

**Volume 15**

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# **Casual Dining**

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**April 2021**

**BESPOKE MARKET INTELLIGENCE SURVEY**

## BACKGROUND:

- ❑ 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).

# I

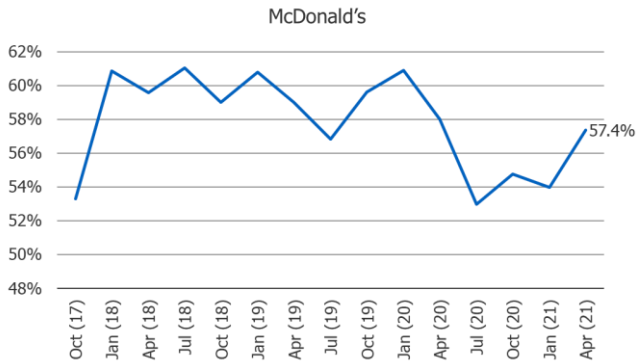
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## Restaurant Specific Data

Posed to all respondents.



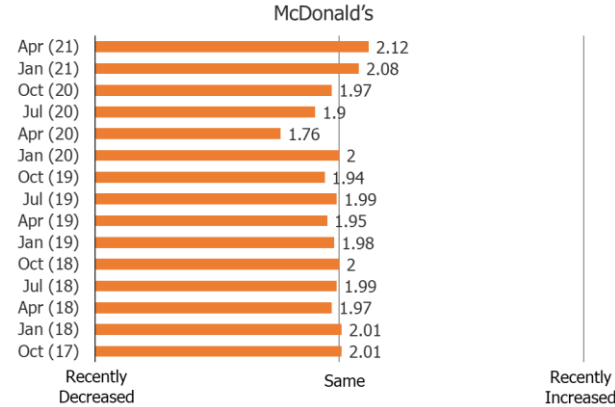
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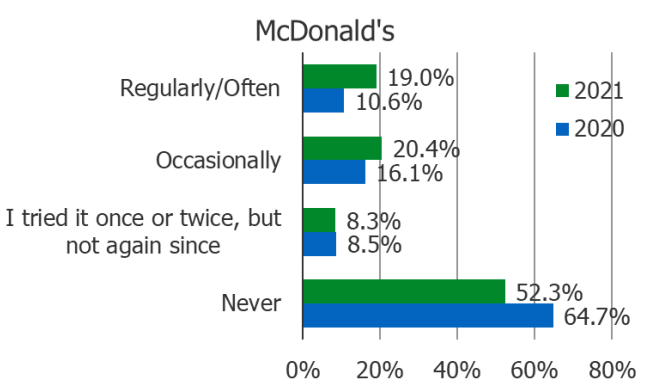
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



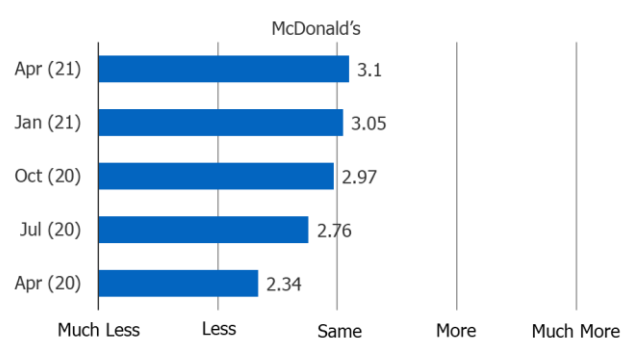
### Orders On Third Party Food Del. Apps



