

2025 STATE OF DIGITAL ORDERING

February 2025





Tapping Technology's Growth Potential

Consumers have stuck with the digital ordering platforms they and their favorite restaurants raced to adopt during the crisis years of 2020 and 2021. While operators today integrate these tools into the hospitality-focused experience they've always tried to cultivate, consumer demand for digitized convenience is only increasing. So too is the need for a foodservice brand to show a return on investment for all its technology.

In this inaugural **State of Digital Ordering** report from Nation's Restaurant News, the operator community is indicating a constant state of change. Consumers have more options than ever before to dine on-premises or off-premises and to place orders with a human server, a mobile app, or perhaps a voice-AI-enabled chatbot. Over the long run, this proliferation of convenience technology for consumers should lead to sustainable sales growth for restaurants, but it requires operators to prioritize smart investments right now.

Nearly 250 foodservice leaders from NRN's audience shared their opinions, investment plans, and struggles to modernize their tech stacks to keep up with consumers. Even if they feel settled with their off-premises ordering channels or want to wait on switching their loyalty platform or on embracing artificial intelligence, they nonetheless are exploring all their options.

Beyond the question of which digital ordering capabilities to add, operators encounter a trickier one once they deploy those tools: How are these platforms supposed to work together? Read on to see how restaurant leaders across every segment of the industry take on these challenges.

Key Findings



Strategists Need a Clearer Path to Profitability

Despite adopting or exploring many digital ordering tools, operators don't rank their omnichannel-sales strategies as the most profitable moves they can make. They're willing to invest in their tech stacks, but they need to see a better ROI.

What it means: Only 10% of respondents said growing omnichannel sales is a top-three strategy for boosting profitability, lower than any other option. Each new digital channel needs to show top-line sales growth, or restaurants should move on quickly.



Menu and Labor Strategies Currently Benefit Most

Data is flowing in from more ordering channels, generating insights that restaurant leaders use most often to inform their menu and labor optimization. Yet other priorities, like marketing, will compete for operators' investment as well.

What it means: The two most popular data strategies were menu optimization, cited by nearly half of all respondents, and labor optimization, identified by more than two in five. Leveraging customer data to improve marketing is secondary now but has long-term potential.



Tech Stack Architecture is a Team Sport

Few restaurant companies can develop their own digital solutions, so they're often integrating apps and hardware from specialized suppliers. Beyond training support now, operators also want long-term collaborative guidance for building their tech stack.

What it means: Fewer than one in five operators prefer to build their own technology, while half of respondents opt for buying end-to-end solutions from bigger vendors. No matter how many partners they have, restaurateurs must insist on close collaboration and support.



Off-Premises Channels Are Still On-Point

Online ordering for off-premises transactions, especially third-party delivery, rose to the top of restaurateurs' rankings for channels that drive incremental sales. There surprisingly is room for more growth in adoption, especially for FSR and independent operators.

What it means: The 25% of participants who said third-party delivery performs best of all digital channels represented all industry segments and doubled the number of people citing the No. 2 tactic, branded mobile apps. Self-operated delivery and catering also stood out.



Mobile Apps Are Calling

Full-service and independent respondents did show an urgency to catch up to their peers in adopting branded mobile apps, which ideally would be part of a comprehensive plan to enable digital ordering, catering, loyalty, and more capabilities.

What it means: Currently, LSR and chain respondents are approximately five times as likely to have a branded mobile app as their FSR and independent counterparts. Resolving that disparity is crucial to sit-down restaurants' offering more digital convenience.

Key Findings (Continued)



Complexity Amplifies Cost Pressures

No matter how they architect their tech stacks, operators say that, after expected concerns over cost, their greatest challenges involve integrating digital solutions and data sets from their partners, whose hands-on support is crucial to their success.

What it means: More than one in five operators name inadequate support from technology partners as a major drawback to offering more digital-ordering channels. This cascades into other challenges like integration headaches and difficulty tracking orders from multiple platforms.



For Loyalty Programs, Functionality Trumps Affordability

Operators are as cost-conscious about digital loyalty platforms as they are about any technology, but the more salient challenges for them adopting or expanding such tools deal with data collection and getting insights for marketing strategies.

What it means: More than one in five operators said their top challenge with adopting or expanding a loyalty program was not getting enough usable customer data, with few differences across segments. If loyalty doesn't yield actionable data, it just becomes a discounting platform.



Third-Party Delivery Remains First Choice

Restaurants may still have to contend with third-party aggregators over data sharing and commissions, but delivery apps are among the industry's most adopted and highest-rated digital tools. Menu makers largely expect this channel to grow.

What it means: With more than two in five operators already offering it, third-party delivery is the most popular off-premises channel, and 60% of those adherents want to grow its share of sales. FSR and independent respondents have a big gap to close in adoption.



AI Intrigues the Industry

Independents showed more skepticism, yet most respondents were at least interested in finding out how artificial intelligence might help their businesses. Operators appear bullish on generative AI to save time writing marketing copy and analyzing data.

What it means: Use cases for generative AI, like quickly producing social-media posts or spreadsheet reports, are low-hanging fruit and appeal to more than two-thirds of operators. But more than half of all respondents see the potential for other kinds of AI to automate digital marketing, supplement training programs, and more.



Self-Service Kiosks Dominance Continues

Kiosks stood out as the consumer-facing hardware operators want to see more of in their dining rooms. Limited-service chains naturally lead the charge on adoption and expansion of kiosks, and they're a favorite target of tech-savvy Data Enthusiasts.

What it means: Nearly one in five restaurateurs are looking to add kiosks, about the same percentage as those wanting to implement emerging voice AI platforms or branded mobile apps. Chain and LSR respondents are looking to widen their advantage in kiosk adoption.

Building Better Strategies

Just because new ordering technologies continue to spread across the foodservice industry doesn't mean that restaurateurs have fully solved how to make digital transactions profitable. To be sure, they're eager to grow digital sales and meet that maturing demand from consumers, but they point more often to other strategies for their recent growth.

According to a proprietary survey Nation's Restaurant News conducted with operators in its audience, only one in 10 restaurant leaders identified omnichannel sales as a top data strategy that drove profitability at their location or brand. By contrast, nearly half of respondents named menu optimization as one of their three data strategies with the greatest impact.

Operators could cite only three top strategies, so menu optimization and labor optimization occupying the top tier of responses makes sense, given how much more relative control leaders

