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Full-Service Restaurants Defy Odds and Surprise Customers During the Pandemic, ACSI Data Show

Full-service restaurants outperform fast food industry in customer satisfaction during COVID-19

ANN ARBOR, Mich., (October 27, 2020) – Satisfaction with restaurants was heading in the wrong direction well before the pandemic upended the industry.

From April 2019 to March 2020 – when U.S. stay-at-home policies first began – customer satisfaction with full-service restaurants stumbled 2.5% to a score of 79 (falling below 80 for just the second time) while limited-service (fast food) restaurants dropped 1.3% to 78, according to the [American Customer Satisfaction Index \(ACSI®\) Restaurant Report 2019-2020](#). All signs signaled that that trend would continue.

Yet, while the struggle is – and remains – real (the industry lost \$120 billion from March to May 2020), restaurants haven't completely waned in terms of customer satisfaction.

According to the [ACSI's new special COVID-19 restaurant study](#) based on surveys collected from April 1, 2020 to September 30, 2020, customer satisfaction with fast food chains holds steady at 78 while, surprisingly, satisfaction climbs slightly with full-service restaurants, up 1.3% to a score of 80.

“Given the shutdowns and setbacks, it's pretty remarkable the restaurant industry was able to meet customer demand, and in many cases, go above and beyond,” said David VanAmburg, Managing Director at the ACSI. “Full-service restaurants showed tremendous adaptability by how quickly they pivoted from traditional dine-in to takeout and delivery options. As the industry becomes even more digitized, restaurants' ability to evolve with the times should only benefit them moving forward.”

Olive Garden joins the elite, while LongHorn Steakhouse falls from perch atop full-service restaurants

Six full-service chains experience customer satisfaction gains since the most recent Restaurant Report, when just one improved and seven of 12 declined.

Even more encouraging: Full-service restaurants are more satisfying from both a delivery and

takeout standpoint. Customers are now happier with delivery (up 5% to 81) compared to dining in (up 1% to 79) and carryout (up 3% to 77).

Olive Garden inches up 1% to an ACSI score of 80, joining Texas Roadhouse (unchanged) and the group of smaller restaurants (unchanged) in first place. Customers feel Olive Garden has made significant strides with both its mobile app reliability and mobile app quality.

TGI Fridays is next, up 1% to 79, ahead of six restaurants with scores of 78: Applebee's (up 1%), Chili's (up 4%), Cracker Barrel (down 1%), LongHorn Steakhouse (down 4%), Outback Steakhouse (unchanged), and Red Robin (up 3%).

LongHorn Steakhouse's first-place reign was short-lived, as customers now believe the experience is pretty much worse across the board, most notably in beverage and food quality, staff courtesy, order accuracy, and layout and cleanliness.

Denny's still resides near the bottom of the category despite climbing 1% to 77. It's joined by Red Lobster, which falls 3%. Ruby Tuesday sits alone in last place, unchanged at 76.

Full-service restaurants aren't perfect. Scores for layout and beverage variety stay put, while both mobile app quality and food variety decline. Still, after improving in just one benchmark in the latest Restaurant Report, full-service restaurants show considerable progress, increasing in beverage quality, staff courtesy, food quality, order accuracy, service speed, and mobile app reliability.

Chick-fil-A is still the fast-food king; Pizza Hut has Domino's in its sights

At the time of the 2019-2020 Restaurant Report, limited-service restaurants appeared better positioned to handle the dynamics of the pandemic than their full-service counterparts. Turns out, that's not the case.

Although more customers are carrying out food, those that do carry out remain less satisfied compared to customers dining in and receiving delivery. The latter two lead the way at 79, while carryout is unchanged at 76.

Nine brands see customer satisfaction slide during the pandemic – down from 11 before – while only four improve their scores.

Chick-fil-A keeps its stranglehold on the fast-food segment with a stable ACSI score of 84, followed by the group of smaller fast-food chains (unchanged) and Domino's (up 1%), which tie at 80. Domino's improves across all benchmarks with the exception of food variety.

Pizza Hut climbs 3% to 79, joining KFC, which remains steady. Chipotle tumbles 3% into a tie with Starbucks (unchanged) at 78. Customers are more disappointed with Chipotle's staff

courtesy, checkout/delivery speed, and beverage variety in the past six months.

Four brands have an ACSI score of 77: Arby's (down 3%), Burger King (up 1%), Panera Bread (down 3%), and Papa John's (down 1%).

Dunkin' and Subway both plummet 4% to 76. Little Caesars (down 1%) and Taco Bell (up 1%) tie at 75, followed by Popeyes, unchanged at 74. Wendy's falls 4% into a tie with Jack in the Box (unchanged at 73). Both are ahead of Sonic Drive-In, which slides 3% to 72. McDonald's sits alone at the bottom with a steady ACSI score of 70.

