FOOD SERVICE CX IN Q3 2026: DINING EXPERIENCE IMPROVES, BUT OPERATIONAL PRESSURE REMAINS

Service Delivery Pressure Map



90.1%

Global dining satisfaction score

1.9M

Dining feedback responses analyzed

Operational strength

Service & staff experience

Highest friction

Choice, availability & replenishment

Food Services CX reached 90.1% in Q3 across 1.9 million in-the-moment dining feedback responses, improving from Q2 while maintaining a strong overall dining experience.

Beneath the headline score, performance varies significantly across the dining experience. Service and staff remain a clear strength, while choice, availability and replenishment continue to create substantially more friction.

The improvement is not evenly distributed. The overall gain is being driven by stronger performance in several areas, while availability and food and menu execution moved in the opposite direction. This means a higher overall score should not be read as improvement across every part of the dining experience.

Timing adds another layer of pressure. Performance also shifts throughout the day. The dining experience weakens sharply during specific periods before recovering, showing that pressure is concentrated around particular service windows rather than building consistently across the day.

What this means:

Q3 shows that performance is shaped by operational peaks and service transitions. Strong frontline service is holding up, but availability, choice and service flow become more vulnerable at particular moments, creating clear opportunities for targeted action.

For site teams:

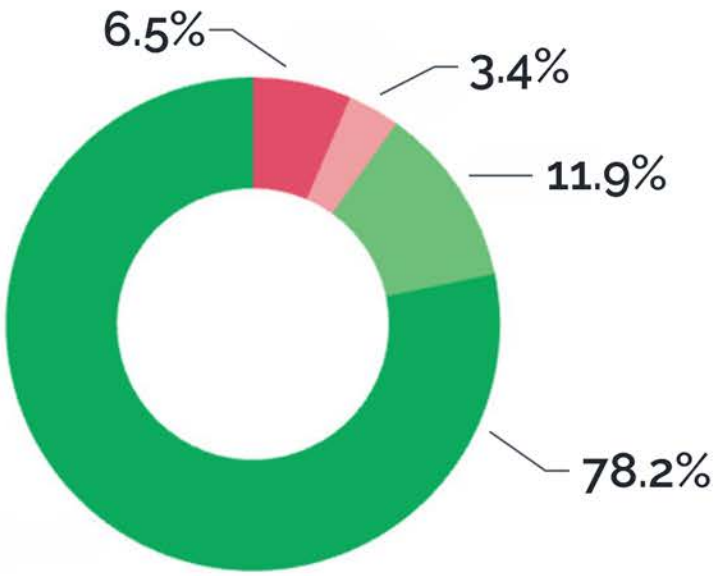
Recurring pressure windows give managers a clearer starting point for action. Align staffing, preparation and replenishment to the moments when the dining experience is most vulnerable, then track those same periods to see whether changes improve performance.

For operational leaders:

The same feedback patterns help leaders distinguish isolated site issues from wider trends across services and locations. This creates a stronger basis for prioritizing support, sharing what works and demonstrating where operational changes are improving the dining experience.

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Q3 PERFORMANCE IMPROVES, BUT THE GAINS ARE UNEVEN



Food Services CX Benchmark

90.1%

- Very happy
- Happy
- Unhappy
- Very unhappy

Food Services CX reached 90.1% in Q3, up from 89.5% in Q2. The improvement reflects a higher share of Very Happy responses, with more diners reporting the strongest level of satisfaction.

Very Happy responses increased from 77.2% to 78.3%, while Very Unhappy responses fell from 6.9% to 6.5%. The shift is positive, but the operational picture underneath the overall score is more mixed, and the overall gain still masks uneven performance across the dining experience.

Some of the strongest areas improved further, led by service and staff experience. At the same time, choice, availability and replenishment weakened, showing that stronger overall performance can still mask operational pressure underneath.

For operators, the priority is not simply maintaining the higher overall score. It is understanding which parts of the dining experience are improving, which are falling behind and where operational attention should be focused next.

