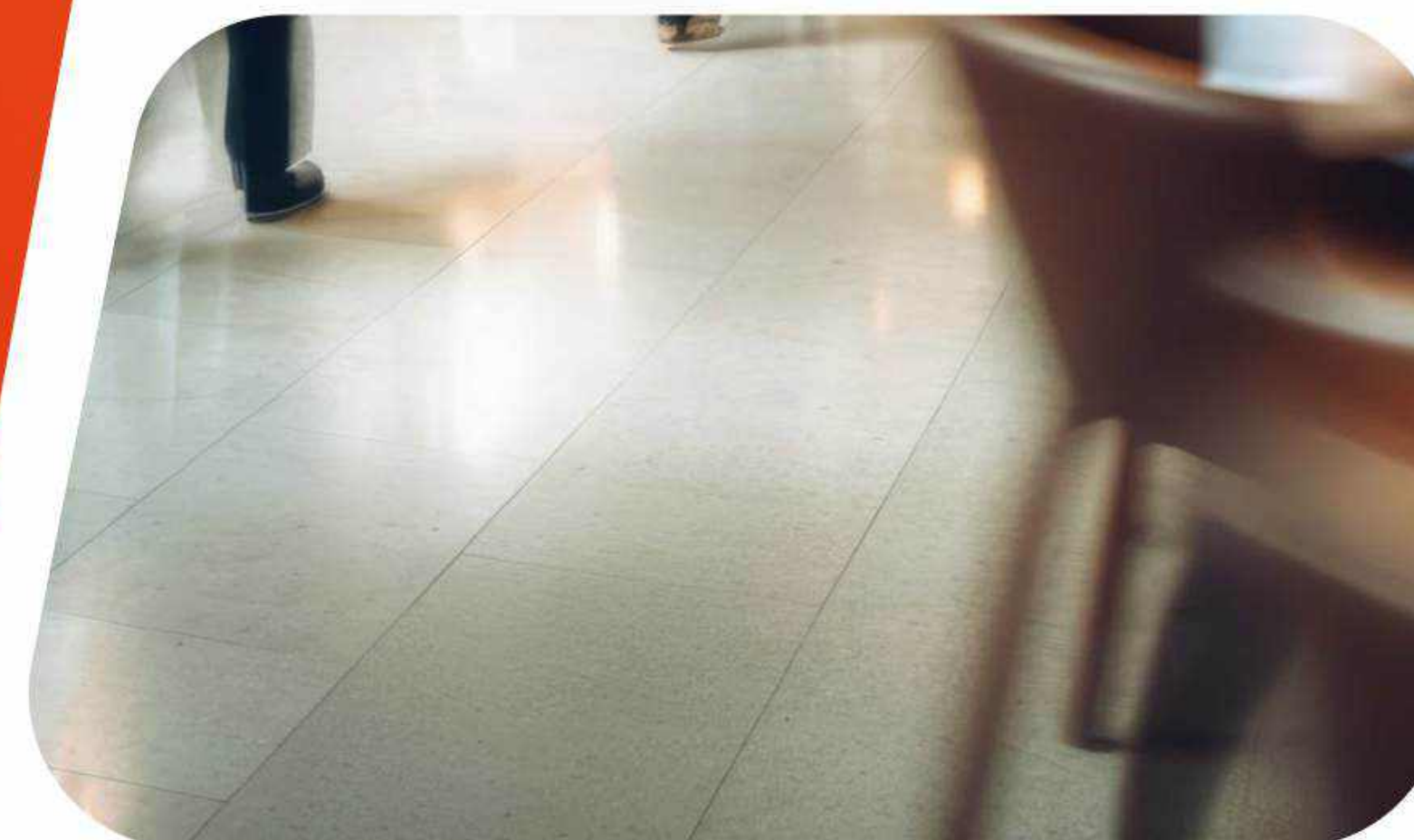
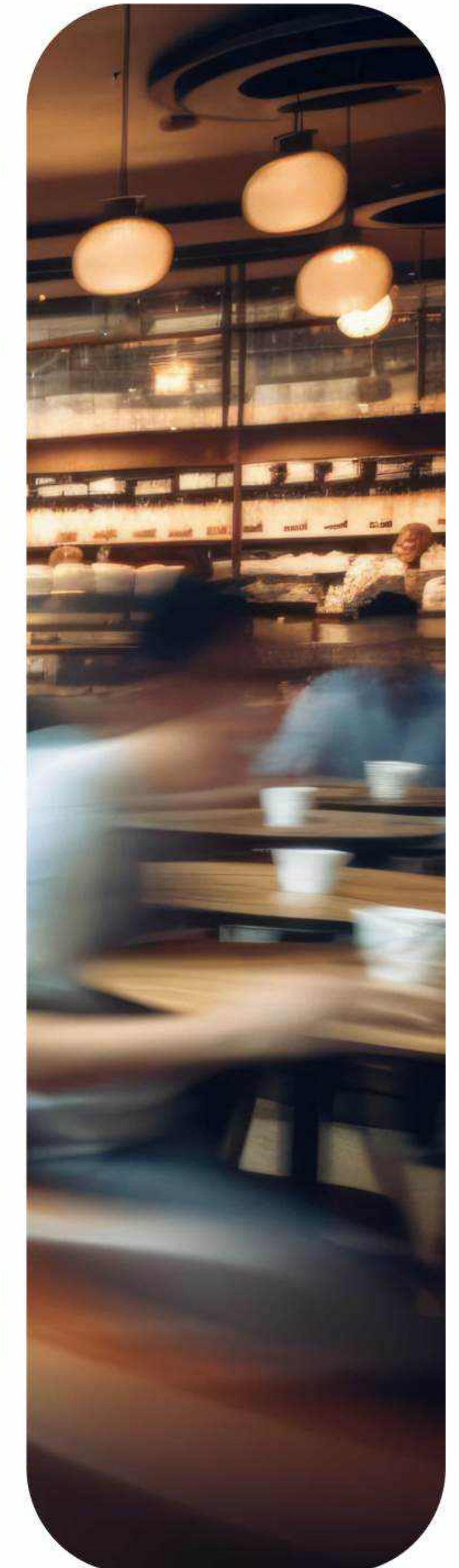




# 2026

## Phygital Index Report

Winning loyalty in an increasingly fragmented market where there's intense competition for every dining occasion





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Introduction

Customer loyalty is crumbling

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# Introduction



# The dining landscape is fragmenting as loyalty breaks down

In 2026, the dining landscape has become increasingly fractured as the rules of restaurant loyalty begin to break down. The boundaries between digital and in-person experiences are fading, and the once-clear distinctions between restaurant categories – from fast food and fast casual to grocery and convenience stores – are dissolving.

At the same time, budget considerations are colliding with higher expectations around food quality, speed, and convenience, reshaping how diners define value in a higher-price environment. Diners are constantly reassessing what feels “worth it.”

This shift is creating real urgency for restaurant brands. As consumers move more freely across channels, categories, and ordering methods, operators are navigating a landscape where no consumer-brand relationship is guaranteed – and long-standing “default” favorites are increasingly vulnerable.

But as restaurant technology stacks have grown more complex, they have also contributed to fragmented systems and disconnected experiences. As a result, customers are left to navigate inconsistent menus, ordering flows, and loyalty touchpoints across channels. In a market where expectations are rising, and patience is shrinking, these gaps are undermining customer trust, costing restaurants revenue and repeat visits.

To better understand these changing dining behaviors, ordering habits, and evolving customer expectations, **Tillster surveyed 2,144 diners in the U.S.** about how phygital innovation is shaping the future of restaurant experiences.

The findings show that consumers are becoming more intentional about where they eat out, what they’re willing to pay for, and which brands they’re likely to return to.



Our research underscores three themes impacting today's dining landscape:

01

### **Loyalty is more fluid**

As diners change spending behaviors, explore alternative dining options, and rethink what value truly means, traditional restaurant leaders face growing pressure to differentiate their loyalty programs. Long-standing “default” favorites are increasingly vulnerable as guests actively migrate toward non-traditional competitors.

02

### **Value is being redefined**

Price still matters, but it is no longer the sole driver of repeat visits. Seamless phygital experiences, personalization, surprise-and-delight moments, and consistently strong food quality increasingly determine where diners return. Diners are actively reassessing what feels “worth it” before committing to a purchase.

03

### **Phygital experience dictates success**

Diners want the benefits of personal interaction and the efficiency of digital tools. They reward brands that remove friction, deliver control and convenience, and seamlessly blend technology with service — and stay away from experiences that feel inconsistent, confusing, or disconnected.

## Key findings

**31%**

Of diners say they are visiting restaurant chains less often due to rising prices.

**45%**

Of diners say their favorite restaurant chain has changed in the past year. That's a significant increase compared to only **33%** in 2025.

**36%**

Of diners say they go to grocery chains more frequently compared to this time last year, and **33%** are visiting c-stores more frequently.

**62%**

Of diners are pleasantly surprised by menu and order customization options that they were not previously aware of.