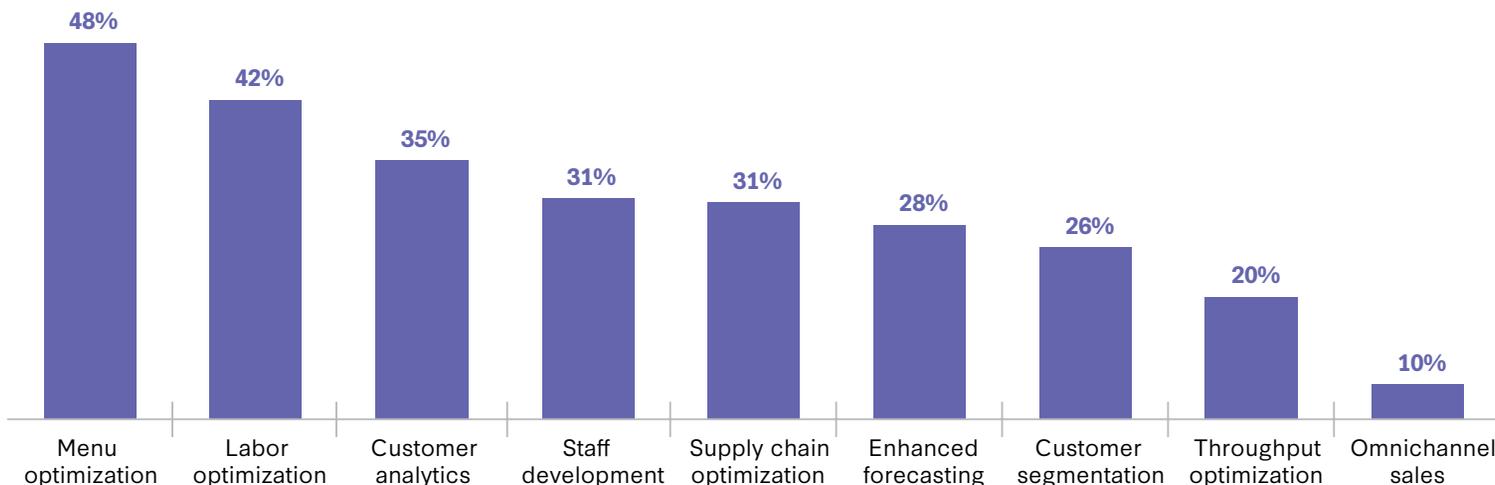
have over their menus and their people. Other options, such as improved training, supply chain management, or throughput, likely flow from decisions restaurant leaders make when they prioritize menu and labor strategies.

Respondents from chain brands and limited-service restaurants were more likely than their peers who lead independent or full-service locations to cite omnichannel sales as a top-three priority. One in six chain and LSR participants answered this way, compared with about one in 10 for their counterparts and for the full sample of respondents.

Yet it ranked lowest among those groups as well, suggesting that even operators more reliant on digital ordering still look for a better ROI as they offer more ways for consumers to conveniently order carryout or delivery.

Which data strategies are the most impactful for profitability at your organization?

Base: All respondents (n=239)



Operators Remain Consistently Confident

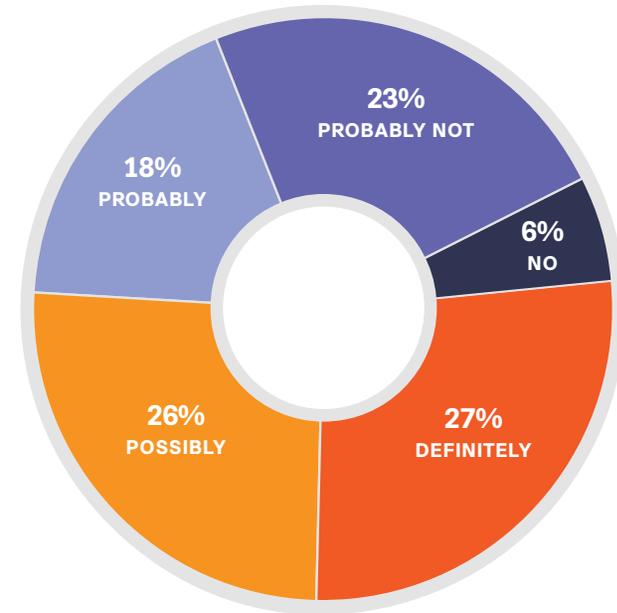
Familiarity with and confidence in data strategies did not make a difference in how operators perceived omnichannel sales as a strategy, either.

When respondents were asked whether they optimized the customer data they collect, slightly more than one in four said they “definitely” analyze the information they get from their digital ordering tools and use it to improve strategy. That figure is consistent with past NRN research, in which about seven in 10 respondents have previously said they at least “possibly” or “probably” optimize their data, and usually between **25%** and **30%** of people self-identify as Data Enthusiasts who “definitely” do.

Data Enthusiasts were not significantly more likely to identify omnichannel sales as a top-three data strategy — only **11%** of them answered this way — and in fact they were only slightly more likely than the full sample of respondents to name certain initiatives like optimizing labor, supply chain, or throughput.

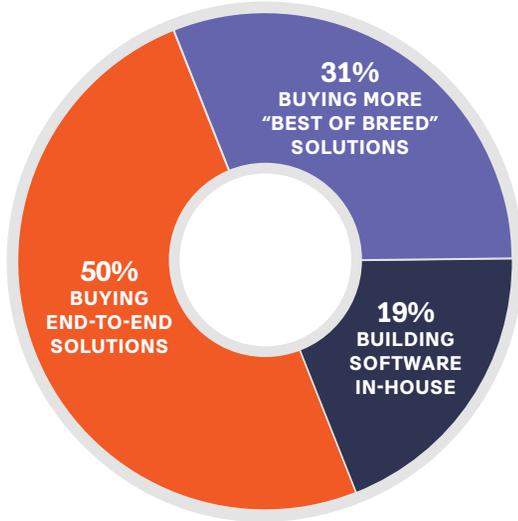


Does your organization optimize the customer data it collects?



Base: All respondents (n=242)

Which setup for your technology stack is best for your organization?



Base: All respondents (n=223)

Prioritizing Partnership and Collaboration

To accommodate more digital ordering and other strategies, operators can design their tech stacks in several ways. Few respondents, only about one in five, expressed an interest in building their own proprietary systems, meaning that most restaurant leaders work with outside partners and vendors to set up their suite of technology.

Most often, operators prefer to buy end-to-end solutions that combine as much functionality as possible from one or only a few providers, which is also consistent with previous NRN research. Half the respondents in this survey answered this way, leaving the remaining three in 10 to prefer what tech strategists call the "best in breed" method. The latter approach involves seeking out individual point solutions for specific business needs, resulting in an operator buying the best available software for digital marketing, training, online ordering, and so on.

Chain operators were twice as likely as their independent counterparts to express an interest in building proprietary solutions (**27% to 13%**), while the independent respondents were more likely than their peers at chain restaurants to opt for end-to-end tools (**55% to 42%**). Otherwise, the "best in breed" approach appealed equally across service style and business size, between **30%** and **33%** for each subgroup.



Segment differences did arise, however, for the kind of working relationship operators demand from technology partners.

Approximately three in 10 respondents want help auditing and analyzing their tech stacks to weed out poor performing components, and the same number want their vendors to train restaurant staff how to use digital tools to their full potential. Full-service respondents were much more likely to identify training as their biggest need from vendors.

LSR operators were nearly twice as likely as FSR leaders to want their current partners to help them consolidate their tech stacks, to winnow down their total number of vendors, a preference stated by slightly more than one in five total respondents. Slightly fewer, **18%** of the full sample, want tech suppliers to help them lay out a road map of features and new solutions to adopt.



What support from your technology partners would be most helpful to improving your tech stack over the long run?



Base: All respondents (n=228)

Which of the following categories of technology are you most likely to invest in over the next 12 months?

Social / online monitoring	41%
POS systems	37%
Inventory management	35%
Digital marketing	32%
Training systems	31%
Labor management	30%
Analytics / business intelligence	29%
CRM system	26%
Digital loyalty	25%
Customer feedback program	24%
QR-code menus / payments	21%
Customer Data Platform	20%
Digital ordering / delivery	20%
Self-service kiosks	20%
Integrations / APIs	17%
Reservation / waitlist systems	15%
Technology-focused staff	13%
Self-service tablets	11%

Base: All respondents (n=229)

Reaching for Digital Touchpoints

Restaurant leaders have a broader range of requirements than before for their technology investments. Beyond balancing the needs to budget for hardware or software programs, they also must prioritize how much they support operations, marketing, or their more top-of-mind strategies like menu and labor optimization.

This group appeared most likely to invest in what they identified earlier as secondary strategies. The most common target for procurement over the next 12 months was software for monitoring social media and online reviews and managing brand engagement across those sites, which slightly more than two in five respondents cited.

