



Inside the Fast Lane:

Consumer Insights for

Quick-Service Restaurants

Introduction

As a cornerstone of American dining, the quick-service restaurant (QSR) industry plays a significant role in everyday life — millions of people rely on these restaurants each week for affordable, convenient meals, making it a key touchpoint in consumer behavior. Recent trends, as explored in this report, reveal shifting expectations, technological openness and evolving brand loyalties across demographics.

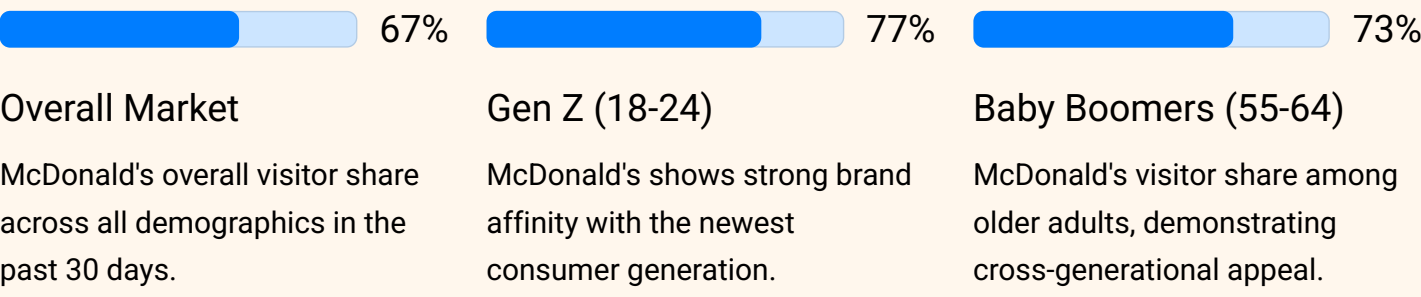
While legacy brands like McDonald's maintain dominant market share, regional and cultural nuances influence awareness and visitation, creating opportunities for localized strategy. Age, income and education level significantly shape attitudes toward AI, automation and digital ordering tools, indicating that personalization and tech-forward experiences will resonate more with some groups than others. And despite interest in innovation, most consumers still value human interaction, especially older adults.

For QSR marketers, staying on top of these dynamics is essential not just to remain relevant, but to tailor campaigns, product offerings and customer experiences that meet the nuanced needs of an increasingly segmented and curious audience. This report highlights key consumer insights around QSR brand awareness, what drives — or discourages — visitation, sentiment around AI in restaurants and more.