Top factors when choosing where to eat

**45%**

Food quality

**44%**

Convenience

**34%**

Speed

# Key findings



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**Customer loyalty is crumbling**

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**Customer loyalty is crumbling**



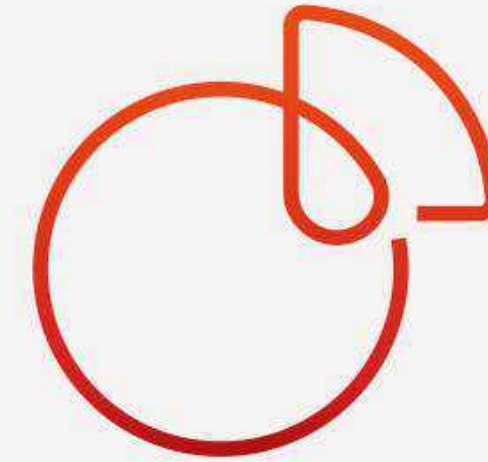
# Customer loyalty is crumbling

Diners are shifting in ways that fundamentally challenge long-standing assumptions about loyalty and growth – rethinking where they choose to eat, how often they visit, and how much they spend.

A key theme of Tillster's 2025 Phygital Index was that consumer loyalty was already beginning to erode as diners explored more options and became less tied to a single "go-to" brand.

While many customers still have favorite restaurants and participate in loyalty programs, those relationships are becoming increasingly fragmented and inconsistent. That trend has only accelerated in 2026.

To understand how these shifts are reshaping the competitive landscape, let's take a closer look at **three critical dynamics** driving change across restaurant categories today.



The risk is clear: As diners increasingly explore alternative options and shift spending habits, traditional leaders will need to work harder to grow and deliver differentiated experiences that justify every visit.

# 45%

Of diners say their favorite restaurant chain has changed in the past year. In 2025, that portion was only 33%



# 01 Fast-food and fast-casual are ceding ground, while grocery and c-stores surge

Loyalty is increasingly up for grabs, even among established favorites and long-standing category leaders. In particular, fast-food and fast-casual chains are feeling the pressure.

At fast-food chains, diners are ditching regular trips. Despite 91% eating fast food at least once per month, **only 26% of diners head to the same chain multiple times per week, and only 23% stop in once per week.**

Meanwhile, fast-casual spots do a great job drawing in regulars, but they struggle with broader appeal. **While 85% visit at least once per month, 11% of diners avoid fast-casual entirely.**

At the same time, grocery chains and convenience stores are gaining traction – and increasingly competing for the same meal occasions.

These outlets are no longer viewed solely as snack stops or secondary options. Investments in prepared foods, made-to-order stations, upgraded store layouts, and grab-and-go meal solutions are narrowing the experiential gap between restaurants and retail food providers.

## GROCERY

# 36%

**of diners say they go to grocery chains more frequently** compared to this time last year, up from 25% in 2025.

However, grocery chains continue to face an uphill battle in driving consistent, repeat dining traffic. Out of all options, **diners are least likely to eat at a grocery chain frequently**: 24% visit once a month or less, 9% eat less than once per month, and 16% avoid them altogether.

## C-STORES

# 33%

**of diners are visiting c-stores more frequently**, compared to 24% in 2025.

But c-stores face a similar challenge: **78% of respondents eat at c-stores at least once per month.** Yet a noticeable share – 22% of diners – opt out of eating at c-stores entirely.



Three in 10 (29%) diners say they go to fast-food chains less frequently, and an even higher portion (37%) say they are visiting fast-casual chains less frequently.

## How and where c-stores are winning diners

Convenience stores' investments in food as a revenue driver appear to be paying off. In particular, c-stores are winning over more customers based on improved quality, service, and price perception.

Snacks continue to drive convenience store purchases, with 34% of diners primarily grabbing snack items – reinforcing the category's strength as a quick, grab-and-go solution.

As nontraditional competitors close the gap on quality, service, and price, restaurants across the board must work harder to differentiate.



78%

Say prices at c-stores are on par or better than fast-food and fast-casual chains

45%

Say c-stores provide better service compared to fast-food and fast-casual chains

44%

Say c-stores provide better quality food compared to fast-food and fast-casual chains

# 02

## Diners are holding the line on spending – and delivery is often the first to go

With rising food and commodity costs, diners are keeping an eye on their pocketbook. In fact, **the majority of diners (58%) are paying closer attention to price changes in dining menus.** That has a measurable impact on eating-out behavior.

When they do dine out, many diners are carefully managing their budgets. **In the past 6 months, seven in 10 (69%) diners have decreased or kept their budget the same for eating out due to economic conditions.**

That budget caution is directly colliding with traffic growth in certain categories. Take c-stores, for example: **While more diners are stopping in, 33% are trimming their spending when they visit.**

This pattern holds across restaurant categories. Whether dining at fast-food chains or fast-casual spots, most diners are maintaining steady per-visit spending.

### KEY FINDINGS

Spend about the same amount during each fast-food visit.

57%

Spend about the same at grocery chains.

56%

Spend about the same amount at fast-casual restaurants.

53%



Nearly a third (31%) of diners are visiting restaurant chains less often due to rising prices.

## As diners scrutinize costs, delivery is often one of the first conveniences to go.

About half of diners (47%) purchased most of their fast food directly at the restaurant over the past 12 months, compared to 37% who mostly used third-party apps like Uber Eats or DoorDash.

Delivery fees appear to be the driving force behind this shift. In fact, 61% of diners have abandoned a delivery order due to service fees, and about half have switched to pickup at checkout because delivery and service fees were too high.

Cutting back on delivery isn't the only adjustment diners are making. As cost-conscious consumers grow more wary of added fees and price premiums, they're reevaluating spending across the entire dining experience. **One-third (33%) are choosing lower-priced items, 27% are using loyalty programs more often, and 26% are tipping less.**

As pickup becomes a more intentional choice for cost-conscious diners, restaurants must ensure their operations and technology can adapt. Systems that can intelligently balance demand between pickup, delivery, and in-store ordering – while maintaining speed and service quality – will be critical to delivering a consistent guest experience as ordering behaviors continue to evolve.



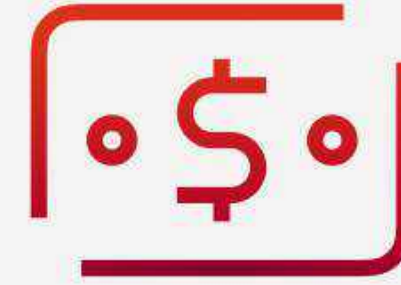
## The “tip creep” problem

Tipping fatigue is emerging as a meaningful friction point in the digital dining experience: **40% of diners have abandoned an order because they felt pressured to tip.**

As tipping prompts continue expanding to kiosks, drive-thru, and mobile apps, “tip creep” increasingly impacts diners’ ordering behavior. For instance, **62% of diners tip less or avoid ordering from places due to tip prompts.**

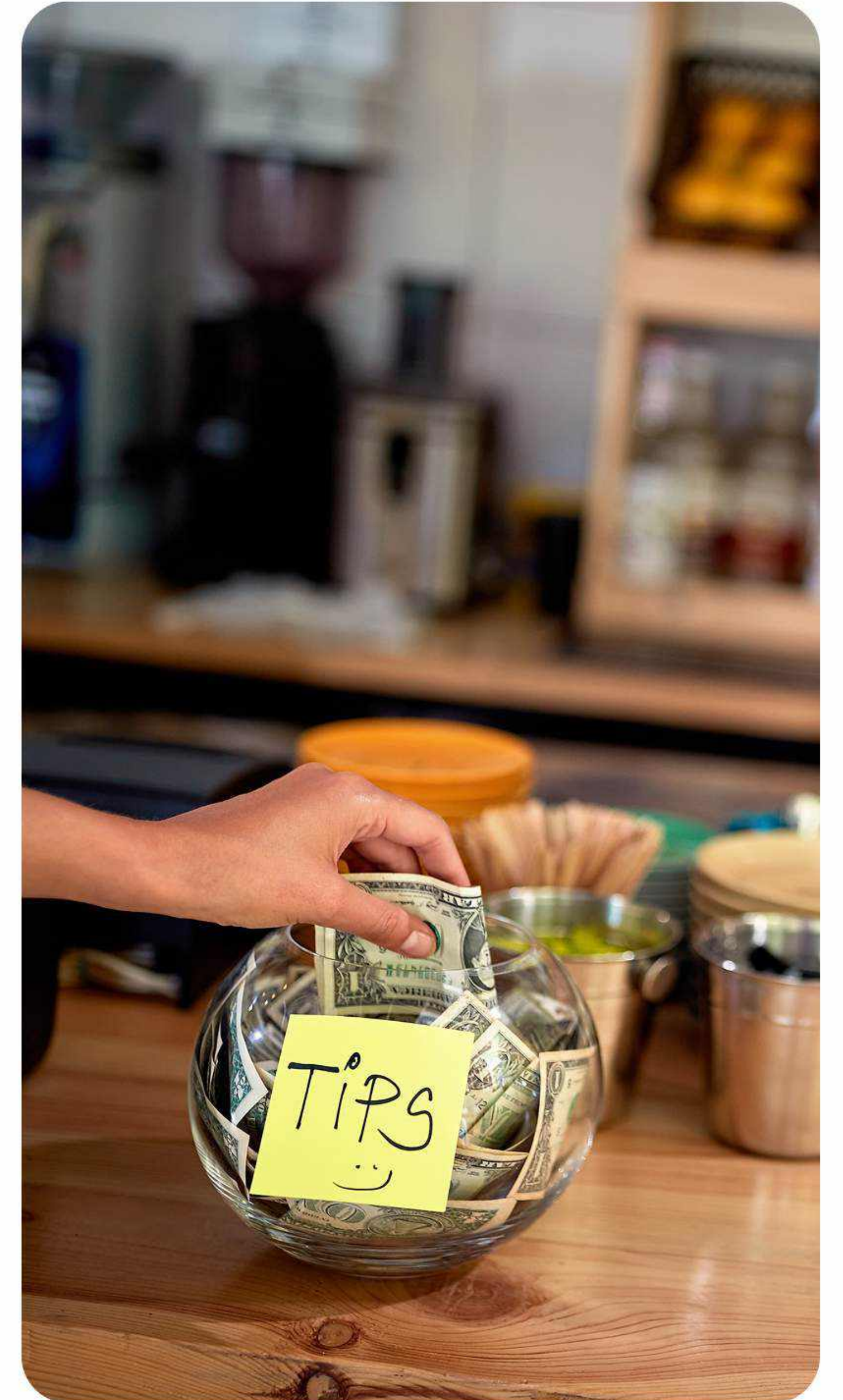
Half of diners (50%) don’t leave a tip when ordering from a kiosk at a fast food restaurant, while 42% of diners have left a tip in the past 12 months.

