YouGov

UNITED STATES

Check, please: US dining out report 2025

Are rising costs reshaping America's dining habits?

/Research Reality

Contents

Foreword

“Although dining out remains a staple for Americans, economic pressures have made consumers more cost conscious. Seven in ten consumers say they eat out at least once a month, yet more than a third report doing so less frequently compared to last year, citing rising costs and a greater need to save financially.

This report examines how Americans are approaching dining out in 2025: how often they go, the types of restaurants they visit, how they’re adapting their behavior to manage costs, and what incentives could encourage them to dine out more often.”

Nora Hao

Sr. Sales Director, YouGov America

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Report takeaways

Diners are dining out less frequently

37% of US diners say they are dining out less frequently than they used to a year ago.

Of these, 69% cite a perceived rise in expensiveness as a reason for them visiting restaurants less often.

Appetite for cheaper alternatives

More than half of US diners say they have altered their dining preferences with a view to saving money.

Of these, 60% say they are choosing cheaper restaurants, while 53% say they look to use discounts or coupons to cut costs.

Discount delights

Most US diners agree that discounts in form or another can incentivize them to visit restaurants more often.

Buy One, Get One offers can be especially attractive. But how should restaurants communicate their offers to potential diners?

Powered by the YouGov panel

The insights in this report are fueled by YouGov's consumer research panel, which has 30 million registered members from 55+ markets.

Every day, our members trust us with their data and opinions – enabling us to gain insights into behaviours and attitudes from people of all ages, backgrounds and beliefs.

Inclusion is essential for our members, our clients, and our mission. We invest millions each year to ensure we can create truly nationally representative online samples and access hard-to-reach groups.

The Pew Research Centre concluded that YouGov "consistently outperformed" other online competitor samples for accuracy.

30m
registered panel members

55+
markets

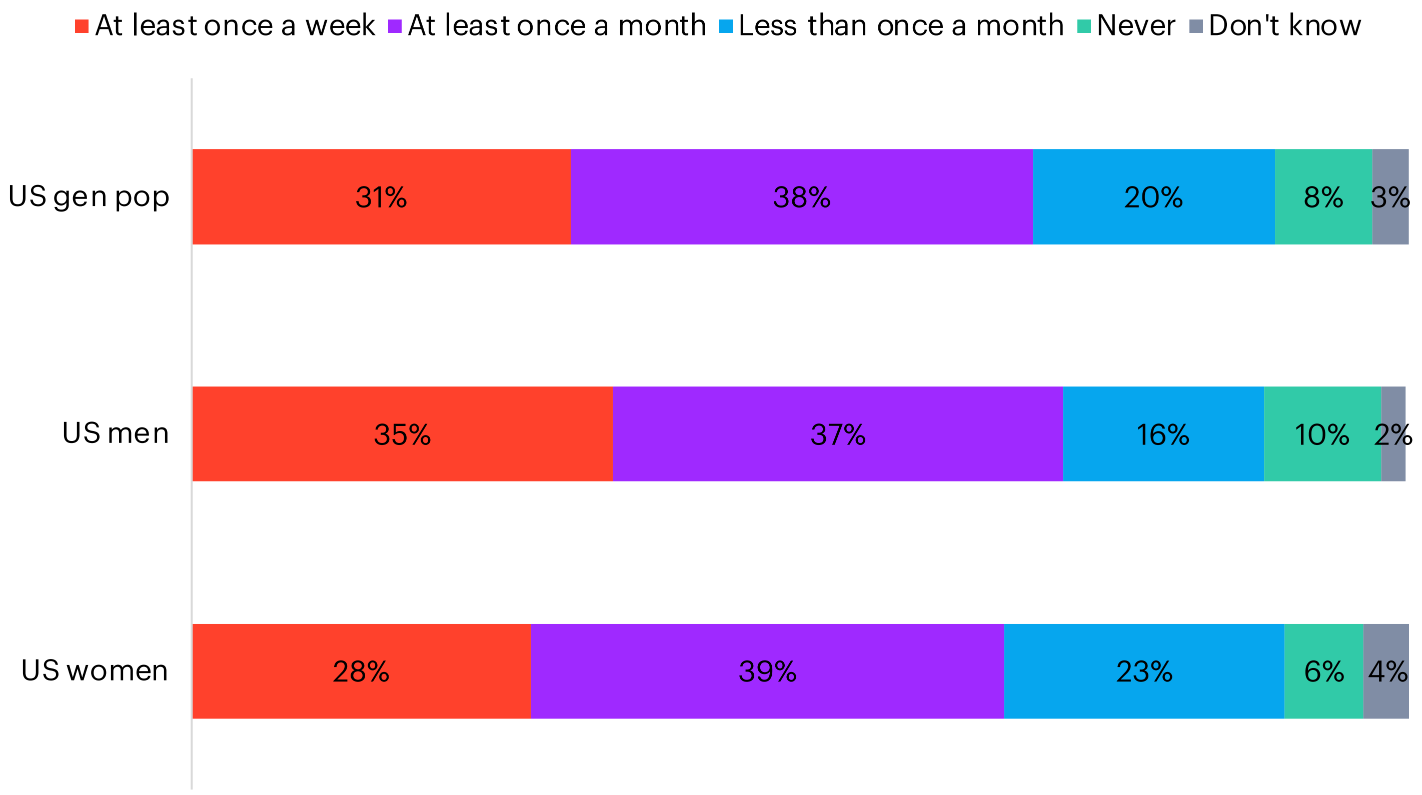
America's appetite for dining out

3 in 10 Americans dine out at least once a week

38% dine out at least once a month but less often than once a week. One in five dine out less often than once a month (20%). Less than a tenth say they never eat out.

Get in touch for more data

How often, if ever, do you eat out at restaurants (including cafés, pubs serving food, and fast-food joints)?

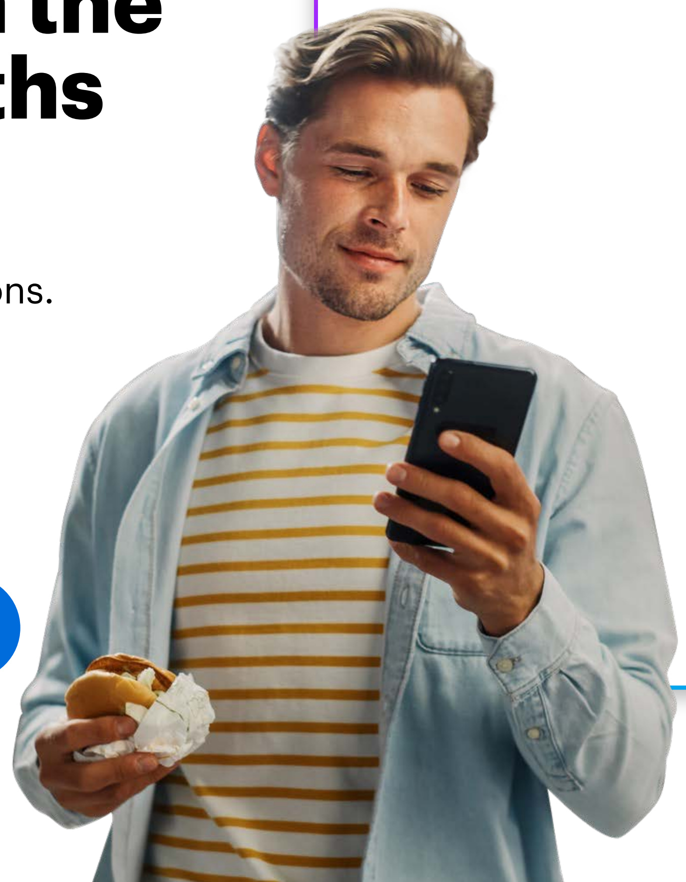


YouGov Surveys, August 11 – September 2, 2025. US gen pop: n> 1,500; US men: n> 700; US women: n> 750

