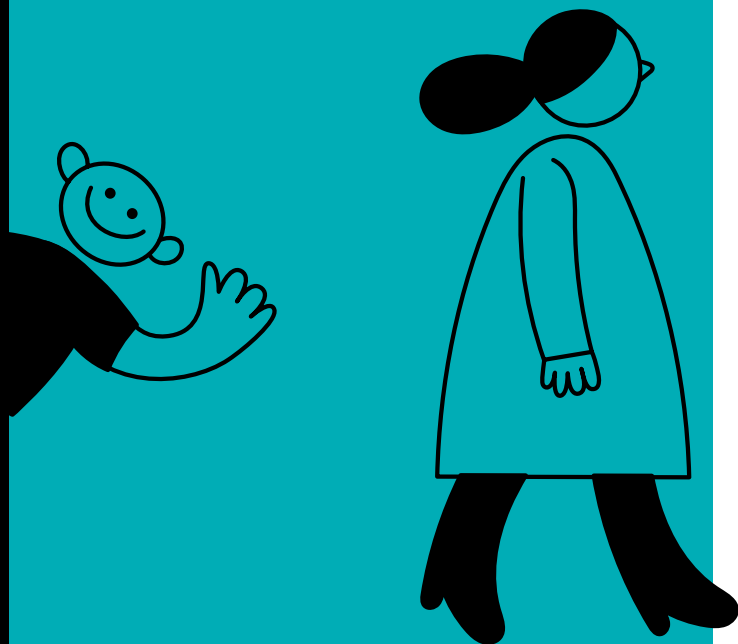
- ✔ If using tipping prompts, keep suggested tip sizes between 10-20%
- ✔ Emphasize any deals or specials to combat the perception of higher dining costs
- ✔ Offer lower-price options for cost-conscious diners, like lower-priced domestic beers or small plates instead of full-sized entrees

3



Behavior & Preferences








Driven by a desire for speed and convenience, solo dining, drive-thrus, and fast food joints are all experiencing a spike in popularity.



Some Consumers Trade FSRs for Fast Food Joints

With a changing in spending habits has also come a change in other diner behavior, namely, where diners are going when they dine out. This year, 27% of diners reported seeking out fast food restaurants most often, which is a significant increase from 16% who said the same last year. On the other hand, 24% reported seeking out family style restaurants most often, which is a decrease from 28% who said the same last year. So while consumers think both QSRs and FSRs have gotten more expensive, they do seem to be favoring fast food venues where the average bill size is smaller and there's less of an expectation to tip.

Type of Restaurant Consumers Seek Out Most Often YoY

	Fast food	27%▲	16%
	Fast casual	21%▼	28%
	Brasserie/bistro/cafe	5%	6%
	Bar/grill	15%	12%
	Fine dining	7%	7%
	Family style	24%▼	28%
	Other	2%	2%

“I’m still dining out a lot. One change from last year is that I’m maybe visiting more of those casual self-serve dining places, like Panera and Corner Bakery. I think the reason is cost. Because when you dine in at a place with a server, it’s an additional 20% tip right off the bat. Saving 20% is a lot when you’re dining out all the time like I am.”

(Female, 68, Chicago, IL)

Solo Dining on the Rise

While dining out is typically a social activity, this year saw a notable increase in solo dining. This year, roughly one in five (21%) of diners said they typically dine out alone, up from 18% who said the same last year. In fact, 29% of Americans say they dine alone weekly or more often, and the rates are even higher among younger diners – 49% of Gen Z and 46% of Millennials dine alone weekly or more often.

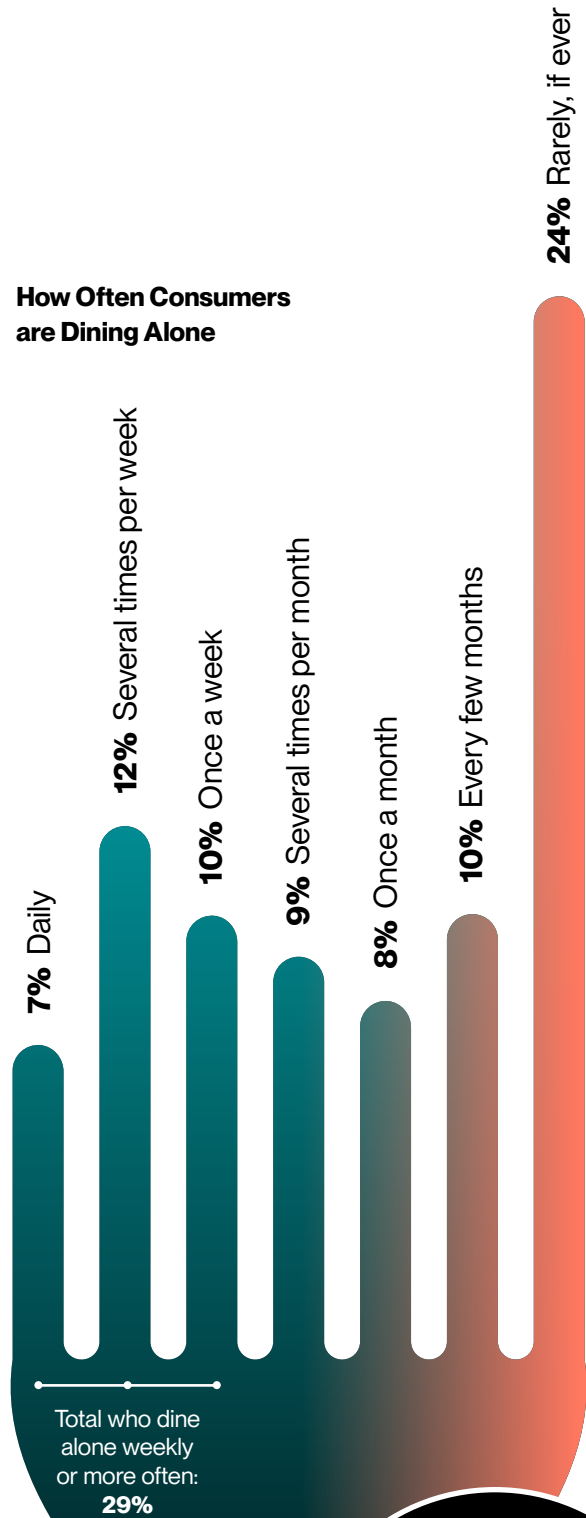
While the majority of consumers still dine out with their significant other (51%) or family (49%), the rise in solo dining gives restaurateurs new opportunities to adjust their offerings and venues to cater to a growing segment.



21%
say they **usually** dine alone

12%
say they **always** dine alone

How Often Consumers are Dining Alone



49% of Gen Z dine alone weekly or more often

46% of Millennials dine alone weekly or more often

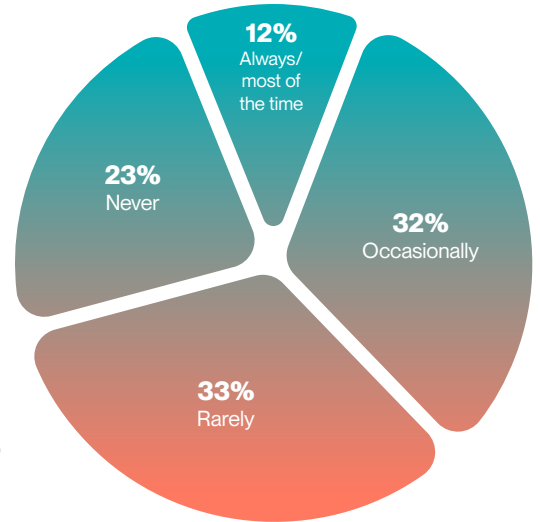
Diners Save Reservations for Special Occasions

With solo dining on the rise, it's perhaps unsurprising that reservations are still something most diners reserve for special occasions. 56% of diners say they *rarely or never* make a reservation, while 32% *occasionally* make one (up slightly from 27% who said the same last year). Millennials are slightly more likely to make a reservation than their peers, with 21% of Millennials saying they *always* make a reservation and 38% saying they *occasionally* make one.

Among those who do make the occasional reservation, the most common reason was for a special occasion like a birthday or anniversary. However, for Gen Z diners, the most common reason was for a date night.

Regardless of the reason, the number one way to make a reservation is still calling in – a clear preference across all generations and a strong case for restaurants to have a phone number available for bookings. However, for those who do turn to third-party booking apps, OpenTable was the clear winner, with 79% using the platform, followed by just 32% who use Yelp.

