

# QUICK SERVICE RESTAURANTS – US – 2024

With a growing interest in fresh, high-quality fast food, QSRs will benefit from improving and innovating for convenience and health amidst growing competition.



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Analyst



# Quick Service Restaurants - US - 2024

## This report looks at the following areas:

- Changes in foodservice ordering
- QSR ordering frequency
- Interest in QSR improvements
- QSR consumer dining motivators
- QSR innovation and menu claim interest
- Consumer attitudes towards QSR dining

## Overview

QSR visitation increased in 2024 after recovering from a dip in traffic in 2023 stemming from inflation and rising menu prices, but maintaining visitation of both new and loyal customers presents challenges beyond pricing alone. An astounding 63% of consumers are interested in menu claims around freshness, reinforced by 53% of consumers agreeing food quality should be improved when it comes to ordering from fast food restaurants. Operators in the QSR space have their work cut out for them as competitors in the fast casual segment hone in on attributes that deliver freshness and quality. As other segments expand their footprint and deliver on fresh, made-to-order eats, QSRs must work towards improving the end-to-end experiences as consumer perceptions around quality and convenience continue to evolve.

QSRs will benefit by adapting to lifestyle trends that consumers are incorporating into their every day eating habits. 44% of consumers express they would be motivated to order fast food if healthier options were available on menus. Menu innovation around health-focused offerings will prove QSRs to be an easy and accessible option for consumers on the go, especially when patrons are short on time.



With a growing interest in fresh, high-quality fast food, QSRs will benefit from improving and innovating for convenience and health amidst growing competition.

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# Report Content

## Key issues covered in this Report

- Overview

## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market size and forecast
- Market predictions
- Opportunities

## MARKET DYNAMICS

### Market context

- Market context

### Market drivers

- Budget constraints can make low-cost QSRs appealing
  - Graph 1: household budget changes, Consumers & the Economic Outlook, 2024
- QSR brands face backlash over pricing
- Packaging concerns may rise among pregnant women

### Market size and forecast

- Retail sales and forecast of limited service restaurants
- Limited-service restaurant growth reaches new limits
- Retail sales and forecast of limited service restaurants

## CONSUMER INSIGHTS

### Consumer fast facts

### Restaurant ordering

- Fast food stays on top, for now...
  - Graph 2: restaurant ordering, 2022-24
- Polished menus are captivating female diners' attention
  - Graph 3: restaurant ordering, by gender, 2024
- Suburbanites have a more varied restaurant rotation

- Graph 4: restaurant ordering, by area, 2024

### QSR ordering frequency

- Frequent visits are down, but moderate visits are up
  - Graph 5: QSR ordering frequency, 2023-24
- Men are highly engaged, and snacking can further this
  - Graph 6: QSR ordering frequency, by gender, 2024
- Can operators further boost Millennial visitation through snacking opportunities?
  - Graph 7: change in QSR ordering frequency, 2024

### QSR improvement interests

- The customer (service) is always right
  - Graph 8: QSR improvement interests, 2024
- Move over, main entrees
  - Graph 9: QSR improvement interests, 2024
- Millennials are seeking improvements in QSR coffee
  - Graph 10: QSR improvement interests, by generation, 2024
- Adults want happy meals, too!
  - Graph 11: QSR improvement interests, by parental status, 2024

### QSR dining motivations

- Affordability & tech improvements
  - Graph 12: QSR dining motivations, 2024
- Rewards programs will foster long-term relationships with female diners
  - Graph 13: QSR dining motivations, by gender, 2024
- Gen Zs expect holistic QSR experiences
  - Graph 14: QSR dining motivations, by generation, 2024
- Daily deals can help make ends meet for some
  - Graph 15: QSR dining motivations, by financial situation, 2024

### QSR innovation concept interest

- 2024: the year of the snack
- 2024: the year of the snack
  - Graph 16: QSR innovation concept interest, 2024
- Consumers want brands to help them make better choices
- A little information can go a long way
- Customizable MTO options will delight female diners
  - Graph 17: QSR innovation concept interest, by gender, 2024
- Urban dwellers want all the bells and whistles
  - Graph 18: QSR innovation concept interest, by area, 2024

### QSR menu claim interest

- Fresh over everything
- Fresh over everything
  - Graph 19: QSR menu claim interest, 2024
- QSRs bring back classics...but with a twist
- Interest in organic claims lag behind fresh and natural
  - Graph 20: QSR menu claim interest, 2024
- Tim Horton's highlights freshness of offerings through marketing material
- Turn up the heat to wow male diners
  - Graph 21: QSR menu claim interest, by gender, 2024
- Gen Zs and Millennials like it hot
  - Graph 22: QSR menu claim interest, by generation, 2024
- Premium claims will set QSRs apart for urban consumers
  - Graph 23: QSR menu claim interest, by area, 2024

### QSR attitudes

- Streamlined interactions can drive QSR appeal
- Streamlined interactions can drive QSR appeal
  - Graph 24: QSR attitudes, 2024
- Loyalty drives more appeal than generic promos
  - Graph 25: QSR attitudes, 2024
- Interest in sustainability initiatives lies in a grey area
- Interest in sustainability initiatives lies in a grey area
- Millennials will pivot to QSRs to save money
  - Graph 26: QSR attitudes, by generation, 2024
- Price-sensitive diners will seek experiences that fit the bill
  - Graph 27: QSR attitudes, by annual household income, 2024

## INNOVATION AND MARKETING TRENDS

### Launch activity and innovation

- Will value plays dictate visitation?
- Brands are giving consumers the best of both worlds
- Snackable menus help fill in the gaps
- Cinnabon becomes more accessible beyond the mall
- Brands get out of their comfort zone
- New menu items are comin' in hot

### Marketing and advertising

- QSRs are spreading the love...and addressing heartache this Valentine's Day
- Brands launch and showcase seafood items in time for Lent
- Brands fly high with 4/20 deals
- McDonald's brings "McDonald's" to life for anime fans

### Opportunities

- AI technologies can enhance the ordering process
- Lean on AI to remove language barriers
- Strategic partnerships can add a premium touch
- Give consumers the power to shape menus
- QSRs can take a piece of the catering pie
- McDonald's Indonesia launches a wedding package

### APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast methodology
- Forecast fan chart methodology
- Market forecast table: LSRs at inflation-adjusted prices

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