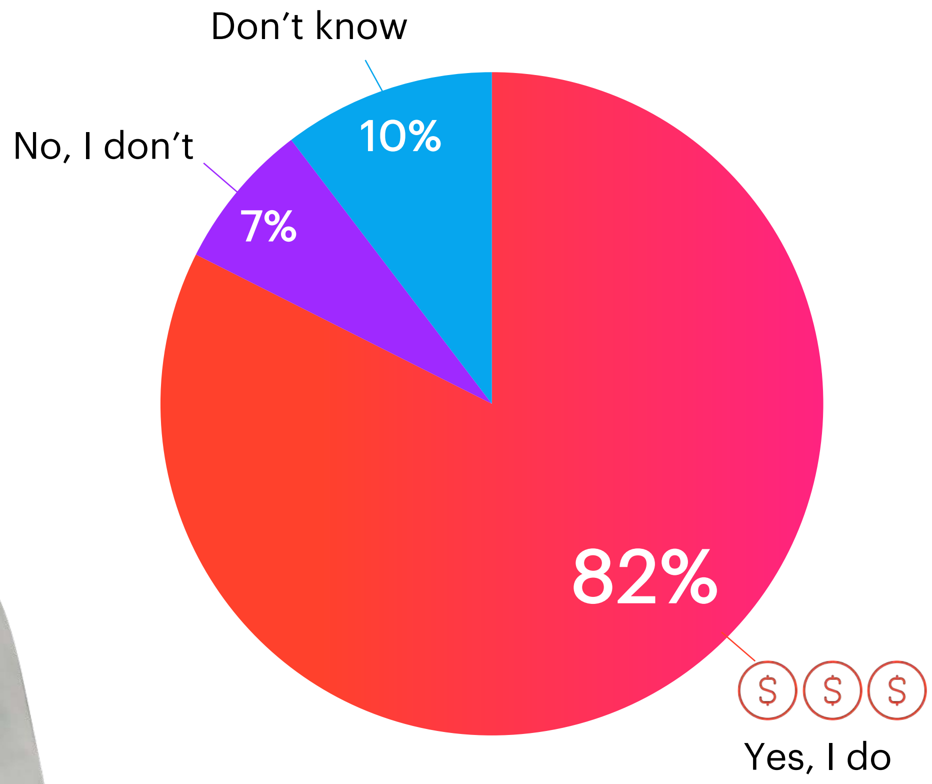
8 in 10 American diners feel restaurant prices have risen in the past 12 months

This sentiment is consistent across genders and generations.

Get in touch for more data



Do you think restaurant prices have increased noticeably in your area in the past 12 months? (% of US diners)?



YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300.

37% of American diners say they dine out less frequently now

Among lower income diners, this share rises to 44%. A third of middle-income diners and just over a quarter of higher income diners report eating out less frequently now than they did a year ago.

Get in touch for more data

Has your frequency of dining out changed compared to 12 months ago?

	I eat out more now	I eat out about the same	I eat out less now	Don't know
US diners	**8%**	**51%**	**37%**	**4%**
Lower income diners (< 75% of median income)	7%	44% ▼	44% ▲	5% ▲
Middle income diners (75-200% of median income)	7%	58% ▲	33%	2% ▼
Higher income diners (> 200% of median income)	9%	64% ▲	27%	0%

YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300; Lower income diners: n> 500; Middle income diners: n> 550; Higher income diners: n> 100.
▲/▼: indicates statistically significant difference compared to US diners.

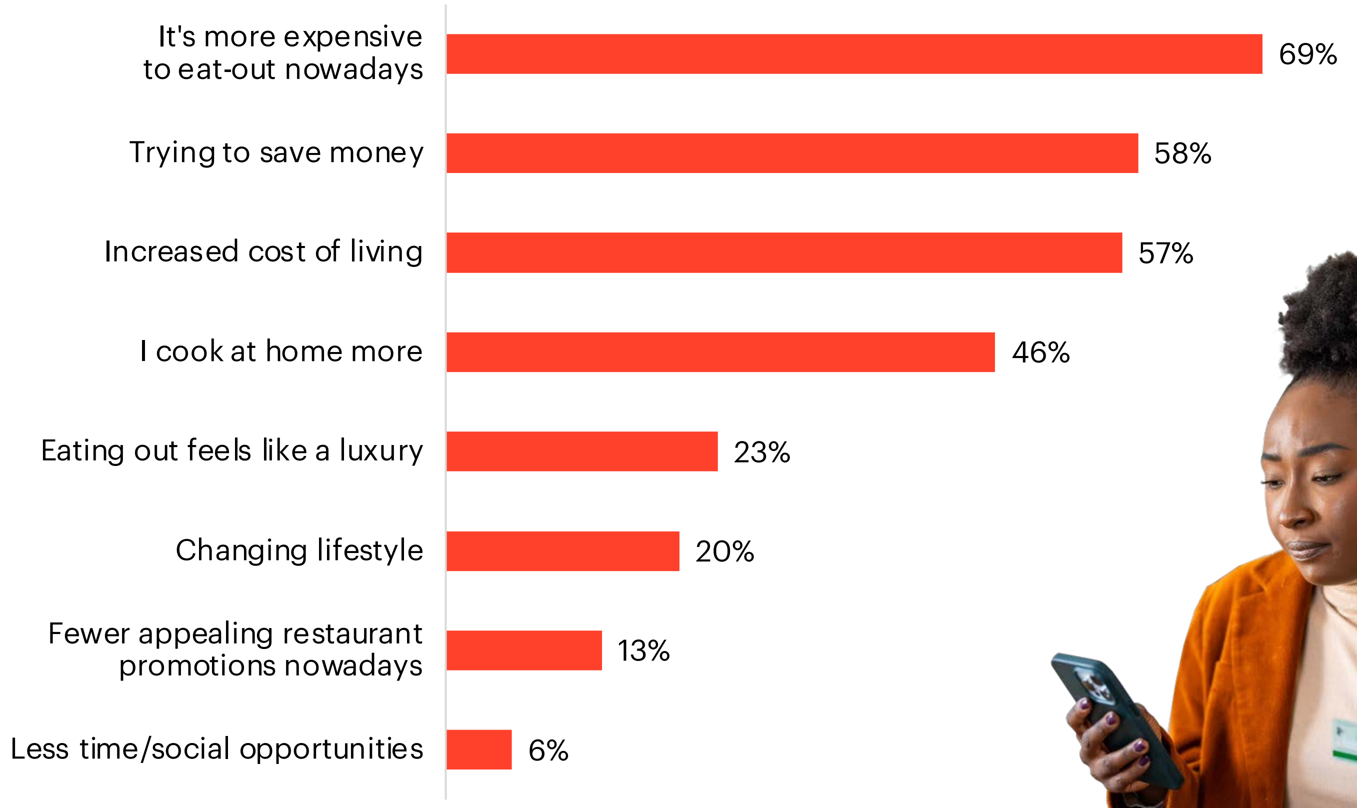
Two-thirds of American diners who dine out less frequently cite increasing prices

About three in five also say they are trying to save money (58%).

A similar proportion cite increased cost of living as a factor (57%).

Get in touch for more data

Which, if any, of the following are reasons for you dining out less now than 12 months ago? (% of US diners who dine out less frequently)



YouGov Surveys, August 11 – September 2, 2025.
US diners who dine out less frequently: n> 450.
Top 8 options shown.