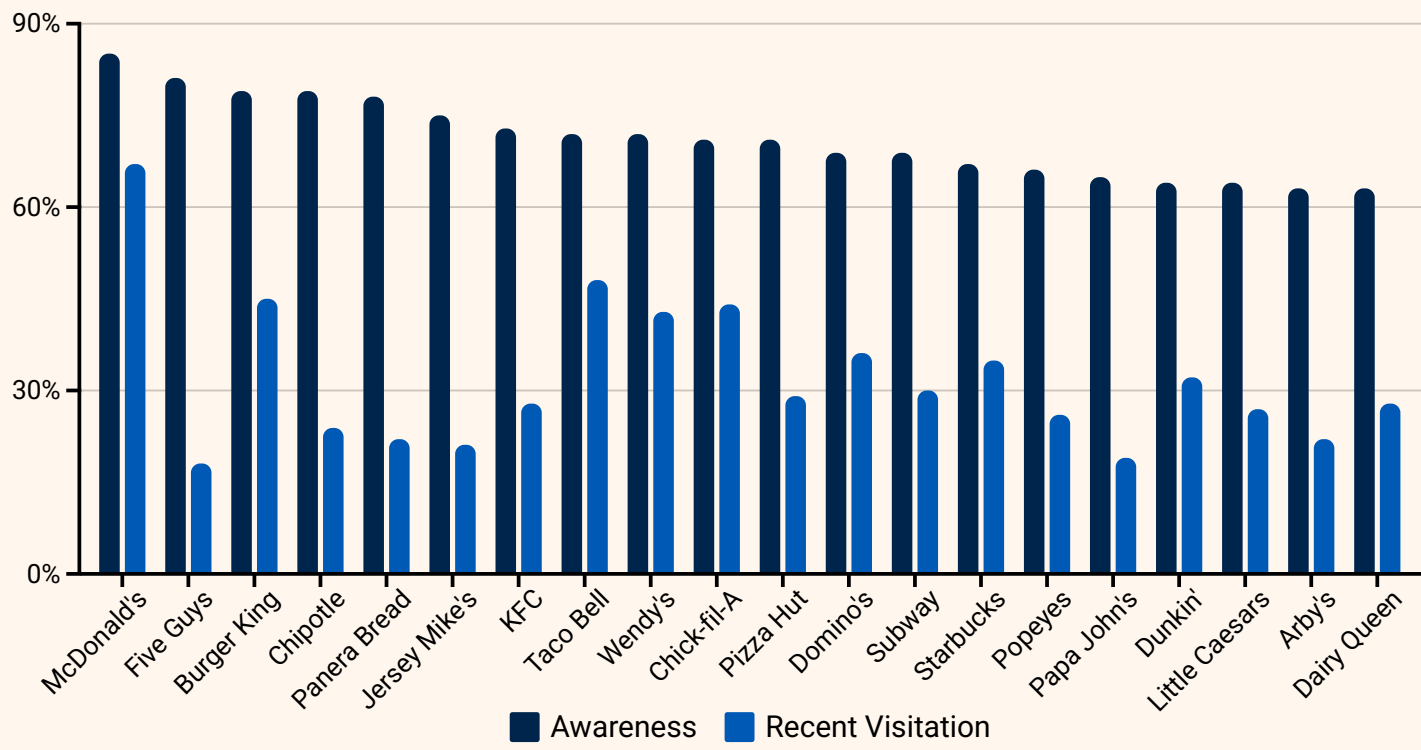


Market Dominance: McDonald's Leads for Brand Awareness, Visitor Share

Recent data reveals McDonald's overwhelming dominance in the QSR sector, capturing the both the highest brand awareness overall (85%) and largest share of recent visitors (67%). This dominance is even more pronounced among specific demographic segments, highlighting the brand's multi-generational appeal.



Top 20 QSR brands (as ranked by awareness) vs. recent visitation





Regional Awareness



Top Nationwide Brands

Burger giants dominate for awareness across the country, led by **McDonald's** (85%), **Five Guys** (81%) and **Burger King** (79%). Other fast food/fast casual leaders like Chipotle, Panera Bread, Jersey Mike's and KFC, among others, exceed 70% national recognition.



Regional Standouts

Some brands shine in certain regions: Hits in the South include **Smoothie King** (57% regional awareness), **Tropical Smoothie Cafe** (52%), **Whataburger** (52%) and **Zaxby's** (53%). Meanwhile, **In-N-Out** (72%) and **El Pollo Loco** (53%) rule in the West.



The Northeast Leads on Dunkin'

75% of people in the Northeast are aware of **Dunkin'**, far outpacing its performance in the West (54%) and South (62%).



Midwest Favorites

Consumers in the Midwest show higher awareness for **Jimmy John's** (69%), **Little Caesars** (69%) and **Dairy Queen** (72%) compared to other regions.