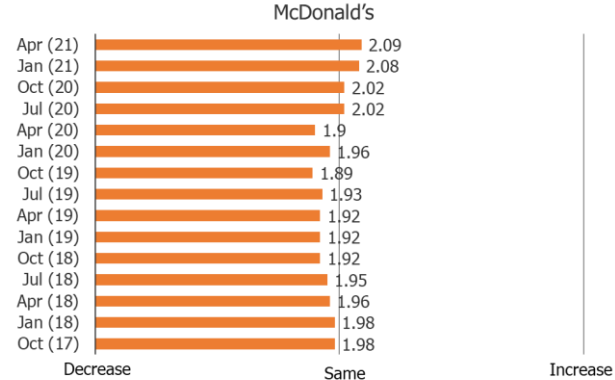
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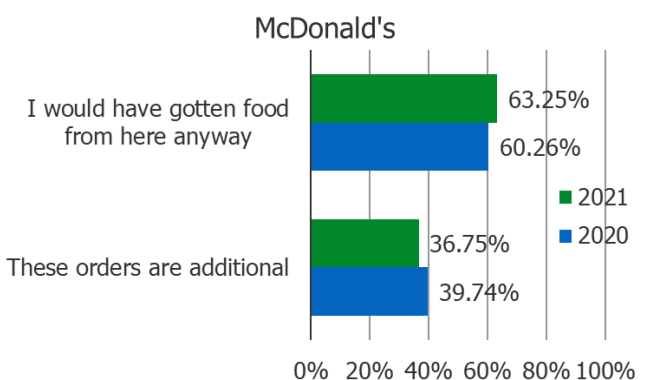
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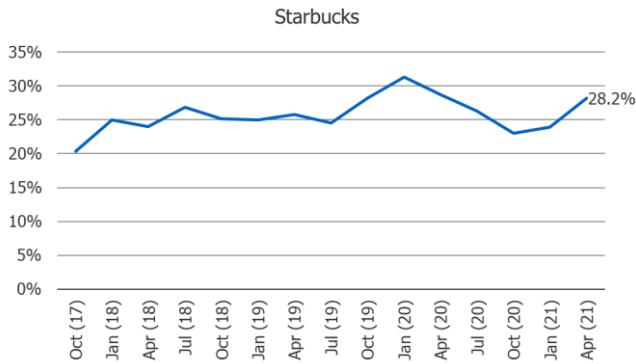
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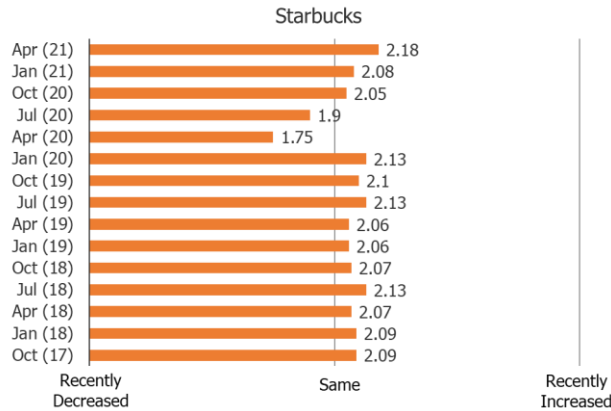
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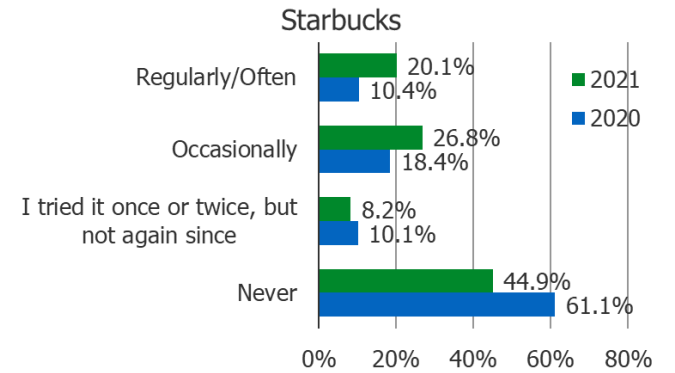
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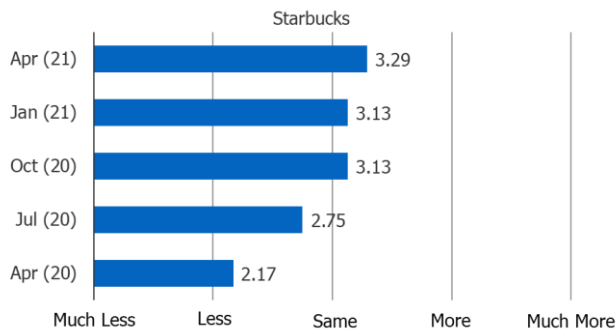
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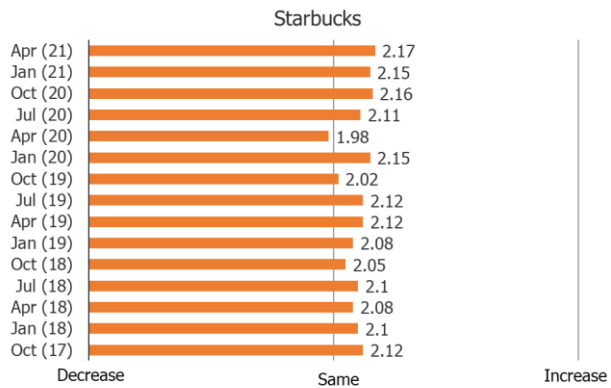
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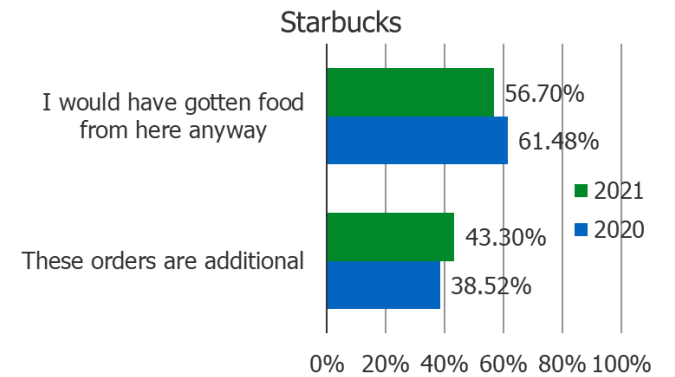
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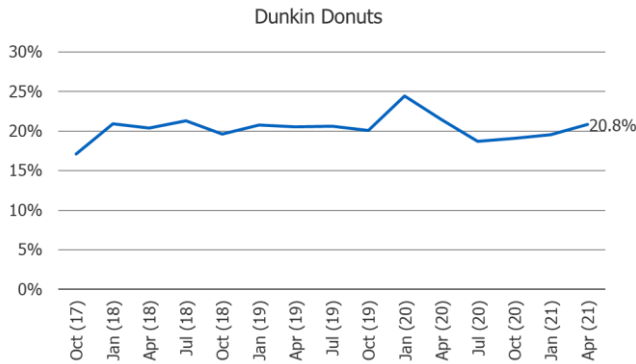
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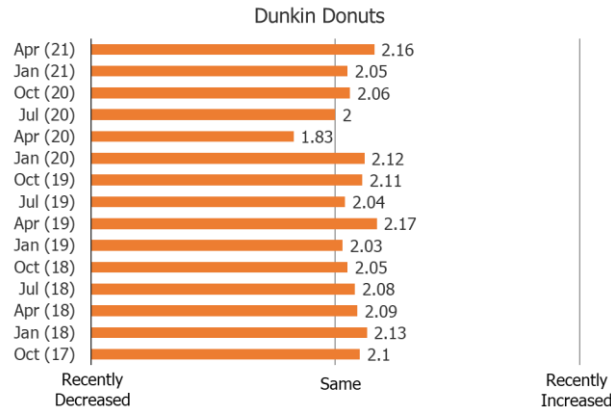
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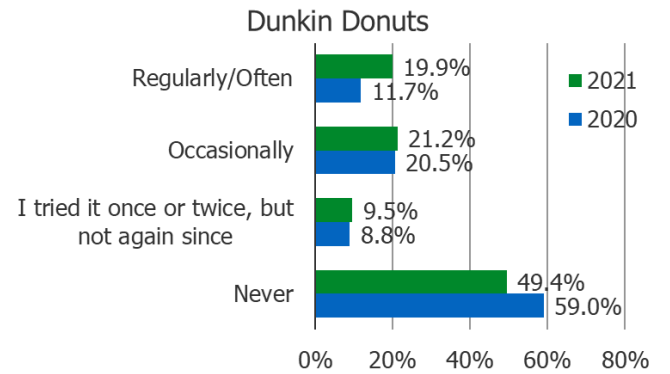
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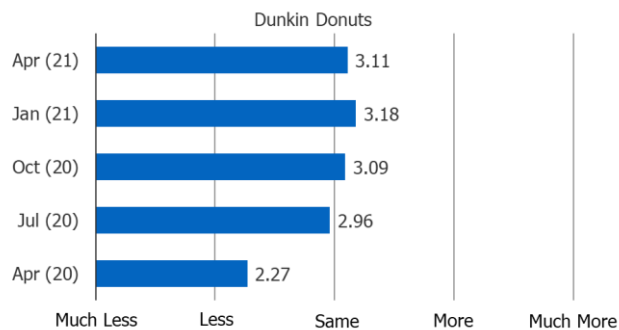
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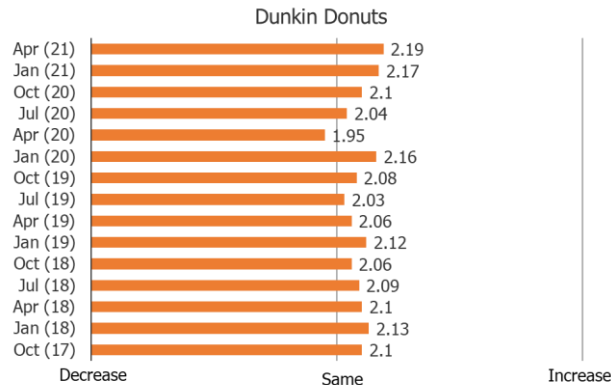
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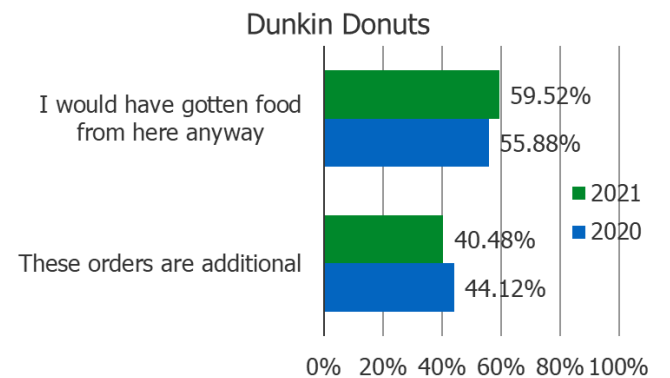
