Volume 15

Casual Dining

April 2021

BACKGROUND:

 \Box Survey of ~1,500+ US Consumers balanced to census.

FINDINGS:

- Sequentially Improved Trends in Casual Dining
 - Overall usage of casual dining is improved sequentially as the recovery from COVID lows continues.
 - Expected future usage sentiment is improved and net positive for most restaurants.
 - □ COVID headwind has retreated over the past two quarters relative to last year.
 - □ Sentiment toward menu changes for all restaurants is net positive (to varying degrees for each restaurant).

Ι

Restaurant Specific Data

**Posed to all respondents.

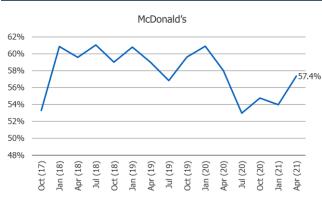
Who Uses Regularly or Occasionally

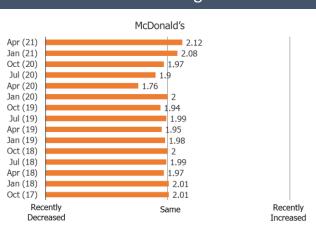
Posed to Respondents Who Use Restaurant Regularly or Occasionally.

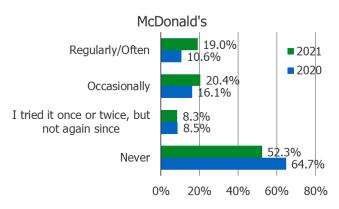


Recent Usage









Posed to Respondents Who Use Restaurant Regularly or Occasionally.

Posed to Respondents Who Order Restaurant on Third Party Apps.

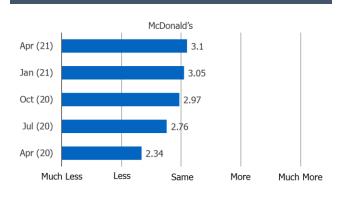


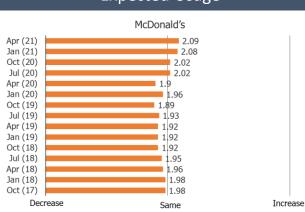
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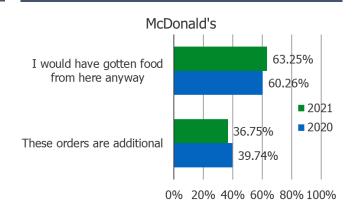
Using More or Less Due To COVID

Expected Usage







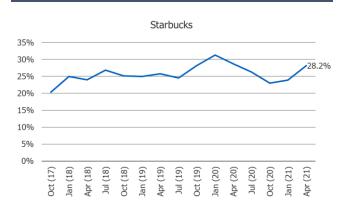




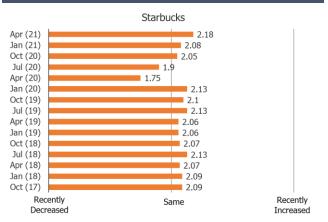
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



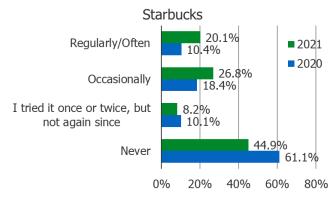
% Who Uses Regularly or Occasionally



Recent Usage



Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

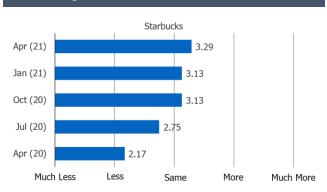




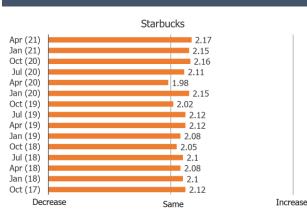
Posed to Respondents Who Order Restaurant on Third Party Apps.

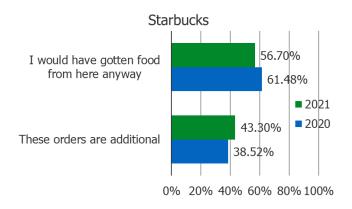


Using More or Less Due To COVID



Expected Usage





% Who Uses Regularly or Occasionally

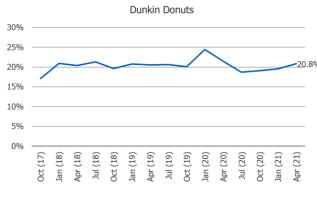
Dunkin Donuts

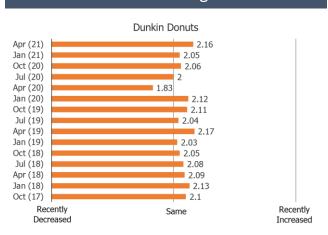
Posed to Respondents Who Use Restaurant Regularly or Occasionally.

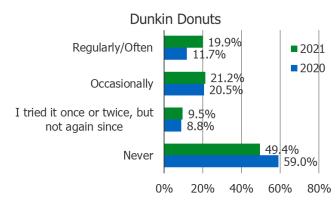


Recent Usage









Posed to Respondents Who Use Restaurant Regularly or Occasionally.

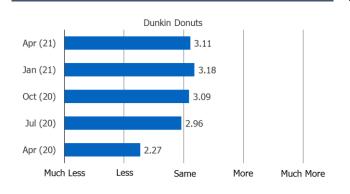


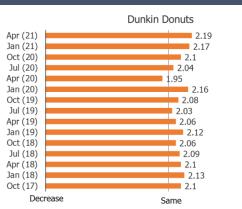


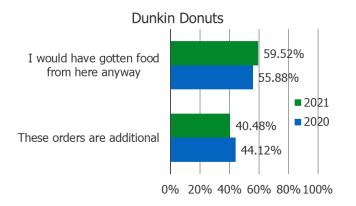


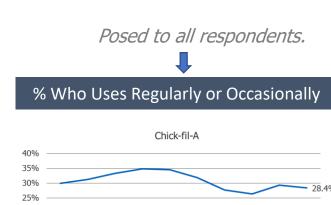






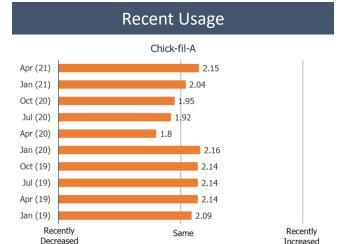




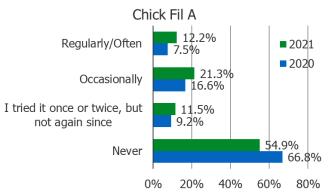


20%

Posed to Respondents Who Use Restaurant Regularly or Occasionally.