These signals suggest that operators must carefully consider how tipping prompts are integrated into digital touchpoints. While technology enables new payment flexibility, overloading customers with tip requests risks undermining the very convenience these tools are meant to deliver, adding pressure at checkout.



# 40%

Of diners have abandoned an order because they felt pressured to tip.



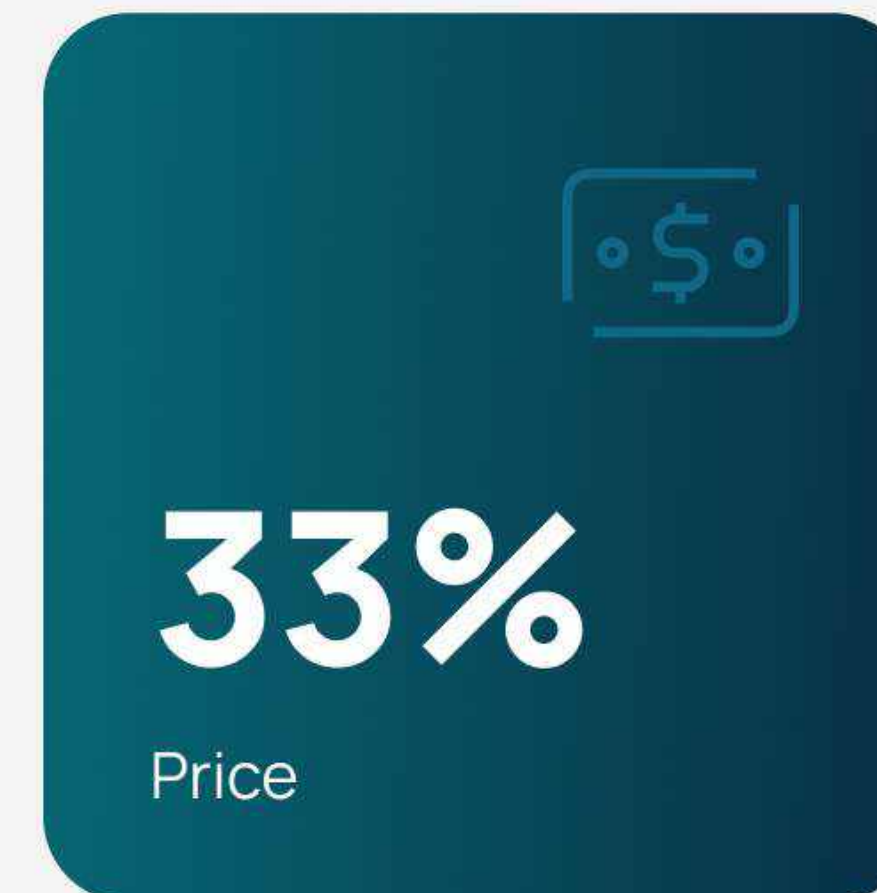
# 03 Customers are reimagining what value looks like

While many diners are pulling back on spending, a growing segment appears to be stabilizing and adapting to current pricing realities. The share of consumers who say they have made no changes to their dining habits increased from 16% in 2025 to 23% in 2026.

What is changing is how diners decide where to go. Price still matters – 33% cite it as a top factor – but as we’ve seen year over year, price continues dwindling down as a primary consideration.

When asked about the most important considerations when choosing where to eat, diners ranked food quality (45%), convenience (44%), and speed (34%) as their top 3 factors.

## Top factors in choosing where to eat out



# Value is being redefined by quality, not price

Today's diners are reassessing what "value" truly means – and what factors make a restaurant experience valuable. When assessing overall value, food quality and freshness (44%) rank as the top factor, closely followed by portion sizes (34%).

Meanwhile, just 32% of diners rank price among the most important factors. That's down from 59% in 2025, when it ranked as the top factor for diners.

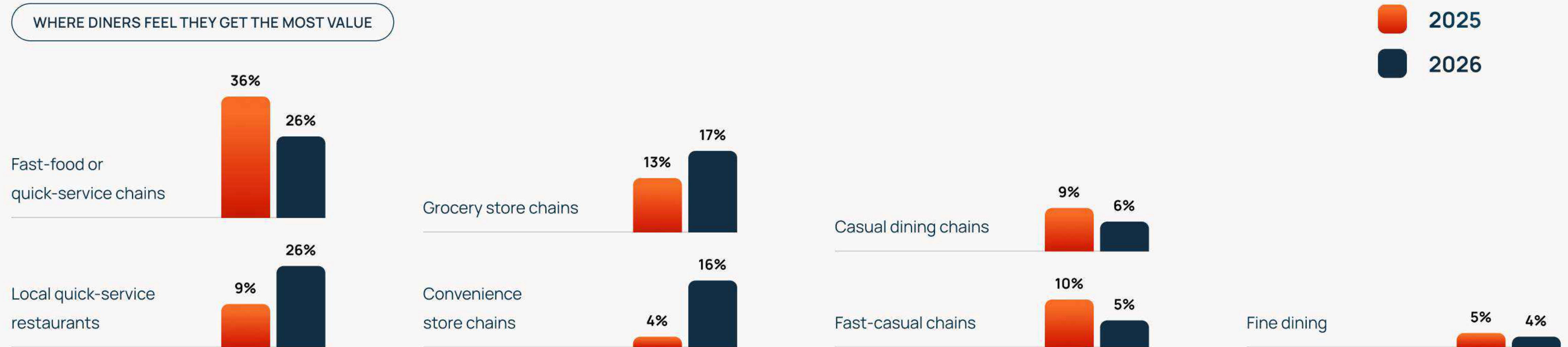
Price now sits alongside other critical experience factors. About three in 10 say that order accuracy (29%), ease of ordering (29%), and restaurant cleanliness (28%) are the most important considerations when assessing value. Taken together, these factors highlight how value today is increasingly defined by how seamlessly digital and physical experiences work together.

These changing perceptions of value are directly influencing where diners choose to spend. In fact, it helps explain why both fast-food and fast-casual chains are seeing fewer and

less frequent diners and increased competitive pressure from other options. C-stores, for instance, are increasingly winning over diners by delivering on the very attributes customers say matter most.

These shifting priorities are also reflected in where diners say they get the most value. In 2025, 36% said they get the most value from fast-food or quick-service chains, while only 26% said the same this year. C-stores and grocery chains, on the other hand, both saw increases in perceived value, which underscores their growing popularity among diners.

WHERE DINERS FEEL THEY GET THE MOST VALUE



## The fundamentals still matter

While diners have more choices than ever, what motivates them to choose one restaurant over another is shifting in important ways. And it's clear that the fundamentals of restaurant service still drive dining decisions.

Diners are becoming less influenced by external signals when deciding where to eat, with social media's influence on dining decisions dropping dramatically. **In 2026, 64% of diners said social media does not influence their dining choices, while only 36% said it does influence where they eat.**

Instead, when diners think about their favorite quick-service or fast-casual restaurants, the fundamentals still dominate. **Great food (43%), reasonable prices (37%), and order accuracy (20%) lead the list.**

This may help explain the renewed momentum behind casual dining. **In fact, 30% of respondents say they are visiting casual dining chains more frequently, compared to 17% in 2025.**

While diners may be trimming everyday convenience purchases, they remain willing to spend when the experience feels differentiated. And fundamentals like taste, value perception, and reliable execution remain the strongest drivers of dining decisions.





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Casual dining chains have seen a boost in diners stopping in, with 80% visiting at least once a month, up from 68% in 2025.

Moreover, 33% of respondents are spending more each visit – a slight increase from 30% in 2025 and the only increase in spending across all dining options.