What moved in Q3?

Improved

Service & staff experience ▲ 1.4pp

Value perception ▲ 10.9pp

Overall dining experience ▲ 2.6pp

Cleanliness & environment ▲ 3.0pp

Speed, queue & service flow ▲ 0.5pp

Weakened

Choice, availability & replenishment ▼ 0.9pp

Food quality & menu execution ▼ 1.4pp

The gains are concentrated

Service and staff experience strengthened in Q3, while food quality and menu execution weakened, highlighting the divide between frontline service and food execution.

Availability remains the clearest pressure

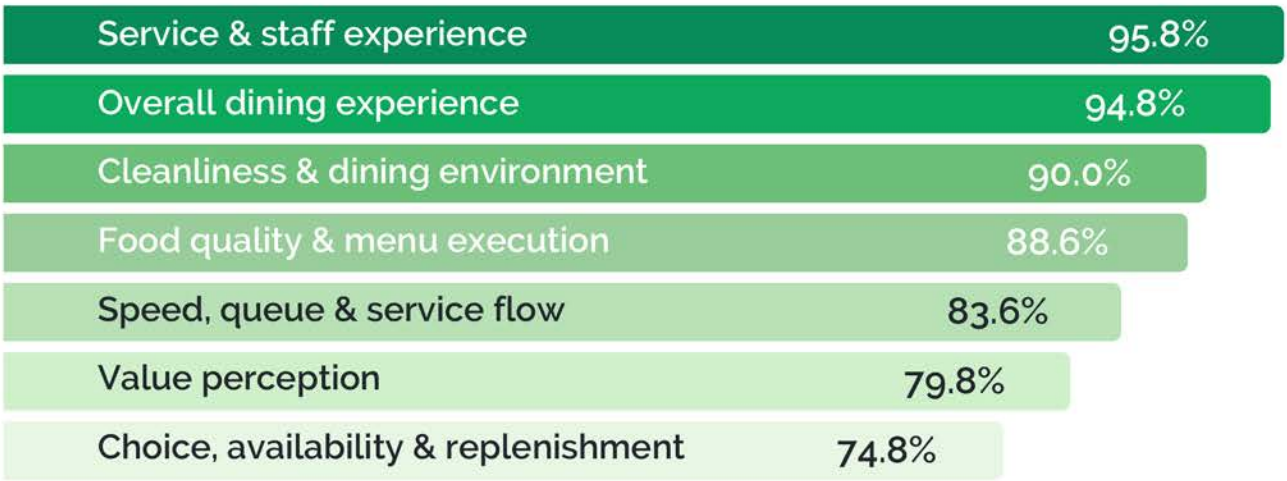
Availability remains particularly weak, while selection also declined. The challenge is not only having enough food, but consistently giving diners the choice they expect.

Performance is diverging

Strong frontline service cannot fully compensate when food, choice or availability fall short, making these the clearest areas for improvement.

STRONG SERVICE MEETS FOOD & MENU PRESSURE

Food Service Operations Benchmark



Q3 reveals a clear divide in operational performance. Service and staff experience remains a clear strength, while choice, availability and replenishment performs substantially lower. With food quality and menu execution also losing ground, the clearest opportunities sit within the food and menu experience.

Frontline delivery strengthened further in Q3. Staff service, friendliness and availability remain strong, showing that teams are maintaining high standards while other parts of the dining experience remain under pressure.

Dining environment standards also improved, supported by strong cleanliness and atmosphere scores. This points to another area of consistent operational execution.

Availability remains the standout weakness, with positive feedback falling below half. Combined with weaker selection, the challenge is not simply having enough food, but consistently giving diners access to the choices they expect.

Food quality and menu execution weakened in Q3 despite quality itself remaining relatively strong. Portion size creates more friction, showing that the food experience depends on more than quality alone.

For operators, the priority is to close the gap between strong frontline delivery and weaker food execution. Protect service strengths while focusing operational attention on availability, choice and menu execution to create a more consistent dining experience.