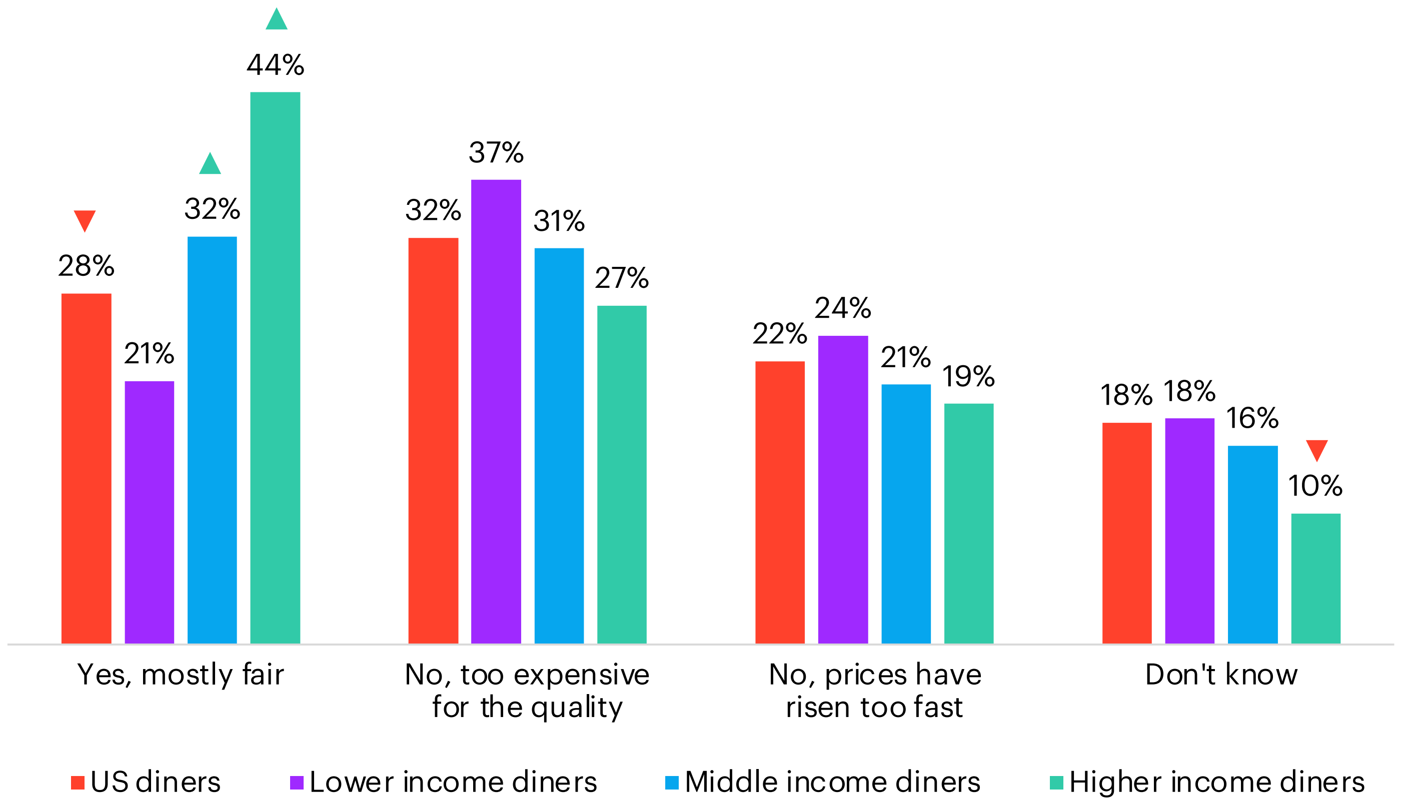
Only 28% American diners feel restaurant prices are fair

This increases to 44% among higher income American diners but drops to 21% among their lower income counterparts.

A third of diners (32%) overall feel that prices today are too expensive relative to quality.

Get in touch for more data

Do you feel restaurants are fairly pricing their meals given current inflation and labor costs? (% of US diners)



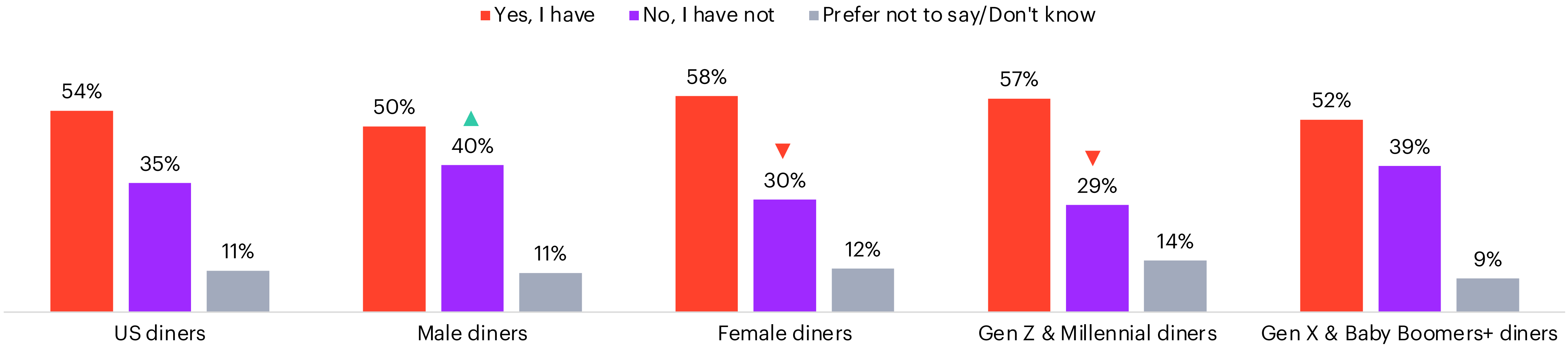
YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300; Lower income diners: n> 500; Middle income diners: n> 550; Higher income diners: n> 100.
Lower income: < 75% of median income; Middle income: 75-200% of median income; Higher income: > 200% of median income
▲/▼: indicates statistically significant difference compared to US diners.

Rising prices, shifting plates?

54% of all American diners indicate they have altered dining preferences to cut expenses

Women (58%) are markedly likelier than men (50%) to say they have changed their preferences.
A similarly large difference is seen between Gen Z and Millennial diners (57%) and their older counterparts (52%).

When you eat out, have you changed your preferences at all to spend less money? (% of US diners)



YouGov Surveys, August 11 – September 2, 2025.
US diners: n>1,300; Male diners: n> 600; Female diners: n> 650; Gen Z & Millennial diners: n> 550; Gen X & Baby Boomers+ diners: n> 750.
▲/▼: indicates statistically significant difference compared to US diners.

Get in touch

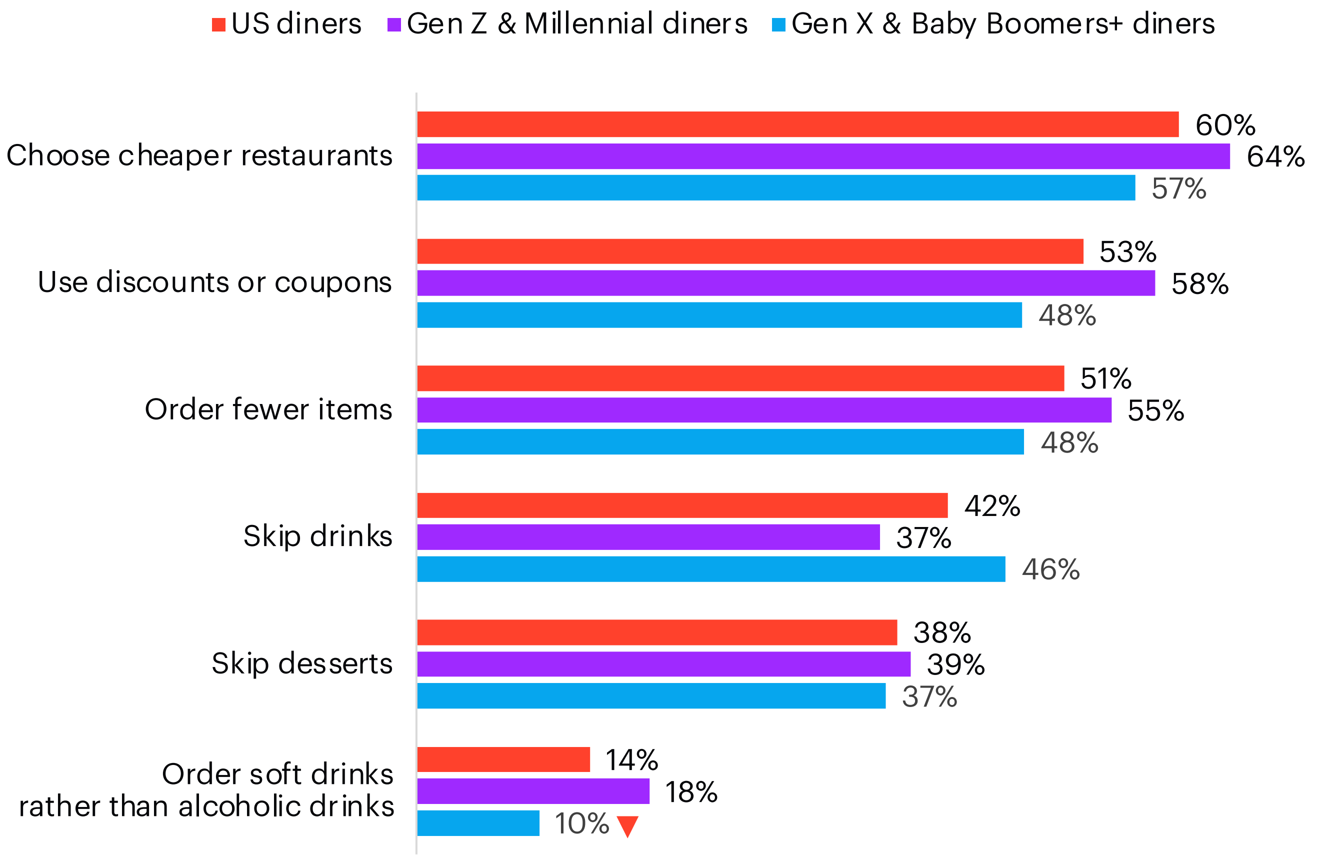
Is a switch to cheaper restaurants on the menu?