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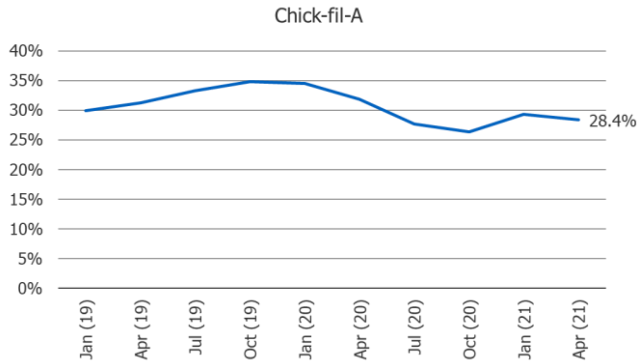
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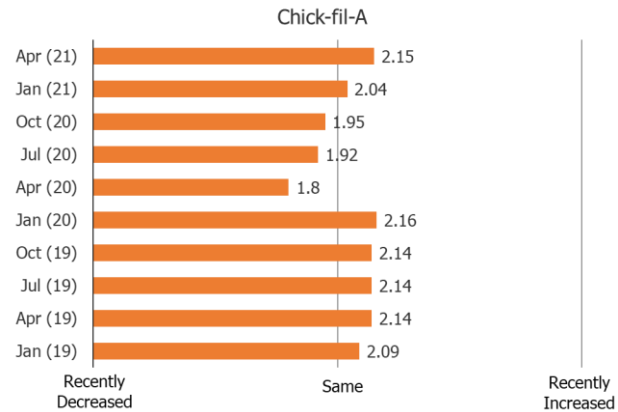
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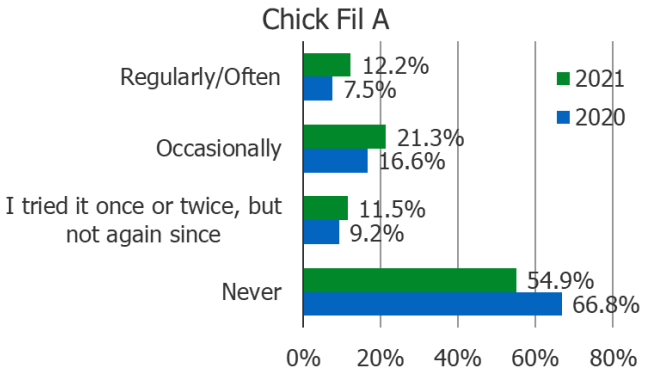
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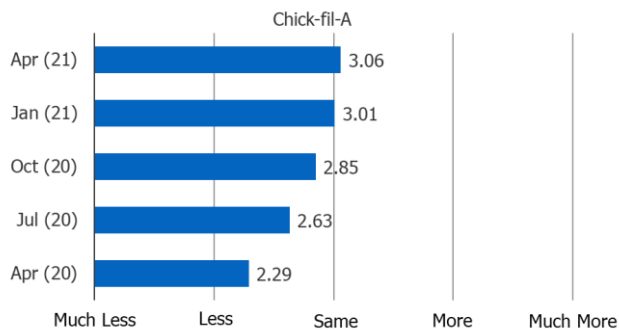
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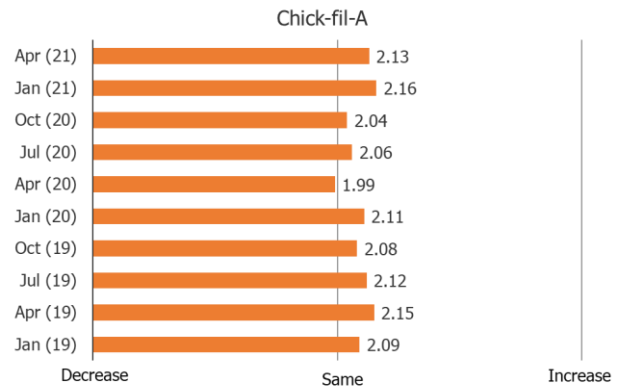
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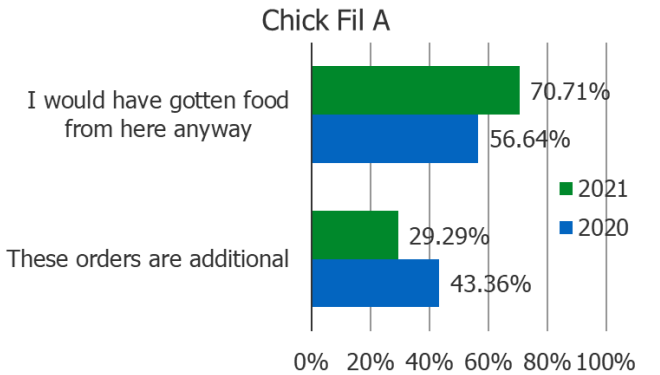
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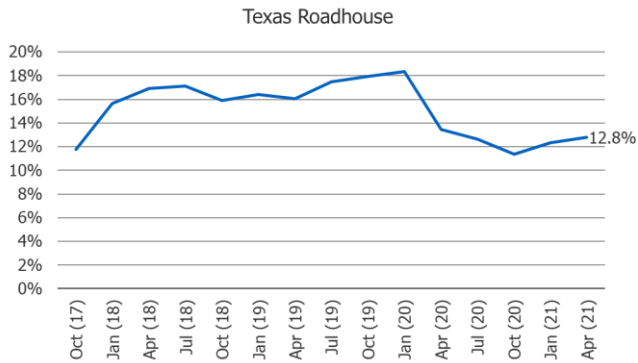
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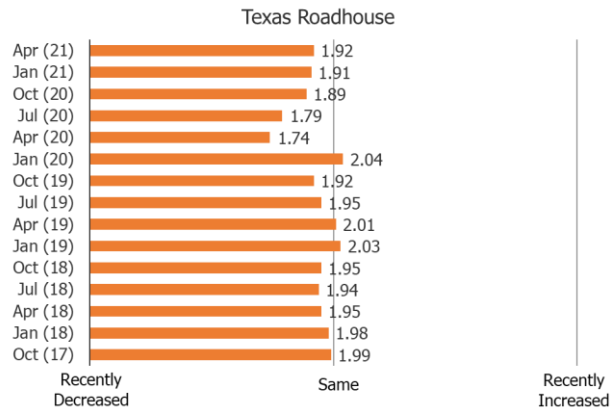
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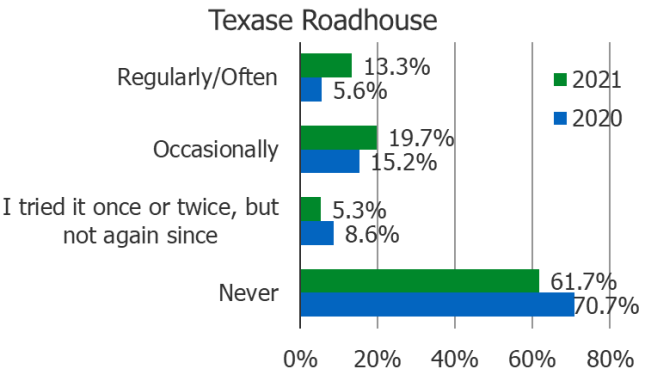
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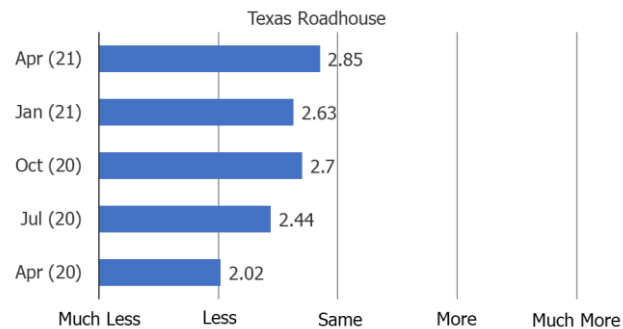
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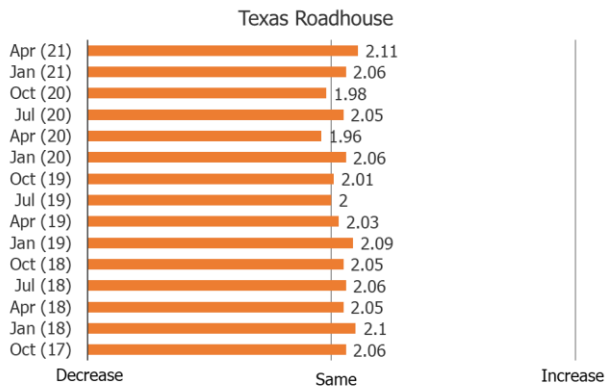
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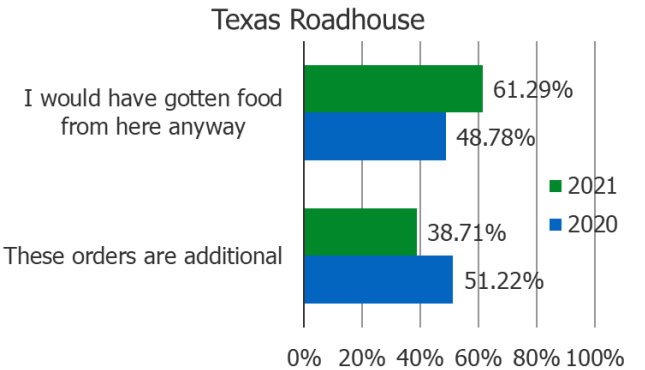
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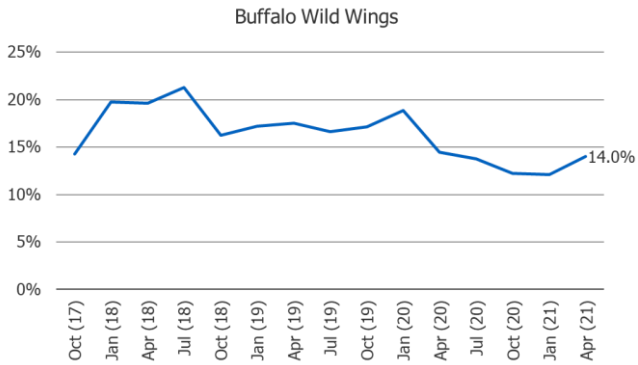