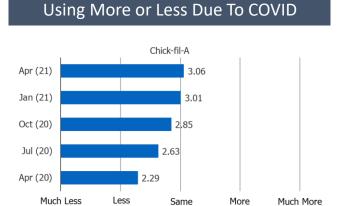


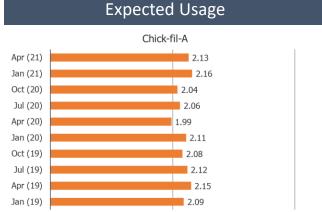
Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

Apr (21)



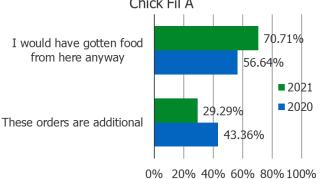


Same

Increase

Posed to Respondents Who Order Restaurant on Third Party Apps.

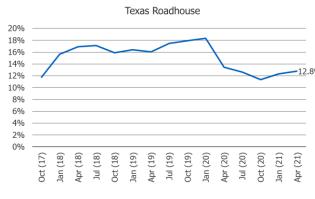




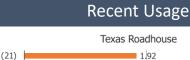
Decrease

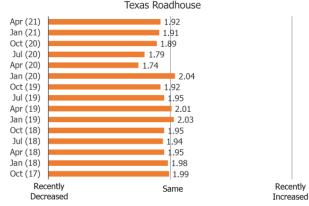




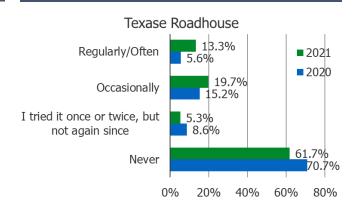


Posed to Respondents Who Use Restaurant Regularly or Occasionally.



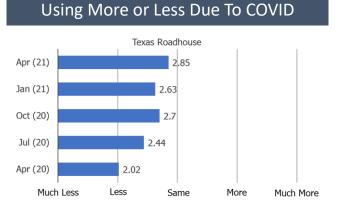


Orders On Third Party Food Del. Apps

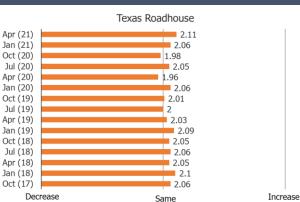


Posed to Respondents Who Use Restaurant Regularly or Occasionally.



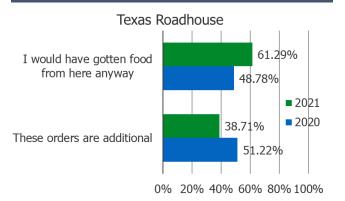


Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.

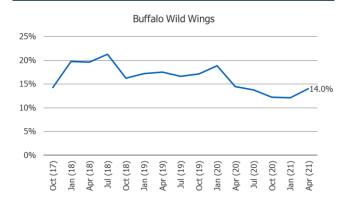




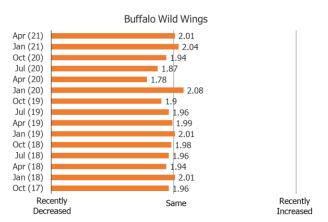


Posed to Respondents Who Use Restaurant Regularly or Occasionally.

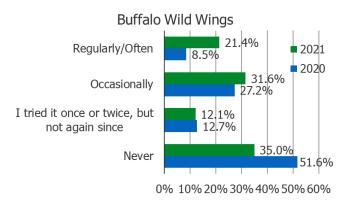
% Who Uses Regularly or Occasionally



Recent Usage

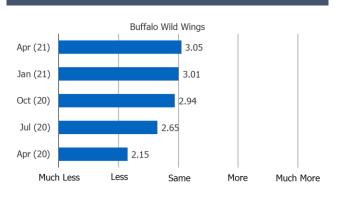


Orders On Third Party Food Del. Apps

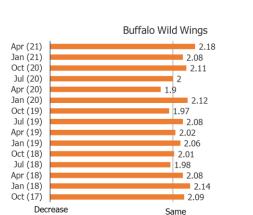


Posed to Respondents Who Order Restaurant on Third Party Apps.

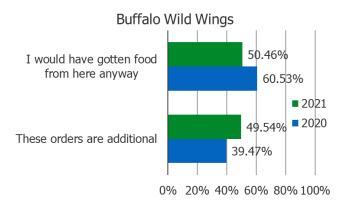
Using More or Less Due To COVID



Expected Usage



Are Orders Additional or Replacement



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

Posed to Respondents Who Use Restaurant Regularly or Occasionally.

% Who Uses Regularly or Occasionally



Recent Usage

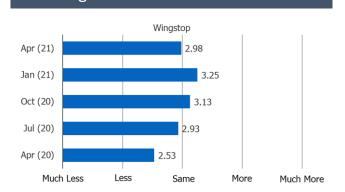


Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.



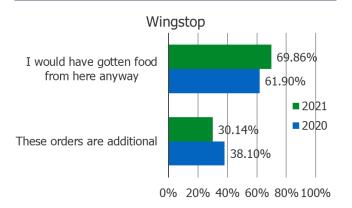


Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.

Are Orders Additional or Replacement





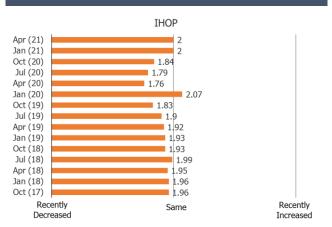
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



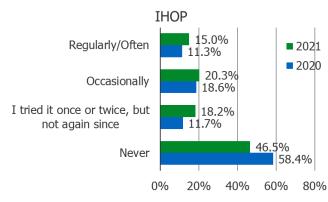
% Who Uses Regularly or Occasionally



Recent Usage



Orders On Third Party Food Del. Apps



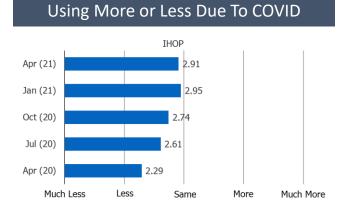
Posed to Respondents Who Use Restaurant Regularly or Occasionally.





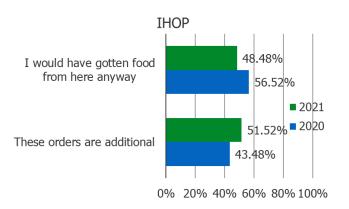
Posed to Respondents Who Order Restaurant on Third Party Apps.

Expected Usage





Are Orders Additional or Replacement



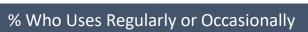


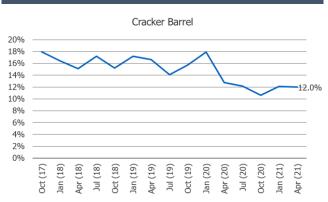
Same

Increase

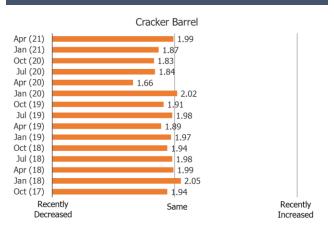
Decrease

Posed to Respondents Who Use Restaurant Regularly or Occasionally.