Another one in three respondents plan to invest in systems for inventory management and digital marketing. That latter category tends to beget spending on other technologies for analyzing customer data, leading another one in four to say they would likely buy tools like a customer data platform or a digital loyalty program.

Straddling the top and second tiers of investment targets were categories dealing with labor, such as training apps or scheduling software, or data analytics and “business intelligence” tools, which would be the category most likely to inform a restaurant’s menu development and pricing strategies. Nearly two in five respondents (**37%**), including significantly more independent operators (**42%**) than chain operators (**26%**), identified point of sale systems as an investment priority.

The POS is often a foundational piece of hardware for most restaurants, as many software solutions integrate with it to manage menu offerings and to feed sales data back to other programs. However, other hardware systems meant to digitize on-premises ordering did not rank as highly. Only around one in five respondents were considering QR code menus or self-service ordering kiosks, about the same number of people looking at new online-ordering and delivery platforms in the coming 12 months.

Only about one in 10 people are considering tablets for table service, including one in six full-service respondents.

Arguably, this sample of restaurant leaders overlooks investments in the infrastructure to support their tech stacks. Only about one in six planned to budget resources for bolstering integrations to enable better interoperability of software from different vendors. Even fewer, **13%** of all respondents, plan to hire technology-focused employees, such as data analysts, to manage their organizations’ technology strategy.

Digital Tools Deliver for Restaurants

Participants may not rate omnichannel sales as a profitable strategy, yet they steadily employ many of the digital channels for ordering in their stores already.

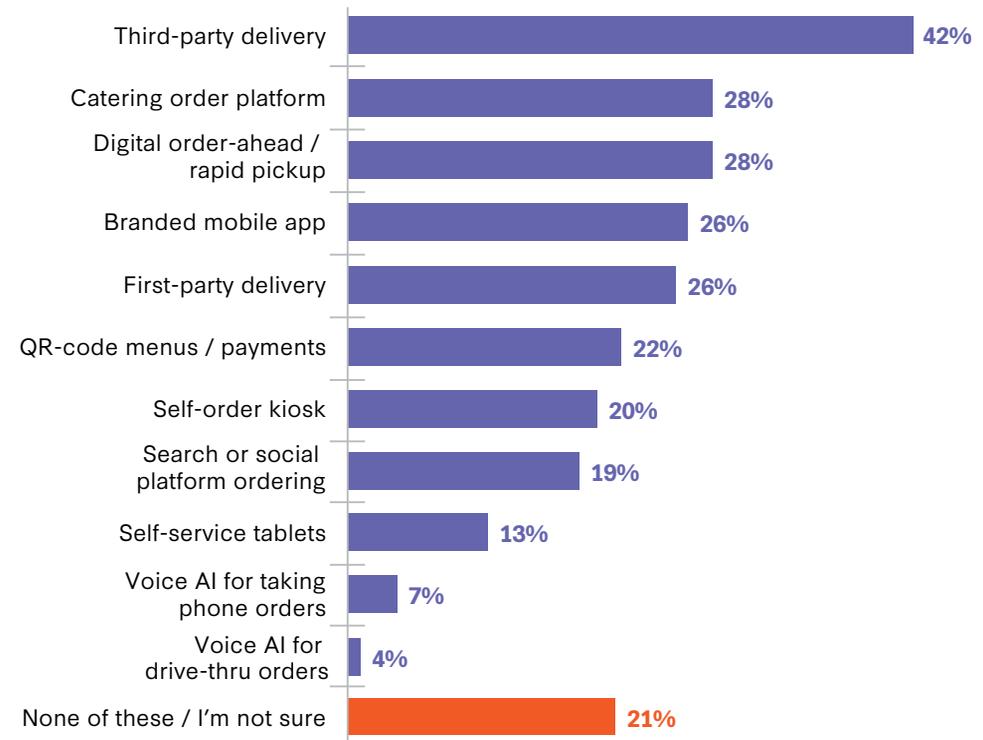
More specifically, limited-service chain operators deploy a wider and deeper set of digital ordering touchpoints than their peers at full-service and independent restaurants — as seen in prior NRN research reports, responses from LSR and chain participants often overlap, as do those from FSR and independent operators. For example, the most common digital ordering method among this sample was third-party delivery, offered by more than two in five respondents. Roughly twice as many operators at LSRs (**60%**) and chains (**61%**) as at FSRs (**31%**) and independents (**34%**) work with delivery aggregators.

Similar segment differences appear for the next most common digital-sales channels, including the cluster atop the second tier of responses like catering platforms, digital order-ahead for carryout, branded mobile apps, and first-party (self-operated) delivery. Presumably, full-service and independent respondents are similarly behind in many of these digital channels for off-premises sales because they lack the financial resources of chains.

Another reason for FSR and independent operators lagging on many of these digital, off-premises channels could be their deficit in adoption of branded mobile apps. For both subgroups, only one in 10 respondents already have a smartphone app, compared with approximately five times as many respondents from LSR (**46%**) and chain locations (**53%**).

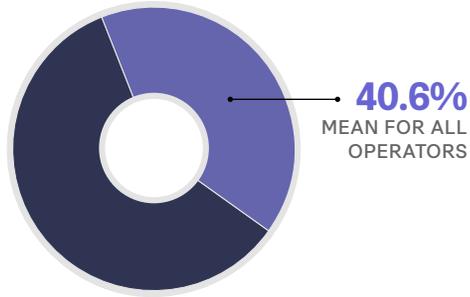
Industrywide, self-ordering hardware like QR code menus and kiosks are in place for about one in five respondents, while another **13%** of participants have self-service tablets at their tables. Segment differences tend to make sense here based on service style and chain size, such as LSR and chain operators being far ahead in adopting kiosks.

Which digital ordering touchpoints do you offer?



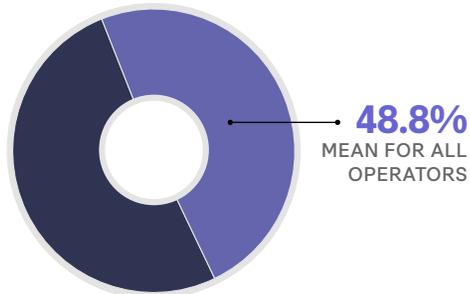
Base: All respondents (n=242)

What percentage of your operation's sales comes from digital touchpoints?



Base: All respondents (n=180)

What is your ideal percentage for sales coming from digital touchpoints, by the end of 2025?



Base: All respondents (n=180)

Gearing Up for Sales Growth

Operators who offer some kind of digital ordering derive a significant portion of their revenue from those channels. Respondents in this survey collectively said they generate, on average, about **41%** of their sales from digital touchpoints. For self-described Data Enthusiasts, that average is about **46%**.

Which channels are most effective? The most common answer from this group of operators, cited by one in four, is third-party online ordering and delivery, which nearly doubled the response rate of the No. 2 option, branded mobile apps.