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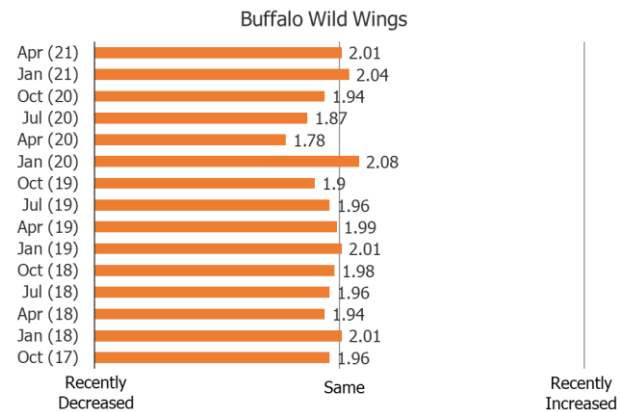
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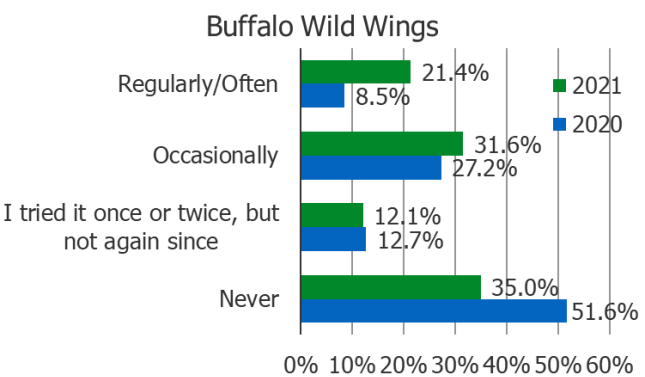
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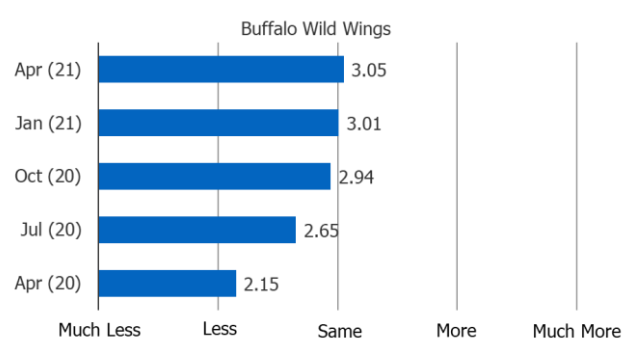
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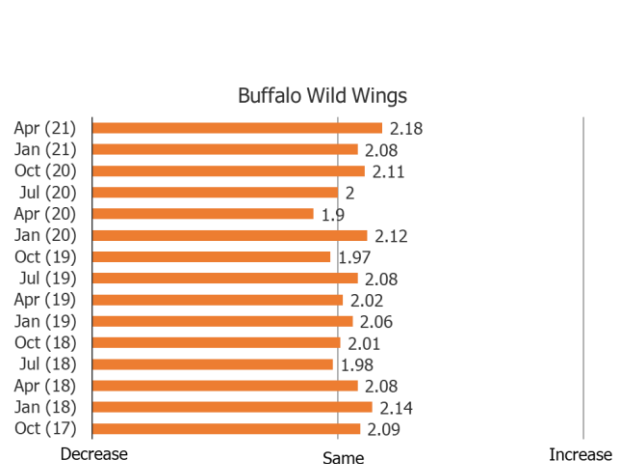
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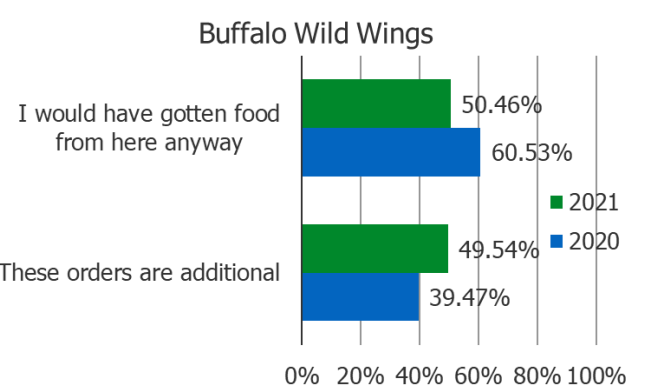
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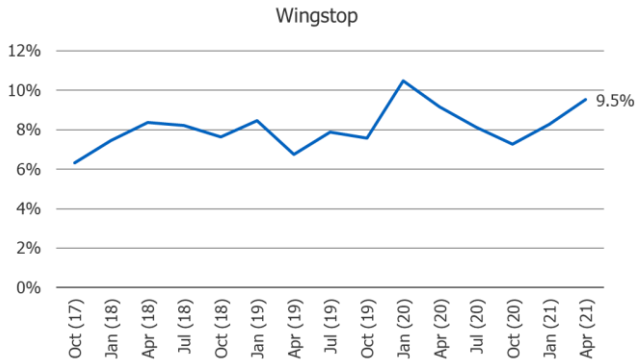
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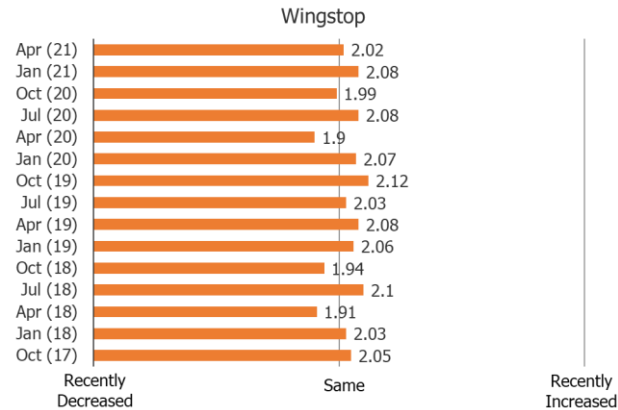
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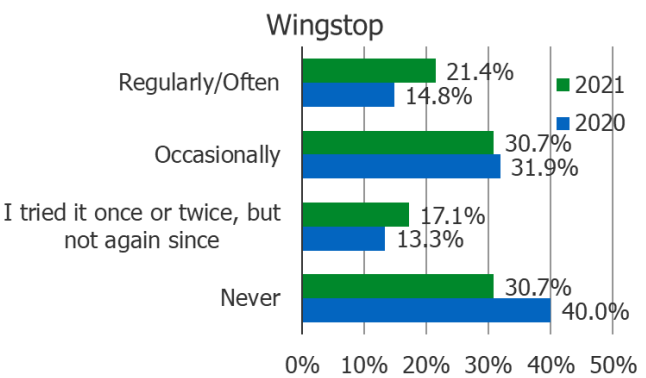
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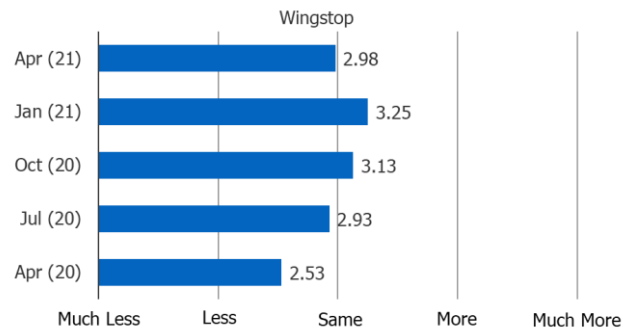
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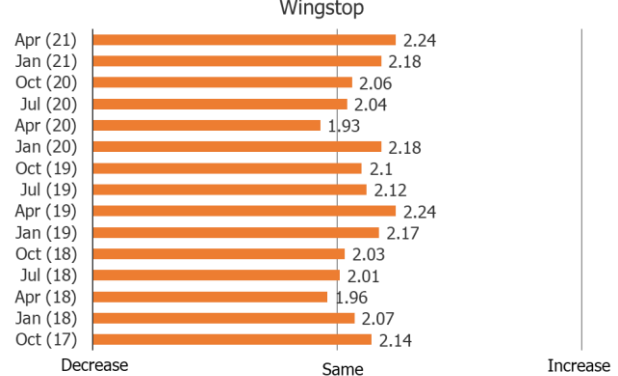
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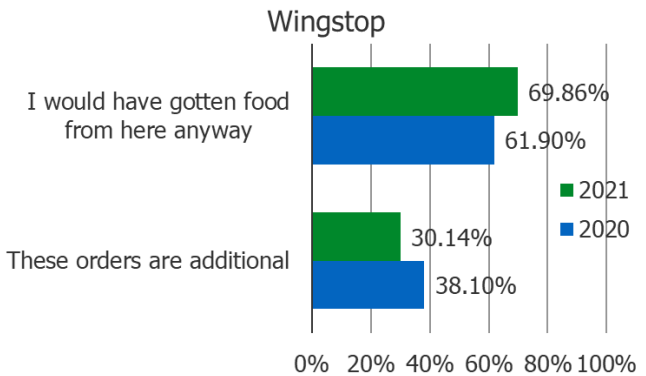
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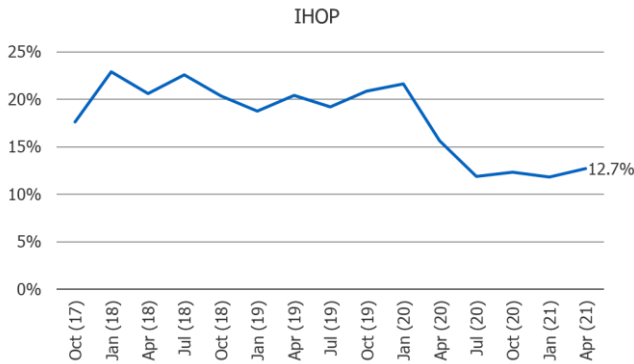
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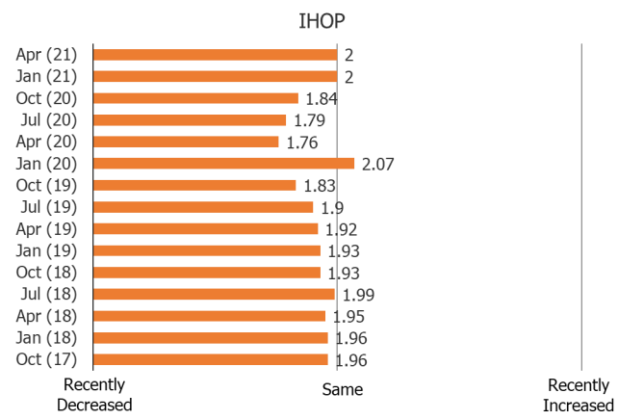
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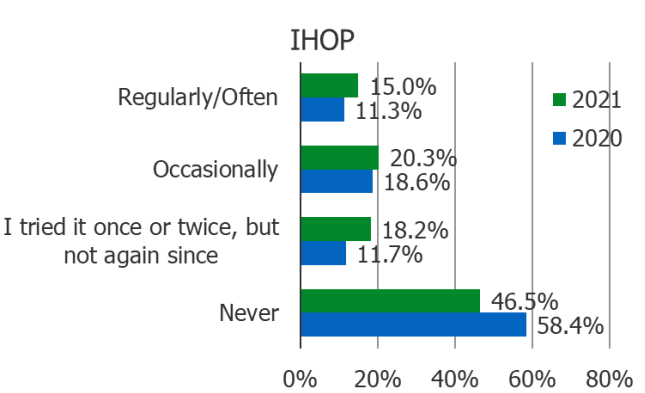
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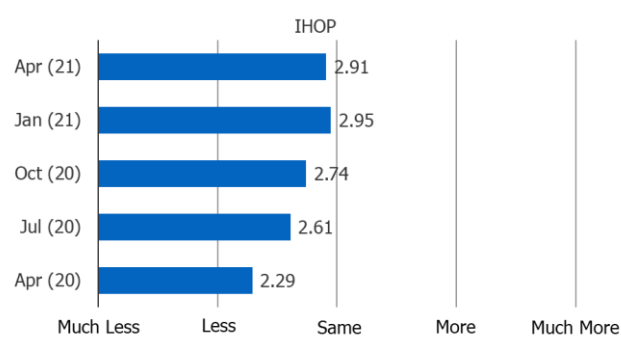
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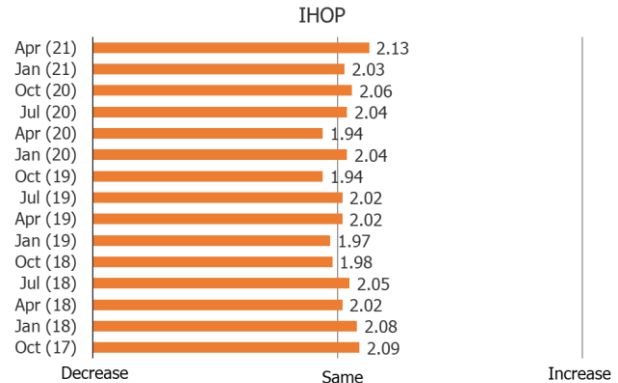