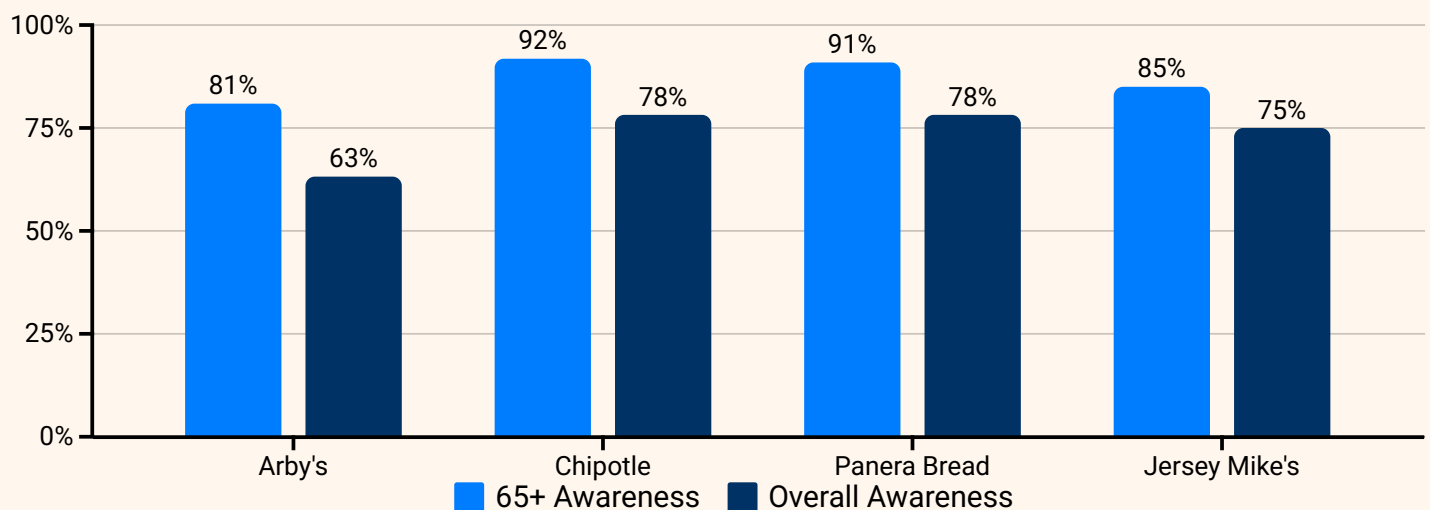
Emerging Players

Brands like **CAVA**, **Sweetgreen** and **MOD Pizza** still have relatively low awareness (<30% overall), showing potential for expansion or awareness campaigns, especially in under-penetrated regions.

Demographic Highlights

Seniors

Our study reveals that consumers aged 65 and older demonstrate notably high awareness of several fast food and fast casual brands compared to the general population. This awareness disparity is particularly pronounced for **Arby's**, where senior awareness exceeds overall awareness by 18 percentage points. For marketers, this presents an opportunity to develop more sophisticated targeting strategies for the 65+ demographic, who may be more receptive to messaging about a wider range of restaurant options than previously assumed.



Black Consumers

Among Black respondents, awareness of Zaxby's stands at 51%, substantially higher than the overall population awareness of 35%.

This notable 16-point difference suggests Zaxby's has established particularly strong brand recognition within this demographic, whether through targeted marketing efforts, store location strategies or cultural relevance.



Ordering With an AI Voice Assistant: Comfort Across Demographics

Comfort with using AI voice assistants to order food at a drive-thru or over the phone varies dramatically across demographic segments, with education level and income emerging as stronger predictors than age for openness to technological innovation. Overall, 61% of total respondents said they would be "somewhat" or "very" comfortable placing an order with an AI voice assistant.

Income as Predictor

High-income earners (\$150K+) demonstrate the highest comfort level with AI voice assistants at 87%.