Among diners who are altering their preferences to cut costs, choosing cheaper restaurants is the most prevalent option (60%).

More than half of them also seek out discounts (53%) or simply order fewer items (51%).

Get in touch for more data

How have you changed your preferences when you eat out to spend less money? (% of US diners who have altered their dining preferences)



YouGov Surveys, August 11 – September 2, 2025. Top 6 options shown. US diners who have altered their dining preferences to save money: n> 700; Gen Z & Millennial diners: n> 300; Gen X & Baby Boomers+ diners: n> 350.
▲/▼: indicates statistically significant difference compared to US diners.

Upscale dining frequency most reduced year-on-year

Compared to 12 months ago, how often do you eat out at the following types of restaurants? (% of US diners)

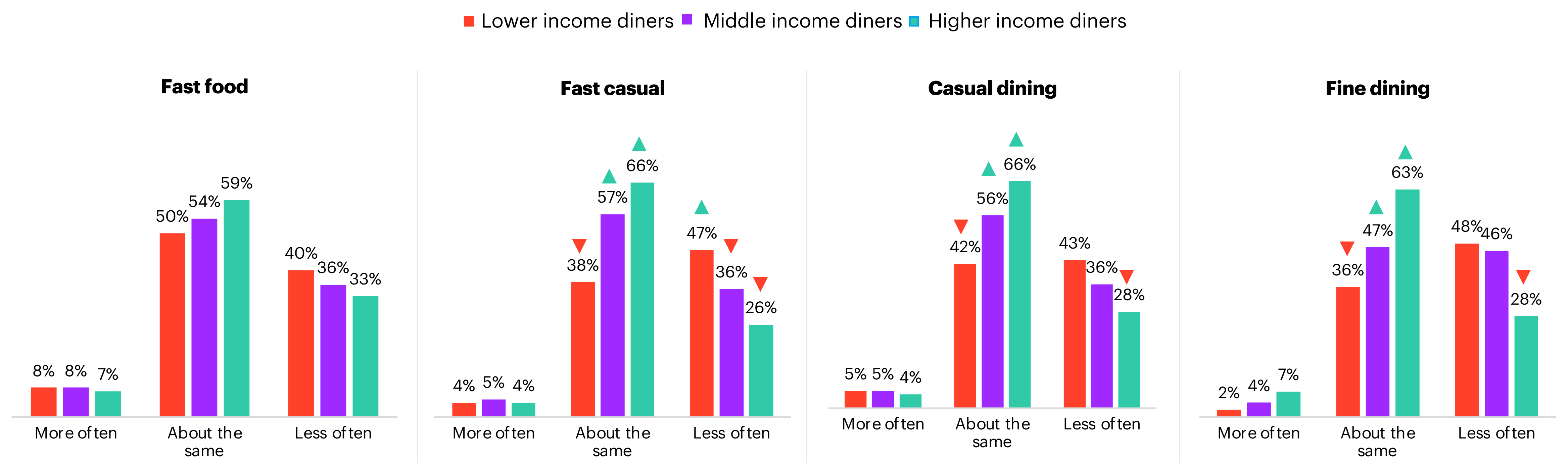
	Fast food restaurants	Fast casual restaurants	Casual dining restaurants	Fine dining restaurants	Café/coffee shops with food	Food trucks/street food vendors
More often	8%	5%	5%	4%	5%	4%
About the same	51%	48%	50%	42%	46%	45%
Less often	39%	41%	40%	46%	41%	39%
Don't know	2%	6%	5%	8%	8%	12%

YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300.

How income impacts America's appetite for dining out

Almost 1 in 2 lower income diners said they eat out less at fine dining restaurants compared to 12 months ago.

Compared to 12 months ago, how often do you eat out at the following types of restaurants? (% of US diners)



YouGov Surveys, August 11 – September 2, 2025.
Lower income diners (<75% of median income): : n> 500; Middle income diners (75-200% of median income): n> 550; Higher income diners (>200 % of median income): n> 100.
▲/▼: indicates statistically significant difference compared to US diners.
"Don't know" responses not shown.

Get in touch

Attracting American diners in 2025

BOGO and discounts have strong appeal

BOGO offers are especially attractive with nearly three-fifths of regular US diners saying these would spur them to dine out more often (58%), with discounts (56%) trailing closely.

A third of consumers also see value in loyalty points (33%) and free appetizers or desserts (33%).

Which THREE, if any, of the following incentives would most encourage you to eat out more often? (% of US diners)

YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300.
Top 6 options shown. “Don’t know” and “None of these” responses not shown.

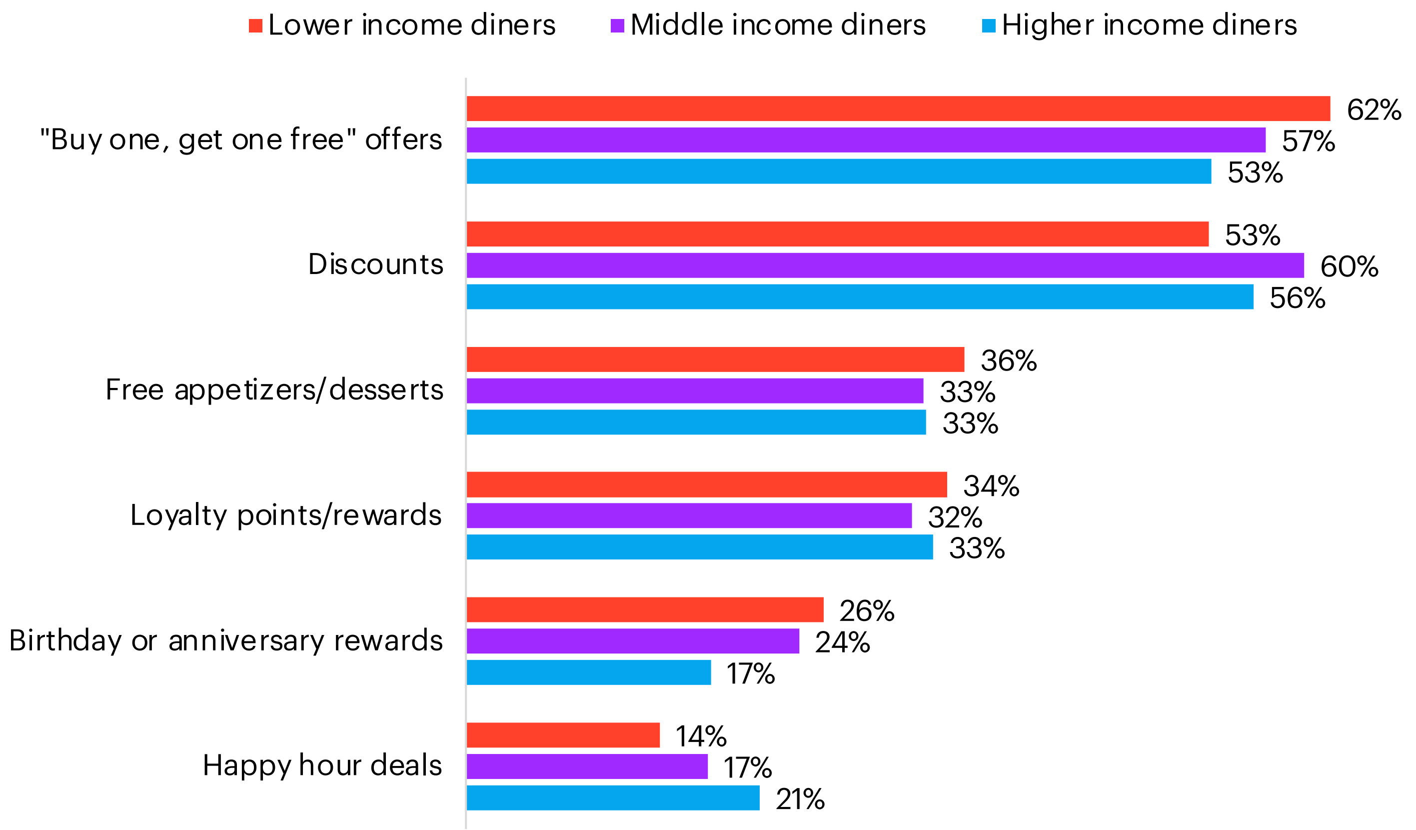
Deals drive demand, but preferences shift by income