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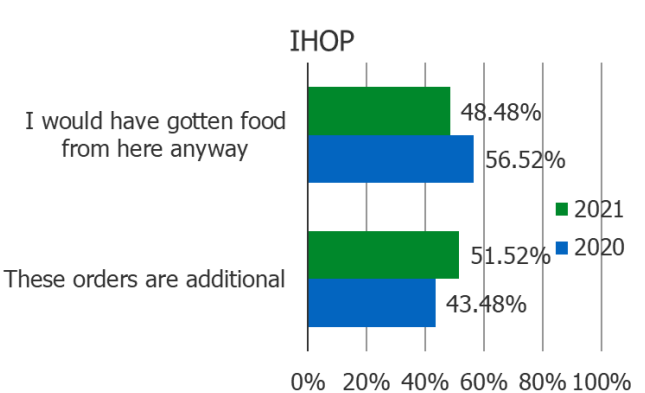
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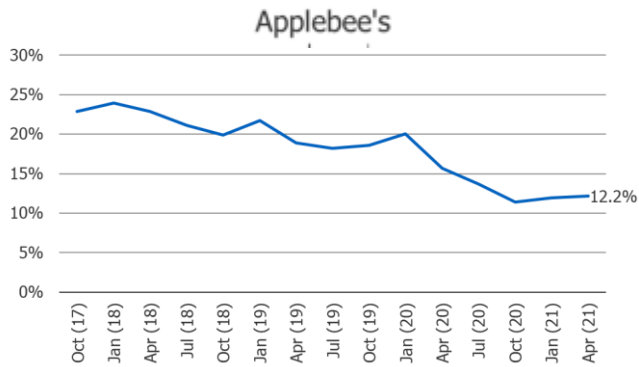
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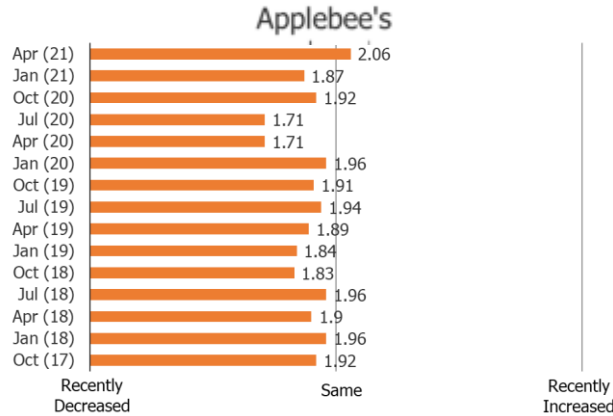
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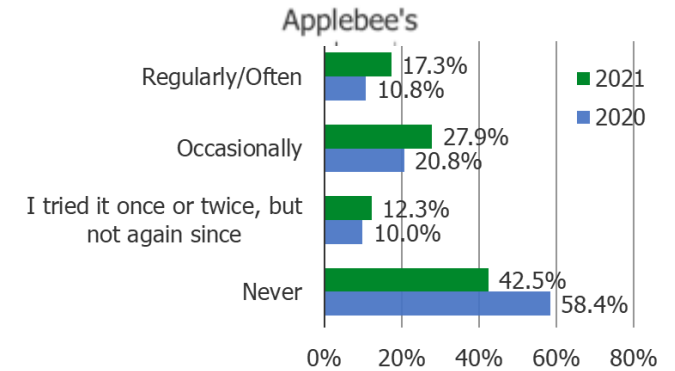
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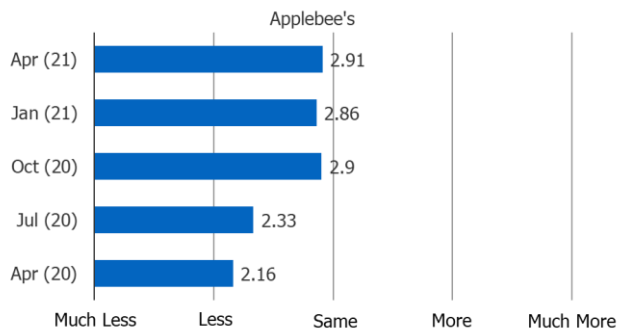
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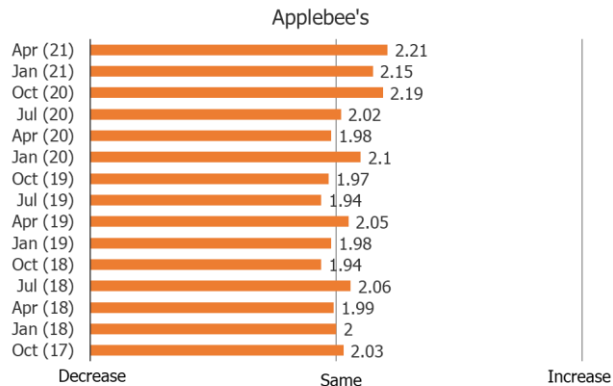
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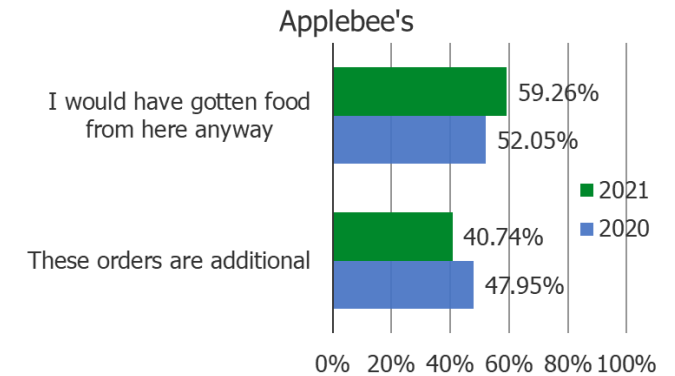
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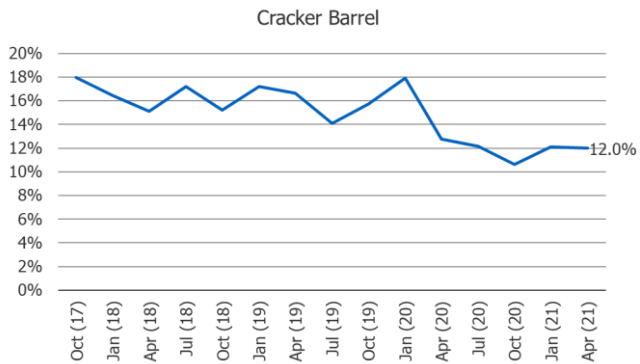
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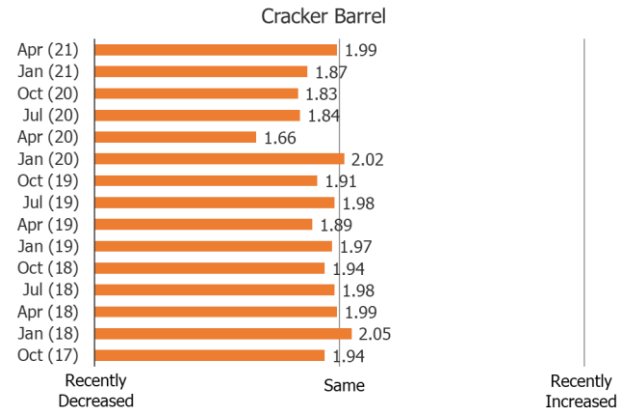
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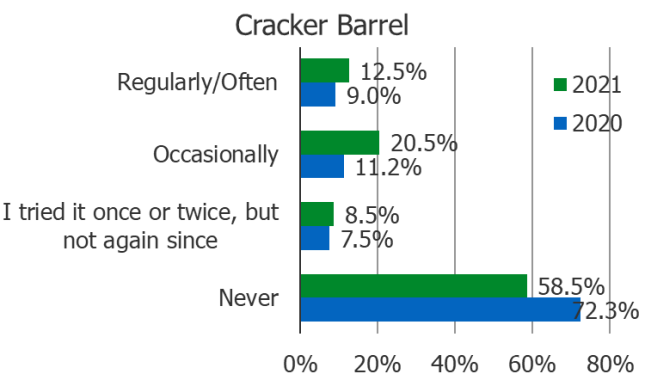
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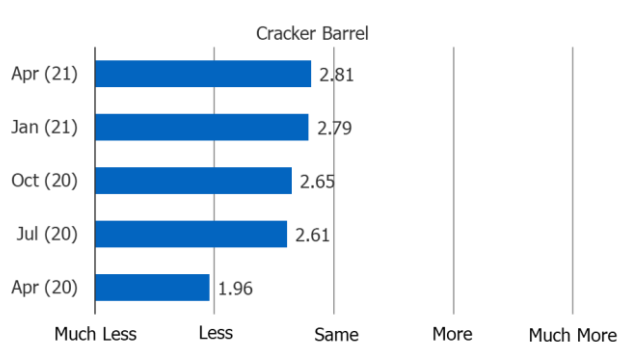
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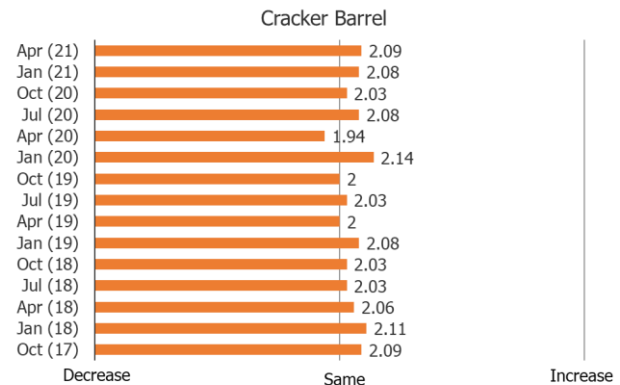
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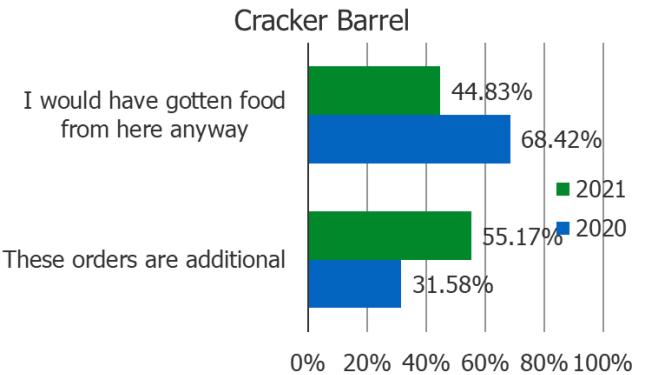
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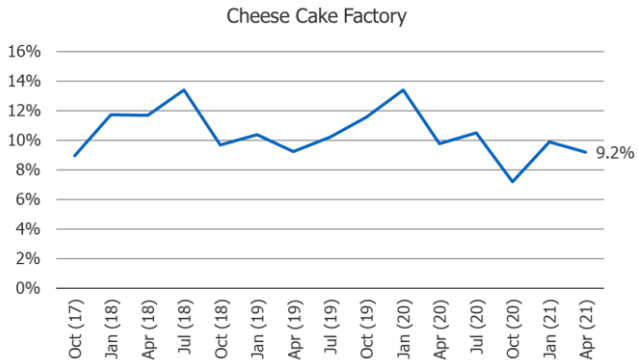
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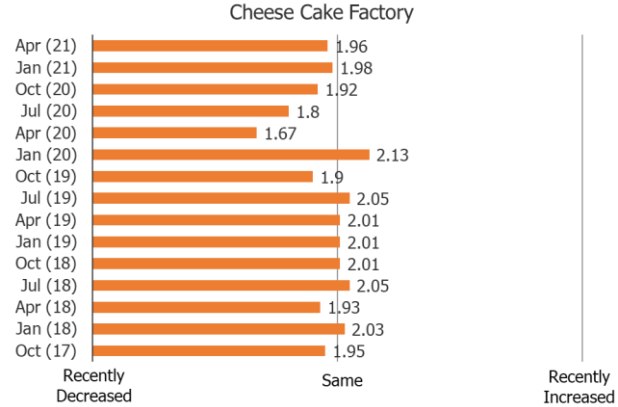
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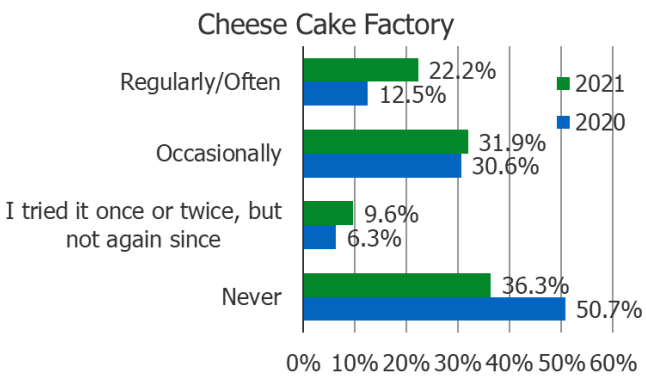