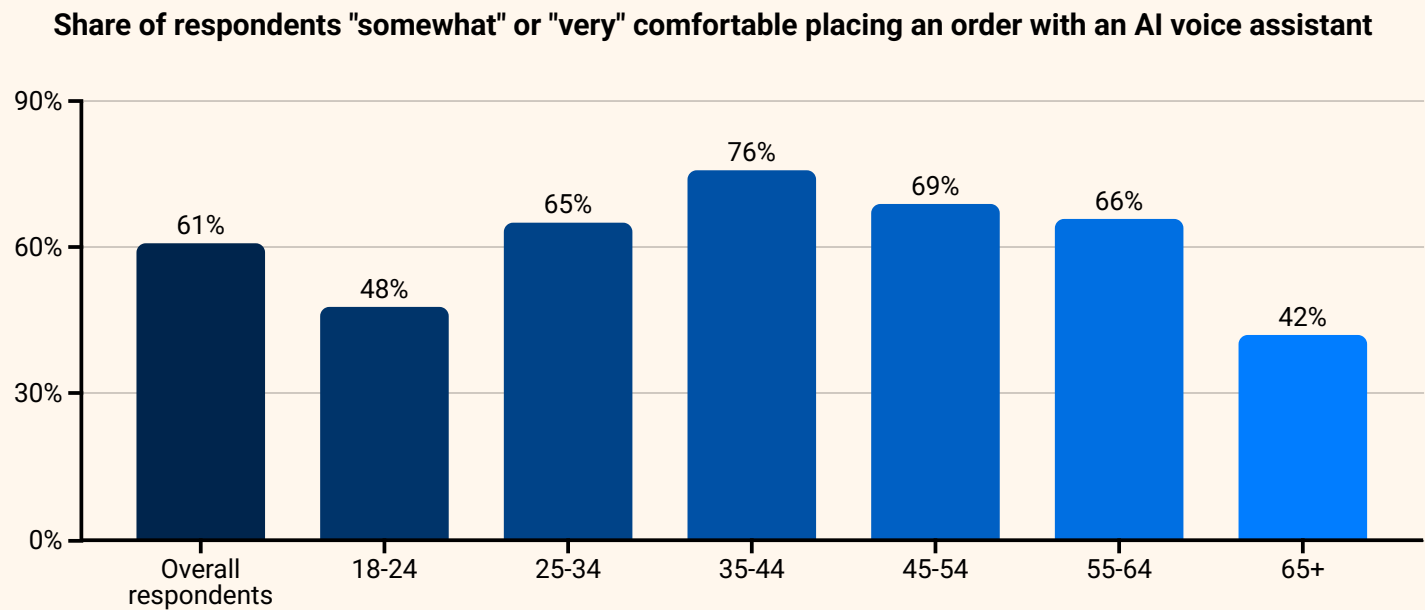
Higher Education

Consumers with Master's degrees also show remarkable comfort with AI voice assistants (82%).

Ethnicity Differences

75% of respondents who identify as Hispanic say they're comfortable ordering with AI voice assistants.

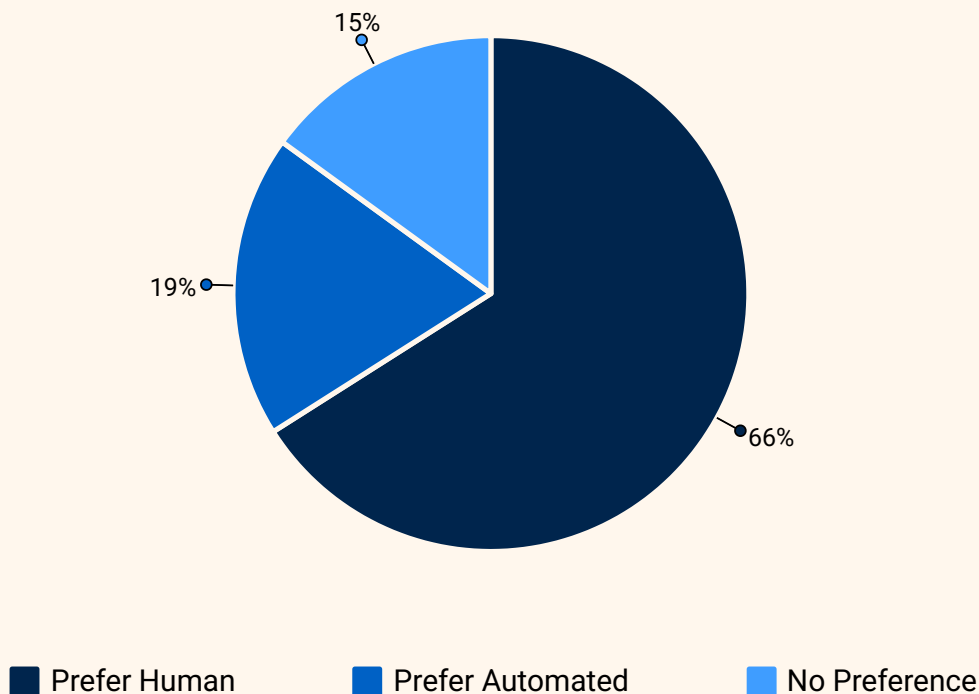
There are also some variations across age groups, with the 35-44 year old cohort demonstrating the highest comfort level, while the youngest and oldest groups have the lowest levels of comfort.