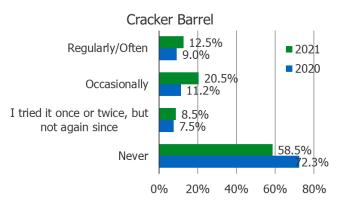




Recent Usage



Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.



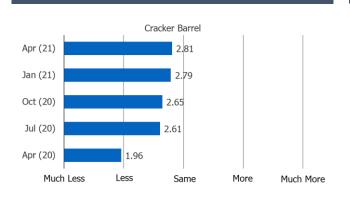


Posed to Respondents Who Order Restaurant on Third Party Apps.

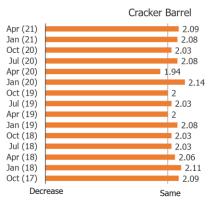
Expected Usage

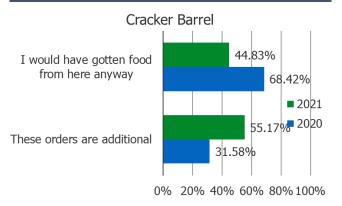
Increase

Casual Dining Deck



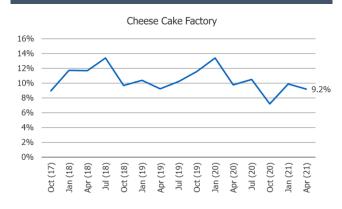
Using More or Less Due To COVID



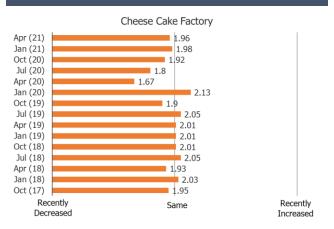


Posed to Respondents Who Use Restaurant Regularly or Occasionally.

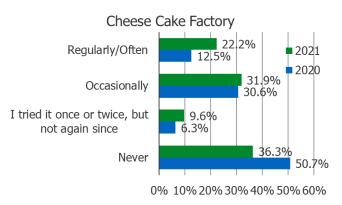




Recent Usage

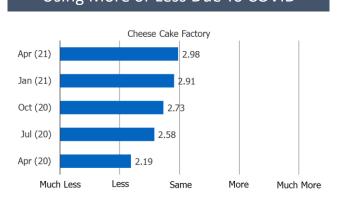


Orders On Third Party Food Del. Apps

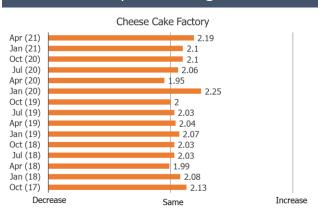


Posed to Respondents Who Use Restaurant Regularly or Occasionally.

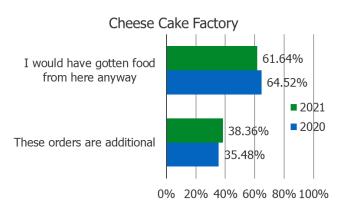




Expected Usage

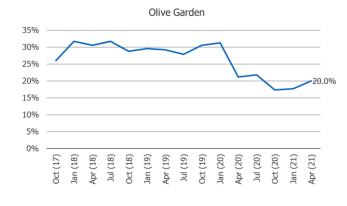


Posed to Respondents Who Order Restaurant on Third Party Apps.





% Who Uses Regularly or Occasionally

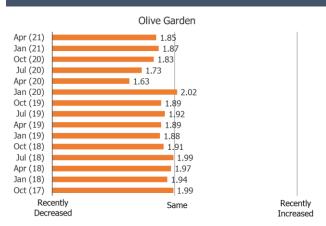


Posed to Respondents Who Use Restaurant Regularly or Occasionally.

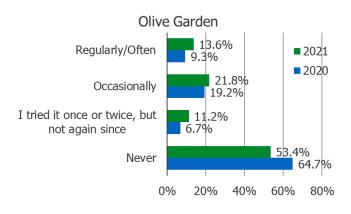
Increase



Recent Usage



Orders On Third Party Food Del. Apps

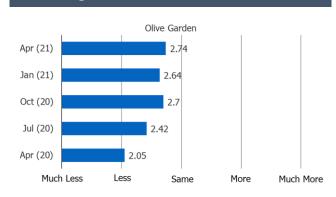


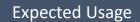
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



1

Using More or Less Due To COVID

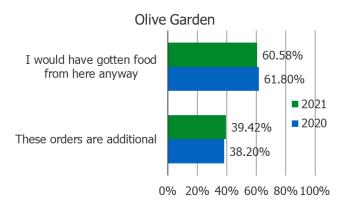






Posed to Respondents Who Order Restaurant on Third Party Apps.





Posed to all respondents. % Who Uses Regularly or Occasionally Longhorn Steakhouse 16% 14%

Jul (18) Oct (18)

10%

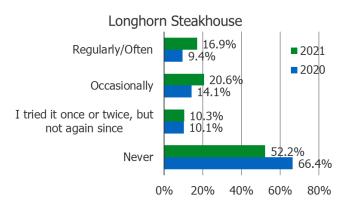
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



Recent Usage



Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.





Posed to Respondents Who Order Restaurant on Third Party Apps.

Using More or Less Due To COVID

Apr (19) Jul (19)

Oct (19)

Jan (20) Apr (20)

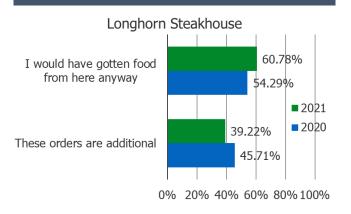
Jul (20) Oct (20)

Jan (21) Apr (21)



Expected Usage





*Who Uses Regularly or Occasionally

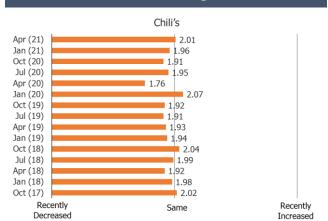
Chili's

15%

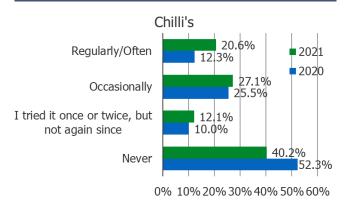
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



Recent Usage



Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

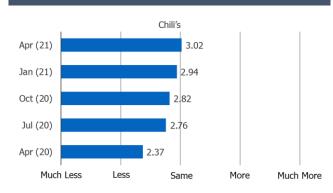


Apr (19) Jul (19) Oct (19) Jan (20)

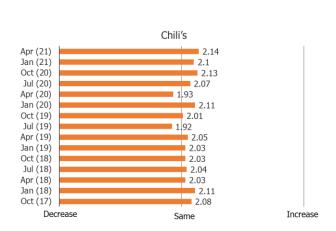
Jul (18) Oct (18) Jul (20) Oct (20)



Using More or Less Due To COVID

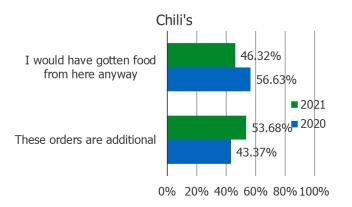






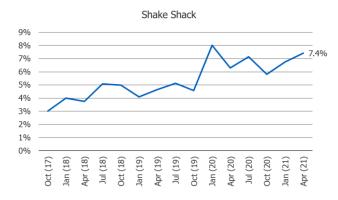
Posed to Respondents Who Order Restaurant on Third Party Apps.