Lower-income diners over-index on BOGO (62%) and birthday rewards (26%), middle-income peak on discounts (60%), and higher-income skew to happy hour deals (21%).

Loyalty points are steady across groups (~32–34%).

Get in touch for more data

Which THREE, if any, of the following incentives would most encourage you to eat out more often? (% of US diners)

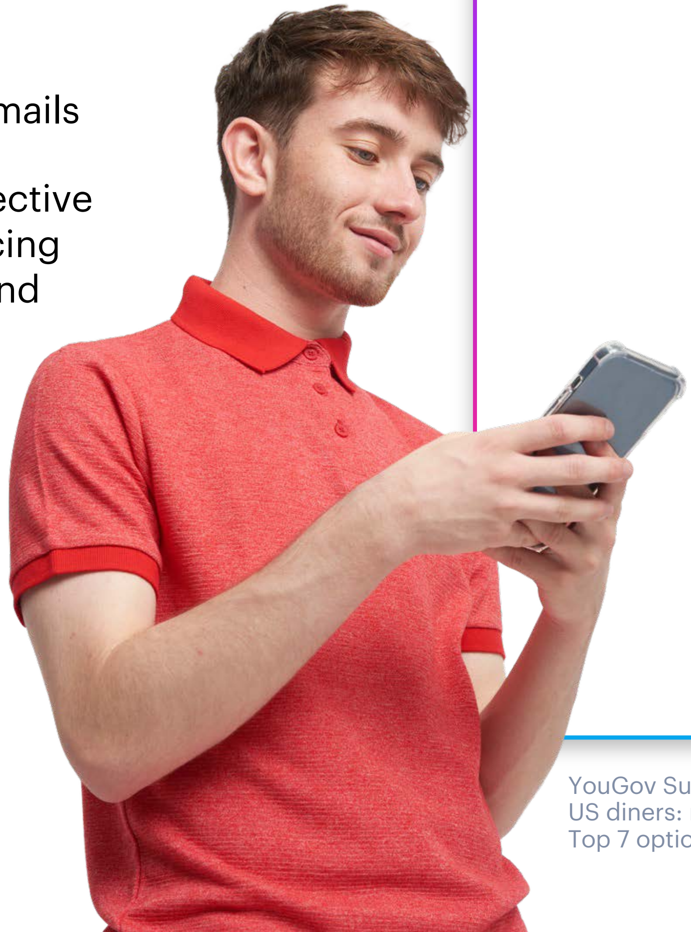


YouGov Surveys, August 11 – September 2, 2025. Lower income diners (<75% of median income): n> 500; Middle income diners (75-200% of median income): n> 550; Higher income diners (>200 % of median income): n> 100. Top 6 options shown. "Don't know" and "None of these" responses not shown.

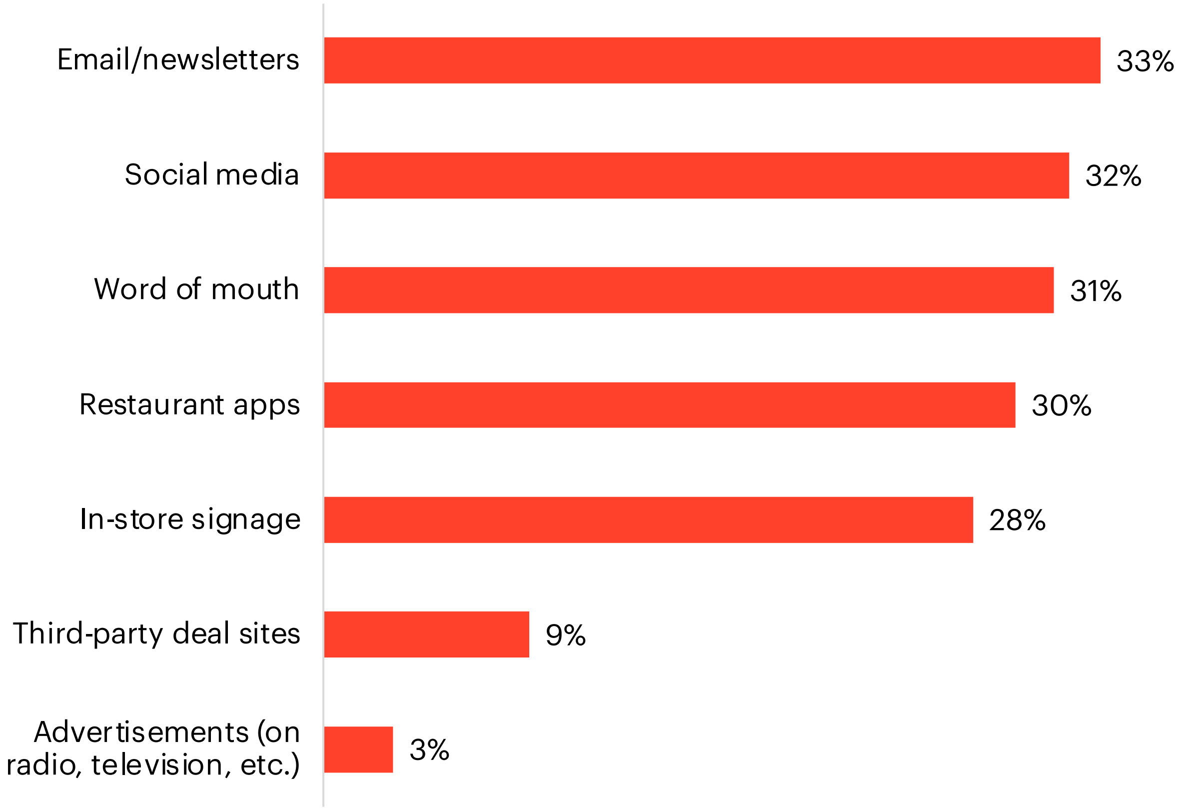
Discount discovery channels

Among US diners, emails and newsletters are among the most effective methods of announcing restaurant promos and deals (33%).

A similar share of them also discover deals through social media (32%) and word of mouth (31%).