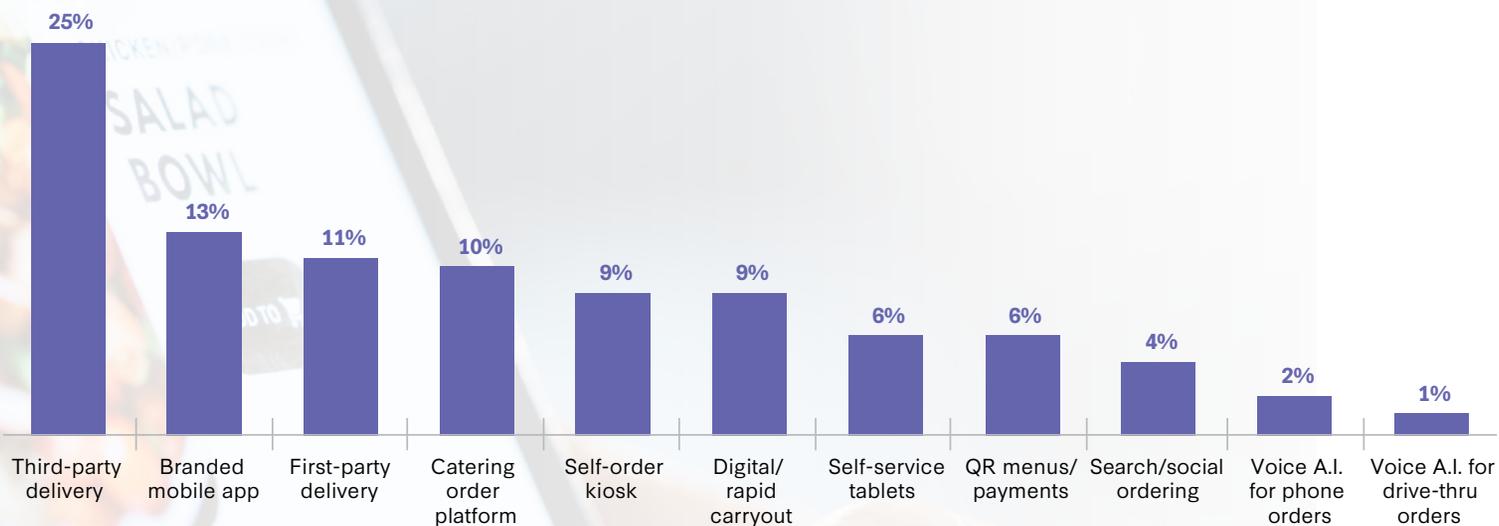
Despite longstanding frustrations restaurant leaders have with delivery aggregators regarding commission fees and data sharing, operators broadly agreed that third-party delivery performs best of the digital channels in this survey. No significant segment differences arose on that opinion. Slightly fewer Data Enthusiasts (**19%**) named third-party delivery their most effective digital touchpoint, but this group had a broader spread of responses than the full sample for their top ordering channel.

The significant gap between LSR and FSR operators, and between chain and independent operators, was apparent once again for views about branded mobile apps' effectiveness. Limited-service and chain respondents named their mobile app their best-performing channel about four times as much as their counterparts did.

LSR operators also were more likely than FSR peers to cite first-party delivery (**14% to 7%**) and digital order-ahead for carryout (**13% to 5%**). By contrast, full-service respondents led where one might expect, elevating table tablets and QR code menus more than limited-service participants did.

By leveraging their most effective digital ordering tools, respondents expect the percentage of sales they derive from their technology to grow. On average, operators are targeting about **49%** of sales from digital channels by the end of 2025.

Of the digital touchpoints you offer, which do you feel performs the best and positively impacts your business the most?



Base: All respondents (n=182)

When to Dial Up New Channels

In general, restaurant leaders are looking to add more of the digital ordering platforms with lower current rates of adoption, such as voice AI systems or self-ordering hardware for on-premises dining like kiosks, QR code menus, and tablets. Branded mobile apps also generate much of the interest in adoption among respondents who don't already have them in place.

It's not necessarily a case of laggards racing to catch up in offering certain tools.

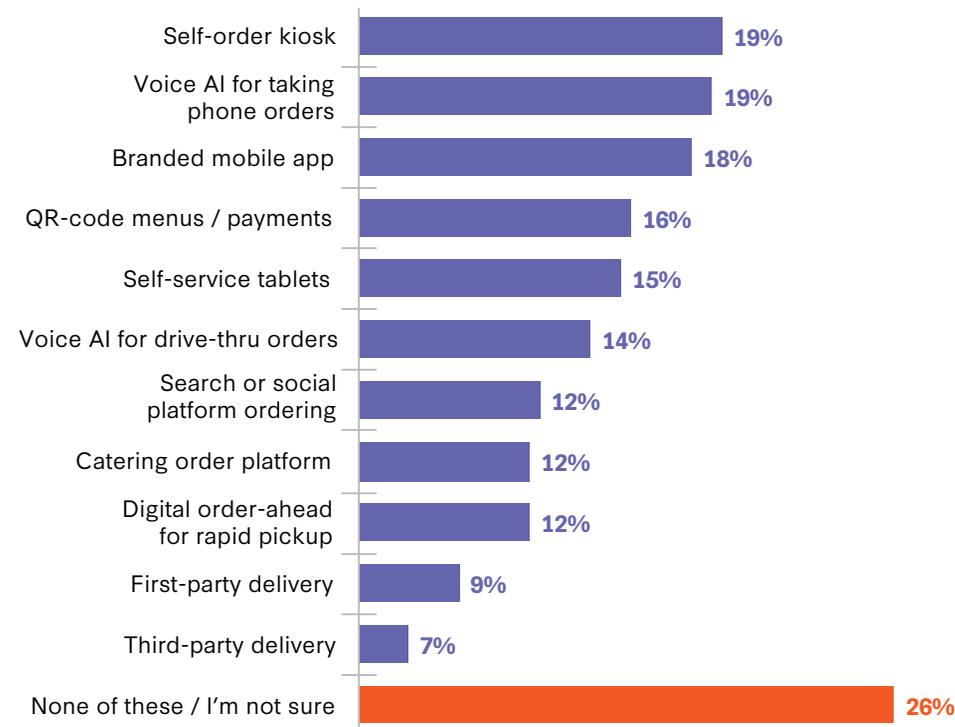
To begin with, independent and full-service respondents, who were less likely than their counterparts to offer many digital touchpoints, were twice as likely as their peers to say, "None of these / I am not sure," when asked about their interest in offering tools they currently lack. Chain and LSR operators were twice as likely as their competitors to target adding self-order kiosks and voice AI systems for taking phone orders, which would widen their lead in adopting those platforms considerably. Naturally, they are much further ahead in considering voice AI technology for taking drive-thru orders as well.

Independent respondents, to their credit, did lead all operator subgroups in wanting to offer a branded mobile app, which would narrow their gap in current adoption. Nearly one in five operators plan to invest in an app this year, including **24%** of independents.

Full-service and independent respondents indicated similar intent to invest in most digital ordering tools, and their views on off-premises channels were interesting. As previously noted, these operators were much less likely than limited-service and chain respondents to already offer most channels.

FSR operators were much less likely to target digital ordering for rapid pickup and carryout (**8%** answered this way, compared with **13%** of LSR operators), but more likely to express interest in first-party delivery (**12%** to **7%** for LSRs) and third-party delivery (**8%** to **6%** for LSRs). Cost structures of course will differ for every restaurant, but would it really be more difficult and expensive for a full-service location to digitize its carryout operation, compared with what it might take to stand

Of the digital touchpoints you do NOT currently offer, which are you most interested in adding to your technology stack?



Base: Varies

up a self-operated delivery model or pay commissions to a third-party delivery aggregator?

