



Full-Service Restaurants in the US

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Full-Service Restaurants in the US - Category analysis

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2025 DEVELOPMENTS

Strategic shifts: Navigating inflation via loyalty and authenticity

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Changes within the most dynamic format – other full-service restaurants

Consumers look for value in every transaction

WHAT'S NEXT?

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EXECUTIVE SUMMARY

Macroeconomic and policy disruptions reshape consumer foodservice

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INDUSTRY PERFORMANCE

Navigating operational volatility and the premiumisation of value

Brands adapt to capture value-conscious diners demanding convenience

Loyalty programmes and experiences connect with customers in a price-sensitive world

WHAT'S NEXT?

Challenges abound, but US consumers still love to eat

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Sustainability and health policy shifts

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The golden arches remain important in consumer foodservice in the US
Dutch Bros continues to see the winds blow in its favour
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