How do you usually find out about restaurant promotions or deals? Please select all that apply. (% of US diners)

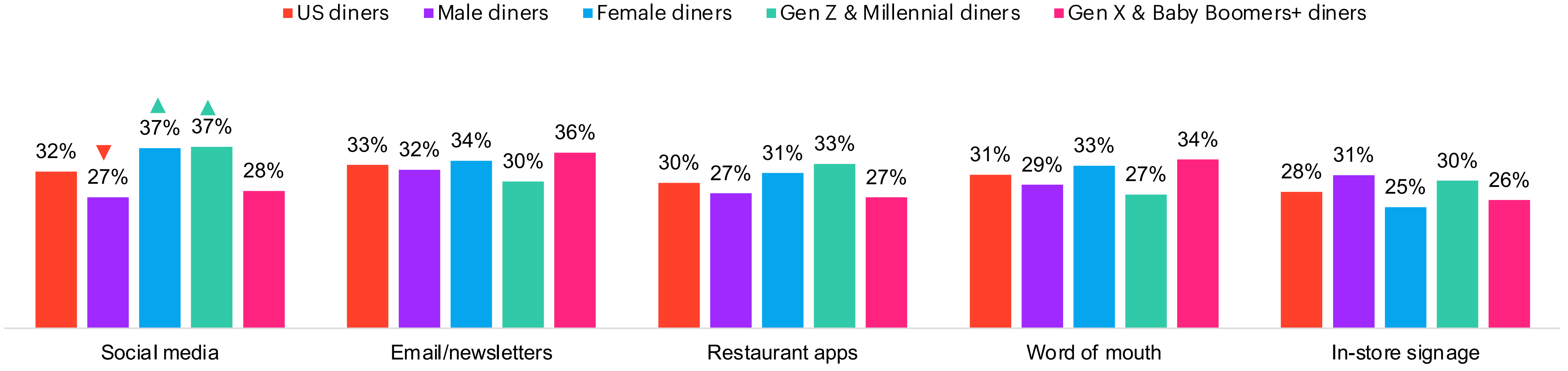


YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300.
Top 7 options shown. “Don’t know” and “None of these” responses not shown.

How do diners discover discounts and promotions?

Gen Z and Millennial diners are much likelier to notice deals via social media (37%) and restaurant apps (33%) compared to older generations (28% and 27%, respectively). Men are markedly likelier to notice in-store signage (31%) than women (25%).

How do you usually find out about restaurant promotions or deals? Please select all that apply. (% of US diners)



YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300; Male diners: n> 600; Female diners: n> 650; Gen Z & Millennial diners: n> 550; Gen X & Baby Boomers+ diners: n> 750.
▲/▼: indicates statistically significant difference compared to US diners.
Top 5 options shown. “Don’t know” and “None of these” responses not shown.

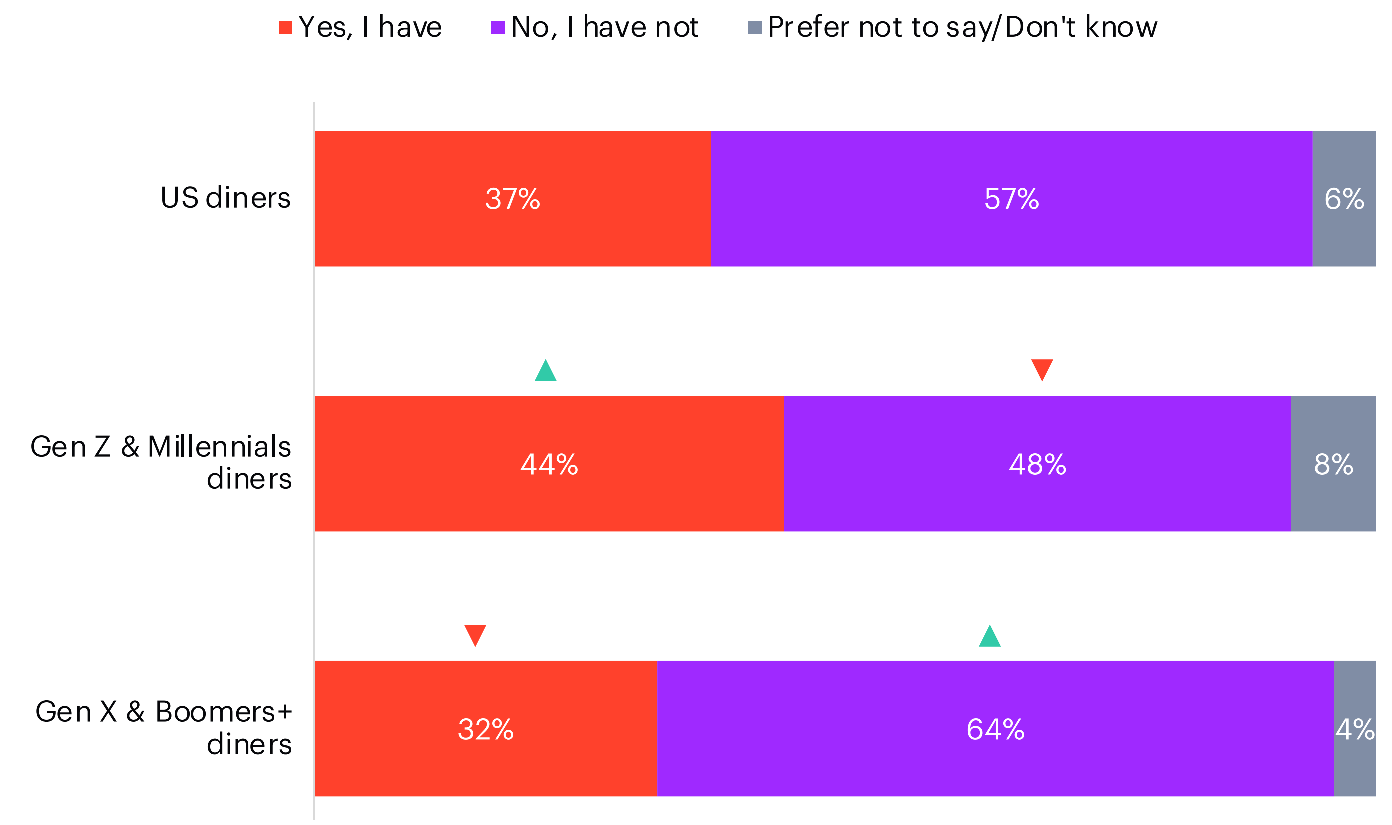
Get in touch

More than a third of American diners have used a restaurant loyalty program

Gen Z and Millennial diners (44%) are far likelier to have used loyalty programs in the past 12 months than older generations (32%).

Get in touch for more data

Have you used a restaurant loyalty program in the last 12 months? (% of US diners)



YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300; Gen Z & Millennial diners: n> 550; Gen X & Baby Boomers+ diners: n> 750.
▲/▼: indicates statistically significant difference compared to US diners.