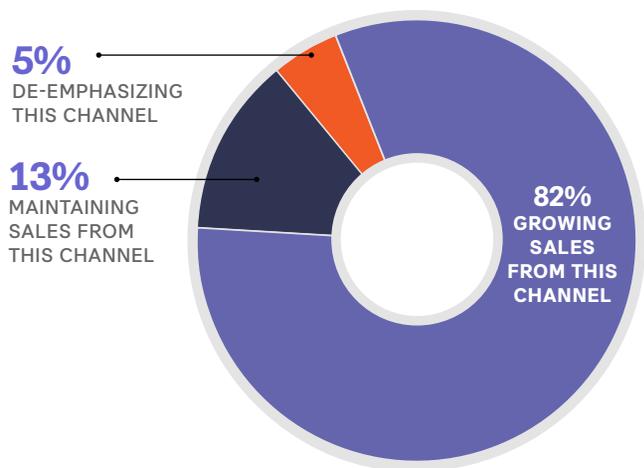
Looking more closely at operators' goals and expectations for their current delivery programs, few want to back away from this ordering strategy, which consumers seem to be sticking with even with the coronavirus pandemic long behind them.

Among the smaller sample of respondents who self-operate a first-party delivery program, more than four in five want to increase their share of sales and traffic from that channel, with only **5%** saying they would prefer to de-emphasize it. Operators broadly agreed about their goals for

first-party delivery, regardless of service style or business size.

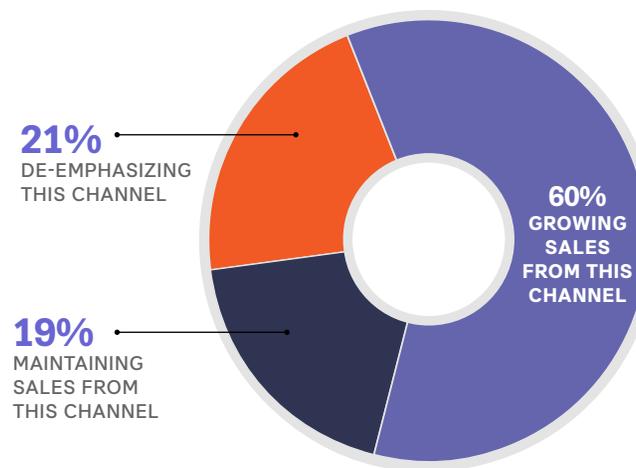
Third-party delivery produced a slightly different picture, as three in five respondents seek to grow their sales from this channel, but about one-fifth want to de-prioritize it in favor of other ordering methods. The remaining **19%** said they would be satisfied with keeping their third-party business steady.

In the coming year, what is your goal for FIRST-PARTY DELIVERY?



Base: Respondents who currently use first-party delivery (n=61)

In the coming year, what is your goal for THIRD-PARTY DELIVERY?



Base: Respondents who currently use third-party delivery (n=99)

Complexity Complicates Digital Drawbacks

As is often the case when dealing with technology, restaurant leaders ranked investment costs as their No. 1 challenge to implementing more digital ordering solutions. Approximately three in 10 people named cost a top-three drawback, and independent respondents felt that pressure in particular, with **36%** answering this way. Even though independents typically favor buying end-to-end solutions from fewer partners, they're still more price-sensitive, compared with the rest of this sample.

Beyond cost, however, the most common concerns that operators named for building up their digital tools dealt with new platforms' complexity, which highlighted respondents' perceived lack of interoperability among potential digital solutions and inadequate support from the vendors that supply them.

While chain and independent respondents alike are just as likely to cite a lack of support from technology partners, a wider gap appeared between LSR operators (**26%** answering this way) and FSR operators (**19%**). The same dynamic holds for limited-service respondents being more likely than full-service ones to identify unsatisfying integrations among digital platforms.

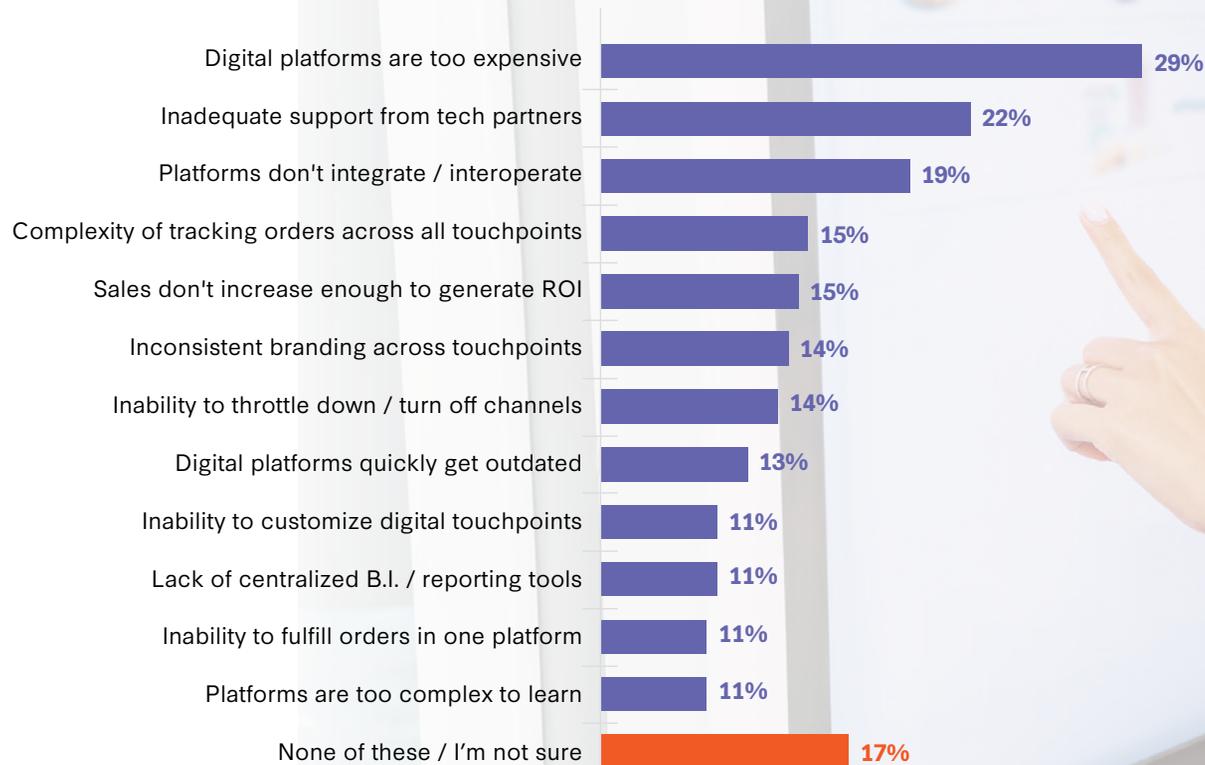
This could be an effect of LSR operators already having adopted many more digital solutions than FSR peers have, which is especially true for branded mobile apps and off-premises ordering channels. While it appears to be very early in the industry's adoption of voice AI programs, limited-service respondents were also ahead of full-service respondents for that option as well.

The big challenge of interoperability appears more salient for a subgroup of respondents who prefer to buy digital solutions instead of building their own in-house. While nearly one-fifth of all respondents cited a lack of integration as a problem, only one in 10 people who attempt to build proprietary technology said so.

Those who practice a "best in breed" approach to tech stack architecture also over-index significantly for citing the challenge of digital solutions becoming quickly outdated. While only **13%** of all operators deal with this challenge, nearly twice as many "best in breed" adherents (**22%**) answered this way, as did **20%** of chain respondents and **18%** of LSR respondents. Evidently, restaurant leaders who tend to implement more specialized point solutions are likely to be changing elements of their tech stack more often.



What are your biggest challenges with implementing digital ordering touchpoints?