# The generational dining divide

While many dining trends are reshaping the industry broadly, they are not playing out evenly across generations.

A closer look at Gen Z and millennials – two of the most influential and high-growth customer segments – reveals meaningful differences in loyalty, value perception, and dining behavior.

## Gen Z is more open to alternative food options

As fast food and fast casual lose momentum overall, Gen Z is leading the pullback.

At fast-food restaurants, **36% of Gen Z diners say they're visiting less frequently, compared to just 16% of millennials. In contrast, millennials are more than twice as likely to report increasing their visits (27% vs. 12%).**

Fast-casual performance is also less stable among Gen Z: **Only 28% say their visits have stayed the same, compared to 46% of millennials.**

Instead of sticking with traditional chains, Gen Z appears more willing to explore alternative options. Grocery chains, in particular, are gaining ground with younger diners:

**46% of Gen Z say they're visiting more often, compared to 28% of millennials.**

This fluidity extends to brand allegiance. Gen Z diners are more likely than millennials to say **their favorite restaurant chain has changed in the past year (51% vs. 47%),** reinforcing how quickly loyalty can shift within this cohort.

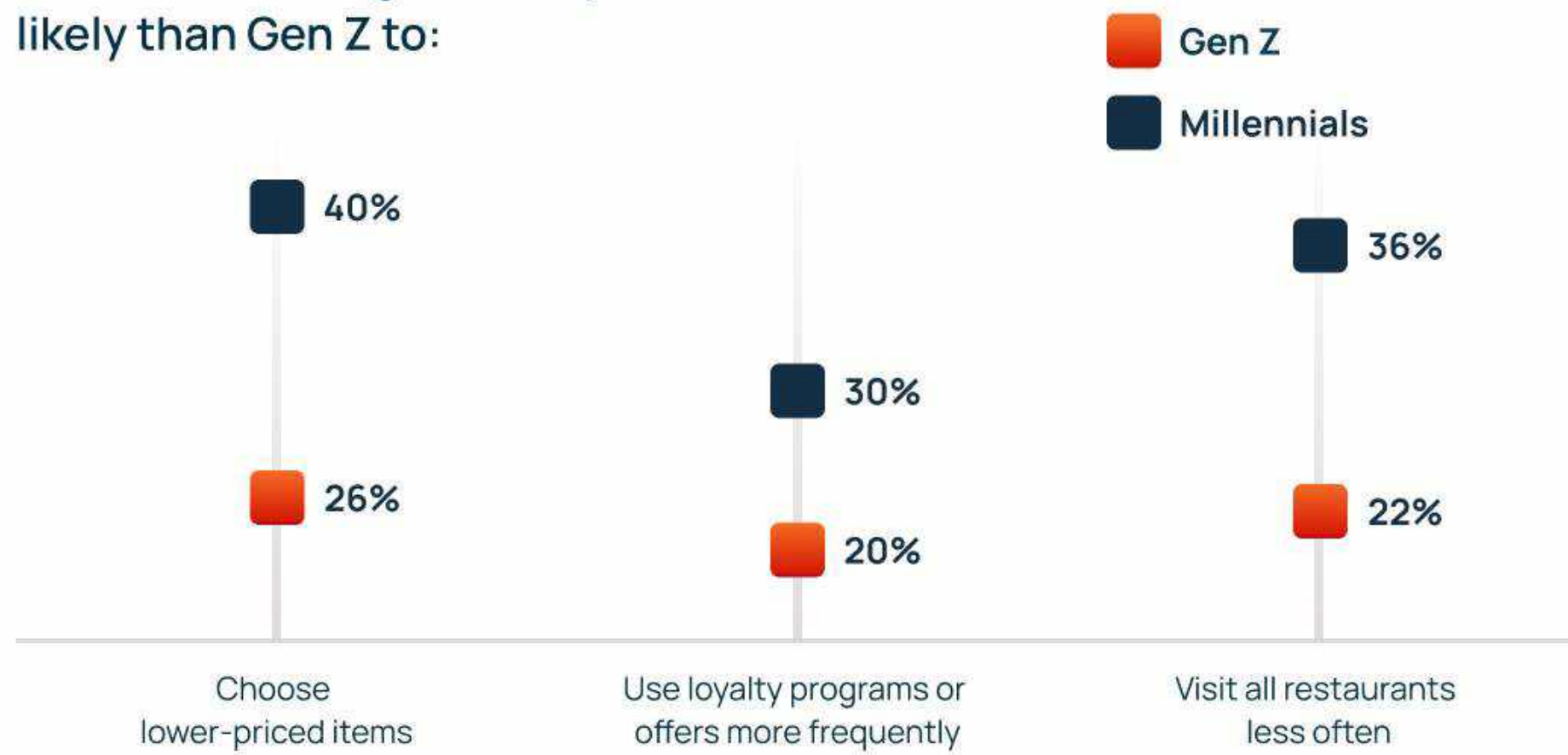
What's driving these differences? Gen Z places a stronger emphasis on food quality – **52% rank it as a top factor, compared to 36% of millennials. Millennials, by contrast, more heavily prioritize convenience (49% vs. 39%) and speed (37% vs. 29%).**



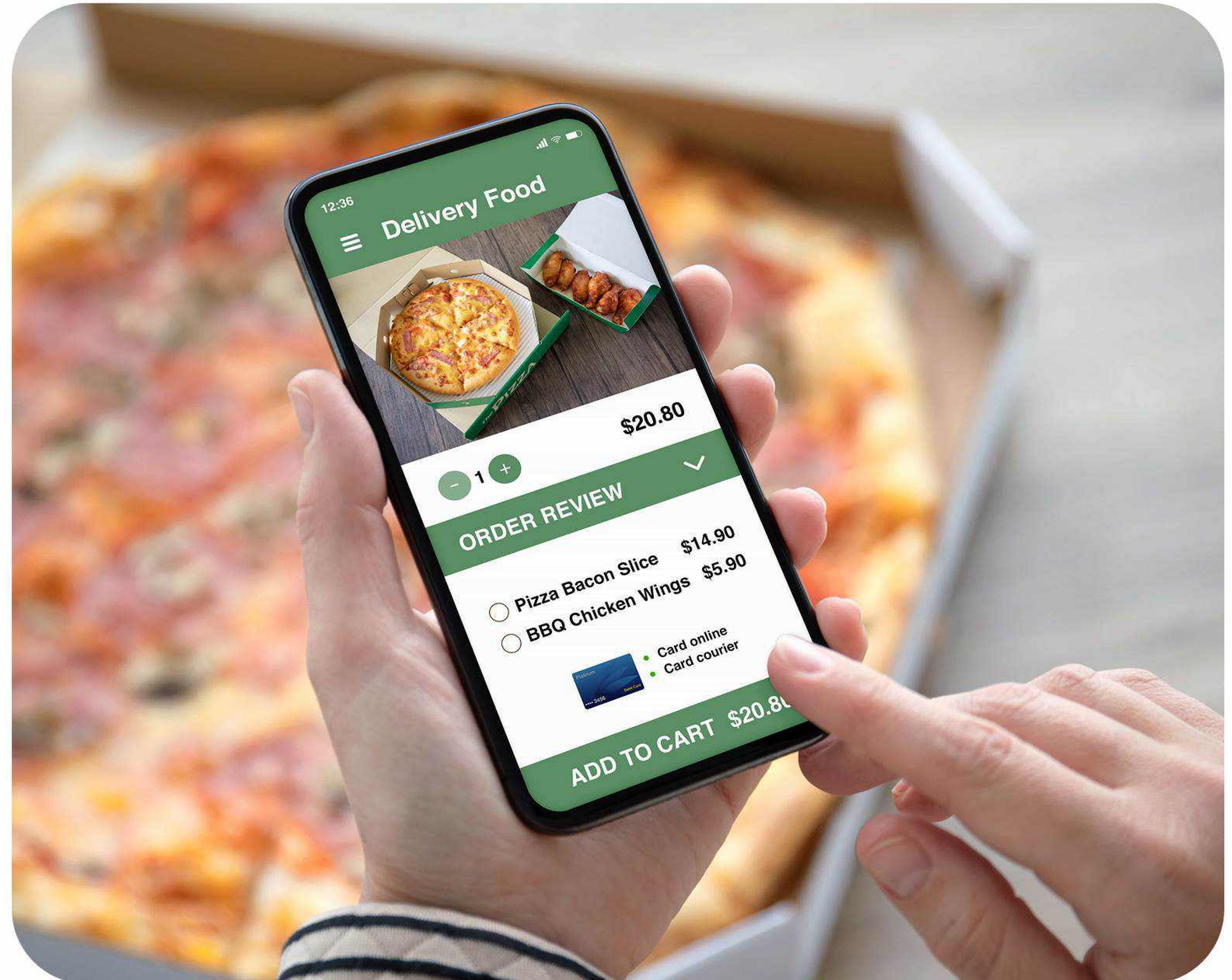
# Millennials are focused on their budgets and more engaged with loyalty programs

While Gen Z shows greater brand fluidity, millennials are feeling the pressure of rising prices more acutely – and adjusting their behavior accordingly.