How Often Diners Make Reservations

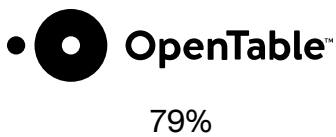


63%

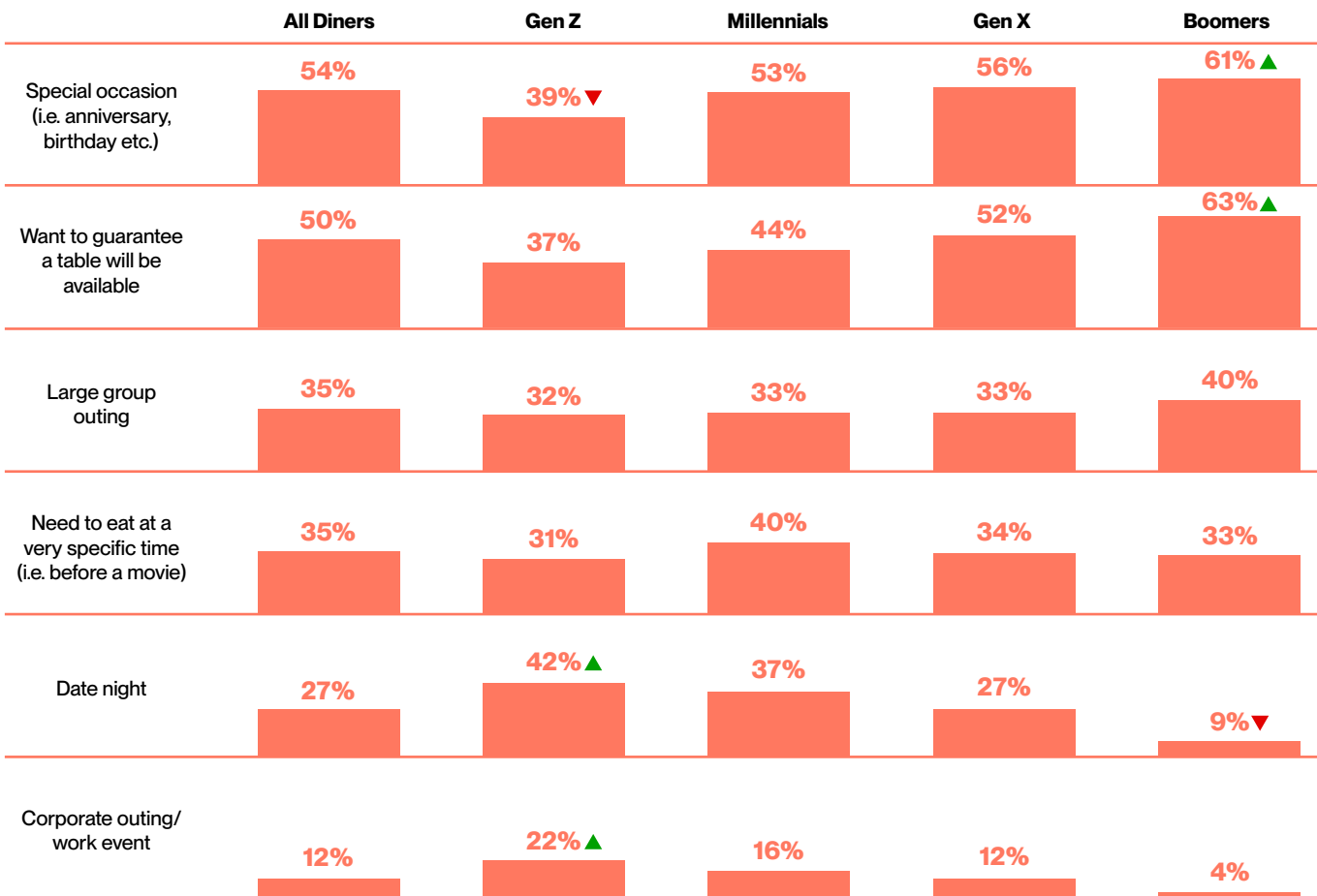
of diners prefer to **call in** to a restaurant to make a reservation



Top 3 Reservation Apps Used



Motivations to Make Reservations



Growing Preference for the Drive-Thru

Diners' takeout/delivery habits have also undergone some interesting shifts, much of which appears to be – quite literally – driven by convenience and cost-savings. Indeed, hitting the drive-thru is now the most common way diners are placing their to-go orders. Additionally, the number of diners who say the drive-thru is their preferred way to receive their to-go orders has risen to 32% – up significantly from 26% in 2023.

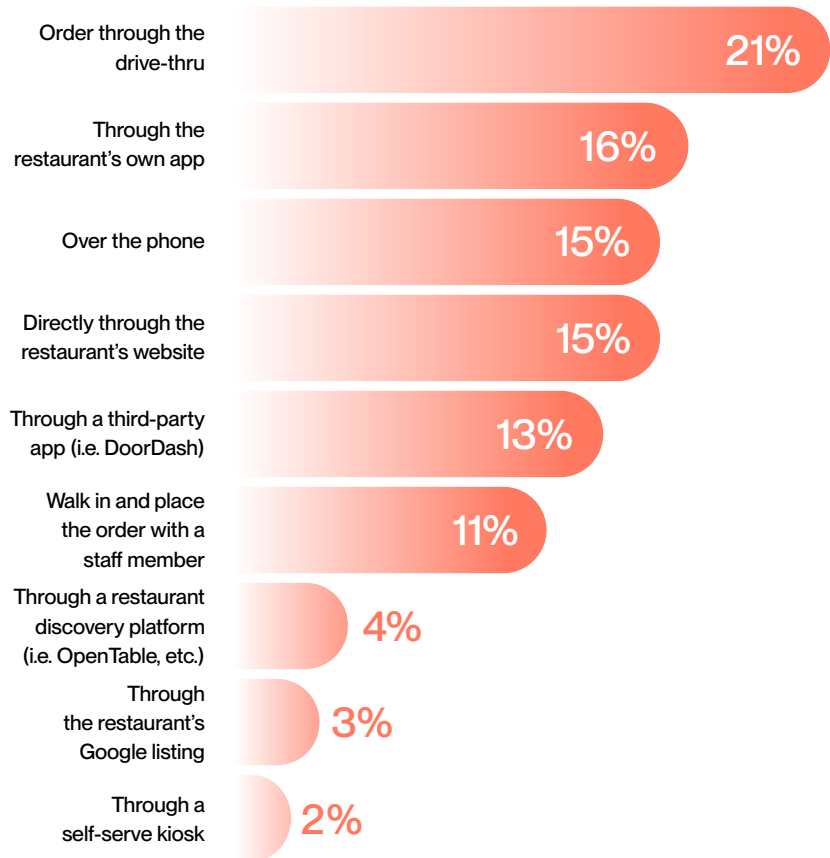
While the drive-thru seems to be fueling a lot of off-premise sales, ordering through direct channels, like over the phone or through a restaurant's own app, are also popular among consumers – as is picking up an order directly versus having it delivered. All of this suggests there is still a preference for dealing with restaurants directly, rather than using a third-party solution as a middleman, likely due to the cost-savings involved.

42%

of loyalty program members prefer to get to-go orders through the drive-thru



How Diners Usually Place a To-Go Order



Preferred Way of Getting Food To Go



Walk in and pick up
2024: 40%
2023: 49%



Through the drive-thru
2024: 32%▲
2023: 26%



Delivery
2024: 27%
2023: 24%



“I don’t do a lot of Uber Eats and DoorDash – I call restaurants directly. Uber Eats and DoorDash are very convenient, but you pay for it. By the time you’ve paid the service fee, the delivery fee, and the tip for the driver, you realize that it’s a lot less costly to just order directly through the restaurant and pick it up.”

Female, 68, Chicago, IL

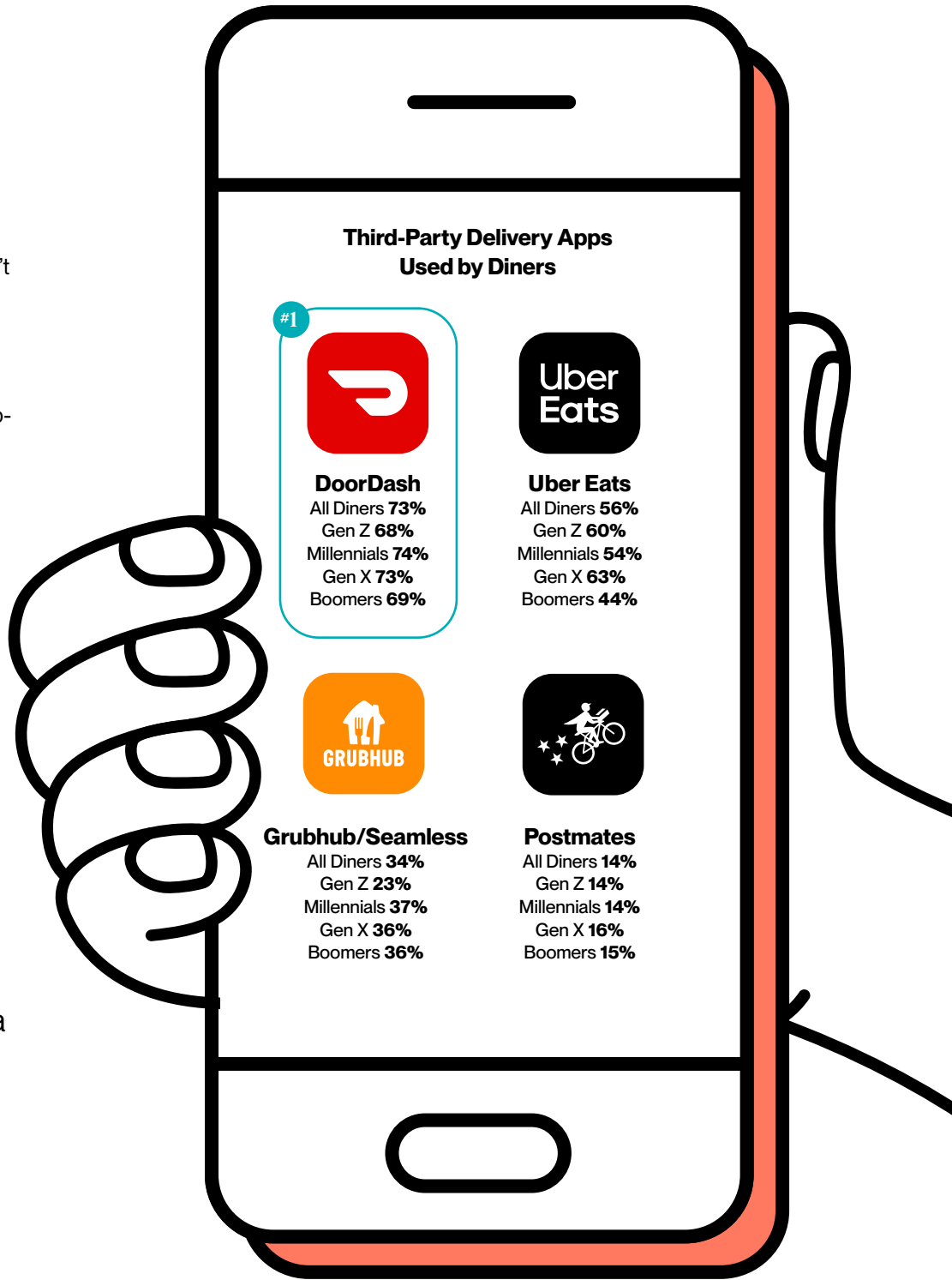
DoorDash the Clear Favorite Among Third-Party Delivery Apps

While it's clear that diners prefer to interact with restaurant staff directly when they can, this doesn't mean delivery apps aren't still a wildly popular option. And among those delivery apps, DoorDash is the clear favorite across all generations. In fact, more than two-thirds (73%) of diners reported using DoorDash. Uber Eats took the second place slot, with 56% of diners using the platform, while 34% reported using Grubhub.