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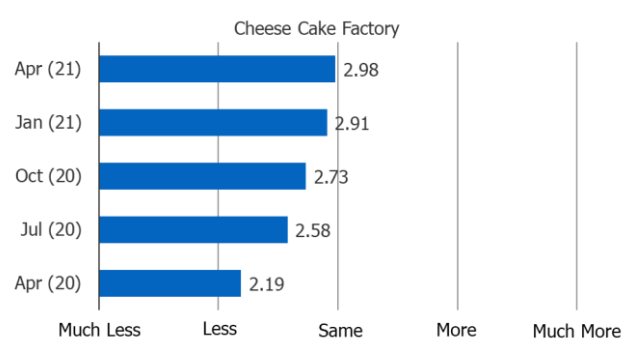
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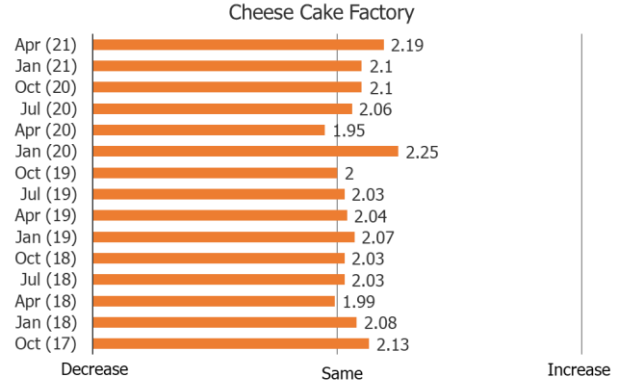
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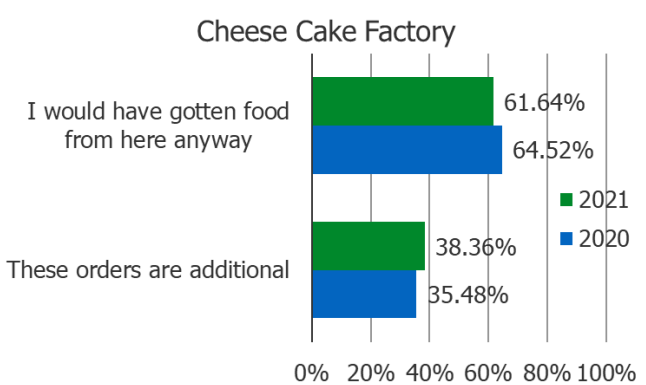
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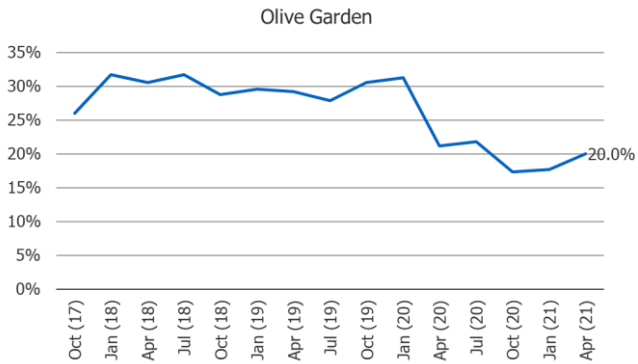
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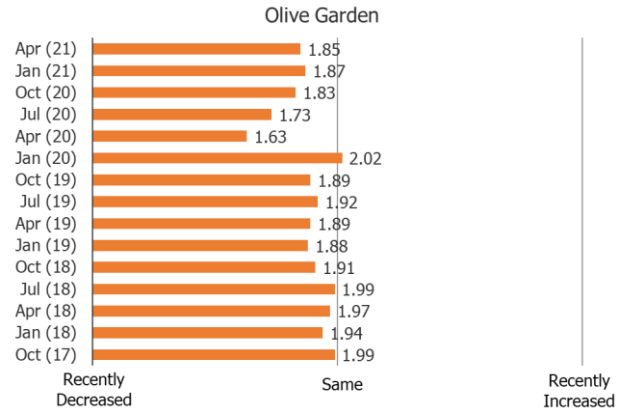
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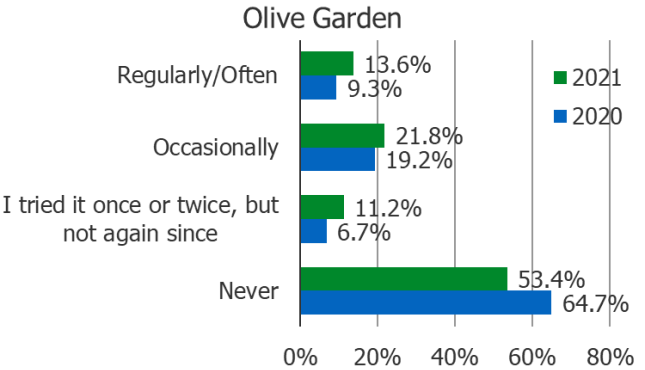
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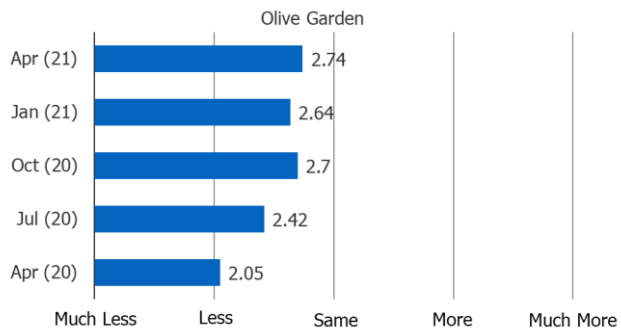
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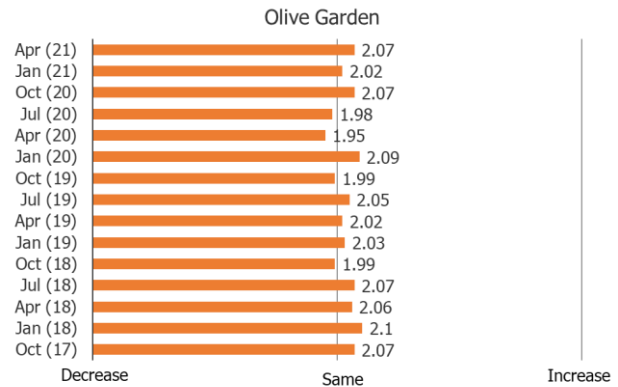
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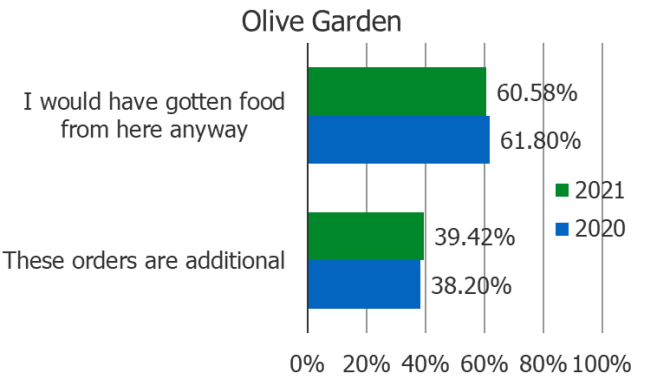
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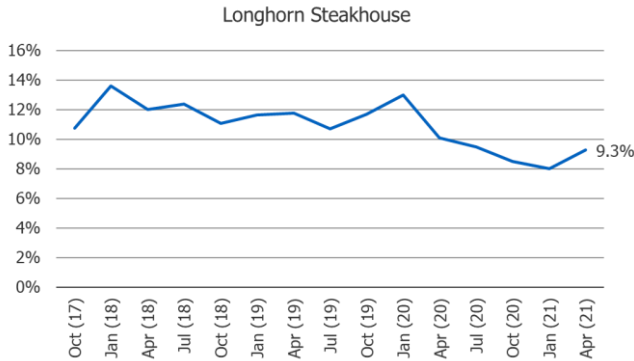
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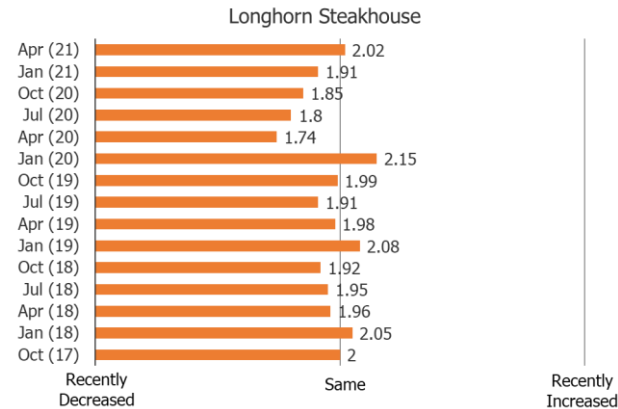
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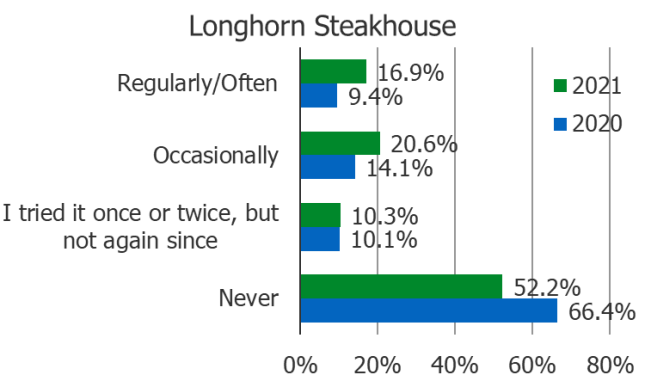
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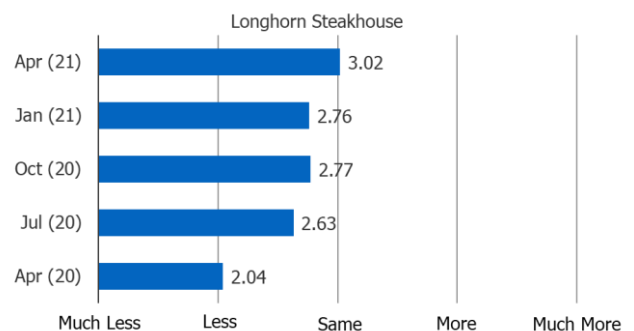
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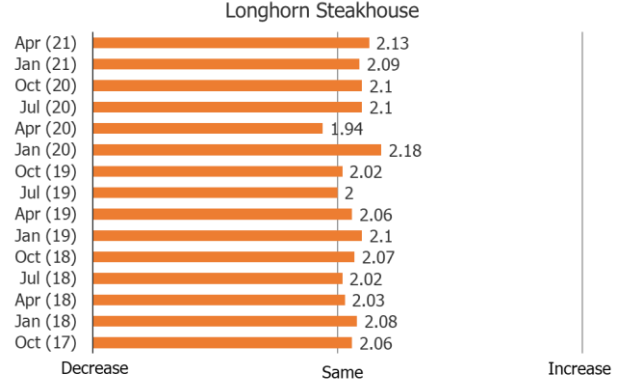
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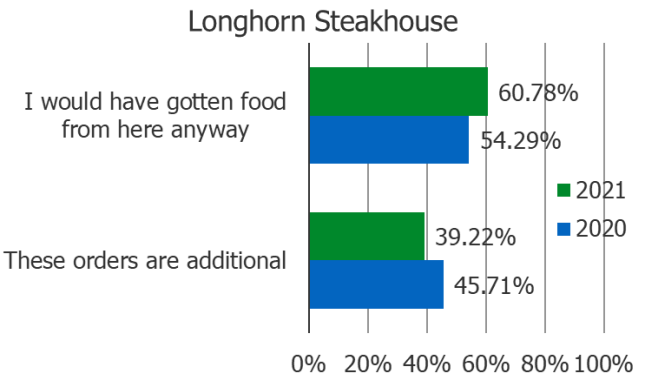
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Posed to Respondents Who Order Restaurant on Third Party Apps.