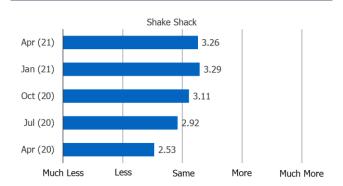
% Who Uses Regularly or Occasionally



Posed to Respondents Who Use Restaurant Regularly or Occasionally.



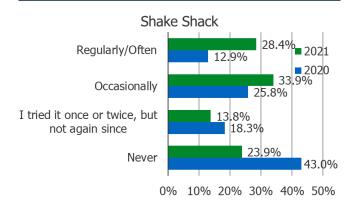
Using More or Less Due To COVID



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

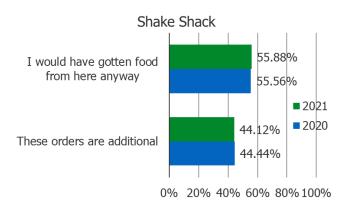


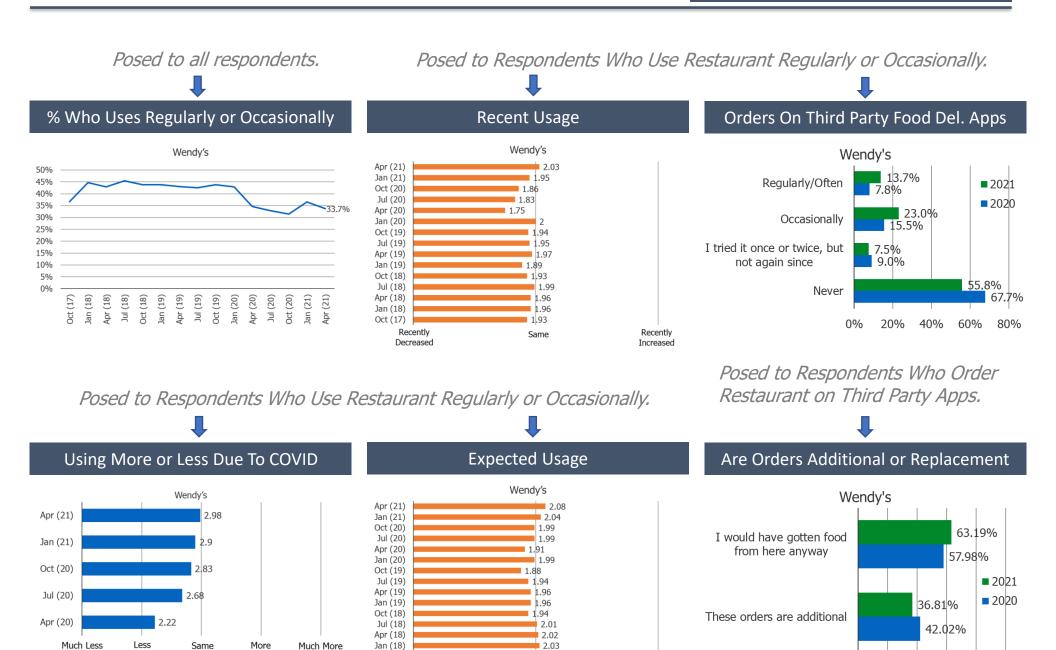
Orders On Third Party Food Del. Apps



Posed to Respondents Who Order Restaurant on Third Party Apps.







2.01

Same

Increase

Oct (17)

Decrease

0% 20% 40% 60% 80% 100%

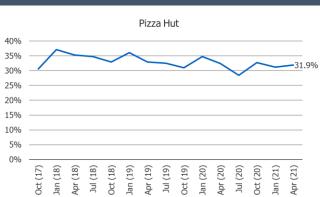




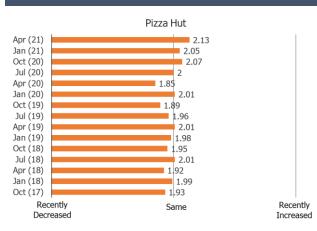
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



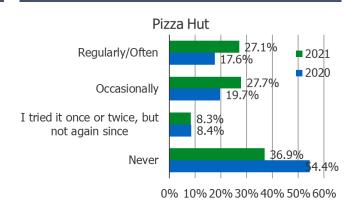
% Who Uses Regularly or Occasionally



Recent Usage



Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

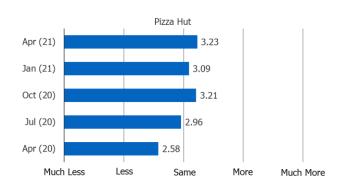


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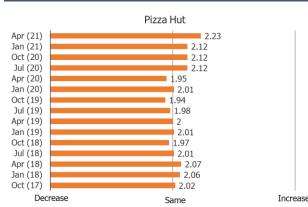
Posed to Respondents Who Order Restaurant on Third Party Apps.

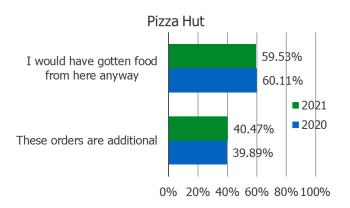


Using More or Less Due To COVID



Expected Usage





Jul (20)

Apr (20)

Much Less

Less

Posed to all respondents. Posed to Respondents Who Use Restaurant Regularly or Occasionally. % Who Uses Regularly or Occasionally **Recent Usage** Orders On Third Party Food Del. Apps Chipotle Chipotle Apr (21) 2.09 Chipotle Jan (21) 21.2% Regularly/Often 2021 Oct (20) 2.04 25% 12.9% Jul (20) 1.94 2020 Apr (20) 20% Jan (20) 2.13 Occasionally 25.5% Oct (19) 1.98 2.1 Jul (19) I tried it once or twice, but 10.8% Apr (19) 2.09 Jan (19) 1.95 10.2% not again since Oct (18) 2 Jul (18) 2 40.8% Never Apr (18) 2.03 51.4% Jan (18) 2 Jul (19) Oct (19) Jan (20) Apr (20) Oct (17) 2.06 0% 10% 20% 30% 40% 50% 60% Recently Recently Same Decreased Increased Posed to Respondents Who Order Restaurant on Third Party Apps. Posed to Respondents Who Use Restaurant Regularly or Occasionally. **Expected Usage** Are Orders Additional or Replacement Using More or Less Due To COVID Chipotle Chipotle Chipotle Apr (21) Apr (21) 3.09 Jan (21) Oct (20) Jul (20) 63.49% 2.1 Jan (21) 3.06 I would have gotten food Apr (20) from here anyway Jan (20) 2.16 61.95% Oct (20) 3.04 Oct (19) 2.03 Jul (19) 2.1

