



PRESS RELEASE

Ipsos Announces the Results of its 2025 Channel Check-In | QSR Mobile Ordering Study

New York, October 1, 2025 - [Ipsos](https://www.ipsos.com), one of the world's leading market research companies, today announced the release of the **Ipsos 2025 Channel Check-In | QSR Mobile Ordering Study**: a new report on the American QSR (quick service restaurant) landscape developed in collaboration with The Coca-Cola Company and Nation's Restaurant News.

The second wave of this annual report has benchmarked digital order-ahead performance across 40 of America's leading quick-service and fast-casual restaurant chains, providing operators with actionable intelligence to improve the in-app ordering experience. The findings are based on a survey of 1,700 U.S. adults aged 18-75, who have used a QSR app in the past month. It also included assessments by 2,891 mystery shoppers who evaluated a specific brand in the study to assess that brand's operational delivery on those attributes that mattered most to the survey respondents.

As mobile ordering becomes a primary sales channel, restaurant brands face growing competition to deliver seamless, fast, and engaging digital experiences. The research found that repeated use of digital ordering platforms is driven by three key factors:

- The ability to save time or skip the in-store line
- Offering the same customization options available as in person
- Presenting compelling deals, offers and promotions

Rooted in Ipsos' award-winning mystery shopping and consumer research methodologies, the Channel Check-In | QSR Mobile Ordering Study delivers data-driven insights into mobile ordering, payment, and pickup channels. The findings enable operators, marketers and product teams to identify pain points, prioritize feature development and fast-track innovations that build loyalty and drive revenue.

2025 Standout Performers

- **Panda Express** – Recognized for Best Overall Performance for the second consecutive year, excelling in time-saving functionality and app-exclusive offers.
- **Sonic** – Demonstrated significant improvement over 2024 with high marks for intuitive app navigation, robust customization and offering estimated pick-up times.
- **Firehouse Subs** – The highest performing new entrant, noted for advanced features such as mobile wallet payments, saved customer profiles and dynamic cart totals during ordering.





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“After the tremendous interest in this study and its results last year, we are delighted to provide this consumer insight and competitive benchmark of performance in this digital space,” said Brad Christian, Chief Commercial Officer, Ipsos Experience Group. “Brands continue to focus on and prioritize this element of their offering, and we appreciate the opportunity to collaborate with them through our loyalty workshops and user experience practices.”

“With over half of foodservice guests now viewing delivery and takeout as essential to their lifestyle, restaurant brands must prioritize investing in the right digital experience to stay competitive,” stated Josh Gurley, VP, Digital Partnerships & Capabilities, The Coca-Cola Company. “We’re laser-focused on decoding consumer behavior in these critical moments and relentlessly innovating to meet and exceed ever-evolving consumer demands. This is not just an opportunity—it’s an imperative for shaping the future of dining.”

Brands seeking to understand how the industry performed and what actions they might take to upgrade their offers can schedule a complimentary review of the study results by contacting Brad Christian at Brad.Christian@ipsos.com.

For more information on this news release, please contact:

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About the Study

Ipsos conducted a consumer survey of 1,700 respondents aged 18-75, all of whom had previously used a limited-service restaurant mobile app, aiming to understand their preferences and expectations for ordering through such apps. Leveraging these insights, Ipsos performed a key driver analysis to outline those operational and experiential attributes, which were configured into measurable performance attributes.

Subsequently, Ipsos deployed approximately 75 mystery shoppers to each of the 40 brands, assessing how effectively each brand delivered on those operational standards. The findings of this study reflect the opinions and perceptions of survey participants and the observations gathered by mystery shoppers.

About the Channel Check In | QSR Mobile Ordering Study Awards

Each brand included in the **Ipsos Channel Check In | QSR Mobile Ordering Study** received scores reflecting their delivery on these operational and experiential standards, grouped into three key assessment categories: App Benefits, Order Experience, and App Capabilities. Ipsos recognized the top performers in each category with an award. Those awards were as follows:

- **Overall Performance Award:** This award recognizes the brand achieving the highest overall score across all performance categories, calculated using a weighted average based on the mystery shop scores. The brand outperforming the mean score across participating brands is deemed the overall winner.
- **App Benefits Winner:** Recognizes the brand delivering superior time-saving capabilities, such as line-skipping and offering exclusive app promotions and deals.
- **Order Experience Winner:** Awarded to the brand excelling in app usage ease, from navigation and customization to providing the same options as in-store, including scheduling pick-ups or previewing wait times.
- **App Capabilities Winner:** Acknowledging the brand offering advanced features like mobile wallet payments, saving contact and payment information for future use, and displaying a running total during order placement.





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About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing nearly 20,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients navigate with confidence our rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120, Mid-60 indices, and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

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