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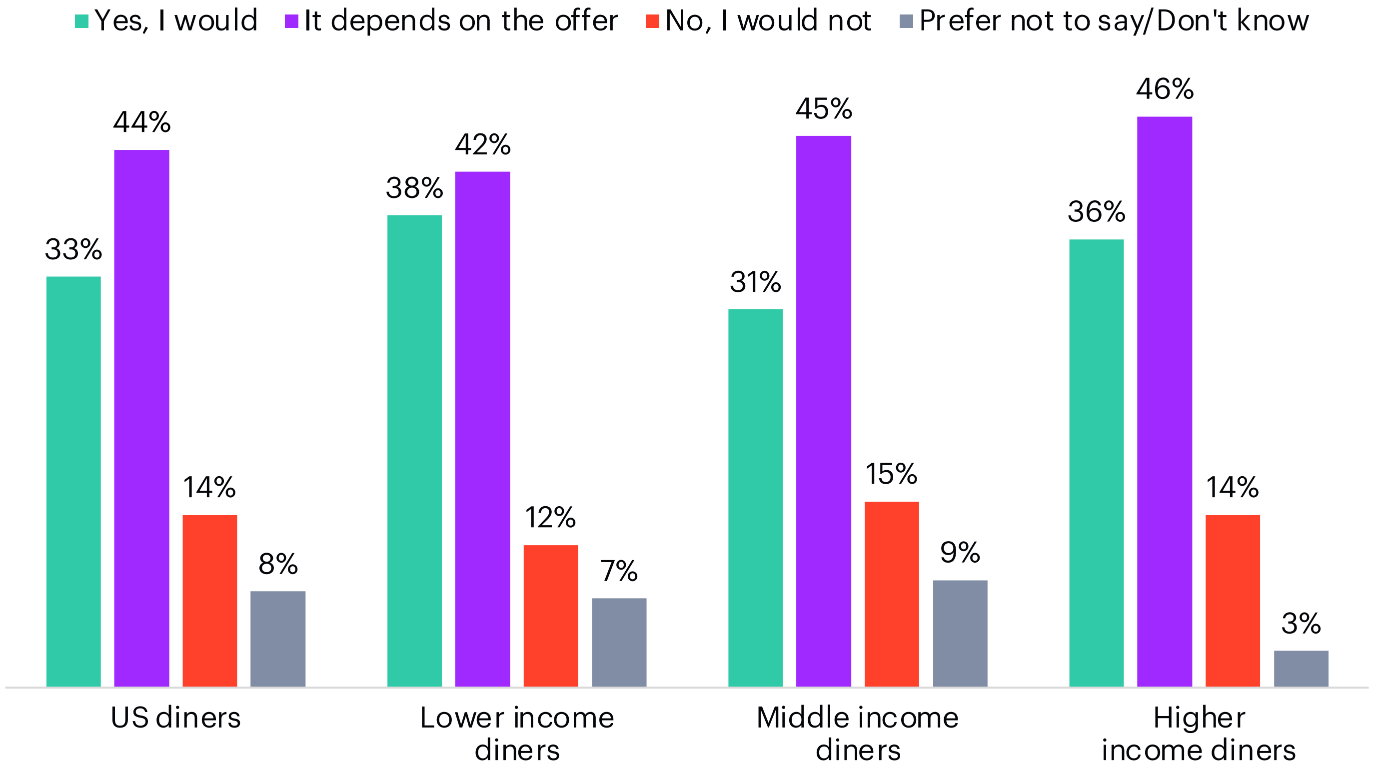
Loyalty programs can attract more diners

77% of all US diners indicate that loyalty programs could have them visiting restaurants more frequently, but that includes the 44% who say, "It depends on the offer."

Loyalty programs have reasonably strong appeal among both lower and higher income diners.

Get in touch for more data

Would you be more likely to return to a restaurant that offers a loyalty program? (% of US diners)



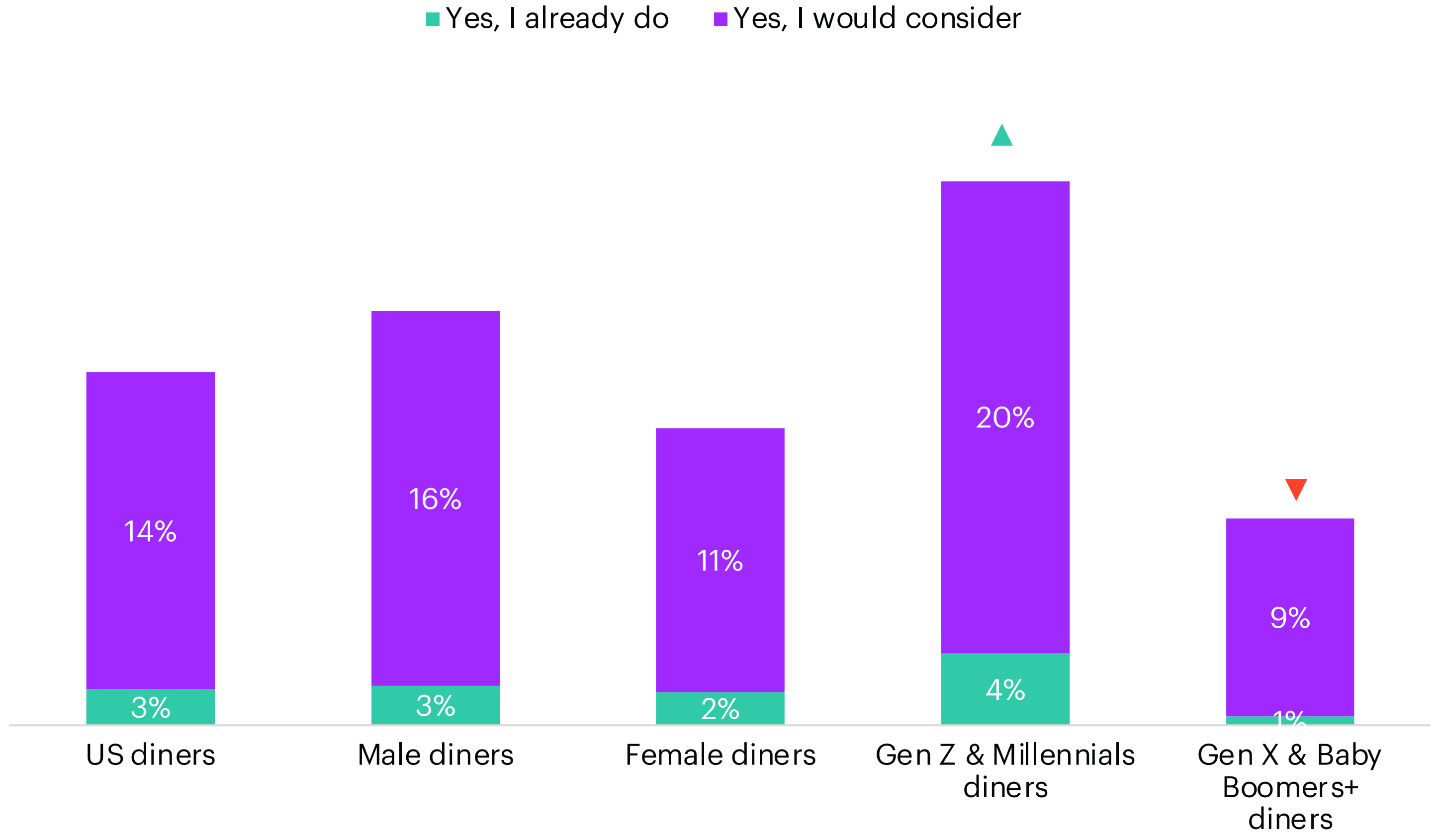
YouGov Surveys, August 11 – September 2, 2025.
US diners: n> 1,300; Lower income diners (<75% of median income): n> 500;
Middle income diners (75-200% of median income): n> 550; Higher income diners (>200 % of median income): n> 100

Pay for perks: US diners' appetite for membership offers

Gen Z and Millennial diners in the US are **most likely** to consider paying a fee to access perks at their favorite restaurant. A fifth of them say they would consider such an arrangement, and 4% say they already do this.

Get in touch for more data

Would you consider paying a monthly fee for perks at your favorite restaurant? (% of US diners)



YouGov Surveys, August 11 – September 2, 2025. US diners: n> 1,300;
Male diners: n> 600; Female diners: n> 650; Gen Z & Millennial diners: n> 550; Gen X & Baby Boomers+ diners: n> 750.
▲/▼: indicates statistically significant difference compared to US diners.

Top of the tables

America's most considered restaurants.

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Most considered QSR restaurants among US diners

While McDonald's in purchase consideration among likely US diners (49.4%), the brand has expeienced a slight decline.

KFC (+1.2 percentage-points) and Burger King (+1.1) see the most traction.

Rank	Brand	Consideration 2025 (%)	Consideration 2024 (%)	Difference
1	McDonald's	49.4	50.3	-0.9
2	Chick-fil-A	39.8	40.2	-0.4
3	Burger King	39.1	38.0	+1.1
4	Wendy's	38.7	39.3	-0.6
5	Taco Bell	36.9	36.2	+0.7
6	Domino's	34.3	34.2	+0.1
7	KFC	33.9	32.7	+1.2
8	Subway	33.3	35.3	-2.0
9	Pizza Hut	31.3	33.9	-2.6
10	Dairy Queen	28.8	31.9	-3.1

YouGov BrandIndex US, October 1, 2024 – September 30, 2025, vs previous year ranked based on consideration score.
Likely to eat at a QSR n> 25,400.
Question: "When you are in the market next to purchase food or drink, from which of the following would you consider purchasing?"
+/- : indicates statistically significant difference compared previous year.