### Are Orders Additional or Replacement

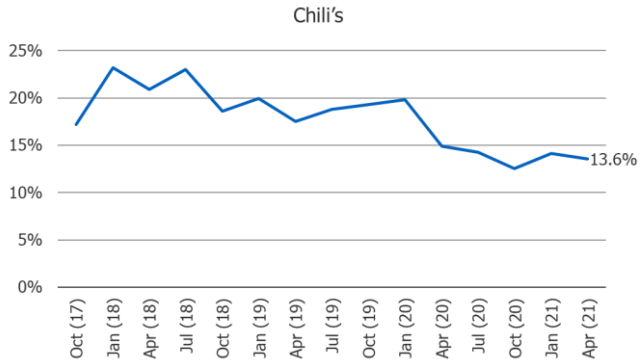




Posed to all respondents.



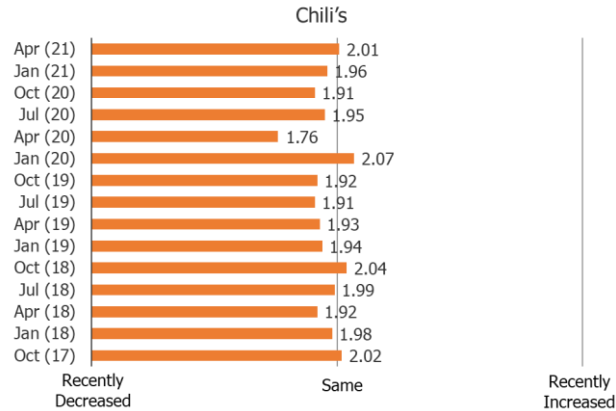
### % Who Uses Regularly or Occasionally



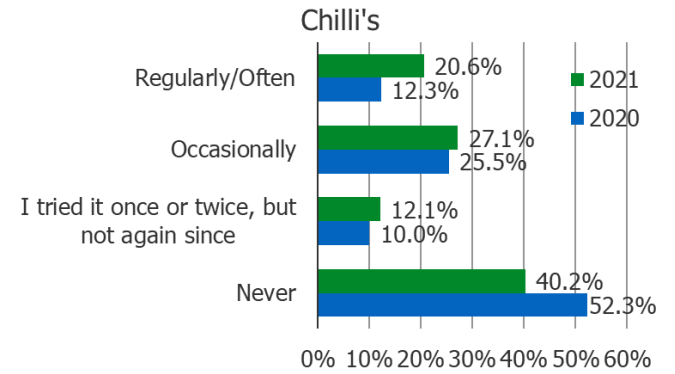
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



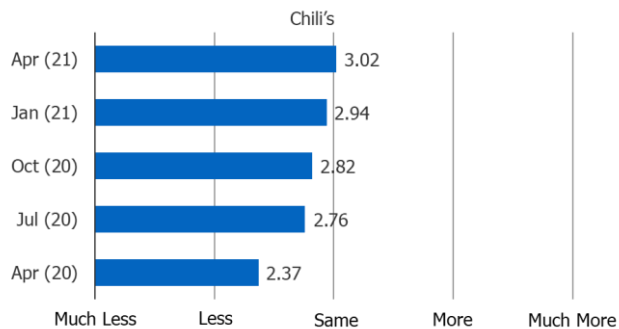
### Orders On Third Party Food Del. Apps



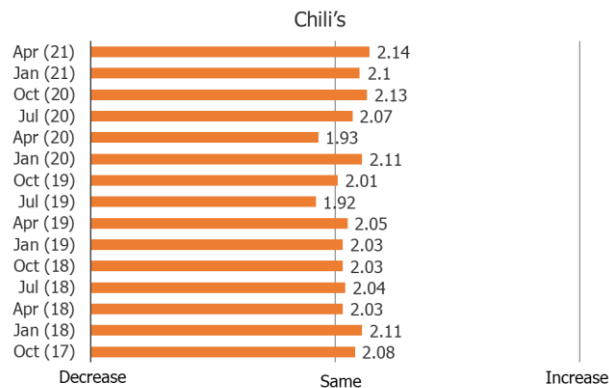
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



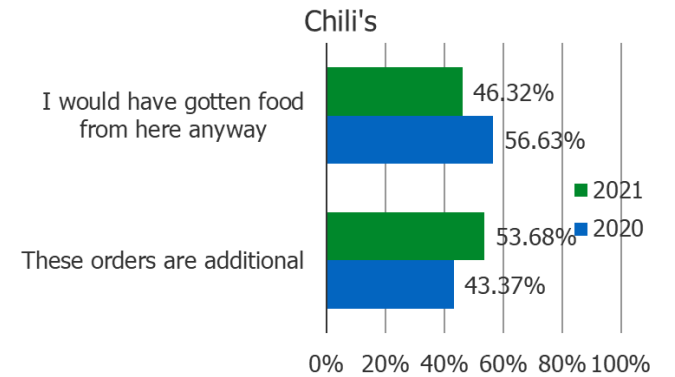
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



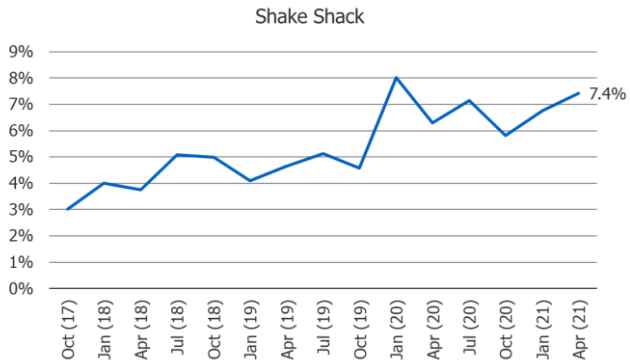
### Are Orders Additional or Replacement



*Posed to all respondents.*



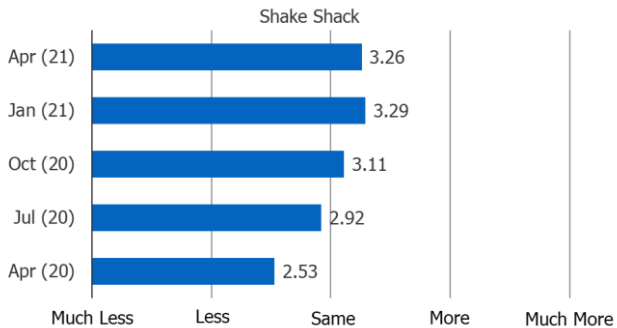
### % Who Uses Regularly or Occasionally