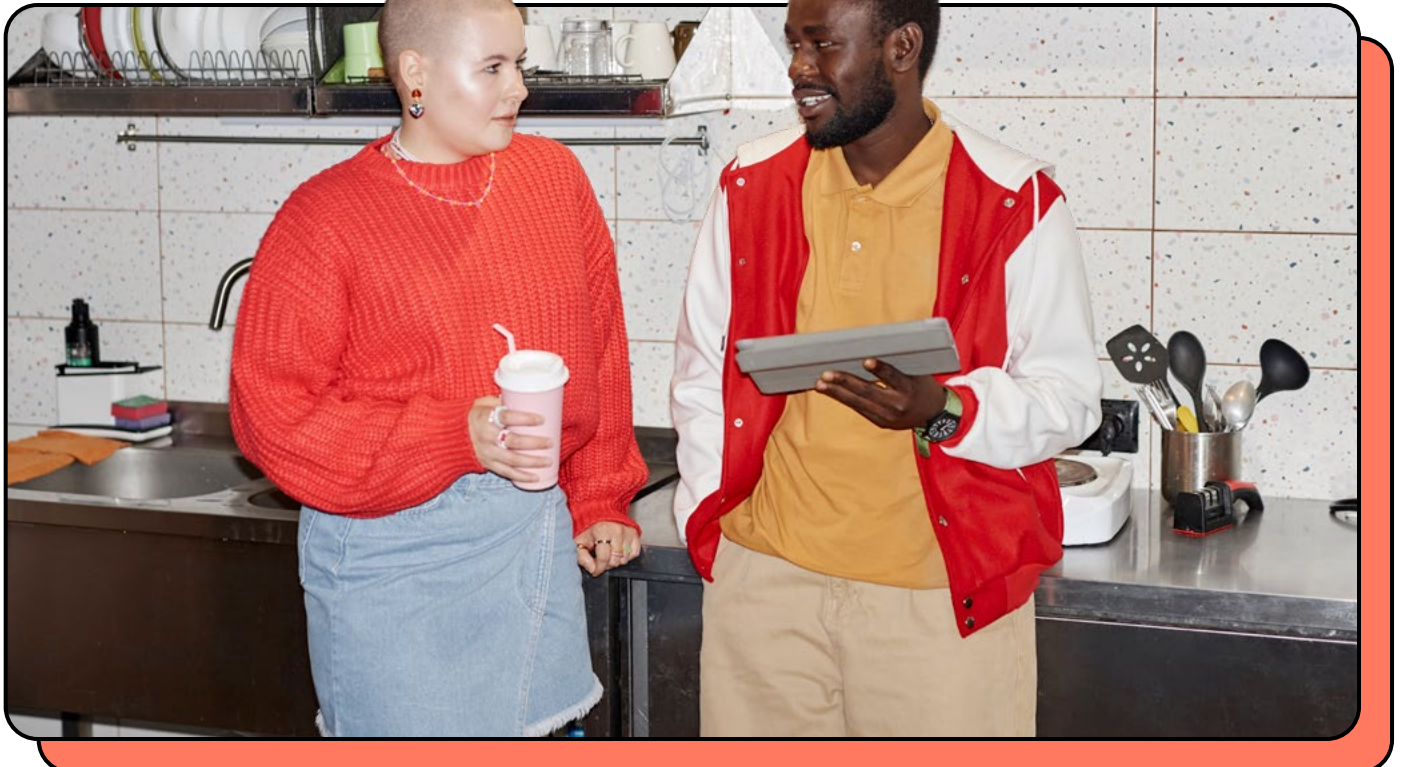
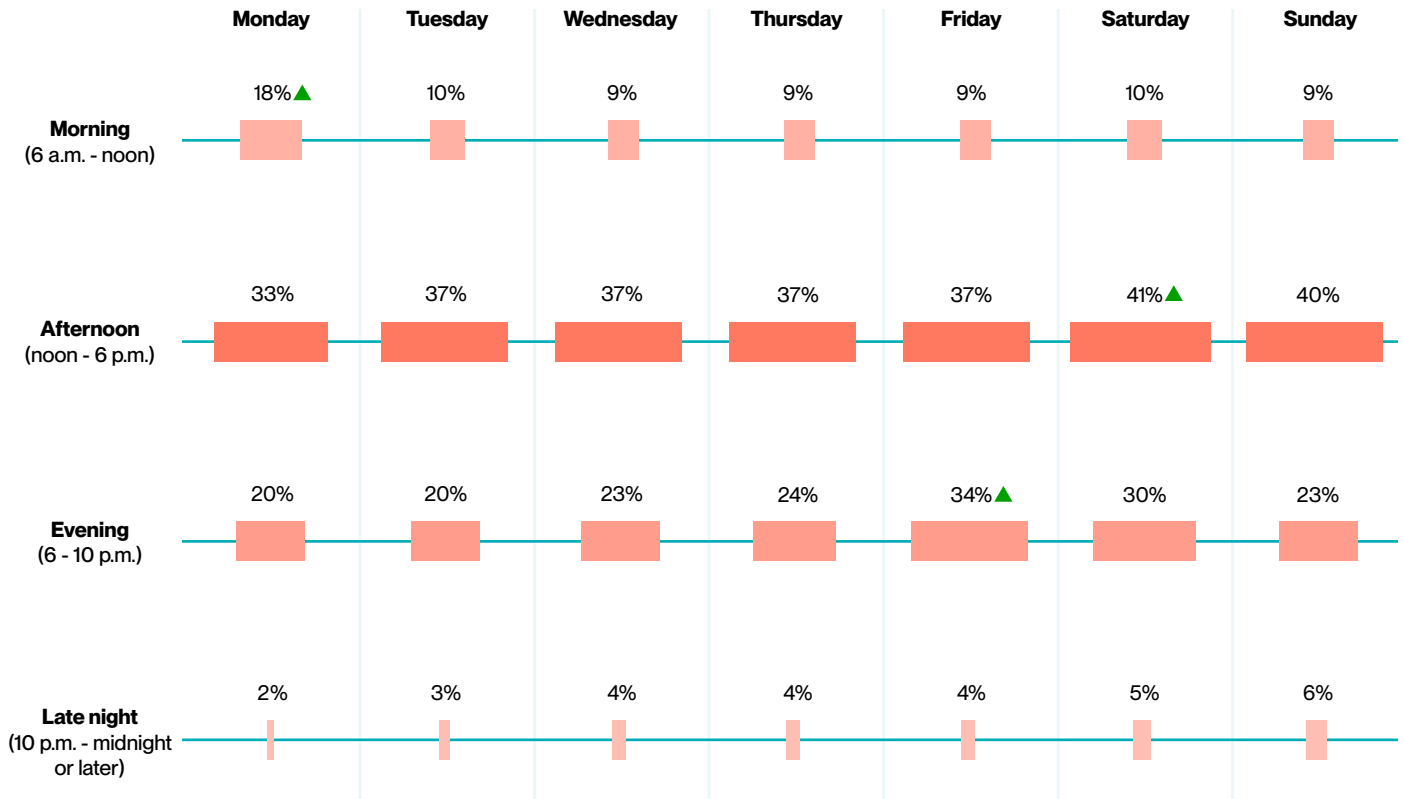
As for when diners are grabbing their takeout or delivery orders, Saturday between noon and 6 p.m. is the most popular time slot, while Monday is the most popular day for morning orders.

“I usually use the [delivery] apps when I really want something specific – like if I went out the night before on a weekend and I woke up thinking I really need a bagel. Or, when I'm not in the mood to cook.”

(Female, 31, New York City, NY)



Most Popular Time to Order Takeout/Delivery by Day of the Week





Our Takeaways

Catering to the desire for speed, convenience, and affordability is the best way to navigate changing diner behavior.

- ✔ Make solo diners feel welcome with single-friendly seating and menu options
- ✔ If you do take reservations, make sure there's an option for guests to book over the phone
- ✔ Diners like having a direct line of communication to your restaurant, but also appreciate the convenience of third-party apps like DoorDash – make sure you offer a mix of both



Motivators

When it comes to getting diners in the door, creative LTOs and positive social media reviews work well, but a great price works even better.



Menu Prices Increasingly Factor Into Dining Decisions

Just as inflation has impacted how often consumers are dining out, it's also impacted how they choose restaurants in the first place. Like last year, the quality of the food offered was the number one factor diners consider when choosing where to eat. However, this year, value for money and a convenient location jumped up to being the second and third most important factors diners consider. Given the growing popularity of QSR venues (especially those with a drive-thru), it's no surprise that cost and convenience are increasingly factoring into Americans' dining decisions.

Top Factors Influencing Where Diners Choose to Eat



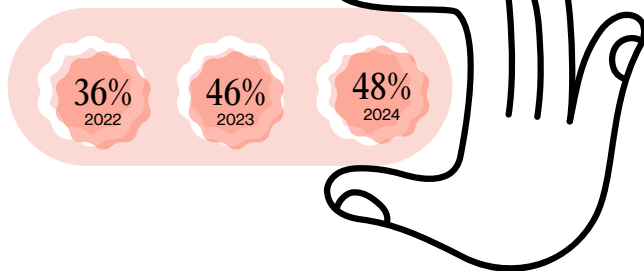
Loyalty Programs Increasingly Popular as a Way to Save

With prices, deals, and discounts increasingly factoring into diner decisions, it's perhaps unsurprising that loyalty program membership is up this year. Nearly half (48%) of diners say they are part of a restaurant loyalty program, up from 46% who said the same last year. The increase appears to be driven by the value loyalty programs can provide, with diners citing access to discounts and coupons and the ability to earn free items as their top two motivations for joining a restaurant loyalty program.

While saving money might be the main motivation for joining a loyalty program, some Gen Z diners also appreciate other, non-monetary benefits, such as access to exclusive perks like merch, more ordering options, and updates from the restaurant.

Regardless of their motivation for joining, loyalty programs seem to be a reliable way to drive visits. Nearly half (47%) of diners say they engage with loyalty programs weekly or more often, up significantly from just 34% who said the same in 2023 – a figure that's likely driven by a greater desire to seek out deals and specials that keep the cost of dining down.

Loyalty Program Membership YoY



Proportion of Diners Who are Part of a Restaurant Loyalty Program by Generation



“I’m a loyalty member at a lot of restaurants, especially fast food chains. I sign up for their loyalty programs because a lot of times they’ll give you good deals or even sometimes buy one get one free deals and things like that. But being a loyalty member gives you access to additional deals so that’s primarily my reason for joining those programs.”