Millennials are significantly more likely than Gen Z to:



In other words, millennials are far more likely to recalibrate how they spend, and appear more willing to engage with structured rewards to offset rising costs.

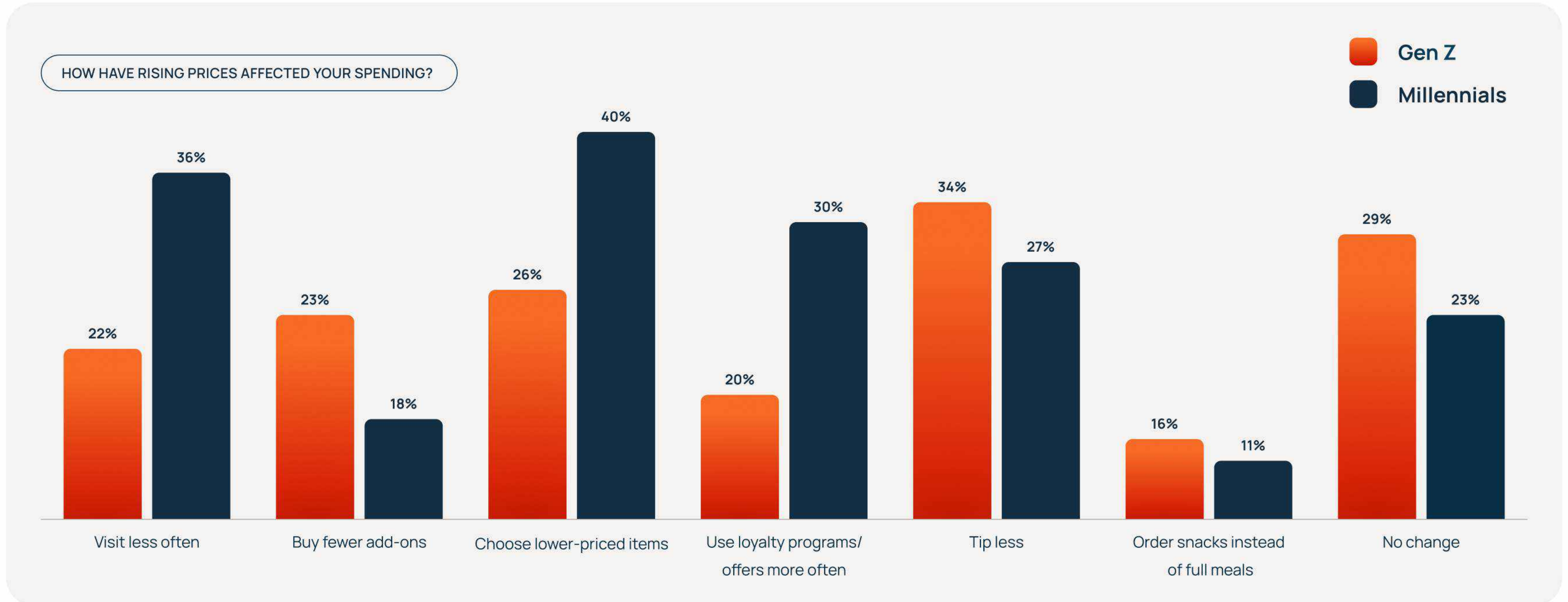


# Loyalty isn't landing with Gen Z

Millennials' stronger reliance on loyalty programs is also reflected in satisfaction levels.

One-third (33%) say they are very satisfied with the loyalty programs they belong to, compared to just 13% of Gen Z diners.

Meanwhile, dissatisfaction is notably higher among Gen Z (31% vs. 20%).



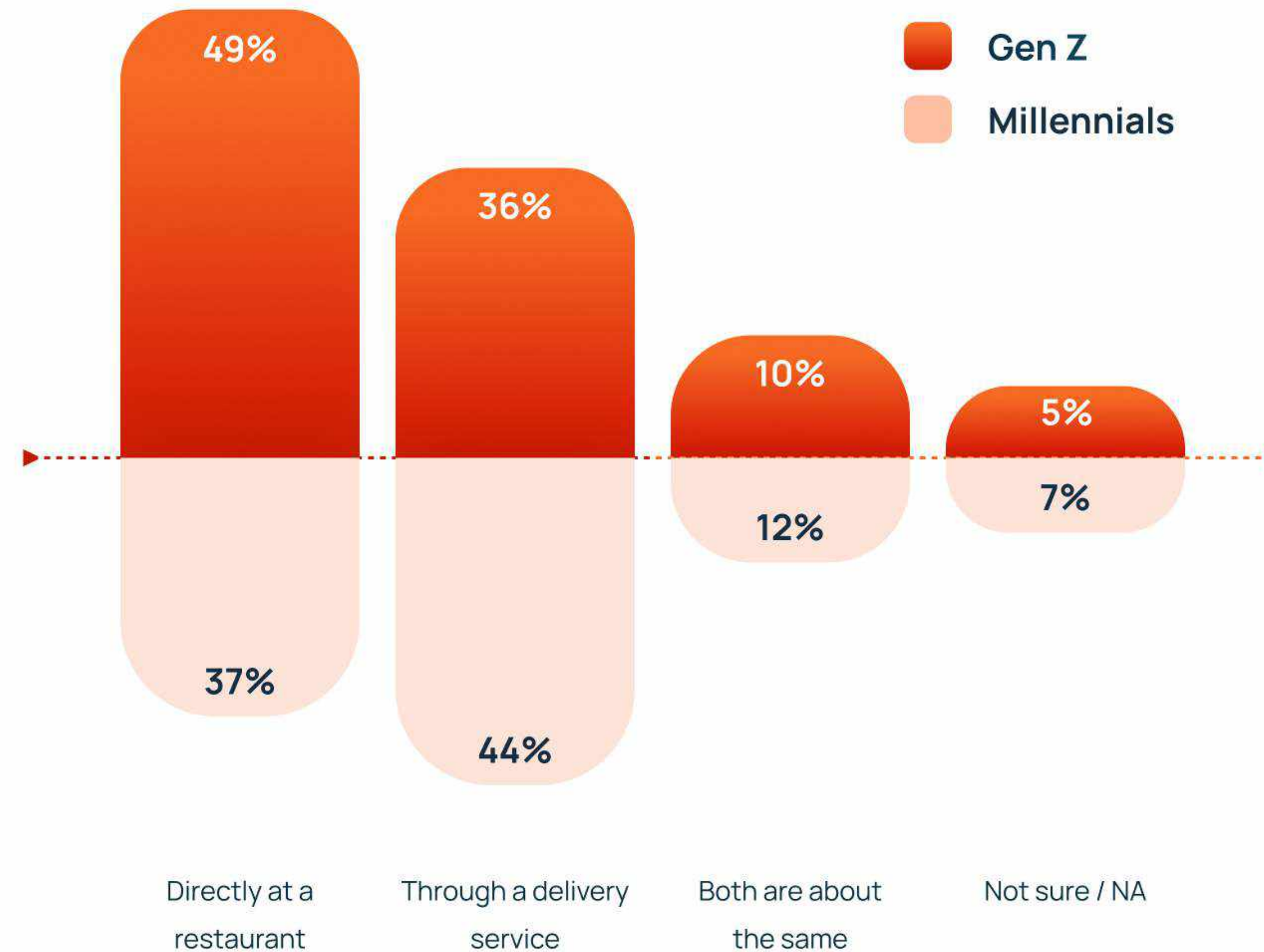
# Gen Z is reconsidering app-based ordering

While Gen Z is often viewed as the most digitally native generation, the data suggests they are selectively pulling back from third-party ordering channels – especially when cost and convenience are misaligned. Digital-native does not mean delivery-dependent.

In the past 12 months, Gen Z diners were more likely to purchase fast food directly at a restaurant (digitally or on-premise), while millennials were more likely to rely on third party delivery services.

Looking ahead, that divergence may widen. When asked about future behavior, Gen Z is more likely to say they plan to reduce their use of third-party apps in the next 12 months (45% vs. 35% of millennials).

IN THE PAST 12 MONTHS, WHERE HAVE YOU PURCHASED MOST OF YOUR “FAST FOOD” DINING?



Millennials, by contrast, are more likely to maintain their current usage levels (47% vs. 33% of Gen Z).

Given the long-term lifetime value of both cohorts, developing tailored strategies to earn – and retain – their loyalty is critical.

Rather than relying on broad generational assumptions, restaurants increasingly need precise customer segmentation and strong behavioral data to understand what truly motivates individual diners. With preferences and spending behaviors varying widely, personalization and context-driven engagement are far more effective than one-size-fits-all loyalty approaches.



For millennials, price mitigation and loyalty value are tightly linked.

For Gen Z, earning loyalty requires going beyond discounts and rewards to deliver high-quality food options and experiences.