These insights suggest that restaurants implementing AI ordering systems should consider deeper demographic targeting beyond the traditional focus on younger consumers. Early AI implementation might be most successful in locations frequented by highly educated, affluent consumers regardless of age, with gradual expansion to broader demographic segments as the technology becomes more familiar.

Human vs. Automated Interaction Preferences

Despite the growing use of automated technologies like AI voice assistants and ordering kiosks in restaurants, our research shows a consistent preference for human interaction at the counter — though the intensity of this preference varies across demographic groups.



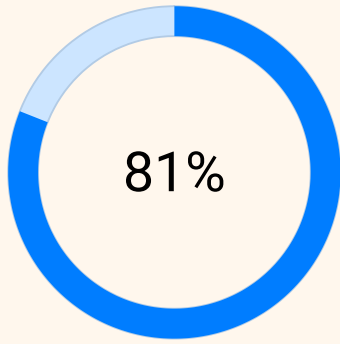
The preference for human interaction is most pronounced among seniors (85% of those 65+ prefer human cashiers or servers), representing a 19-point difference from the overall average. This suggests that restaurants with predominantly older clientele should maintain human service elements even while implementing automation technologies.

Meanwhile, **trust in robotic kitchens** shows varies across demographics, with highest acceptance among Black consumers (63% vs. 41% overall), middle-aged adults 35-44 (61%) and high-income earners \$150K+ (61%). These significant differences indicate that acceptance of back-of-house automation doesn't necessarily align with front-of-house automation preferences.

The data reveals a nuanced picture where consumers may simultaneously prefer human interaction at the ordering counter while accepting automation in food preparation, suggesting restaurants should consider hybrid approaches rather than all-or-nothing automation strategies.

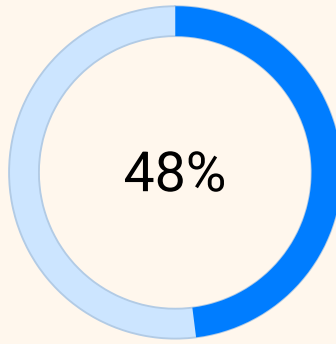
There's Openness to AI-Enhanced Dining...

While consumers show varying levels of comfort with automation replacing traditional human roles, there's surprising openness to AI as a way to enhance the dining experience, particularly through personalization. Consumers appear more receptive to AI when it's positioned as adding value to their experience rather than replacing human elements.



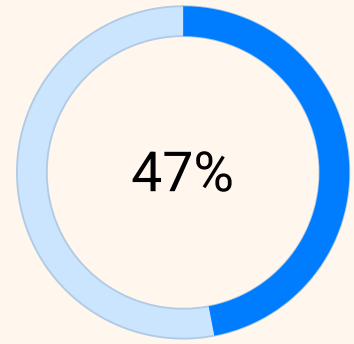
AI Menu Personalization

Percentage of consumers open to trying AI-created "secret menu" items based on their personal order history.



Quality-Driven Automation

Percentage citing high food quality as the primary factor that would entice them to try a fully automated restaurant.