(Male, 27, Dallas, TX)

“For my local coffee shops, I use the punch cards. You get free things and I feel like I’m part of the community. You go in and see the same folks there frequently and everyone’s chatting with you. I feel very loyal to them because of that.”

(Female, 31, New York City, NY)



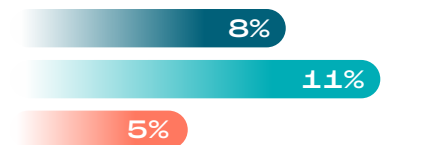
#1 Ranked Factor Influencing the Decision to Join a Loyalty Program



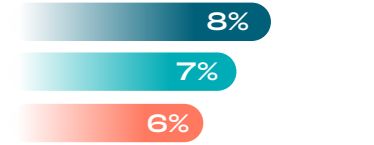
Access to discounts and coupons



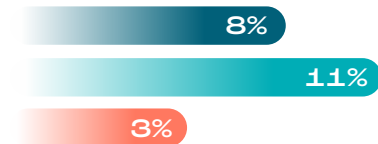
Ability to earn free items



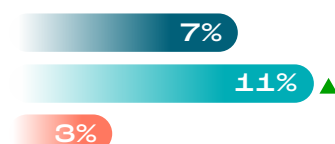
Access to exclusive perks (i.e. merch)



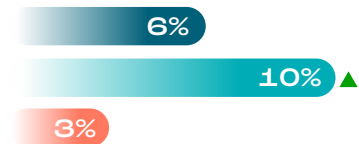
Early access to new menu items



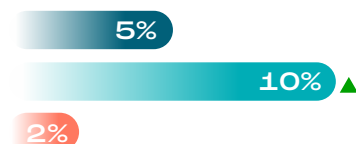
More ordering options (i.e. ability to place mobile orders)



Access to the latest updates from the restaurant



Exclusive access to limited-time menu items



Sense of belonging/joining a community

39%

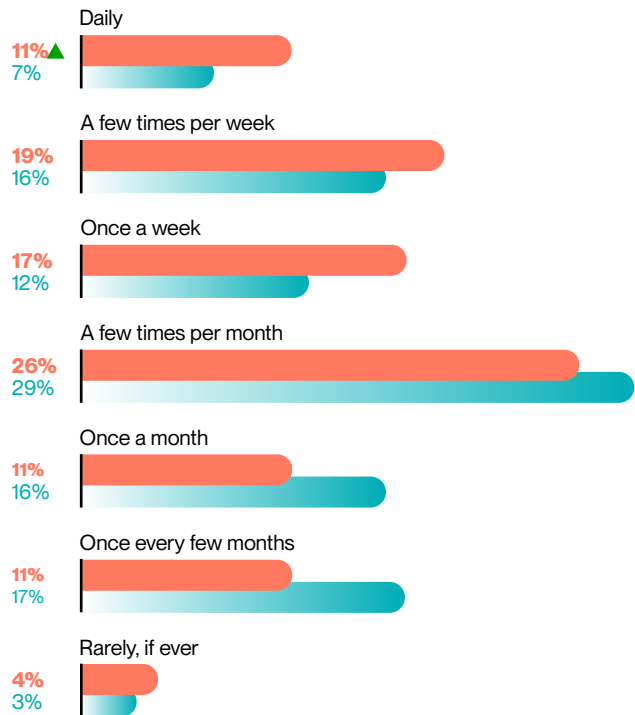
of **all diners** want to receive personalized loyalty offers

58%

of **Gen Z diners** want to receive personalized loyalty offers



How Often Diners Engage with Loyalty Programs 2023 2024



Top 3 Most Preferred Loyalty Offers

Most Preferred Personalized Offers

- 41%** Offers based on past order history
- 23%** Offers based on personal details (i.e. birthdays)
- 15%** Offers based on selected preferences (i.e. dietary preferences)

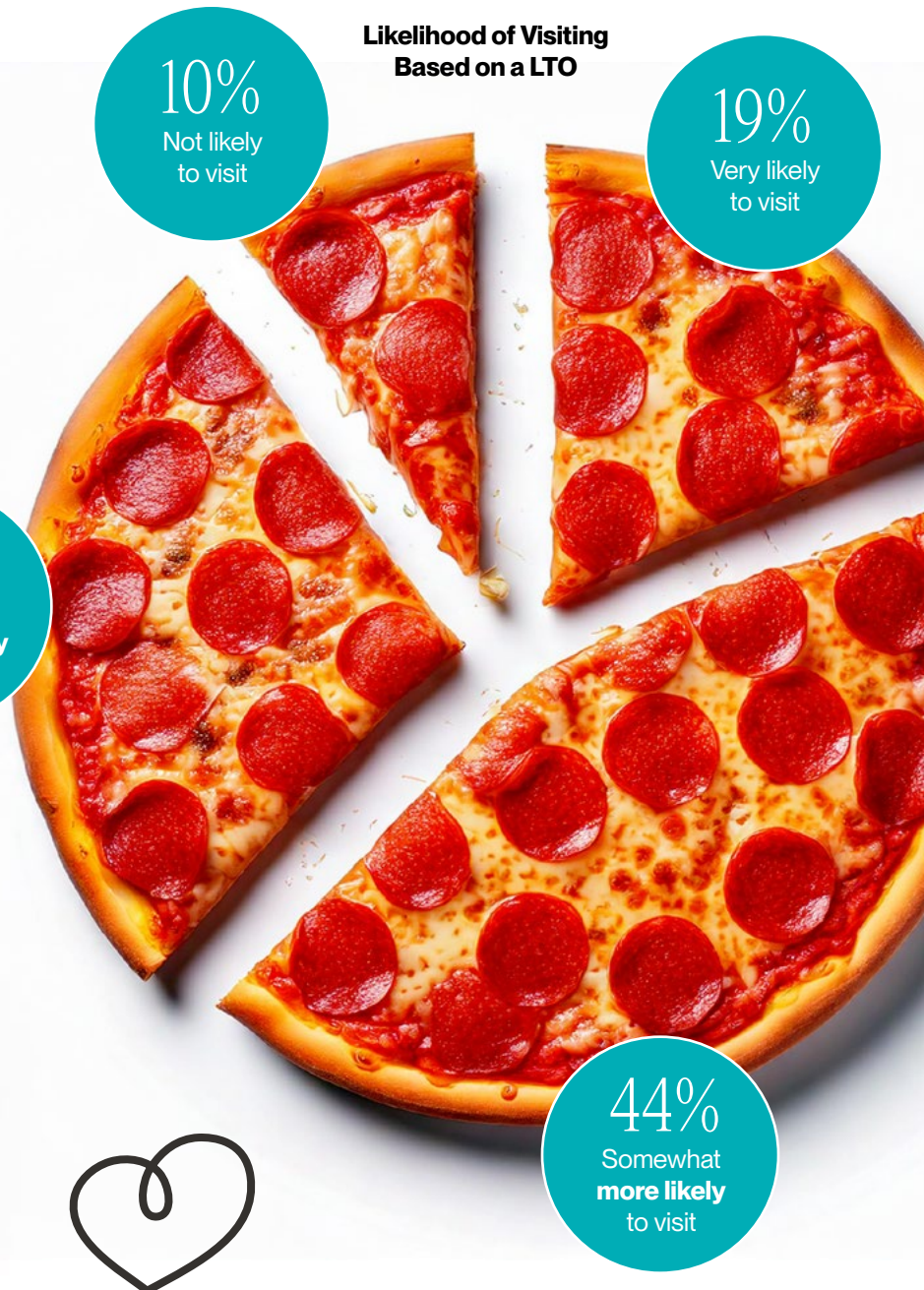
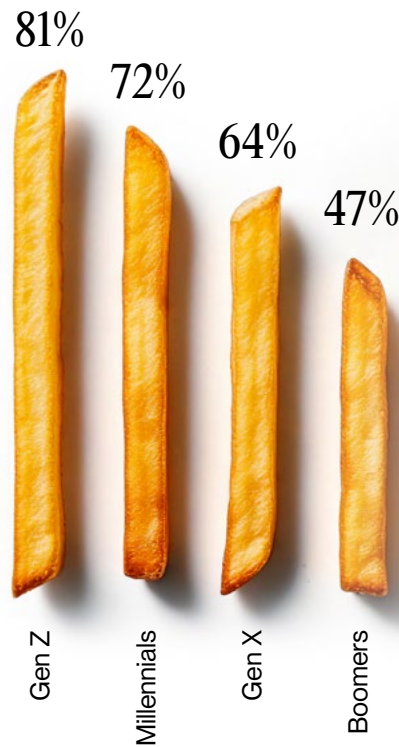
Most Preferred General Offers

- 24%** Dollar discounts (i.e. \$4 off)
- 24%** Buy-one-get-one deals
- 19%** Percent discounts (i.e. 10% off)

LTOs Prove Tempting to the Majority of Diners

Like loyalty programs, LTOs (limited time offers) are also a major motivator for many diners. In fact, more than half (62%) of diners say they would be *very* or *somewhat* motivated to visit a restaurant offering an LTO, but this number jumps to 81% among Gen Z diners and 74% among loyalty program members. In other words, LTOs can be a powerful traffic driver for any restaurant looking to temporarily increase guest visits.

More Likely to Visit a Restaurant Offering an LTO by Generation



Likelihood of Visiting Based on a LTO

10%
Not likely to visit

19%
Very likely to visit

28%
Somewhat not too likely to visit

44%
Somewhat more likely to visit



“I’m a sucker for anything that’s seasonal. So if there’s a seasonal item, like a pumpkin shake or something, I’ll definitely seek that out specifically. And then there’s usually deals associated with those items too.”

(Male, 27, Dallas, TX)

Social Media Proves to be a Popular Restaurant Review Source

While novelty, convenience, and affordability may be the top motivators, social media can certainly sway the choice of restaurant for a significant swath of diners. 41% of diners say they have used social media to research which restaurant to visit. This approach is even more popular among younger diners, with 67%

of Gen Z and 57% of Millennials saying they've used social media to decide on a restaurant.

As for which social platforms diners are using, it depends who you ask and what they're looking for. If diners are looking for a restaurant business profile to look up the business hours or other information, Facebook is usually their go-to platform. However, when diners want to find restaurant reviews, many more are turning to Instagram

and TikTok. In fact, 55% of Gen Z diners hit up Instagram for restaurant reviews and 44% turn to TikTok.