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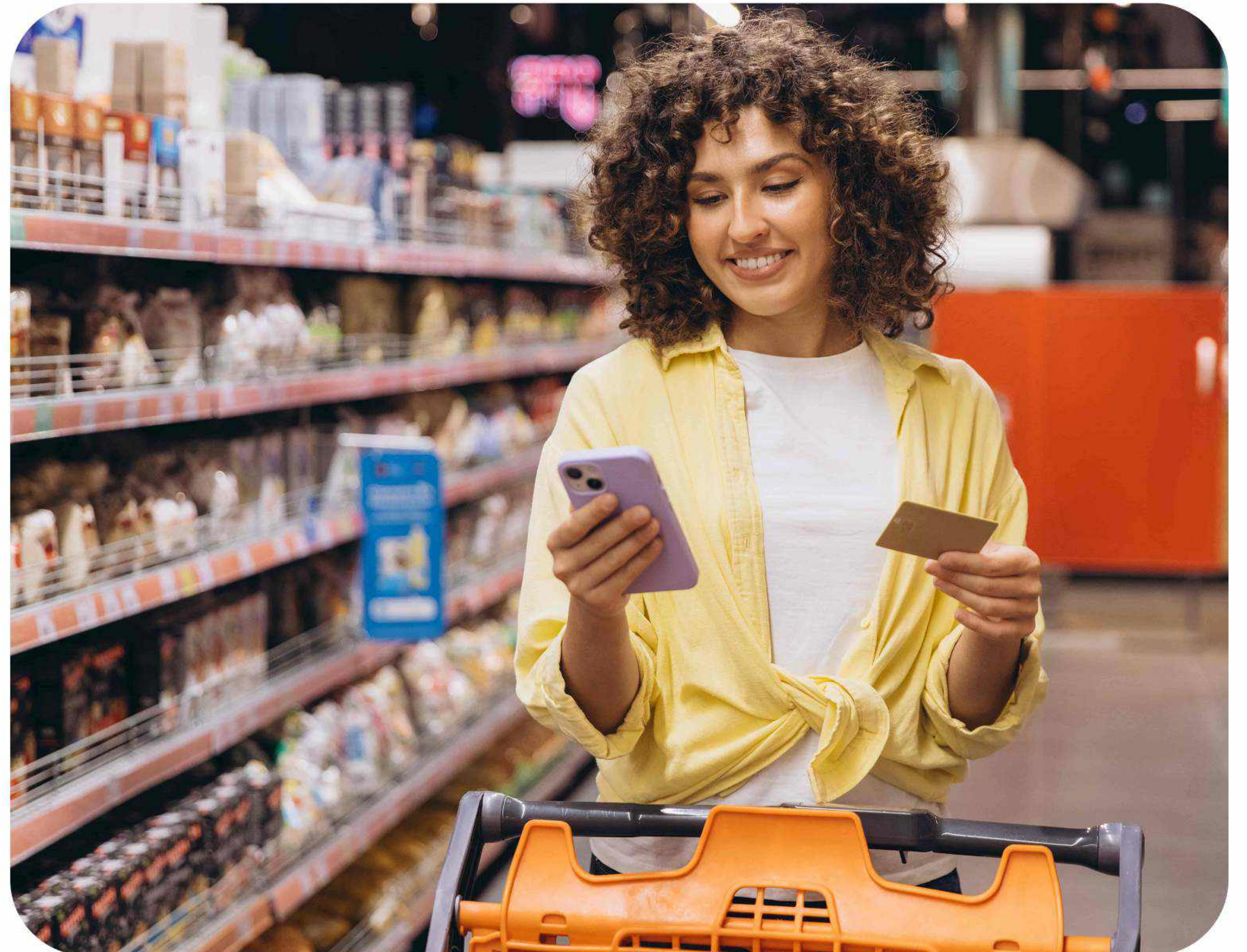
# Seamless phygital experiences matter more than ever

Loyalty today is layered and dynamic. It is no longer built solely on low prices or generous rewards programs; it's shaped by personalized experiences, intuitive technology, and meaningful human interactions that work together seamlessly.

In this environment, the phygital experience – how effectively digital tools enhance and elevate in-person dining, and vice versa – has become a defining factor in long-term loyalty.

As digital ordering becomes fully embedded in the dining experience, brands must ensure that every channel – physical or digital – works together seamlessly to add value. Points and perks may drive short-term behavior, but sustained commitment increasingly depends on how well brands deliver across an expanding ecosystem of connected touchpoints.

Together, these insights reveal **three critical shifts** reshaping how diners experience and evaluate restaurant technology today.



# 01 Omnichannel is expected, and customer expectations are only growing

Today's diners move fluidly across ordering channels. Whether through an app, website, kiosk, drive-thru, or at the counter, diners today expect to be able to access multiple options – and demand that every channel delivers speed, simplicity, and value.

Ordering experiences, much like dining itself, are blending together, and customers expect flexibility that aligns with their needs in the moment.

## Consider other digital ordering options.

A majority of diners also order through a restaurant-specific website or mobile app for in-store/curbside pickup (59%) and for delivery (54%) several times a month, and nearly half (47%) order via a third-party app.

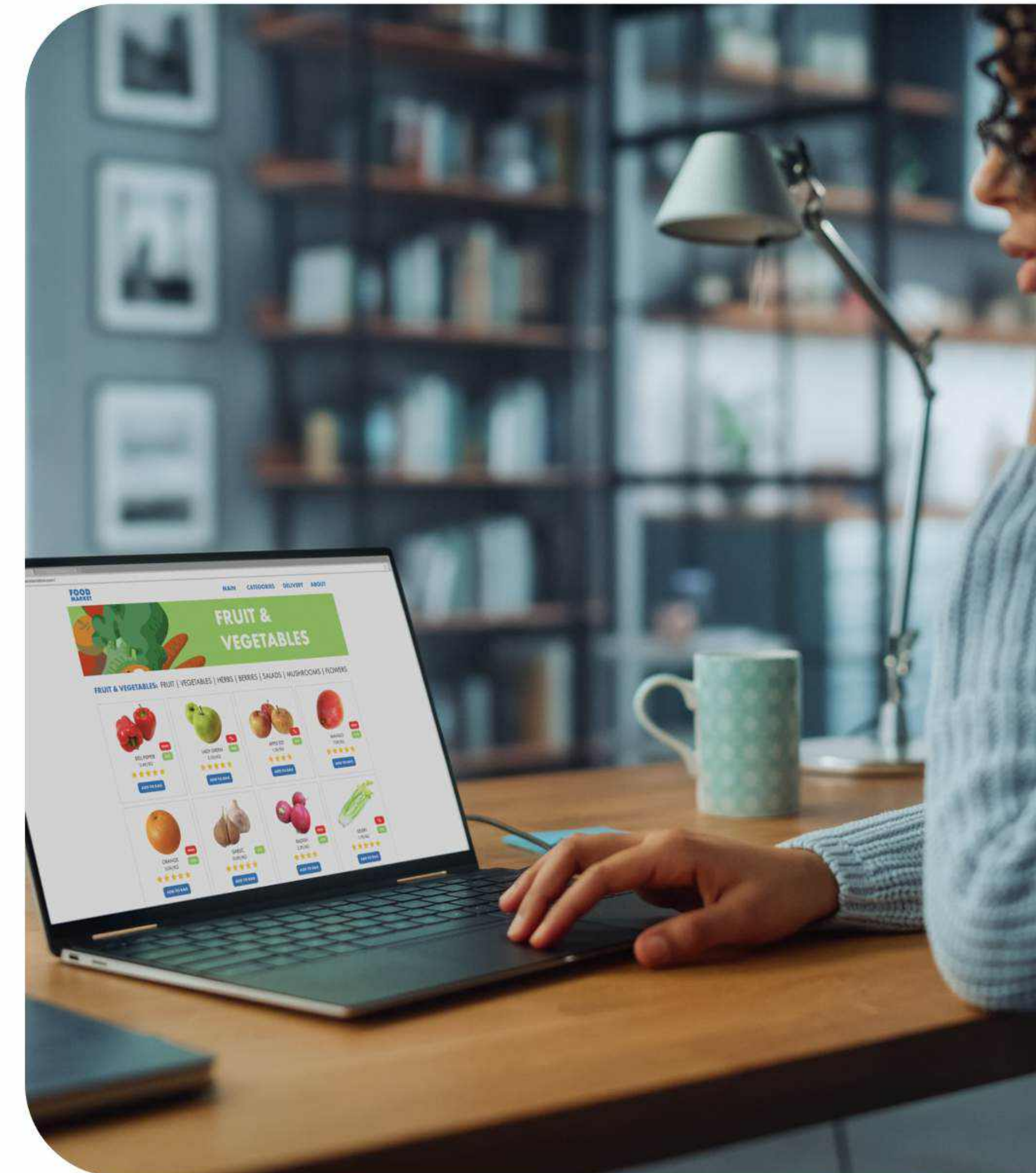
But even in today's digital world, many diners still crave human-centric, personalized interactions when eating out. Those interactions can take many forms, from a friendly cashier to a seamless digital interface that feels intuitive and responsive.

For example, ordering through a cashier also remains common: 61% of diners do so several times a month, including **37% who order from a cashier weekly**.

At the same time, diners are becoming more selective – actively reassessing which channels feel worth it and which introduce unnecessary friction or added cost. While drive-thru remains the most popular ordering option – **75% of diners order via drive-thru at least several times a month** – diners are increasingly exploring other options. In fact, **24% of diners plan to use drive-thru ordering less in the next 12 months**.