Convenience Factor

Percentage citing faster service/greater convenience as their primary motivation for trying automated restaurants.

...But Concerns Remain

Understanding consumer reservations about restaurant automation is crucial for developing effective marketing strategies that address these worries while highlighting benefits. Top concerns include:

21%

Job Displacement

17%

Technical Glitches

15%

Less Human Connection

i Restaurant brands implementing AI or automation technologies should consider transparency campaigns that openly address how these systems work and the measures in place to ensure food quality, data protection and technical reliability. Demonstrating consideration for displaced workers through retraining programs or creating new roles could also help mitigate the primary concern about job loss.

What Gets People to Try New Restaurants?

From viral social media content to good, old-fashioned word-of-mouth, understanding what drives consumers to try new restaurants provides crucial insights for marketing strategy development, particularly for brands seeking to expand their customer base or launch new locations.



Word-of-Mouth

Positive word-of-mouth from someone they know was cited as the No. 1 influence for trying a restaurant by 20% of consumers, demonstrating the power of traditional (IRL) social networks.



Promotions & Deals

Economic incentives rank as the second strongest motivator at 18%, indicating that value perception remains crucial even as experience-based marketing gains prominence.



Online Reviews

Online reviews on platforms such as Yelp and Google influence restaurant trial decisions either "somewhat" or "a lot" for 50% of consumers.



Social Media Content

Nearly half (45%) say they've tried a new restaurant or ordered a menu item because it went viral on social media – with 35% reporting that it did indeed live up to the hype.

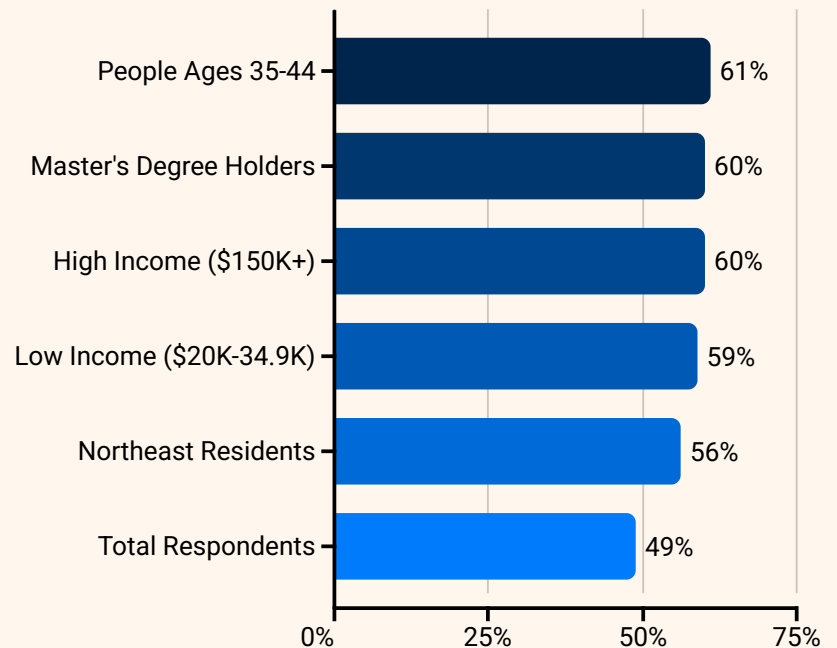




Tipping Trends

Tipping at the counter divides QSR customers, with 49% always leaving something out of courtesy — especially younger middle-aged diners, high earners and those with advanced degrees. But more than half say they're at least somewhat annoyed by these prompts, a sentiment that spikes among older guests.

Groups more likely to always tip out of courtesy



Diner sentiment around counter tipping



Over half (52%) of diners feel either "somewhat" or "very" annoyed when asked to tip for counter service with no table interaction. That share jumps to a notable 81% for people over the age of 65.