2.09

2.15

2.13

2.07

2.04

Same

2.1

2.11

Increase

Much More

More

Same

Apr (19)

Jan (19)

Oct (18)

Jul (18)

Apr (18)

Jan (18)

Oct (17)

Decrease

2021

2020

36.51%

38.05%

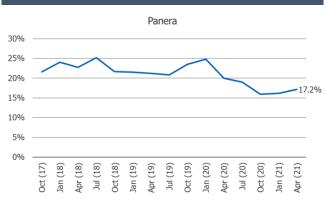
0% 20% 40% 60% 80% 100%

These orders are additional

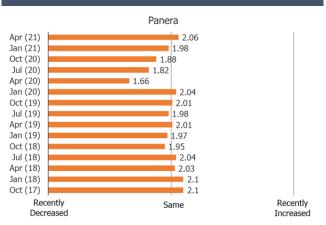
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



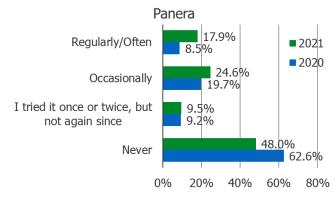
% Who Uses Regularly or Occasionally



Recent Usage



Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

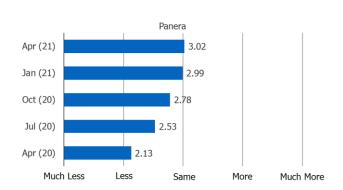




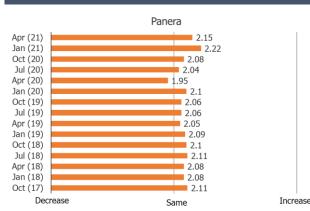
Posed to Respondents Who Order Restaurant on Third Party Apps.

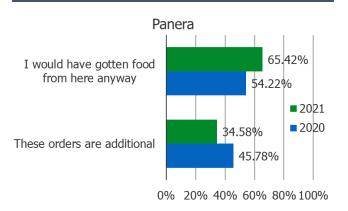


Using More or Less Due To COVID



Expected Usage





Much Less

Less

Same

More

Posed to all respondents. Posed to Respondents Who Use Restaurant Regularly or Occasionally. % Who Uses Regularly or Occasionally Orders On Third Party Food Del. Apps **Recent Usage** Burger King Burger King Burger King 50% 21.7% Jan (21) 45% Regularly/Often **2021** Oct (20) 1.92 11.2% Jul (20) **2020** 35% Apr (20) 19.0% 30% Occasionally Jan (20) 2.03 18.5% 25% Oct (19) 20% Jul (19) I tried it once or twice, but 7.4% 15% Apr (19) 7.8% not again since Jan (19) Oct (18) 52.0% Jul (18) 0% 1.97 Never Jul (18) Apr (19) Jan (20) Apr (20) Apr (18) Jan (19) Jul (19) Oct (19) Jul (20) Oct (20) Jan (21) Apr (18) 62.6% 1.97 Jan (18) 1.97 Oct (17) 1.97 60% 80% Recently Recently Same Decreased Increased Posed to Respondents Who Order Restaurant on Third Party Apps. Posed to Respondents Who Use Restaurant Regularly or Occasionally. Using More or Less Due To COVID **Expected Usage** Are Orders Additional or Replacement Burger King Burger King Burger King Apr (21) Jan (21) Apr (21) Oct (20) 2.03 65.13% I would have gotten food Jul (20) Jan (21) 2.94 from here anyway Apr (20) 1.94 54.07% Jan (20) Oct (19) Oct (20) 2.91 **2021** Jul (19) 1.96 Apr (19) 1.99 2020 Jul (20) 34.87% Jan (19) **1.95** These orders are additional Oct (18) 1.91 Jul (18) 1.93 45,93% Apr (20) Apr (18) 1.99

2

Same

1.99

Increase

Much More

Jan (18)

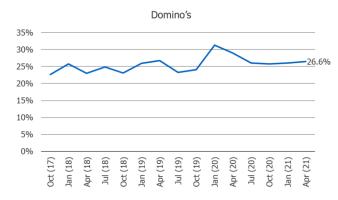
Oct (17)

Decrease

0% 20% 40% 60% 80% 100%



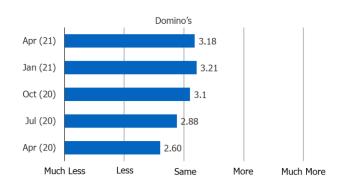
% Who Uses Regularly or Occasionally



Posed to Respondents Who Use Restaurant Regularly or Occasionally.



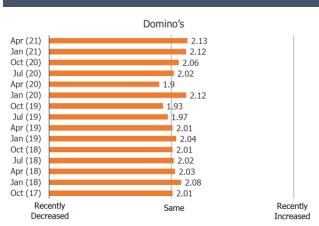
Using More or Less Due To COVID



Posed to Respondents Who Use Restaurant Regularly or Occasionally.

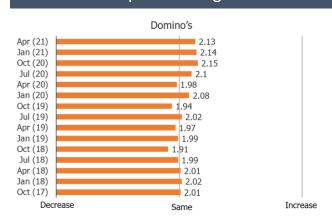


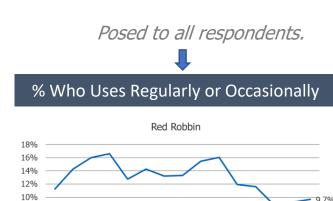
Recent Usage





Expected Usage



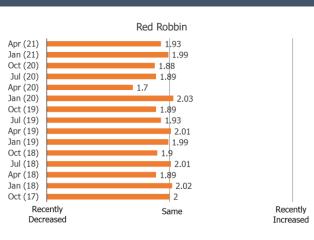


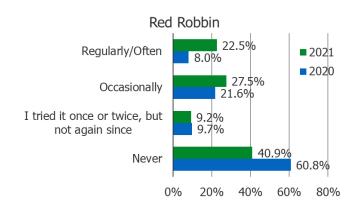
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



Recent Usage







Posed to Respondents Who Use Restaurant Regularly or Occasionally.

Posed to Respondents Who Order Restaurant on Third Party Apps.