It's clear that traditional ordering experiences must be matched by digital capabilities that enhance speed, personalization, and value for customers. That expectation is accelerating the shift toward in-store digital touchpoints that give diners greater control over their experience. Self-service kiosks, in particular, continue to see increased utilization.

As pickup continues to gain traction, seamless, well-orchestrated pickup flows are essential to ensure that guests who opt out of delivery still receive a fast, frictionless, high-quality experience in-store.





Two-thirds of diners (64%) order via a self-service kiosk inside a restaurant at least several times a month.

That's up from 61% in 2025.

## Winning ordering apps put ease and customization first

After years of rapid digital acceleration, diners are increasingly clear about what separates a helpful app from a frustrating one. Functionality alone isn't enough – it must be intuitive, flexible, and seamlessly connected to the broader dining experience.

Our findings underscore a critical lesson: New features and innovations should never come at the expense of simplicity. The most successful ordering platforms will be those that layer personalization and capability onto an experience that remains fast, intuitive, and frictionless.

This becomes even more critical as diners reassess where they order. **A majority (54%) use third-party mobile apps once a month or less, and 40% expect to reduce usage even further in the next year** – a reflection that budget concerns are clearly influencing behavior.

Restaurants will need to incentivize guests to migrate toward lower-cost, first-party channels where margins and relationships are stronger. At the same time, brands must strategically manage menus, pricing, and promotions across third-party platforms to ensure perceived value offsets sticker shock.

### ESSENTIAL VS. NICE-TO-HAVE FEATURES

	Must be Included	Nice to have
Order customization	44%	34%
Delivery options	40%	16%
Ease of use	40%	57%
Alternative payment options	29%	51%
Coupons targeted to you	14%	53%

# 02 Loyalty is moving beyond reward programs

Loyalty programs still play a meaningful role in driving behavior and increasing spend.

But rewards programs are no longer the sole anchor of customer engagement and retention. Last year's survey found that 35% of diners don't belong to any loyalty programs whatsoever. That percentage is virtually unchanged in 2026.

That's likely because there's diminishing satisfaction with loyalty programs. In fact, 28% of diners are dissatisfied with the loyalty programs they belong to for fast-food and fast-casual restaurants. That's a significant jump from 15% in 2025.

## Post-reward spending behavior



## Closing the loyalty gap requires more than rewards

This comes at a time when tighter budgets would seemingly make rewards programs more attractive, not less. The share of diners who always check loyalty programs before deciding where to eat grew by 19 points to 61% year-over-year. Yet, loyalty deal checks remain spotty, with 39% of diners who don't check consistently, if at all.

That gap signals significant missed engagement opportunities – and highlights how easily even enrolled members can disengage without proactive outreach. More targeted, timely nudges could help address underutilization.

To close that gap, restaurants must design loyalty programs that make progress visible and participation effortless. In fact, 23% say the programs they value most clearly track how far they are from earning a reward, making advancement tangible and motivating.

After all, loyalty programs are not the same as Loyalty with a capital L. While rewards can drive incremental spending and short-term behavior, emotional and habitual allegiance is shaped by a broader mix of considerations from food quality and freshness to order accuracy and personalization. Effective loyalty programs reinforce and amplify these core elements.

### TOP QUALITIES OF FAVORITE LOYALTY PROGRAMS

They track how far I am from earning a reward

23%

Easy to understand and use

18%

I earn free items frequently

15%

I'm not satisfied with any

12%

I get surprise offers

10%

## Customers delight in digital experiences that offer customization and surprise

When digital tools surface relevant add-ons, highlight new items, or make customization intuitive and engaging, they create meaningful opportunities to deepen engagement and repeat behavior.

That represents a clear opportunity for restaurants today: 62% of diners are pleasantly surprised by menu and order customization options.

Likewise, offering greater personalization around health-conscious choices can also become a powerful lever for influence. As many chains are introducing calorie-reduced or “better-for-you” options, 56% of diners say they are interested in healthier default menu choices.

At a time when most diners default to familiar choices, these moments of discovery can be powerful levers for breaking routine. A greater share of respondents are sticking with their usual orders in 2026, with order changes rare or occasional for 82% of diners.

New menu items and price changes remain the top ways to entice diners to change their usual order. There’s a significant increase in diners who change their order based on app or kiosk recommendations, which now ranks as the third biggest reason for order changes.

This underscores the importance of dynamic menus and AI-powered recommendations that can surface relevant options in real time, tailored to someone’s preferences, behaviors, and context. Delivering that level of coordination and consistency requires a strong, integrated technology foundation capable of syncing menus, modifiers, pricing, and promotions everywhere customers interact.



# 03

## Phygital platforms must elevate – not complicate – the dining experience

When technology genuinely enhances the experience, it strengthens loyalty and drives repeat visits. But that only happens when phygital experiences are speedy, seamless, and simple to use.

Overall, diners appreciate the speed, accessibility, and ease-of-use that come with ordering via a kiosk. In fact, 40% say the most important part of using a kiosk is that it's quicker, while 34% say that nobody is rushing them.

### BEST PARTS OF USING A SELF-SERVICE KIOSK

It's quicker

40%

Nobody is rushing me

34%

Language barrier

22%

I can visually review my order for accuracy

19%

It shows me all the options I have

17%

I can explore more of the menu

17%



71% of diners say they are equally or more satisfied with kiosk ordering compared to other options.

# Kiosks deliver clear value - with more to unlock

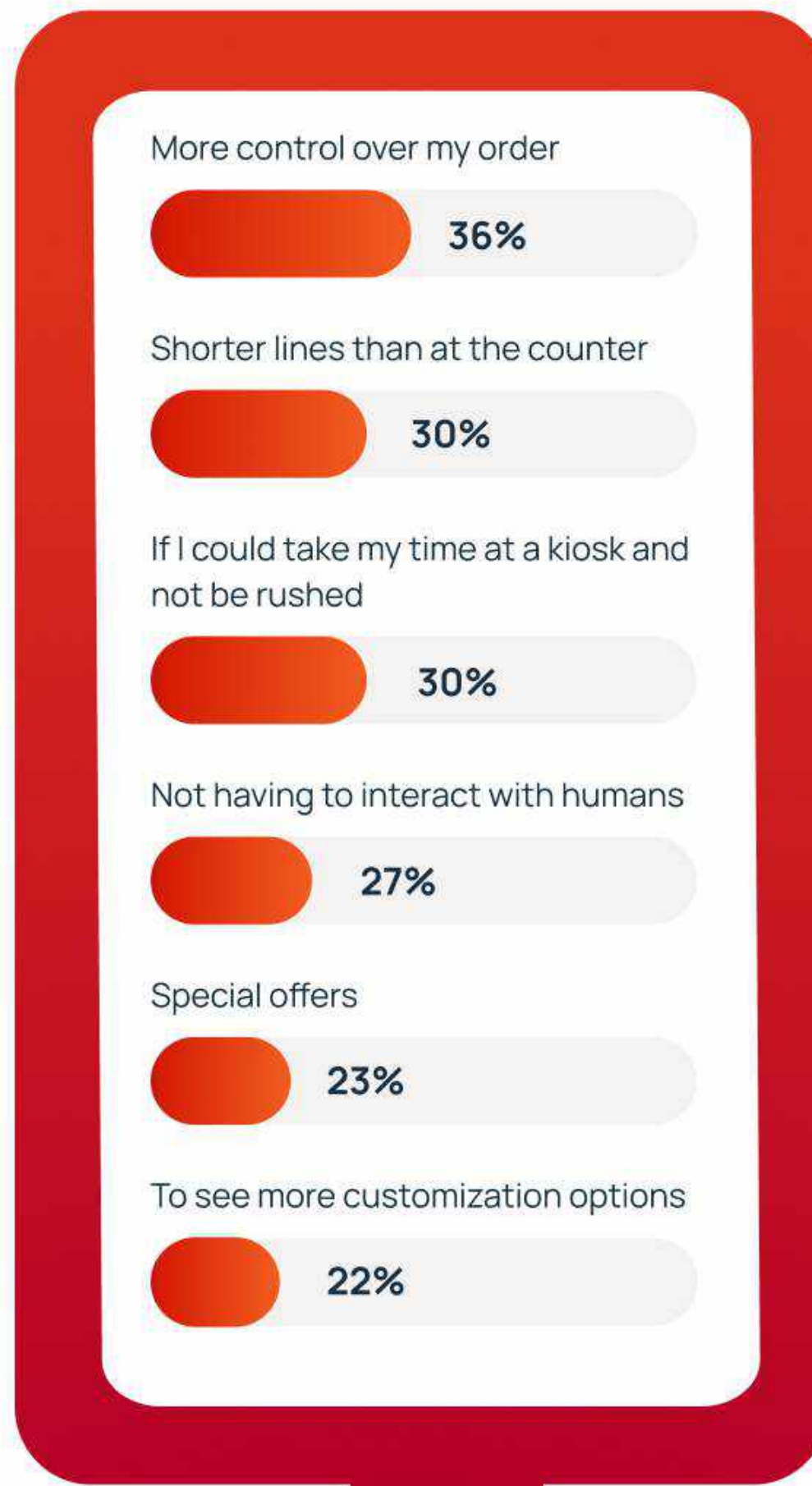
There remains room to improve the kiosk experience, particularly when it comes to customization and ease of use within the ordering flow.