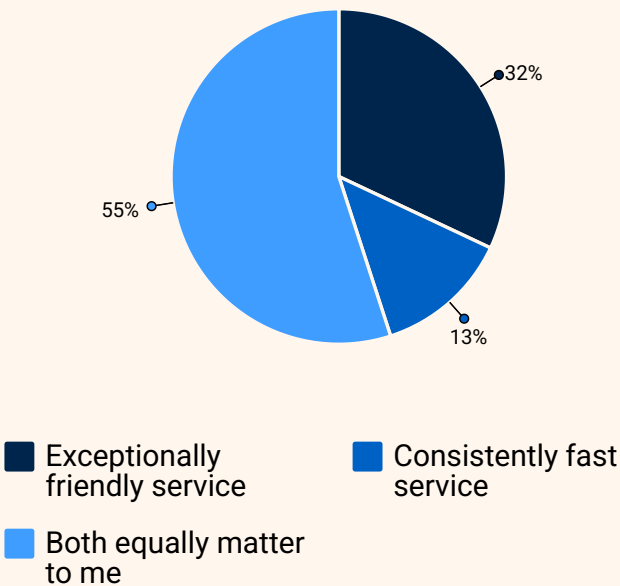


Almost a third (32%) of consumers say they feel "somewhat" or "very" supportive when asked to tip at the counter, with that rising to 49% among people ages 35-44 and 57% for people with Master's degrees.

What Brings Diners Back Again?

In today’s competitive restaurant landscape, customer loyalty hinges on more than just what’s on the plate. Diners expect a seamless blend of quality, value and hospitality that makes them feel both satisfied and appreciated. When these expectations fall short – whether in service, environment or food – consumers may be quick to take their business elsewhere.

What keeps diners coming back to a restaurant?



QSR diners want both quick service *and* a warm welcome, with 55% saying both matter equally.

i In an open-ended response, 47% of consumers said something about **food quality and taste** being a top factor in returning to dine, while pricing and value was mentioned by just 16%.



Strong likelihood to recommend after great service

Over two-thirds of diners are "somewhat" or "extremely" likely to recommend a quick-service restaurant to a friend after a great service experience.

Three of the top factors reported by diners that discourage them from a repeat visit:



Unclean Environment



Rude or Unfriendly Staff



Food Quality Didn't Meet Expectations

Conclusion

The quick-service restaurant industry sits at the intersection of routine and innovation, serving as both a daily habit and a testing ground for emerging technologies and consumer preferences. This report highlights the complexity of today's fast food landscape, where brand loyalty coexists with openness to new experiences, and traditional expectations compete with a growing interest in automation and personalization.

For QSR marketers, success lies in understanding these nuances — leveraging data to meet customers where they are while thoughtfully introducing innovations that enhance, rather than replace, the human-centered experience consumers still value. By staying attuned to shifting demographics, regional behaviors and tech adoption patterns, brands can remain competitive in the quickly-evolving market.

Methodology

These consumer insights were collected from a comprehensive, nationally-representative survey of over 500 U.S. adults conducted in July of 2025.

Want More Insights?

This report is just a sample of the insights that came from the survey on quick-service restaurants — for more information or to get additional demographic data, [reach out to us!](#)

About MX8 Labs

Created by researchers for researchers, MX8 Labs eliminates the trade-offs, compromises and complexities of traditional market research tools so that researchers can finally know it all.

Our platform provides lean research teams, or those simply stretched for bandwidth, with a more efficient way to conduct quantitative research. MX8 Labs proprietary research platform takes arduous research tasks — such as survey programming, fielding, data processing and reporting — and supercharges them without compromising depth or quality of the results. By leveraging this sophisticated technology to automate formerly manual, error-prone and often inefficient steps of survey programming, execution and analysis, research teams no longer have to choose between rigorous methodologies or rapid execution.

Simply put, with MX8 Labs, researchers can now ask more insightful questions, uncover deeper insights and tackle more ambitious projects without extra effort or resources.

MX8 Labs is headquartered in Boston, MA, with offices in London and Los Angeles. Visit us at mx8labs.com and follow us on [LinkedIn](#).