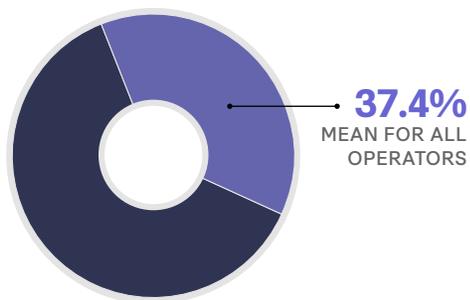
Base: All respondents (n=239)

Operators Stick With Loyalty Programs

As with many digital ordering technologies, LSR and chain operators drive the industry's adoption and interest in loyalty programs. In fact, it's useful to focus on segment differences around loyalty for this set of respondents, because the small number of participants from on-site foodservice locations skewed answers for the full sample.

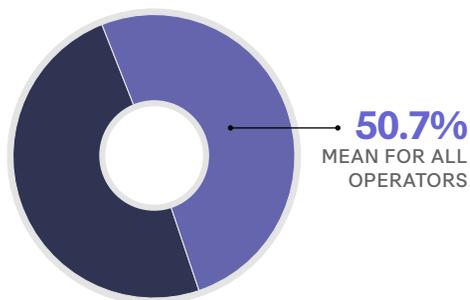
More than two in five respondents offer a customer loyalty program, including approximately three in five LSR and chain operators. More than one in three FSR and independent respondents also offer a loyalty program, yet only **7%** of the on-site operators in this survey do. Only about one in five LSR and chain participants said they have no plans to implement a loyalty program, while that figure rose to approximately one in three among their FSR and independent counterparts.

What percentage of your operation's sales can be attributed to loyalty club members?



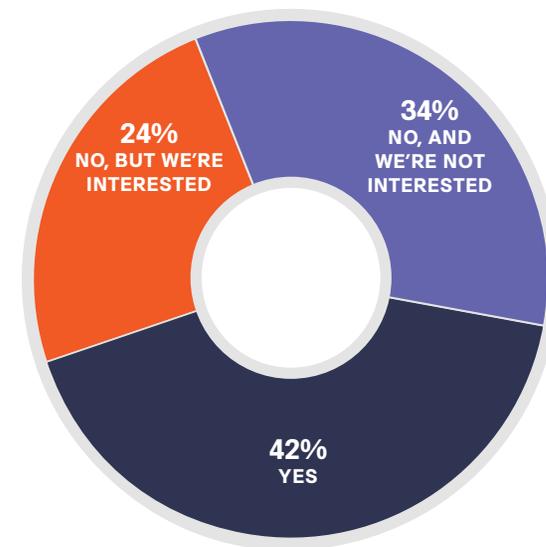
Base: All respondents (n=100)

What is your ideal percentage for sales attributable to loyalty club members, by the end of 2025?



Base: All respondents (n=100)

Does your location or organization currently offer a customer loyalty program?



Base: All respondents (n=242)

The subset of people who already operate a customer loyalty program can attribute a meaningful portion of their sales to that platform, meaning they use it not only as a direct-marketing tool but also as a source for transaction data they can tie to preferences of known customers. On average, these operators generate more than **37%** of their sales from their loyalty programs. Collectively, their goal is to generate a bare majority of sales from loyalty programs by the end of this year.

They also recognize the need to invest in these platforms. Digital loyalty is one area where survey respondents indicated that their need for functionality is a challenge as big as, if not bigger than, their need for solutions to fit their tight technology budgets.

To be sure, an equal amount of all respondents, **15%**, said loyalty problems are too expensive to begin with or that they do not increase sales fast enough to generate a reasonable ROI. Independent respondents were nearly twice as likely as chain peers to cite loyalty programs' expense as a challenge, and FSR operators were more likely than LSR competitors to voice concerns over the platforms' ROI.

But the most common drawback to loyalty programs, cited by **22%** of all respondents, is that these platforms do not collect enough customer data. The usual splits between limited and full service and between chains and independents didn't apply here; operators broadly agreed on the necessity and the challenge of getting data from each loyalty transaction. However, only **11%** of Data Enthusiasts answered this way, supporting the notion that successfully gleaning more information from loyalty programs leads to more confidence that data strategies are being optimized, creating a virtuous cycle.

Nearly three in 10 of the respondents who prefer the "best in breed" setup for their tech stacks also bemoaned the difficulty of collecting data from loyalty programs. If restaurant leaders are searching for the best available loyalty platform, functionality and data collection will be top of mind.

So will interoperability and integrations, especially among operators of limited-service and chain restaurants. That issue led the secondary tier of responses, in which approximately one in six people cited loyalty programs' difficulty integrating with third-party delivery platforms. Nearly as many respondents pointed out disappointing functionality among loyalty programs' marketing automation and customer segmentation capabilities.

What are your biggest challenges with implementing a customer loyalty program?



Base: All respondents (n=240)

Ardent Interest in AI

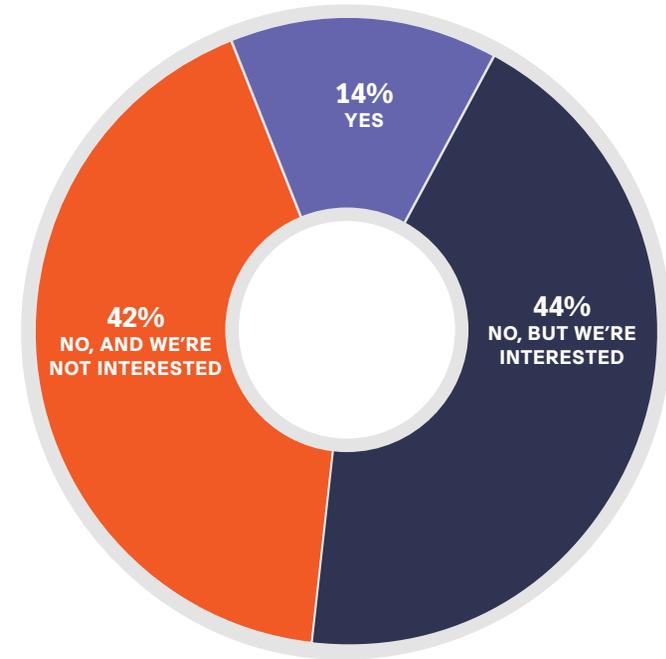
No discussion of restaurant technology and digital ordering is complete today without gauging operator use of and interest in artificial intelligence. As earlier responses indicated, operator interest is picking up for voice AI systems in the ordering path, such as for orders placed on the phone or at the drive-thru, yet it is still very early for AI in foodservice. Recall that fewer than one in 10 participants in this study have already implemented voice AI ordering, and almost nobody called these platforms their top-performing digital touchpoint.

Yet, when the question of AI was broadened out, about one in seven operators said they use AI somewhere in their business. The remaining respondents were about equally split in their interest of adopting AI, with slightly more (44%) expressing an interest than not (42%). Limited-service and full-service operators both resembled the full sample of respondents on this question.

The big difference, however, emerged between chain and independent respondents. More than a quarter of chain operators in this study say they have adopted AI already, versus only 6% of their counterparts at independent restaurants. Those independents were also more than twice as likely as chain respondents to report having no interest in AI at their businesses (52%, compared with 24% for chain participants).



Does your organization currently use artificial intelligence for any business initiatives?



Base: All respondents (n=242)

Nearly three in five operators overall said they are using or would be interested in using AI, but for what? This group was asked to identify the digital business strategies they think benefit or might benefit from incorporating artificial intelligence, and they broadly agreed on the most likely use cases in foodservice.