The No. 1 factor that would encourage diners to use kiosks more often is having more control over their orders, followed by shorter lines than at the counter and having time at a kiosk without being rushed.

Effective kiosks and other phygital experiences must anticipate customer questions and preferences to deliver flexibility and nuance that mirrors ordering with a person rather than boxing diners into rigid pathways.

When designed well, kiosks clearly pay off. Many diners are prone to ordering more when using a kiosk, at least some of the time: **Nearly one-quarter (23%) say they always end up ordering more items than originally intended when placing an order at a kiosk.**

## TOP REASONS DINERS USE A SELF-SERVICE KIOSK INSTEAD OF ORDERING AT THE COUNTER



But there's still meaningful room to drive smarter upsells: **23% say they never order more than intended, while 54% only sometimes add extra items** – suggesting that more relevant prompts and better-timed recommendations could unlock additional revenue.

While diners are open to technology in their dining experiences, their expectations are rising – and tolerance for friction is shrinking. In a landscape where expectations are rising and loyalty is increasingly fluid, restaurants must elevate their technology execution to keep winning customers.

That shift reflects a broader evolution in restaurant technology. Success is no longer defined simply by adding digital ordering channels, but by how well those channels are coordinated and executed.

Increasingly, restaurants must move toward unified systems that connect ordering, menus, loyalty, and operations – ensuring every touchpoint works together to deliver a consistent, reliable guest experience.

## AI's performance in the ordering process needs to match its promise

As restaurants expand digital capabilities, one principle is becoming clear: Technology must be truly ready for prime time. Innovation alone is not enough. Reliability, clarity, and customer trust determine whether new tools strengthen loyalty or erode it.

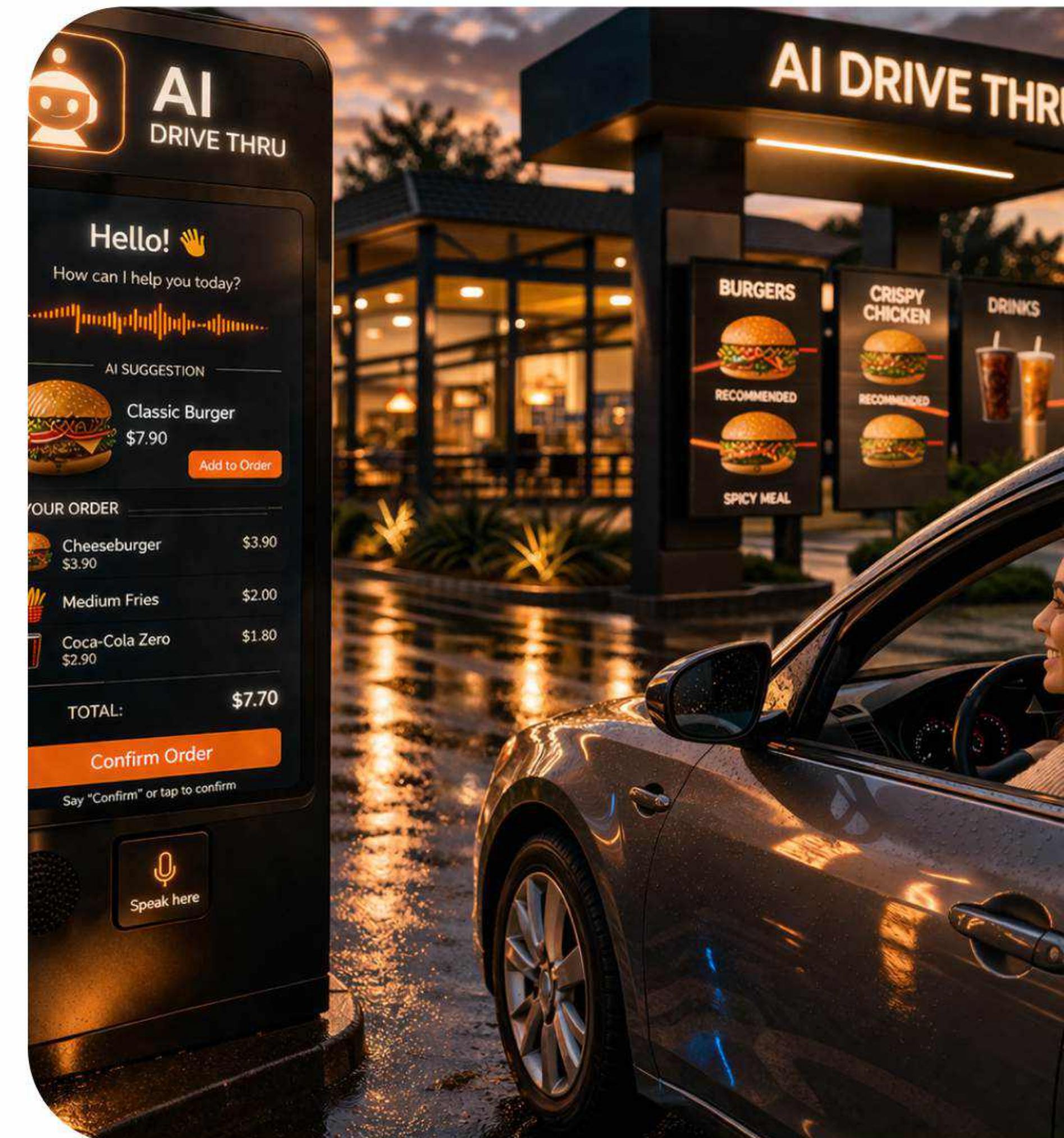
This is especially true for emerging AI-driven innovations. **More diners (44%) report noticing AI or automated bots taking orders at drive-thrus compared to last year (34%).**

However, comfort with AI voice ordering bots hasn't improved much: **38% of diners don't feel comfortable ordering through an automated or AI voice order bot at the drive-thru, compared to 62% who feel comfortable.** That's virtually unchanged from last year.

One likely reason: **51% of diners report having a negative experience when using automated or AI voice ordering bots.**

To move adoption forward, restaurants will need to improve transparency, set clearer expectations, and ensure AI interactions feel intuitive, accurate, and easy to navigate — much like they have done with other digital ordering tools over time.

Diners appear much more comfortable with autonomous robots and AI couriers delivering food. **The majority (58%) said they would be comfortable receiving food delivered by an autonomous delivery service.**



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# The next era of restaurant growth



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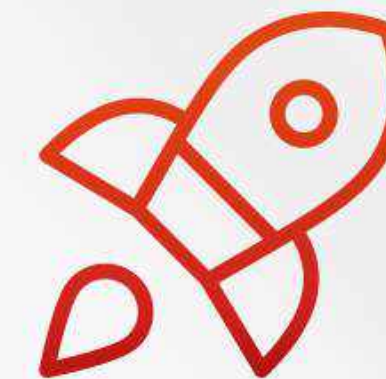
Loyalty has never been more fragmented, nor more fragile.

As diners tighten budgets and expand their options – from grocery and convenience stores to local and national chains – competition for every meal occasion is intensifying. Static loyalty programs, blanket discounts, and disconnected digital tools are no longer enough to secure repeat visits.

Today's consumers expect technology to enhance – not complicate – the dining experience. They want flexibility across channels, frictionless execution, intelligent personalization, and cohesive interactions that feel connected from app to kiosk to counter. The brands that win in 2026 and beyond will be those that elevate every touchpoint, blending digital and physical experiences in ways that feel seamless, intuitive, and purpose-built around the guest.

We are entering a new phase of digital maturity, where restaurants must move beyond patchwork solutions and embrace scalable, integrated platforms that unify operations, strengthen first-party relationships, simplify ordering, and drive measurable performance across every channel.

That's where Tillster leads – empowering restaurant brands to deliver connected, intelligent experiences that turn occasional guests into loyal regulars and transform everyday transactions into lasting relationships.



## Ready to elevate your restaurant's physical and digital experience?

Connect with Tillster to explore how a unified, scalable platform can help you strengthen guest loyalty and drive sustained growth.

[Let's chat](#)

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# Tillster is the global leader in unified commerce solutions

Tillster is the global leader in unified commerce solutions for quick-service and fast-casual restaurant brands.

The company enables operators to own digital and in-store ordering experiences, launch targeted marketing programs, and turn restaurant data into revenue.

Tillster's composable platform spans web and mobile ordering, self-service kiosks, loyalty, couponing, AI-powered recommendations, and dynamic menu management—driving larger checks, stronger loyalty, and long-term agility across channels. Every component can be deployed individually or together, integrating easily with existing stacks.

Tillster powers more than 180 million orders annually across 40,000+ global locations for leading restaurant brands, including Burger King, Popeyes, KFC, and Baskin-Robbins.

## Methodology

In December 2025, Tillster commissioned independent research agency TrendCandy to survey 2,144 U.S. diners about how phygital innovation is shaping the future of restaurant experiences. All respondents were 13 years or older at the time of data collection. The margin of error for this study is +/-4% at the 95% confidence level.

Connect with us to learn more



[www.tillster.com](http://www.tillster.com)