With this influence in mind, it's unsurprising that social media is now among the most popular review sources, second only to Google. For Gen Z diners specifically, social media is actually the number one review source, with 48% saying they've looked up social media reviews in the past 3 months, while just 41% say they've used Google.

Why Diners Visit Each Social Media Platform

Instagram

To discover new restaurants

Facebook

To find extra information about a specific restaurant

TikTok

To learn about trending or local restaurants

Proportion of Diners Looking for a **Restaurant's Business Profile** on Social Media

How Diners Use Social Media

Proportion of Diners Looking for **Restaurant Reviews from Other Users/Influencers** on Social Media

45%



38%

34%



38%

28%



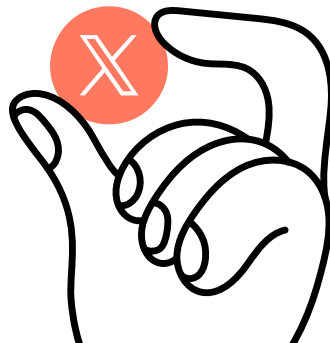
33%

24%



22%

24%



30%

“I like using TikTok for quick snippets of a restaurant review. I also use TikTok when I’m planning a trip and I want to find good places to eat. For instance, I’ll go on TikTok and look at the best spots to eat in Tokyo or New York, and then I’ll flip through the For You Page to see what comes up frequently. Then it just auto-serves me [content] based on that search. I’ve also started following local food bloggers and they’ll highlight new places that just opened. So I’m just constantly getting served those recommendations without me always having to go search for it.”

(Female, 31, New York City, NY)

48%

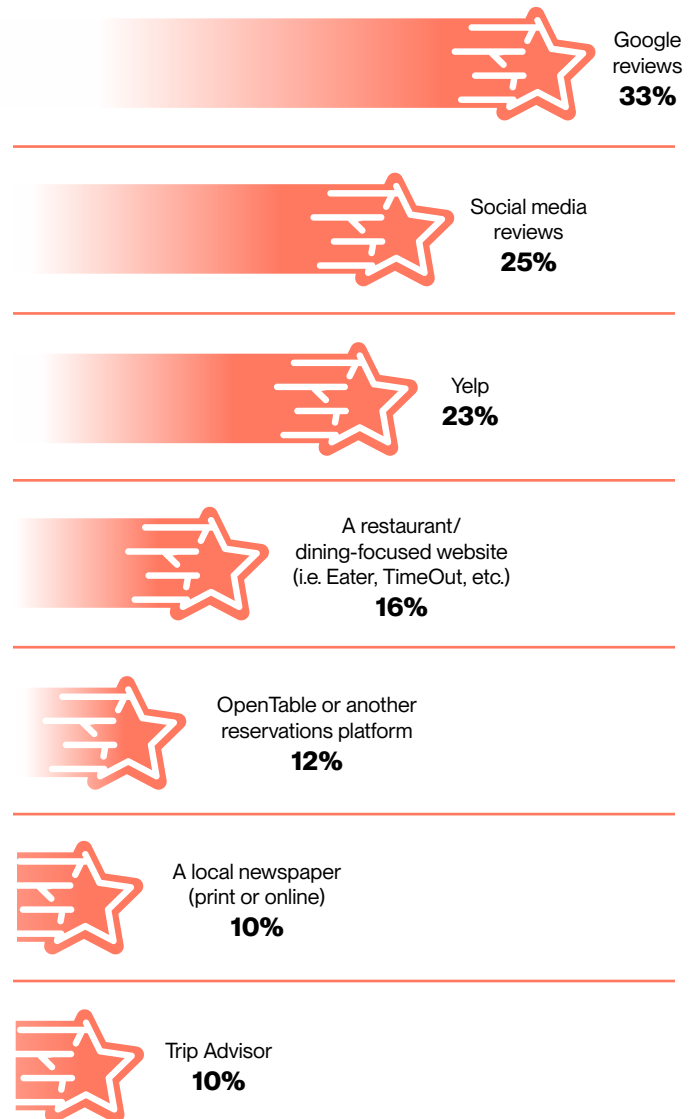
of Gen Z diners have looked at restaurant reviews on social media in the past 3 months

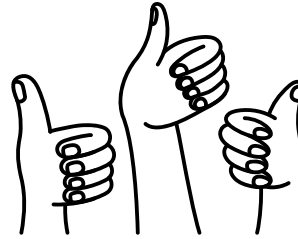
39%

of Millennials have looked at restaurant reviews on social media in the past 3 months



Review Sources Used in the Past 3 Months





MICHELIN Stars Still Matter (But Mostly to Younger Diners)

Social media is one thing, but what about more traditional dining motivators like the highly coveted MICHELIN Stars?

For the average diner, a MICHELIN Star or even a mere feature in the MICHELIN Guide is not much of a motivating dining factor – only about a third (35%) of diners are swayed by a star or a feature. However, for younger diners, it turns out that this designation still carries quite a bit of cachet. In fact, 50% of Gen Z and 50% of Millennials say they would be *significantly* or *somewhat* more likely to visit a restaurant with a MICHELIN Star, while just 33% of Gen X and just 16% of Boomers said the same. In other words, for restaurants with some sort of MICHELIN nod, it's worth shouting from the rooftops.

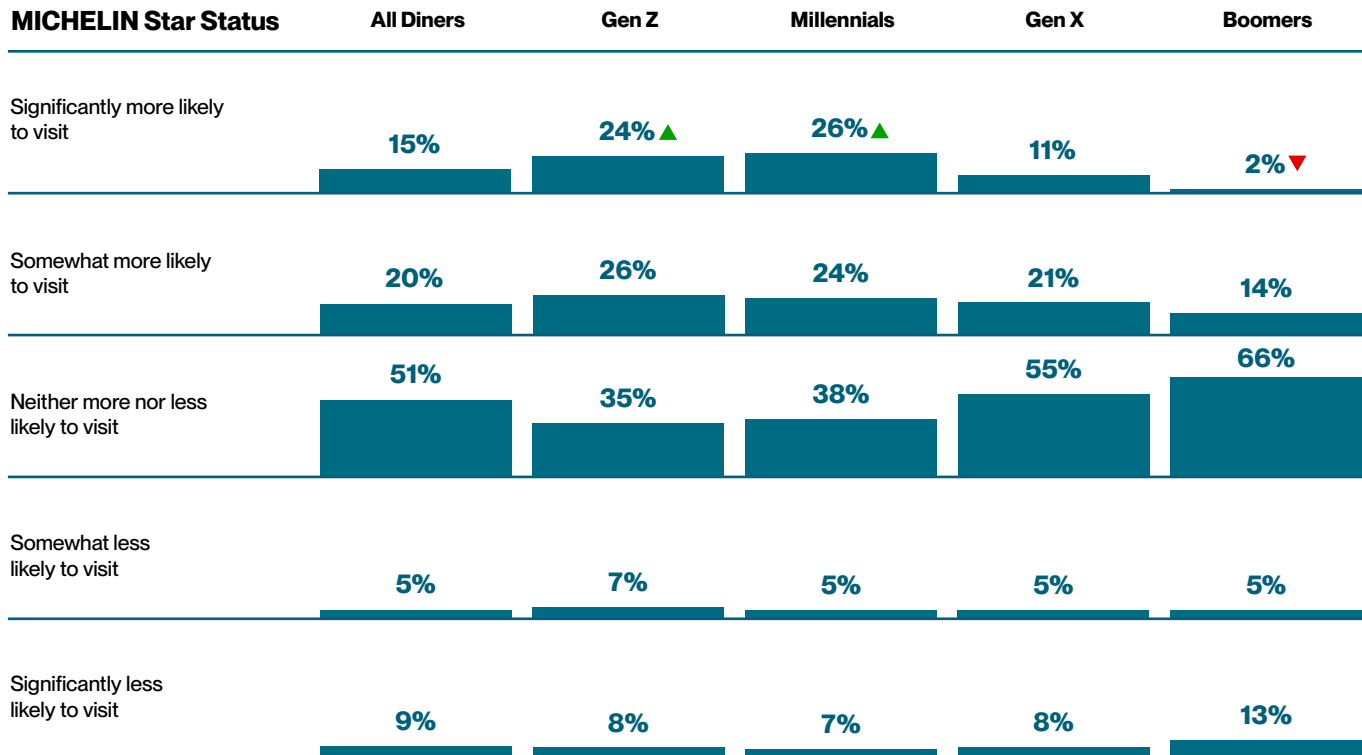
35%

of diners would be more likely to visit a restaurant with a **MICHELIN Star**

32%

of diners would be more likely to visit a restaurant **featured in the MICHELIN Guide**

Likelihood of Visiting a Restaurant Based on MICHELIN Star Status





“If I’m researching a restaurant and it’s well known, I’ll go see what it’s rated on James Beard or if it’s on the MICHELIN top rated list. I like to think of myself as a foodie so when people are coming to town, I can say, ‘Oh, check out my favorite Mexican spot down the street – it has a MICHELIN Star.’ I’m always making sure [a restaurant] has a MICHELIN Star if there’s a special occasion. I’ll look and see where there are starred places that I haven’t been to before and try to get a spot.”

Female, 31, New York City, NY

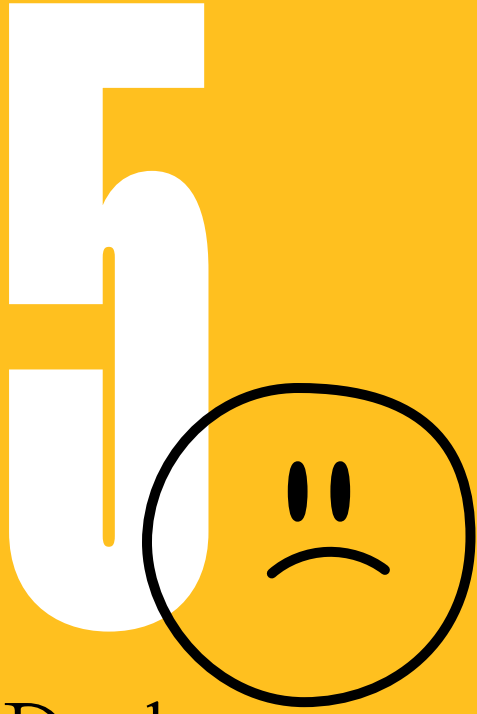




Our Takeaways

Diners are increasingly motivated by newer mediums like TikTok reviews, but more traditional tactics like LTOs are still a reliable way to drive both traffic and repeat guests.