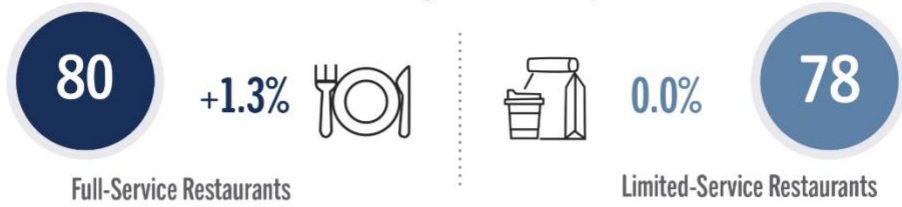
In the 2019-2020 Restaurant Report, only overall mobile app reliability improved among limited-service restaurants. Now, both mobile benchmarks are up, with mobile quality jumping 2% to 83 and mobile reliability inching up 1% to 82. Although declines are minor, customers are less satisfied with food quality, layout and cleanliness, and beverage variety.

The [American Customer Satisfaction Index's special COVID-19 restaurant study](#) is based on interviews with 9,511 customers from April 1, 2020 to September 30, 2020.

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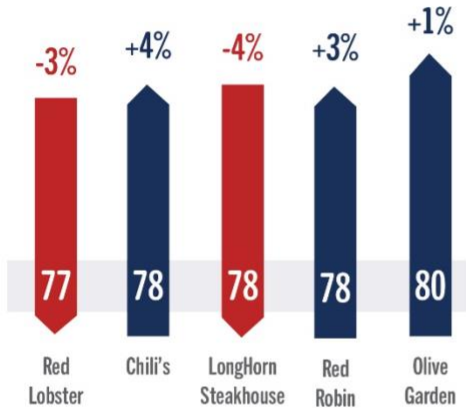
AMERICAN CUSTOMER SATISFACTION INDEX: FAST FOOD DINERS HUNGRY FOR MORE

ACSI's new study reveals surprising results: Customer satisfaction with restaurants has not waned during the COVID-19 pandemic.*

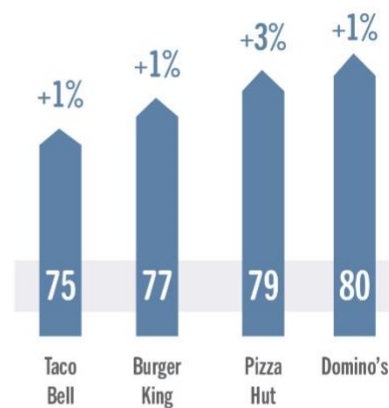


*ACSI results based on customer surveys conducted April-September 2020 as compared with the period April 2019-March 2020.

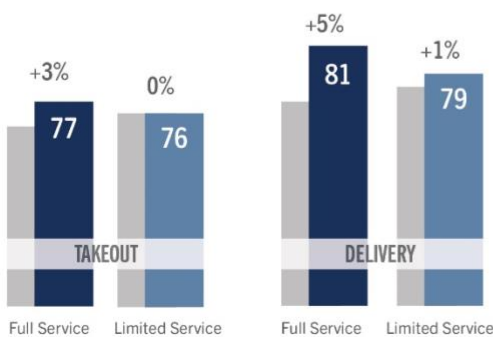
Chili's and Red Robin net biggest ACSI gains among full-service outlets.



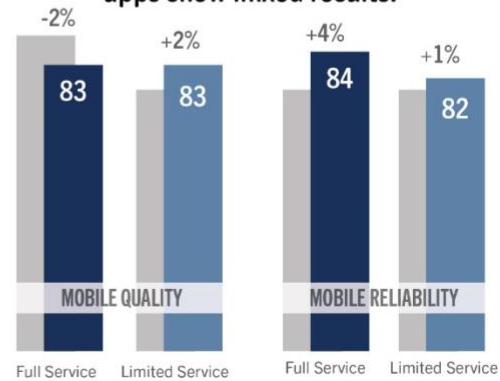
Despite established delivery and takeout models, few fast food chains accelerate.



Full-service restaurants respond quickly to pandemic by improving both delivery and takeout experiences.



Fast food chains improve mobile app performance, while full-service mobile apps show mixed results.



0-100 Scale

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The [American Customer Satisfaction Index](http://www.theacsi.org) has been a national economic indicator for 25 years. It measures and analyzes customer satisfaction with more than 400 companies in 46 industries and 10 economic sectors, including various services of federal and local government agencies. Reported on a scale of 0 to 100, scores are based on data from interviews with roughly 500,000 customers annually. For more information, visit www.theacsi.org.

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