Most considered Casual dining restaurants among US diners

Olive Garden retains its top billing in casual dining consideration, though US diners are slightly less likely to have it in their consideration set than last year.

Texas Roadhouse (+1.5 percentage-points) and Chili's (+0.8) see the most growth among the ten most considered casual dining restaurants.

Rank	Brand	Consideration 2025 (%)	Consideration 2024 (%)	Difference
1	Olive Garden	37.6	38.6	-1.0
2	Texas Roadhouse	34.8	33.3	+1.5
3	Applebee's	30.1	31.2	-1.1
4	Chili's	28.8	28.0	+0.8
5	Cracker Barrel	25.1	27.1	-2.0
6	The Cheesecake Factory	24.9	24.8	+0.1
7	Outback Steakhouse	24.6	24.9	-0.3
8	IHOP	23.8	25.2	-1.4
9	Red Lobster	20.7	23.9	-3.2
10	Buffalo Wild Wings	19.4	20.2	-0.8

YouGov BrandIndex US, October 1, 2024 – September 30, 2025, vs previous year ranked based on consideration score.
Likely to eat at a casual dining restaurant n> 8,200.
Question: "When you are in the market next to purchase food or drink, from which of the following would you consider purchasing?"
+/- : indicates statistically significant difference compared previous year.

Most considered Fast casual dining restaurants among US diners

Panera (33% considering) and Chipotle (29.5% considering) retain their first and second positions, while Five Guys jumps Sonic as the third-most considered fast casual joint.

Among the ten most considered fast casual brands, Waffle House sees the most growth since 2024, with 20.4% of likely diners now considering the restaurant (+1.5 percentage-points).

Rank	Brand	Consideration 2025 (%)	Consideration 2024 (%)	Difference
1	Panera Bread	33.0	33.0	**0**
2	Chipotle	29.5	29.1	**+0.4**
3	Five Guys	27.5	27.7	**-0.2**
4	Sonic	26.8	28.1	**-1.3**
5	Panda Express	25.4	25.0	**+0.4**
6	Denny's	22.0	22.2	**-0.2**
7	Waffle House	20.4	18.9	**+1.5**
8	Steak 'n' Shake	17.6	17.9	**-0.3**
9	Zaxby's	11.3	11.8	**-0.5**
10	Cici's Pizza	10.9	11.2	**-0.3**

YouGov BrandIndex US, October 1, 2024 – September 30, 2025, vs previous year ranked based on consideration score.
Likely to eat at a fast casual dining restaurant n> 20,900.
Question: "When you are in the market next to purchase food or drink, from which of the following would you consider purchasing?"
+/- : indicates statistically significant difference compared previous year.

YouGov

Most considered Specialty restaurants among US diners

Starbucks and Dunkin' extend their dominance, with 35.5% and 32.8% of likely US diners considering each respectively.

Cold Stone Creamery (+1.3 percentage-points) jumps out as the biggest growth story among the top 10 speciality restaurants, though most leading brands in the category experienced positive momentum in 2025.

Rank	Brand	Consideration 2025 (%)	Consideration 2024 (%)	Difference
1	Starbucks	35.5	34.4	+1.1
2	Dunkin'	32.8	31.9	+0.9
3	Krispy Kreme	20.6	20.8	-0.2
4	Culver's	20.5	19.6	+0.9
5	Cold Stone Creamery	16.3	15.0	+1.3
6	Baskin-Robbins	14.7	14.9	-0.2
7	Smoothie King	8.7	8.1	+0.6
8	Dave & Buster's	8.4	8.7	-0.3
9	Tim Hortons	8.2	8.4	-0.2
10	Chuck E. Cheese	8.0	6.8	+1.2

YouGov BrandIndex US, October 1, 2024 – September 30, 2025, vs previous year ranked based on consideration score.
Likely to eat at a specialty dining restaurant n> 19,200.
Question: "When you are in the market next to purchase food or drink, from which of the following would you consider purchasing?"
+/- : indicates statistically significant difference compared previous year.

Most considered restaurants among likely US diners

QSR

Rank	Brand	Consideration score (%)
1	McDonald's ▼	**49.4**
2	Chick-fil-A	**39.8**
3	Burger King ▲	**39.1**
4	Wendy's	**38.7**
5	Taco Bell	**36.9**
6	Domino's	**34.3**
7	KFC ▲	**33.9**
8	Subway ▼	**33.3**
9	Pizza Hut ▼	**31.3**
10	Dairy Queen ▼	**28.8**

Casual dining

Rank	Brand	Consideration score (%)
1	Olive Garden	**37.6**
2	Texas Roadhouse ▲	**34.8**
3	Applebee's	**30.1**
4	Chili's	**28.8**
5	Cracker Barrel ▼	**25.1**
6	The Cheesecake Factory	**24.9**
7	Outback Steakhouse	**24.6**
8	IHOP ▼	**23.8**
9	Red Lobster ▼	**20.7**
10	Buffalo Wild Wings	**19.4**

Fast casual

Rank	Brand	Consideration score (%)
1	Panera Bread	**33.0**
2	Chipotle	**29.5**
3	Five Guys	**27.5**
4	Sonic ▼	**26.8**
5	Panda Express	**25.4**
6	Denny's	**22.0**
7	Waffle House ▲	**20.4**
8	Steak 'n' Shake	**17.6**
9	Zaxby's	**11.3**
10	Cici's Pizza	**10.9**

Specialty dining

Rank	Brand	Consideration score (%)
1	Starbucks ▲	**35.5**
2	Dunkin' ▲	**32.8**
3	Krispy Kreme	**20.6**
4	Culver's ▲	**20.5**
5	Cold Stone Creamery ▲	**16.3**
6	Baskin-Robbins	**14.7**
7	Smoothie King ▲	**8.7**
8	Dave & Buster's	**8.4**
9	Tim Hortons	**8.2**
10	Chuck E. Cheese ▲	**8.0**

YouGov BrandIndex US, October 1, 2024 – September 30, 2025, ranked based on consideration score.
Q: "When you are in the market next to purchase food or drink, from which of the following would you consider purchasing?"

Likely to eat at a QSR: n> 25,400; Likely to eat at a casual dining restaurant: n> 12,700;
Likely to eat at a fast casual dining restaurant: n> 20,300; Likely to eat at a specialty dining restaurant: n> 20,400.

▲/▼: indicates statistically significant difference compared to previous year.

Explore brand tracking

Methodology

The insights in this report have been sourced via YouGov Surveys and YouGov BrandIndex.

The insights in this report were sourced via YouGov Surveys: Serviced – providing rapid answers from the right audience.

The multi-region survey was conducted from August 11 – September 2, 2025, with 1,500 respondents in the USA. Additional insights are available for 16 other markets: Australia, Canada, Denmark, France, Great Britain, Germany, Hong Kong, India, Indonesia, Italy, Mexico, Poland, Singapore, Spain, Sweden, and the UAE.

US diners are defined as those who answered with "Less than once a month" or more frequently to the question: "How often, if ever, do you eat out at restaurants (including cafés, pubs serving food, and fast-food joints)?"

The brand rankings in this report are sourced from YouGov's always-on brand tracker, YouGov BrandIndex.

Consideration scores are based on respondents' answers to "When you are in the market next to purchase food or drink, from which of the following would you consider purchasing?" Filtered by respondents who are likely or very likely to eat at: a QSR in next 30 days, a casual dining restaurant in next 30 days, a fast casual dining restaurant in next 30 days, a specialty dining restaurant in next 30 days.

To qualify as a top ranked brand, brands must have scores available for at least 183 days between October 1, 2024 – September 30, 2025. Consideration scores have been rounded to a single decimal place. A minimum base size of 300 (n) is required.

Throughout the report, each generation is defined as: Gen Z (1997 or later), Millennial (1981-1996), Gen X (1965-1980) and Baby Boomers+ (Pre-1964).

Income groups are defined as: Lower income (< 75% of median income), Middle income (75-200% of median income), Higher income (> 200% of median income)

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