Using More or Less Due To COVID

Red Robbin

2.20

2.87

Same

More

Apr (21)

Jan (21)

Oct (20)

Jul (20)

Apr (20)

Much Less

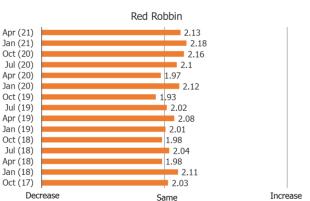
Apr (19) Jul (19)

Oct (19) Jan (20) Apr (20)

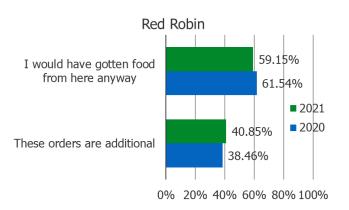
Jul (20) Oct (20)







Are Orders Additional or Replacement



Much More

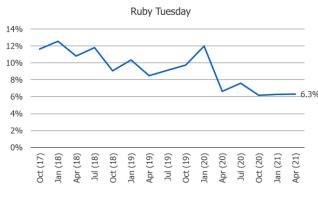
**Ruby Tuesday

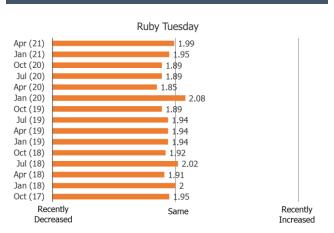
Posed to Respondents Who Use Restaurant Regularly or Occasionally.

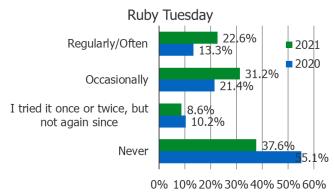


Recent Usage









Posed to Respondents Who Use Restaurant Regularly or Occasionally.

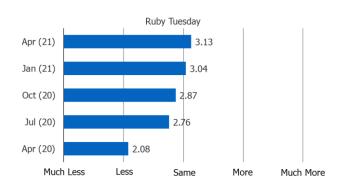


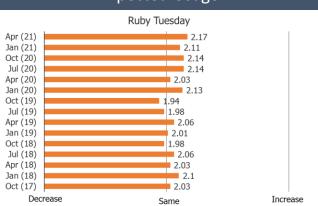


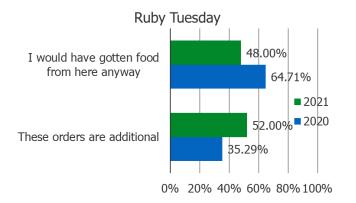
Using More or Less Due To COVID

Expected Usage

Are Orders Additional or Replacement





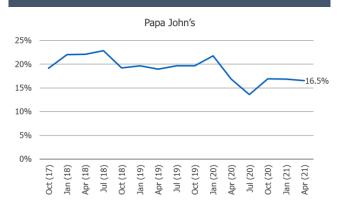




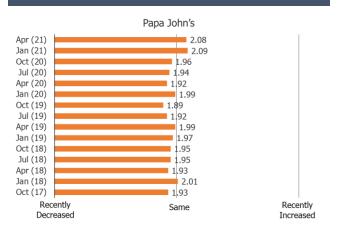
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



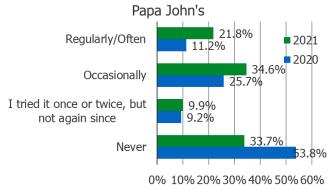
% Who Uses Regularly or Occasionally



Recent Usage



Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.



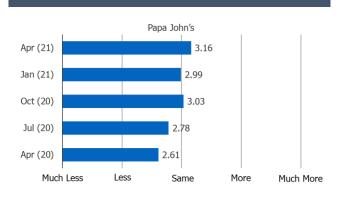
Using More or Less Due To COVID

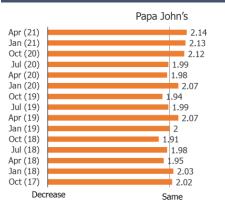
1

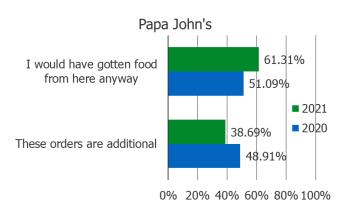
Expected Usage

Posed to Respondents Who Order Restaurant on Third Party Apps.

Are Orders Additional or Replacement









Same

Decrease

Have you noticed any menu changes recently?

Posed to respondents who regularly or occasionally use each of the following.

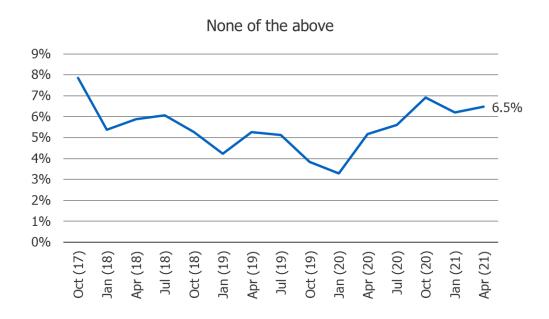
Changes I like % (minus) Changes I dislike %

	Apr (19)	Jul (19)	Oct (19)	Jan (20)	Apr (20)	Jul (20)	Oct (20)	Jan (21)	Apr (21)
KFC	18.6%	15.1%	16.5%	18.2%	18.6%	16.4%	25.3%	18.1%	29.9%
Papa John's	24.6%	11.7%	13.0%	22.6%	24.1%	13.7%	20.7%	26.2%	28.8%
Pizza Hut	19.8%	18.4%	10.4%	19.9%	18.4%	18.5%	28.9%	20.8%	28.4%
Starbucks	24.3%	26.8%	28.1%	26.9%	25.2%	17.7%	24.1%	21.6%	28.3%
Domino's	22.9%	22.0%	16.7%	20.9%	23.8%	18.9%	25.8%	21.2%	28.2%
Burger King	22.1%	16.4%	18.7%	18.8%	16.7%	16.1%	19.6%	19.5%	27.5%
Dunkin Donuts	24.3%	20.4%	24.4%	20.9%	12.9%	13.5%	23.7%	21.6%	25.5%
Cheese Cake Factory	16.1%	18.1%	9.9%	21.6%	13.9%	5.1%	8.6%	20.3%	25.2%
Applebee's	22.4%	19.1%	23.7%	22.2%	16.5%	3.9%	15.1%	19.7%	24.6%
Popeye's				25.1%	25.6%	20.1%	17.0%	17.0%	23.7%
Wendy's	19.5%	21.3%	16.6%	17.0%	15.7%	9.9%	15.9%	12.1%	22.6%
Panera	20.8%	22.1%	20.7%	16.8%	17.0%	11.2%	12.9%	27.4%	22.6%
Sonic	22.0%	24.8%	18.5%	21.3%	21.2%	13.0%	18.7%	18.0%	21.2%
Chipotle	15.4%	15.3%	18.4%	17.1%	17.7%	12.5%	16.7%	19.5%	21.2%
McDonald's	19.6%	21.4%	13.4%	14.1%	14.2%	8.2%	13.0%	15.1%	20.9%
Taco Bell	26.4%	24.9%	18.0%	18.6%	17.1%	11.9%	-6.0%	6.5%	20.3%
Red Robbin	23.2%	17.8%	13.8%	11.7%	21.0%	17.1%	22.5%	12.7%	19.7%
Chili's	25.6%	15.4%	19.8%	22.7%	13.2%	13.1%	12.0%	15.6%	18.6%
Chick-fil-A	13.0%	14.4%	19.2%	18.3%	12.3%	9.4%	12.2%	14.6%	18.0%
Texas Roadhouse	12.2%	6.4%	1.9%	13.9%	3.5%	6.9%	12.1%	12.9%	17.6%
Ruby Tuesday	16.0%	14.4%	6.9%	12.9%	12.3%	17.5%	17.8%	9.9%	16.1%
Buffalo Wild Wings	9.2%	14.6%	12.5%	17.2%	12.2%	11.2%	19.7%	14.9%	16.0%
Cracker Barrel	16.3%	21.0%	9.8%	21.8%	11.7%	14.8%	7.1%	-2.3%	14.8%
Longhorn Steakhouse	21.4%	19.6%	6.3%	20.2%	13.4%	2.1%	12.9%	-1.7%	14.0%
IHOP	19.2%	26.0%	12.1%	18.6%	14.7%	10.1%	11.7%	15.7%	13.9%
Wingstop	28.7%	15.8%	15.1%	16.0%	15.6%	23.8%	16.0%	34.2%	11.4%
Olive Garden	25.4%	20.3%	19.9%	24.7%	18.6%	12.2%	15.4%	16.0%	8.5%