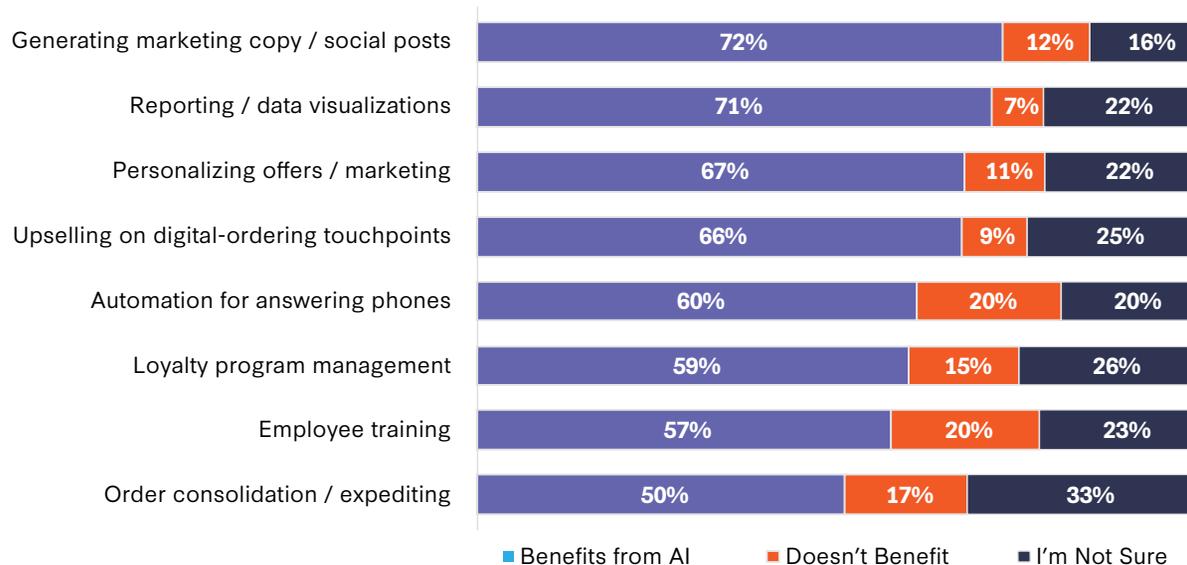
More than seven in 10 respondents think AI could save time with generative features, such as using a large language model to quickly produce copy for marketing campaigns and social posts, or quickly generating reports and data visualizations to help executives decide on strategy. Another two-thirds of survey participants see the value of AI in their digital-marketing programs, as in

AI-enabled personalization of offers and messaging to different audience segments.

About as many said AI could improve upselling opportunities at digital points of sale, like a self-order kiosk or at the drive-thru.

Even the less popular edge cases people are considering for AI got at least half of study participants to respond positively. For each potential strategy, including lower-ranked ones like employee training or expediting orders in the kitchen, respondents were more likely to be unsure of the value AI might add than they were to be dead-set against it and sure that AI had nothing to offer.

Which digital strategies do you think **BENEFIT FROM AI or **DON'T BENEFIT FROM AI**, or indicate if **YOU'RE NOT SURE**?**

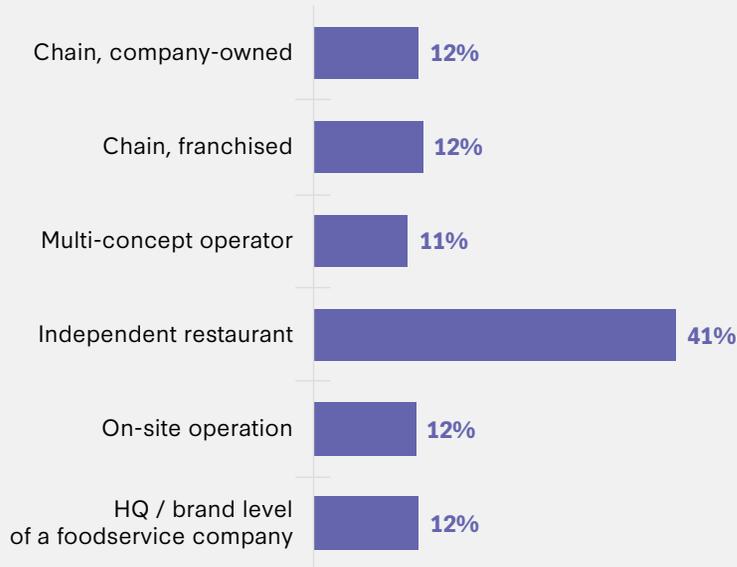


Base: All respondents (n=varies)

Who We Surveyed

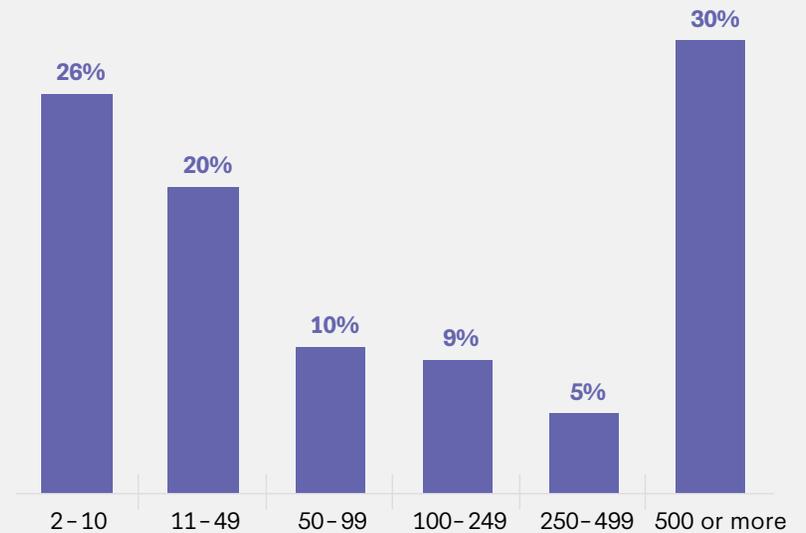
Nation's Restaurant News surveyed nearly 250 foodservice operators online over a two-week period from December 2024 to January 2025. The custom survey was promoted to Nation's Restaurant News' audience via email, editorial products and social media. Respondents provided select demographic information about their businesses, but individual results were anonymized. Respondents self-identified as foodservice operators and represent a diverse mix of industry segments. Key business decision makers were well represented in the sample, with most identifying as the owner-operator or as a director-level role. The sample was made up of 88 chain or multiconcept operators, 126 independent restaurateurs, and 28 on-site operators.

Which of the following best describes your restaurant operation?



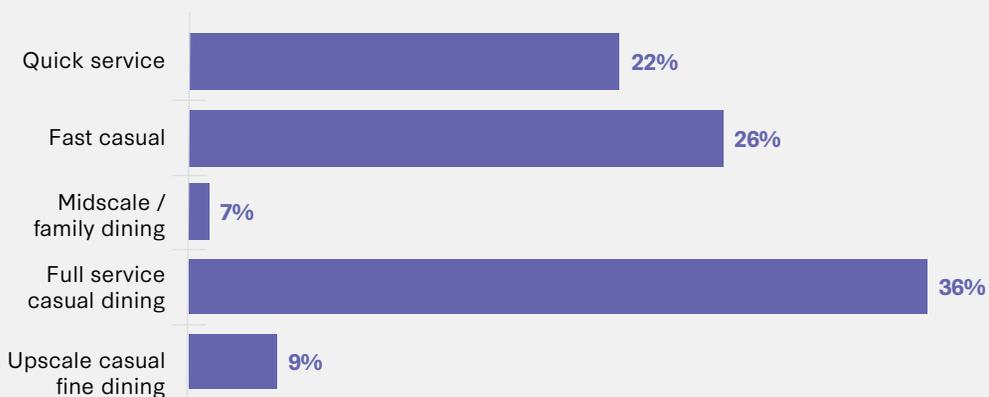
Base: All respondents (n=242)

How many units are in your operation system wide?