- ✔ Build up a positive social media presence (especially on Instagram) by incentivizing key influencers to visit and review your venue
- ✔ Consider launching LTOs when you need a temporary boost in diner traffic
- ✔ If your restaurant earns a MICHELIN Star or a mention in the MICHELIN Guide, publish that information widely



Deal-Breakers

Lengthy wait times and service charges (especially hidden ones) are major deterrents for today's diners.

Negative Feedback is a Dealbreaker for Most Diners

It's one thing to understand what motivates diners to choose certain restaurants, but it's equally as important to understand what deters them. And for the average diner, the number one deterrent is negative feedback from friends. In fact, a poor review heard through word of mouth was actually ranked as *more* of a deterrent than a recent health inspection warning. Though it's worth pointing out that younger diners appear to be a bit more forgiving of poor reviews shared verbally. In fact, both Gen Z and Millennials said that negative *online* reviews are a bigger deterrent for them.

Added costs like service charges (added fees) or auto-gratuity (an automatic tip) were also a deal-breaker and major source of confusion for a significant group of diners, especially older ones. More than half (53%) of Boomers said they would be deterred from visiting a restaurant with added service charges and 41% would be deterred by a restaurant with auto-gratuity.

And, of course, time is money for many people, so it's unsurprising that a wait time of over 30 minutes was a top deterrent for many diners, especially older diners. In fact, the average amount of time diners say they would wait for a table is just 22 minutes, suggesting diners are still looking for a speedy experience, even when dining in.

22

minutes is the average amount of time diners say they will wait for a table



Reasons Diners Would be Deterred from Visiting a Restaurant



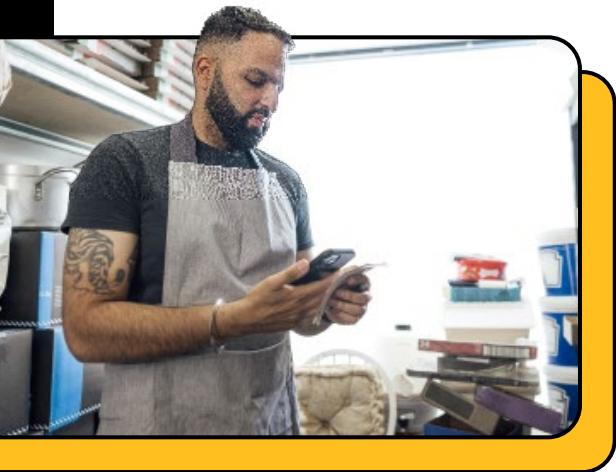
51% of diners will leave a loyalty program if it **takes too long to accumulate rewards**

41% of diners will leave a loyalty program if there are **no tempting deals or offers**

Speed and Quality Concerns Cited as Top Takeout/Delivery Frustrations

Time is also money when it comes to takeout/delivery. On average, diners say they would wait just 29 minutes for delivery orders, 1 minute less than the year prior. Across all generations, diners say they would wait between 27 and 30 minutes for their delivery order, suggesting that consumers have come to expect a certain level of speed when it comes to off-premise dining.

They also expect a certain level of quality, when dining at home. The number one reported issue with takeout/delivery was that the order is inaccurate or items are missing, followed by high delivery fees and the food being cold. Boomers are especially sensitive to inaccurate orders, with 35% citing this as their number one frustration with takeout, compared with just 20% of Gen Z diners who said the same. For restaurants, this points to the increasing importance of heightened quality control.



Average Time Diners Will Wait for a Delivery Order by Generation

Gen Z
30 Minutes

Millennials
30 Minutes

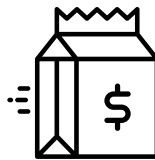
Gen X
28 Minutes

Boomers
27 Minutes

Top 3 Takeout/Delivery Frustrations



1 Order is inaccurate



2 High delivery fees



3 Food is cold



“I feel like if I saw a service charge, I’d be a lot less likely to go back to that restaurant because my opinion is that restaurants should just incorporate it into the price of the food. **Don’t hit me with all these different fees, it’s off-putting to me.**”

Male, 27, Dallas, TX



Our Takeaways

By keeping wait times and service charges to a minimum, restaurants can avoid incurring the wrath of diners (and raking up poor reviews).

- ✔ If service charges are necessary, aim to be as clear and transparent about any additional charges upfront to avoid the ire of unsuspecting diners
- ✔ Make it fast and easy for diners to earn rewards – even small ones – to keep them engaged in your loyalty program
- ✔ Keep an eye on delivery times and make changes if wait times start to creep up



Technology

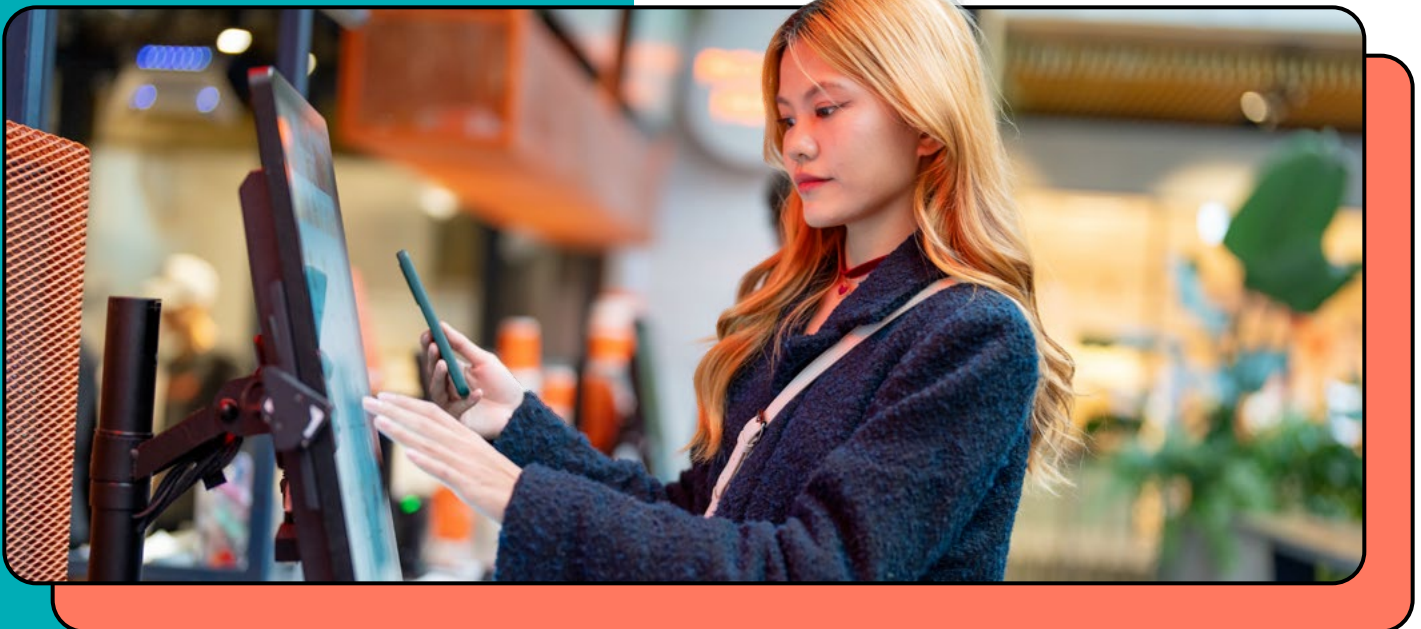
Diners may be relatively comfortable with technology, but that doesn't mean they're ready for it to replace traditional hospitality and service.

Diners are Largely Comfortable with Tech in Restaurants (Including AI)

Just about every sector is being disrupted by automation and AI, the restaurant industry is no exception. Fortunately for today's tech-savvy restaurateurs, most diners are fairly comfortable with the use of technology in restaurants. In fact, nearly a third (31%) say they are *very* comfortable with technology in restaurants and 28% are *somewhat* comfortable. Interestingly, Millennials are the most comfortable with these changes, with 70% saying they are *very* or *somewhat* comfortable compared with just 62% of Gen Z who said the same. Boomers are the least comfortable with more than a third (35%) saying they are *very* or *somewhat* uncomfortable with technology in restaurants.

As for the kind of tech they're most comfortable with, diners seem to prefer solutions that will make their experience faster, more accurate, and less expensive. For instance, 48% of diners say they are *very* or *somewhat* comfortable with AI-generated offers/discounts, while 42% said the same about AI-powered drive-thru.