Operational strength: Service & staff experience

Strong service, friendliness and staff availability continue to protect the dining experience, helping maintain consistency when operations come under pressure.

For Q4: Maintain staffing discipline and frontline standards, using feedback signals to recognize strong performance and target coaching needs.

Biggest Q3 pressure: Choice, availability & replenishment

Availability remains the clearest weakness, with selection also losing ground. When diners cannot get what they came for, strong service elsewhere can only do so much to protect the experience.

For Q4: Track availability by service period, strengthen replenishment and use recurring feedback patterns to identify and act where choice consistently falls short.

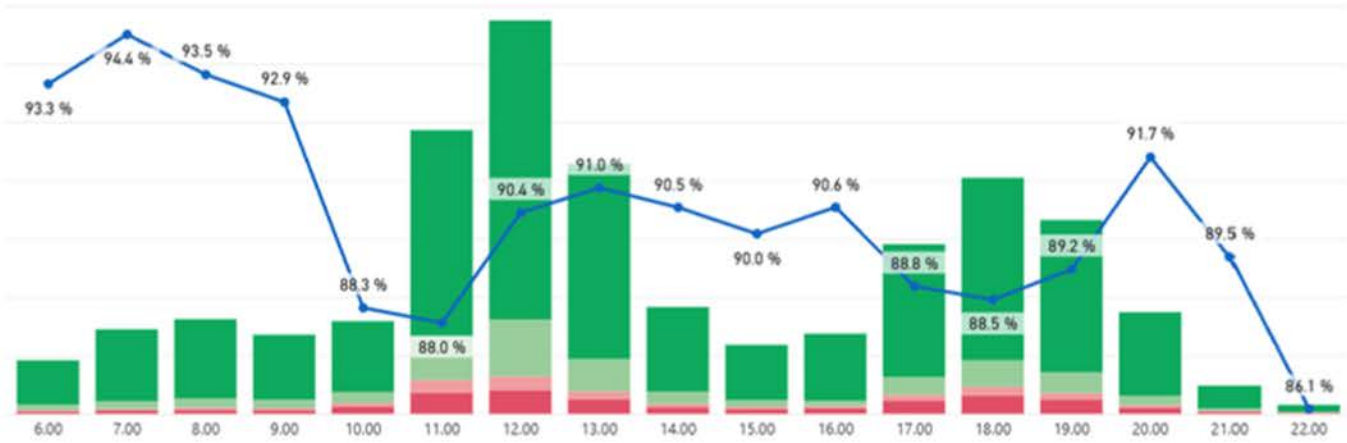
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SERVICE PRESSURE COMES IN WAVES

Q3 shows that the dining experience does not simply weaken as the day progresses. Performance shifts across service periods, with pressure emerging in the late morning and early evening.

For operators, these recurring windows provide a clearer basis for action. They show where to review preparation, staffing and availability as service operations come under greater pressure.

Hourly Performance Pattern



Service Delivery Pressure Map



KEY OBSERVATIONS

1. Late morning brings the first pressure

Dining satisfaction falls sharply at 10:00 and remains low at 11:00, marking a clear shift from stronger early-morning performance.

2. Midday performance holds up

Dining satisfaction recovers from 12:00–14:00 despite high feedback volumes, showing that higher volume does not necessarily weaken the dining experience.

3. Evening pressure returns

Dining satisfaction weakens again from 17:00–19:00, making later service periods another important window for operational attention.

WHERE OPERATORS SHOULD FOCUS

Prepare for service transitions

Use recurring pressure windows to guide preparation, staffing and availability, then track whether performance improves.

Focus metric: Dining satisfaction by hour and service period.

Availability under pressure

Review preparation and replenishment around pressure windows so menu choice holds up throughout service.

Focus metric: Availability feedback by service period.

Learn from stronger periods

Compare stronger service periods with weaker ones to identify practices that can be applied where performance falls short.

Focus metric: Dining satisfaction across comparable service periods.