II

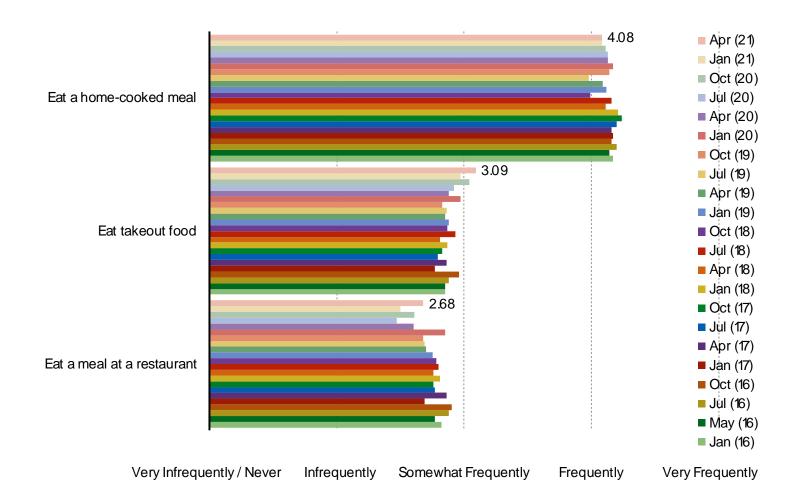
Overall Casual Dining Trends

% of respondents who replied "none of the above" when we asked which of the following restaurants they use regularly or occasionally.



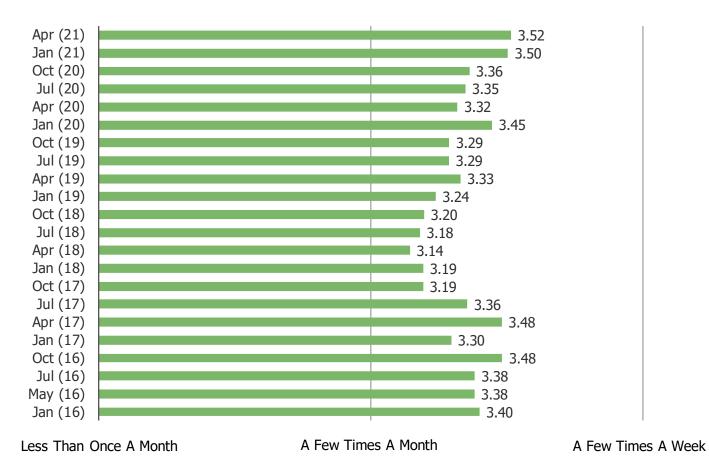
How often do you do the following?

Posed to all respondents.



Casual Dining Deck

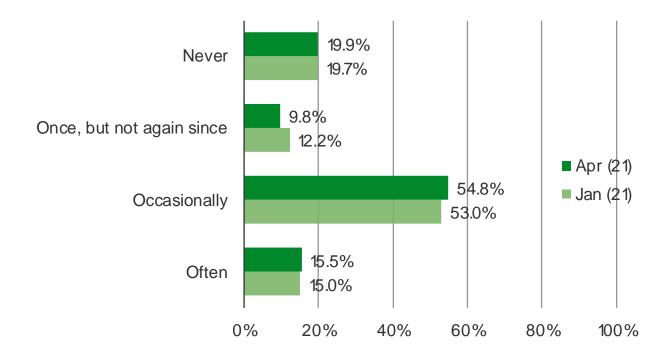
How often do you visit fast food / fast casual dining restaurants?



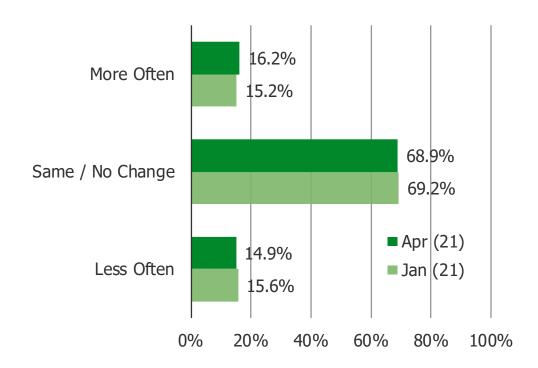
III

Fried Chicken Sandwiches

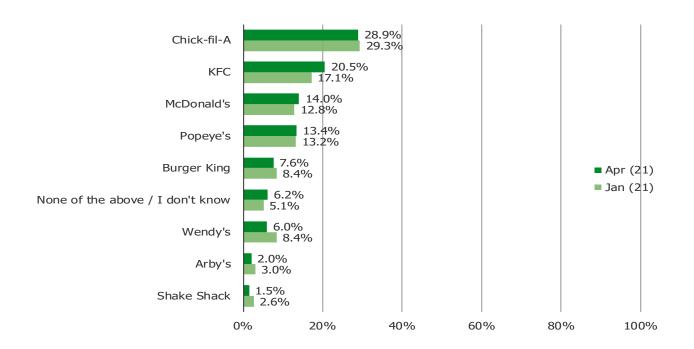
How often do you eat fried chicken sandwiches?