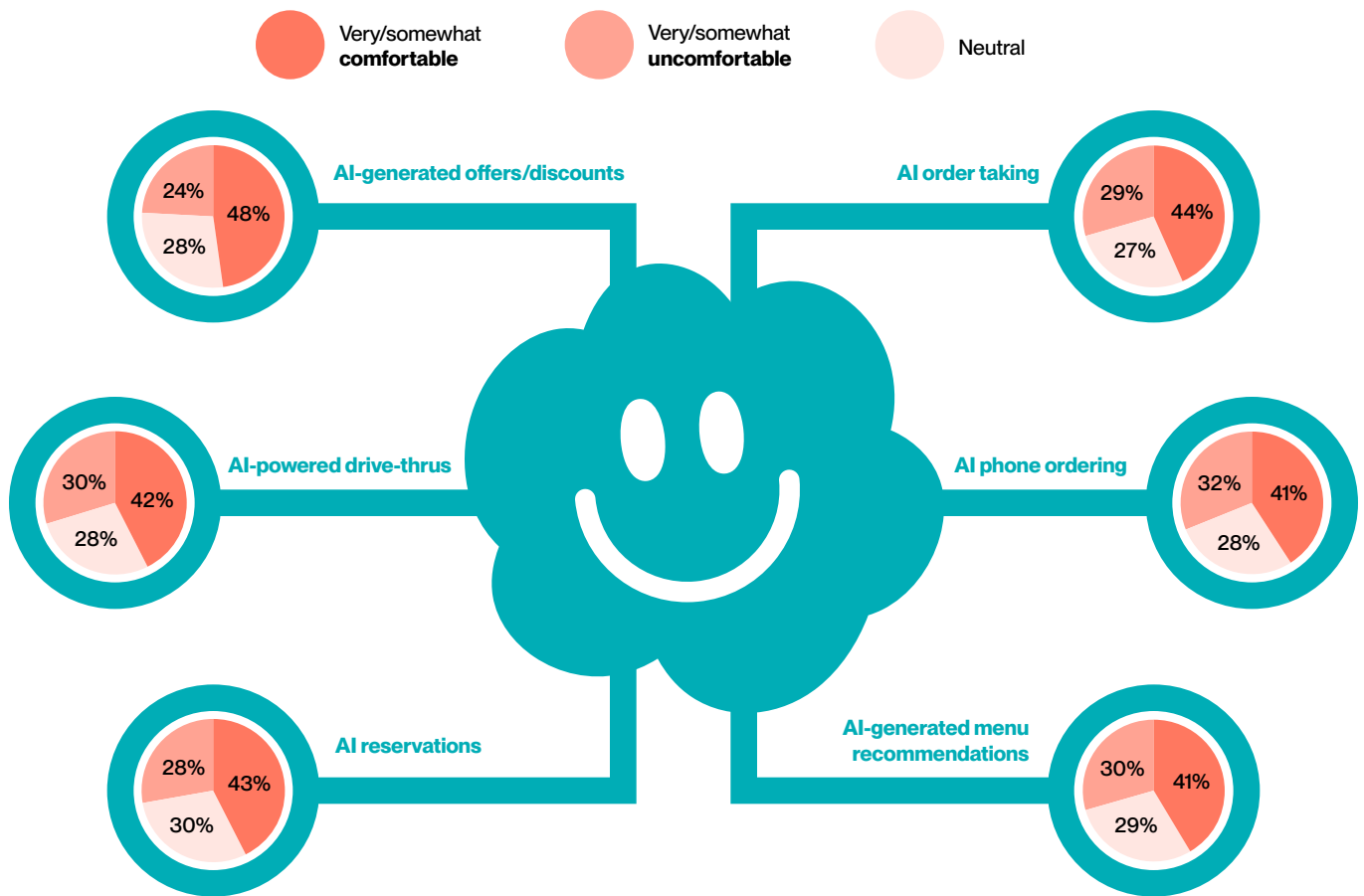
It's worth noting that many diners, especially Boomers, do have some real concerns with AI. As diner interviews revealed, some are concerned with AI skewing their expectations, especially when it comes to AI-generated menu images or descriptions. And while most are comfortable with AI used in the context of a drive-thru or a self-serve kiosk, they draw the line at bringing AI into the dining room.



“I’m okay with technology where I’ve seen it. I think it’s a good thing because it can speed up processes like long lines and taking payments faster. I’m also okay with technology making things more efficient in the kitchen – why have some guy pouring in ice cream and stirring it when you can have a milkshake maker that can make five milkshakes at a time? But I think if I went to a really nice restaurant, I would be a little put off if everything was automated. For example, if I went to a really nice restaurant and I had to scan a QR code to see the menu, I would find that a little offensive.”

(Female, 68, Chicago, IL)

Diner Comfort with AI-Assisted Restaurant Technology



Diner Comfort with Technology in Restaurants



Very comfortable
31%



Somewhat comfortable
28%



Neutral
23%



Somewhat uncomfortable
9%



Very uncomfortable
9%

Traditional Service Still Preferred Over QR Codes

While diners may be fairly comfortable with tech and even AI in restaurants, they seem to draw the line at anything that impacts a more traditional full service experience. Just like last year, diners overwhelmingly

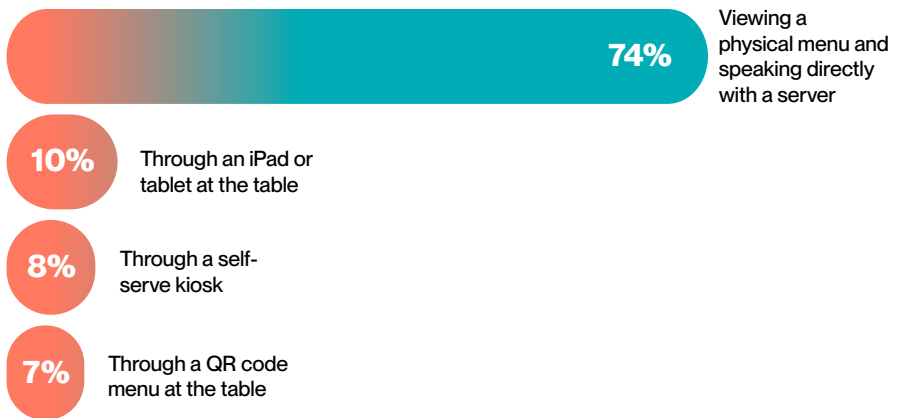
prefer to view a physical menu and place their order directly with a server. Only a small minority (7%) prefer QR code ordering.

When it comes to paying the bill, diners are a little more flexible, which presents an area of opportunity for restaurants. The majority (51%) of

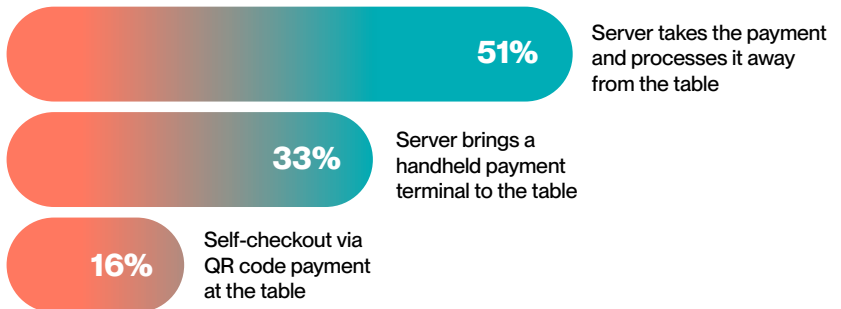
diners prefer that the server process the payment away from the table. However, a third (33%) prefer the server bringing the payment terminal right at the table. Some younger diners are even comfortable with QR code payments – 27% of Gen Z diners and 23% of Millennials actually prefer this process.



Preferred Way to Place an Order



Preferred Way to Pay for an Order



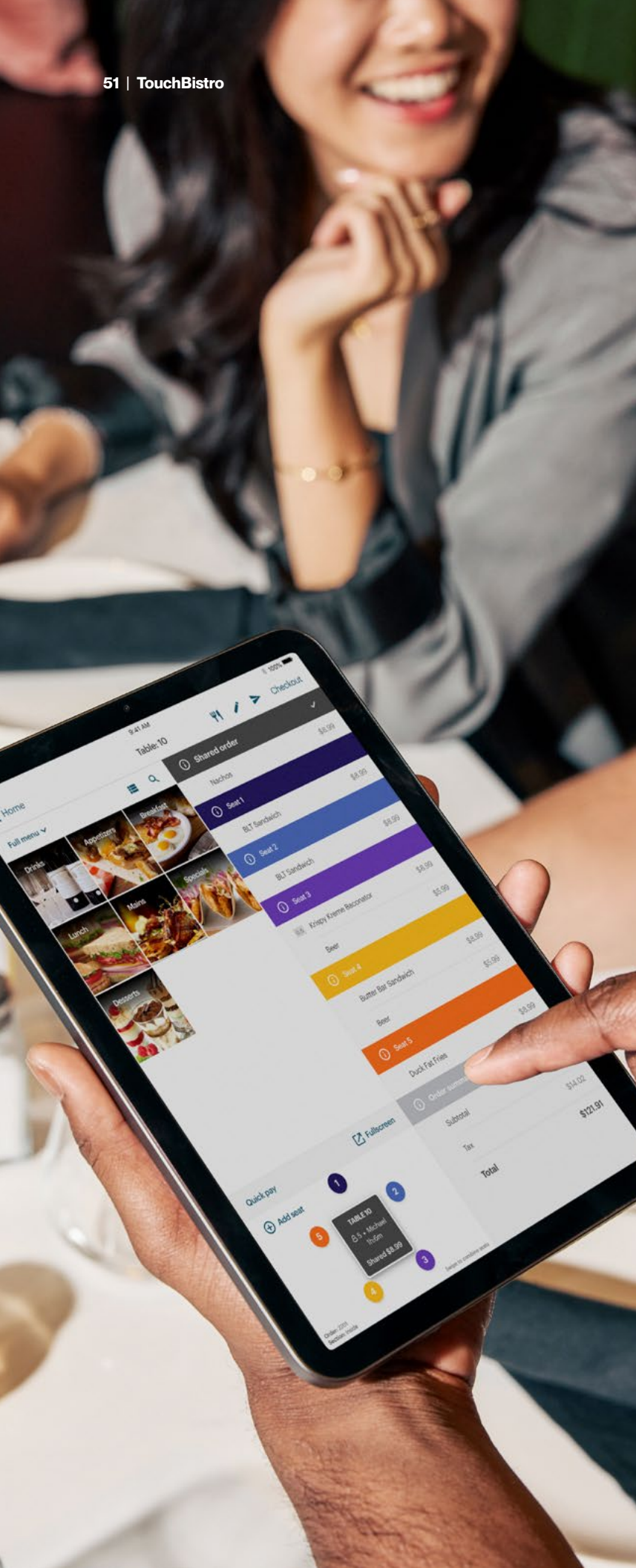
“I’ve noticed more places now have the credit card readers that they bring to your table instead of you giving them the card with your check. It’s nice because I feel like it’s quicker to get out of the restaurant and I feel more secure about [using the credit card readers myself] versus having somebody take my card back and do it themselves. I’ve experienced identity theft challenges because of that when traveling so it’s nice to see that kind of technology advance a little bit.”

(Male, 27, Dallas, TX)



“I still think that when you go to a fancy restaurant or a MICHELIN Star restaurant, you have the expectation of service – that you’ll be waited on and catered to. I shouldn’t have to pull out my phone to read a menu. If I go to a really nice restaurant, I want that personal touch.”