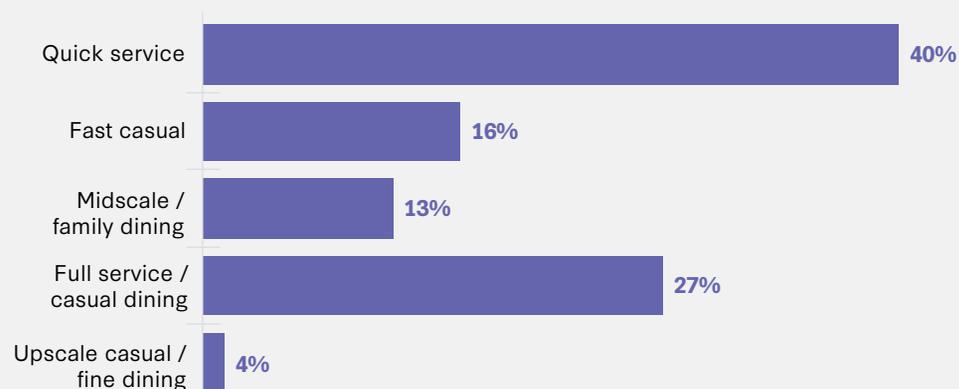
Base: Chain restaurants, multiunit restaurants, brand / HQ employees (n=114)

Which best describes your restaurant concept?



Base: Chain restaurants and independent restaurants (n=159)

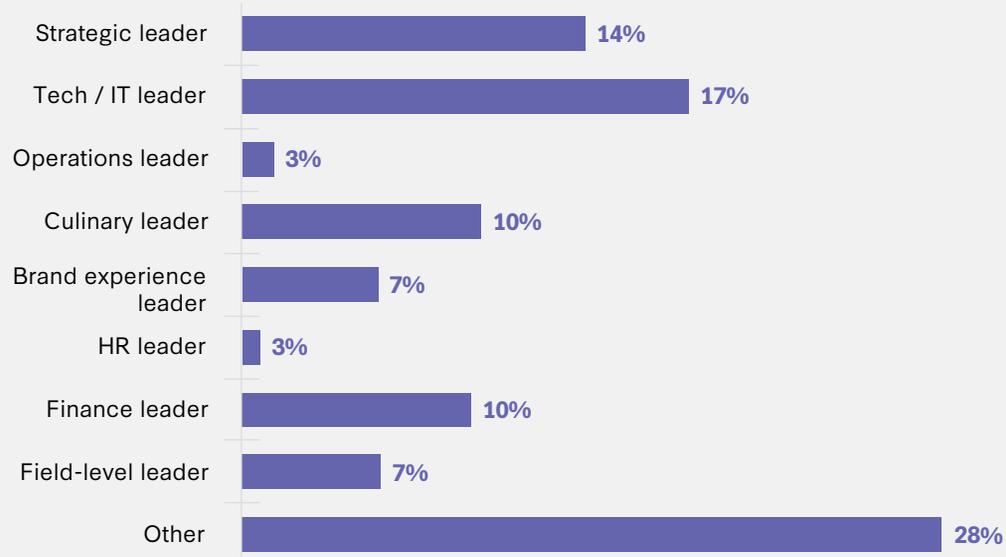
Which best describes your company? If you operate across multiple segments, which one describes most of your locations?



Base: Multi-concept operators, HQ / brand level (n=55)

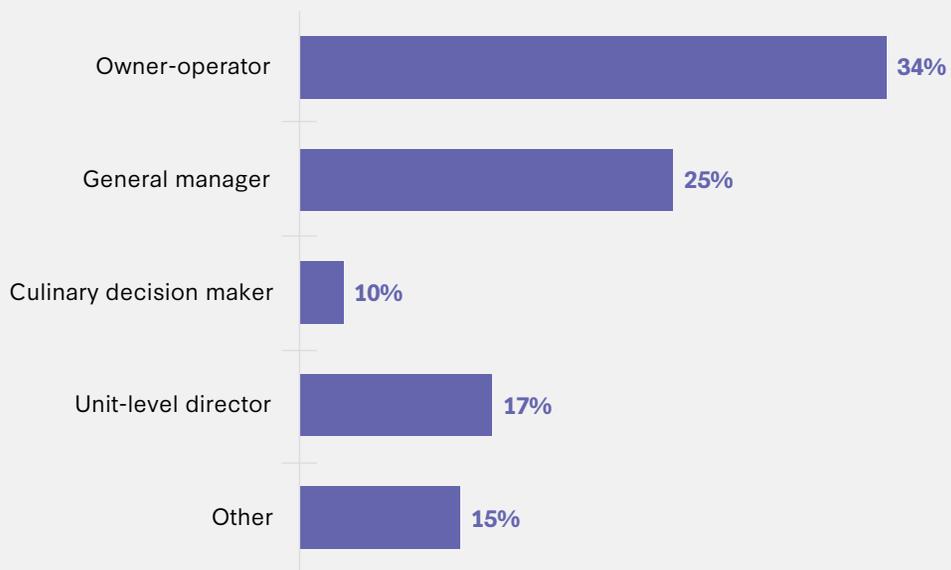


Which of the following best describes your job function?



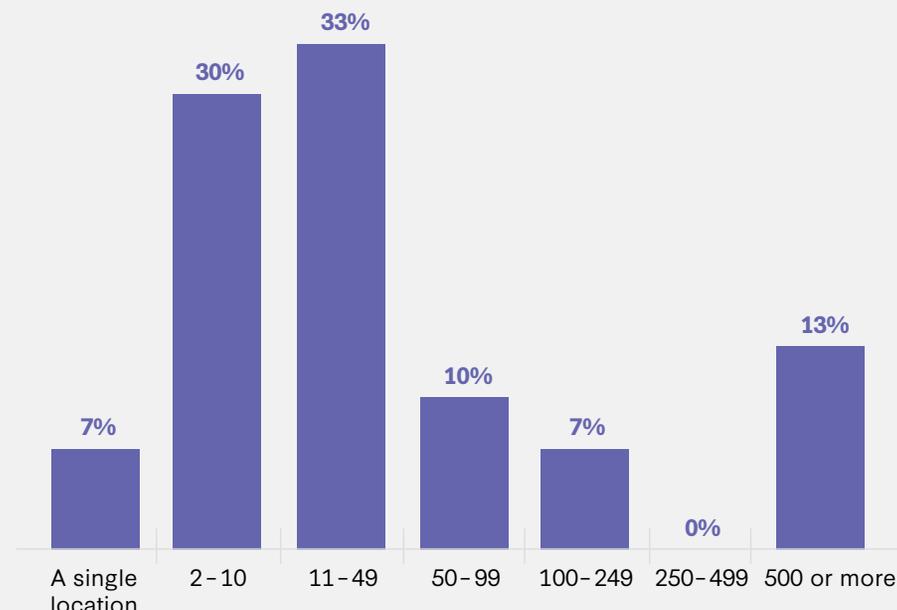
Base: HQ / brand level (n=29)

Which of the following best describes your job function?



Base: All operators but those at HQ / brand level (n=212)

How many locations do you operate as a franchisee?



Base: Chain restaurants, franchised (n=30)

About

This report was developed and produced by the research and insights division of Nation's Restaurant News, with support from our sponsor PAR Technology. The report features original research by NRN and design and project management by Informa Engage. To participate in upcoming NRN market intelligence reports or to sponsor custom research, contact Peter Loibl at peter.loibl@informa.com.



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Nation's Restaurant News

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