Are you changing how often you eat fried chicken sandwiches?



In your opinion, which of the following has the best fried chicken sandwich?

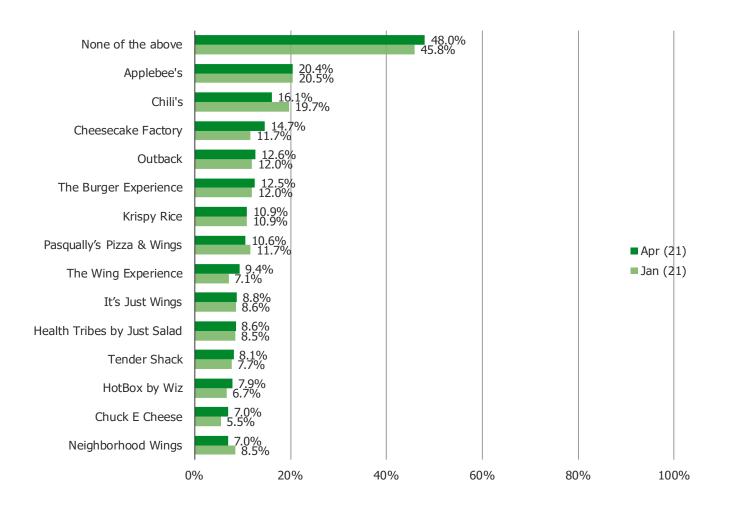


IV

Ghost Kitchens

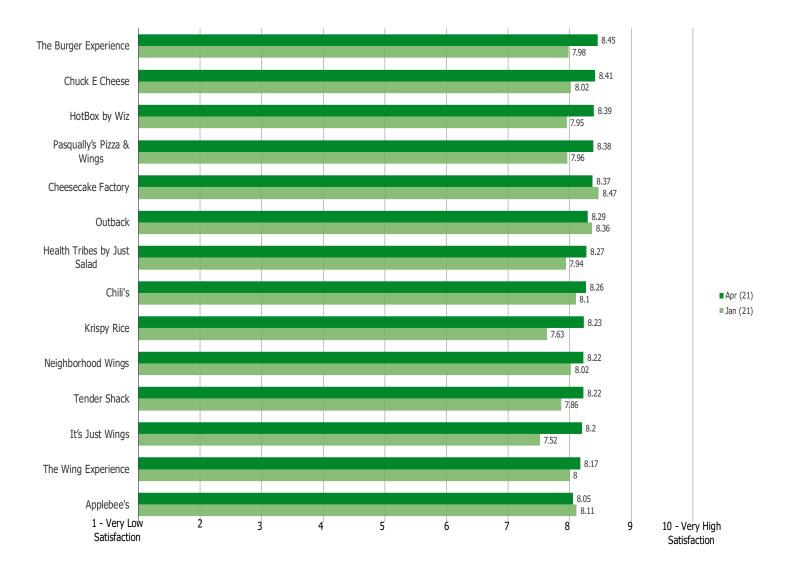
Have you ordered from any of the following on food delivery apps that you use?

Posed to respondents who use food delivery apps.



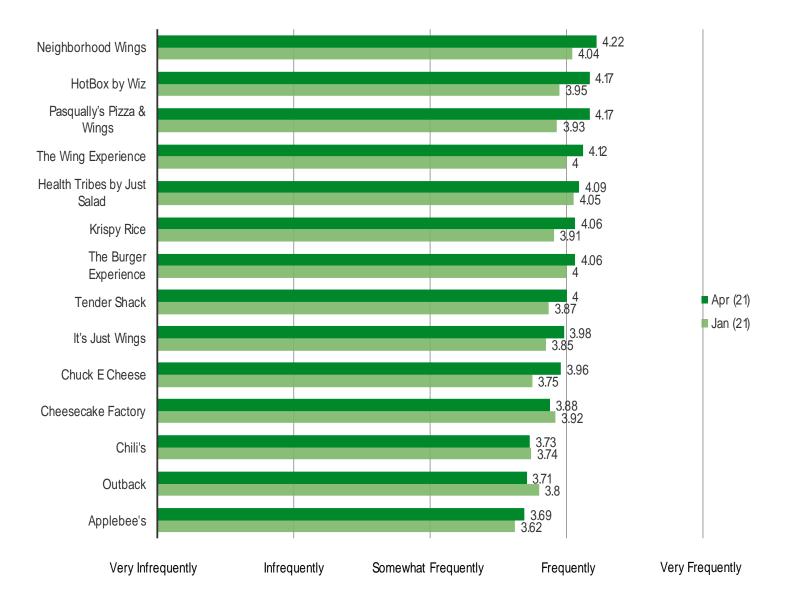
How satisfied were you with your most recent order from the following:

Posed to respondents who have ordered from each of the following via food delivery apps.



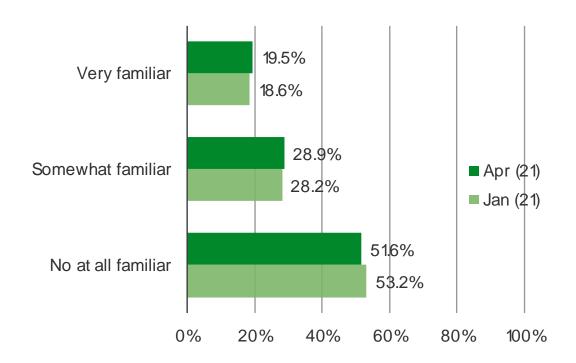
How often do you expect to order again from the following going forward?

Posed to respondents who have ordered from each of the following via food delivery apps.



Are you familiar with "Ghost Restaurants" or "Delivery Only Virtual Restaurants"?

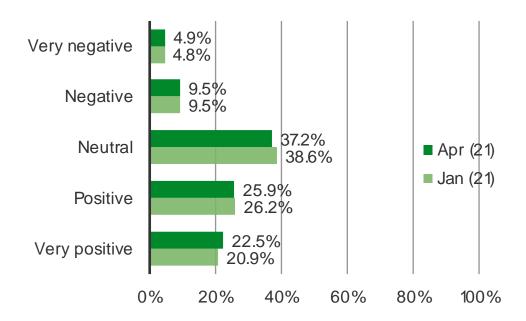
Posed to respondents who use food delivery apps.



What is your opinion of ordering from this type of restaurant?

Posed to respondents who use food delivery apps.

Description shown to respondents: A "Ghost Restaurant/Kitchen", also known as a virtual restaurant or cloud kitchen, is a foodservice establishment that offers take-out only. These "ghostly" eateries don't have a storefront, so customers can't come to pick up their own food. Ghost restaurants deliver food directly to their patrons, often through the use of third-party delivery services.



How easy or difficult do you think it is to tell the difference between regular restaurants and ghost restaurants/kitchens in food delivery app feeds?

Posed to respondents who use food delivery apps.