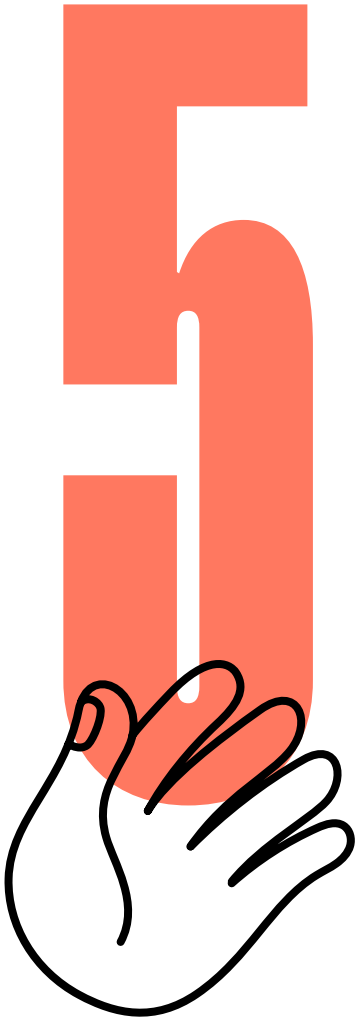
Female, 68, Chicago, IL



Our Takeaways

Though diners are increasingly comfortable with technology, restaurants have to strike a balance between tech that drives efficiency, but doesn't detract from hospitality.

- ✔ Save some tech for behind-the-scenes work that can speed up and streamline operations without taking away from the diner experience
- ✔ Keep QR code menus to a minimum and prioritize one-on-one interactions with guests
- ✔ Experiment with taking payments at the table to see how diners respond



Top Five Trends in 2025

With food costs high and diner expectations even higher, there are a few key opportunities that restaurateurs should take advantage of in 2025.

1 Minimizing Menu Price Increases • Just because diners are still dining out and ordering in, it doesn't mean they're happy about higher menu prices. And in the case of lower income diners, price is actually a major deal-breaker right now. In 2025, restaurateurs should aim to minimize significant menu price increases, explore value menus where they make sense, and avoid implementing any sneaky service charges.


2 Expanding Off-Premise Options • Years of sustained growth demonstrate that takeout/delivery is here to stay, especially since many consumers consider it a cheaper alternative to dining in. In fact, for increasingly time and patience-starved consumers, it's become a weekly, sometimes daily habit. Operators without this lucrative channel should consider introducing it, while those lacking a strong off-premise business should look for ways to optimize the experience for speed and convenience.

3 Leveraging Limited Time Offerings (LTOs) • With increased competition and higher food costs, there are only so many opportunities to compete on price. But one way restaurants *can* stand out is with creative product development that generates buzz. When traffic is sluggish, LTOs can be a quick and easy way to draw in new customers, especially younger ones. Just remember to keep these promotions short to avoid the dreaded menu bloat.

4 Maximizing Diner Discovery • Most restaurateurs know that social media is an essential marketing tool, but operators need to ensure their social media presence matches the way diners search for and discover restaurants. Operators can get more out of social media by polishing their own profiles (especially on platforms like Instagram and Facebook), but also by encouraging user-generated content like social media reviews, which drives organic diner discovery.

5 Experimenting with Tech • Given the host of benefits that technology offers restaurants, it's welcome news that diners are increasingly comfortable with foodservice automation and AI. In the back of the house, operators should focus on tech that drives speed, efficiency, and cost savings (like inventory management solutions). In the front of house, operators should take a more cautious approach to new tech and experiment with solutions that make sense for their particular venue type, like mobile payment terminals or a self-service kiosk.

CONCLUSION



In the face of inflation and new pressures like the return to the office, it's clear that dining habits have undergone some changes.

Diners are certainly more conscious of what they're spending and are more attuned to deals and specials, especially if they are a member of a loyalty program. They're also watching their tips and resisting any pressure to tip more than they have in the past.

Their dining decisions have also shifted, with social media – especially user-generated reviews on social media – increasingly playing a role in which restaurants consumers choose to dine at.

Despite these shifts (and some very real grievances about the cost of dining out), the bottom line is that most consumers are still dining out and ordering takeout/delivery quite frequently. In fact, the demand for speed and convenience has only further entrenched the habit of ordering in weekly or more often. And though some have cut back, it tends to be lower-income households, which were dining out less frequently to begin with.

For restaurateurs, this paints an optimistic picture of the year ahead and suggests that by making strategic adjustments – be it introducing more discounts, anticipating trending flavors, or better accommodating solo diners – they can successfully navigate changing diner habits and preferences.





Tackle 2025 & Beyond with TouchBistro

TouchBistro is an all-in-one POS and restaurant management system that makes running a restaurant easier. Providing the most essential front of house, back of house, and customer engagement solutions on one easy-to-use platform, TouchBistro helps restaurateurs streamline and simplify their operations, increase sales, and deliver a great guest experience.

✓ Exclusively Designed for Restaurants

TouchBistro was born out of a mission to make running a restaurant easier and continues to provide solutions exclusively for restaurant businesses.

✓ Easy to Learn, Easy to Use

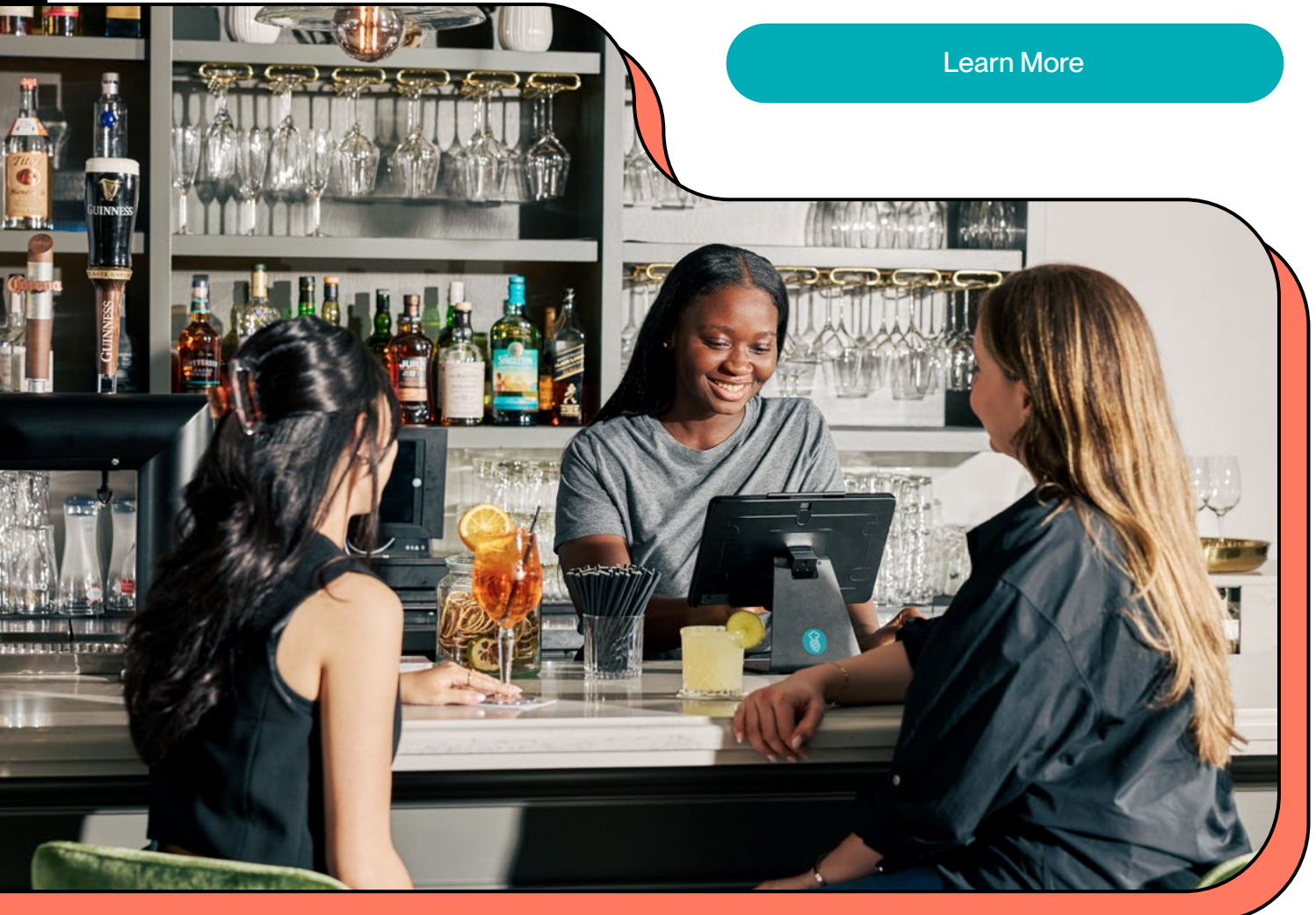
Intuitive software makes TouchBistro easy to learn and even easier to use.

✓ Round-the-Clock Support

Get up and running quickly with TouchBistro's one-box POS solution and enjoy the peace of mind of 24/7 support, available 365 days of the year.

To find out if TouchBistro is the right fit for your restaurant, get in touch today.

[Learn More](#)





Respondent Profile

Gender

Male: **48%**
 Female **51%**
 Other: **1%**

Age

18-34: **28%**
 35-54: **34%**
 55+: **38%**

Generation

Gen Z: **11%**
 Millennials: **32%**
 Gen X: **25%**
 Boomers: **29%**
 Silent Generation: **3%**

Household Income

Less than \$50,000: **36%**
 \$50,000-\$99,999: **32%**
 \$100-000-\$149,999: **14%**
 \$150,000-\$199,999: **8%**
 \$200,000+: **6%**
 Prefer not to say: **3%**

Household Members

Children in the household: **30%**
 No children in the household: **70%**

Region

Northeast **17%**
 Midwest **21%**
 South **38%**
 West **24%**

New York City **32%**
 Chicago **16%**
 Miami **6%**
 Houston **10%**
 Los Angeles **28%**
 San Francisco **8%**
 Other **21%**

Urban **33%**
 Suburban **45%**
 Small town/rural **22%**



Methodology

We partnered with research firm The Harris Poll to survey 1,500 diners in the U.S. Our research was conducted from October 15 to October 25, 2024. Survey results are accurate +/- 3% for the general population of American diners.



The Harris Poll is a global consulting and market research firm that provides the insights needed to build a better tomorrow. Since 1956, The Harris Poll has been using hard data to uncover essential insights about our society, which has helped win elections, pass legislation, and drive change around the world.



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