*Posed to Respondents Who Use Restaurant Regularly or Occasionally.*



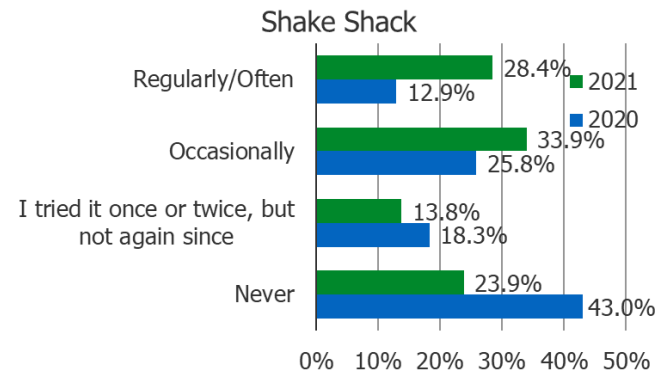
### Using More or Less Due To COVID



*Posed to Respondents Who Use Restaurant Regularly or Occasionally.*



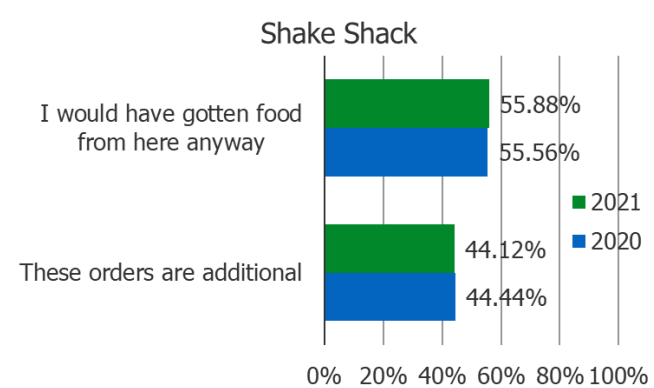
### Orders On Third Party Food Del. Apps



*Posed to Respondents Who Order Restaurant on Third Party Apps.*



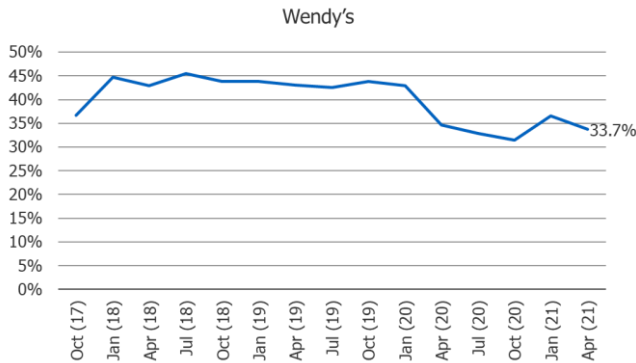
### Are Orders Additional or Replacement



Posed to all respondents.



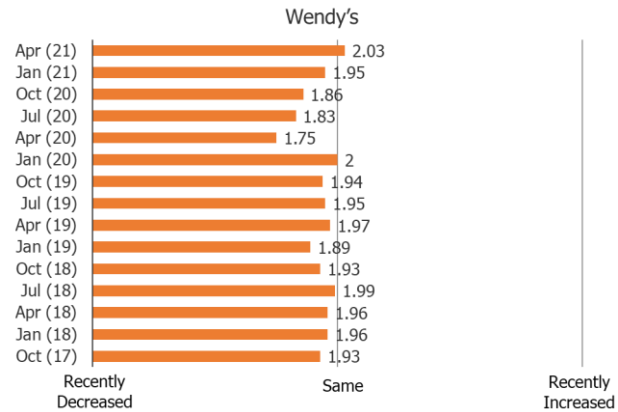
### % Who Uses Regularly or Occasionally



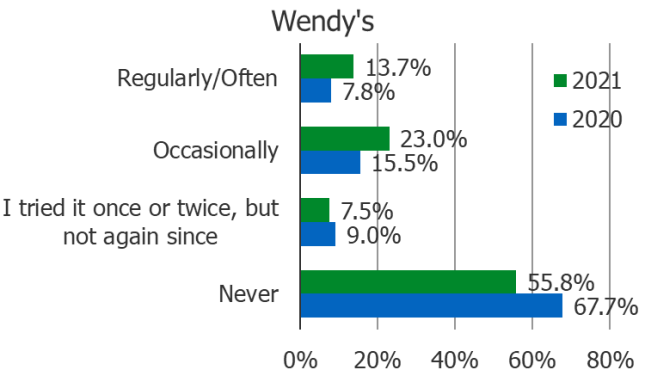
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



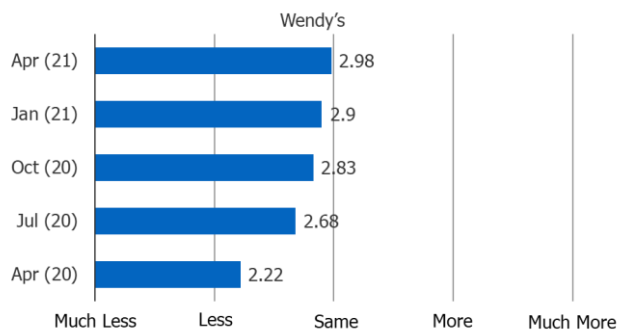
### Orders On Third Party Food Del. Apps



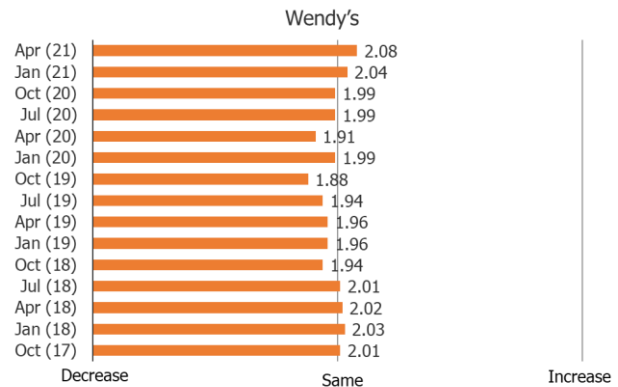
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### Using More or Less Due To COVID



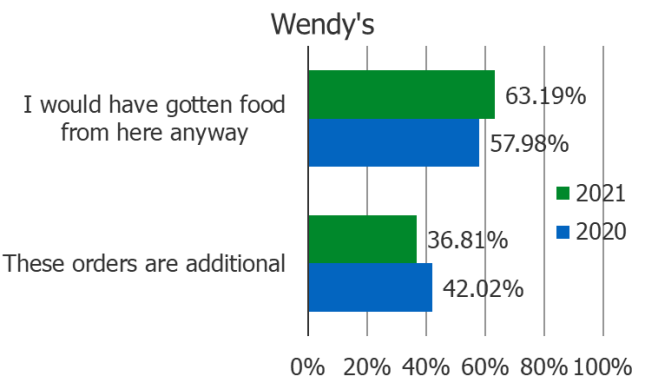
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



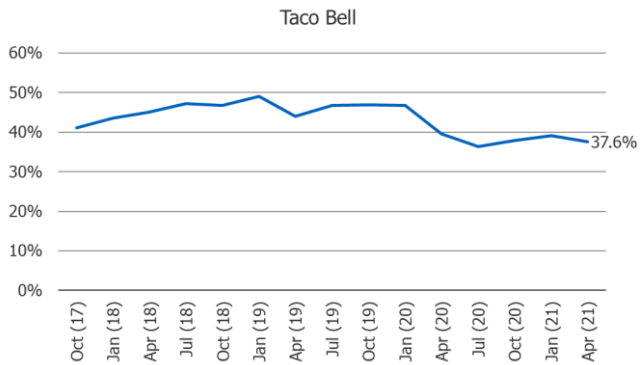
### Are Orders Additional or Replacement



Posed to all respondents.



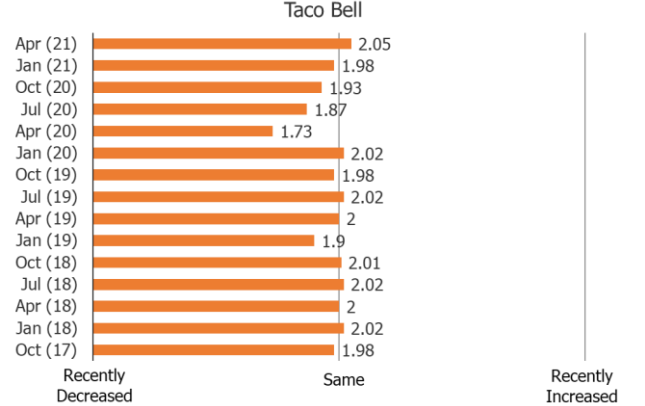
### % Who Uses Regularly or Occasionally



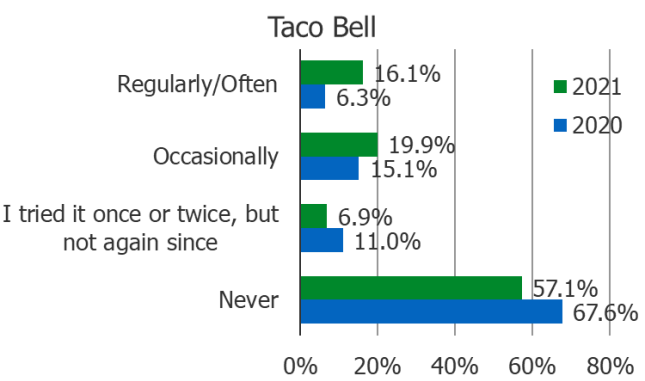
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### Recent Usage



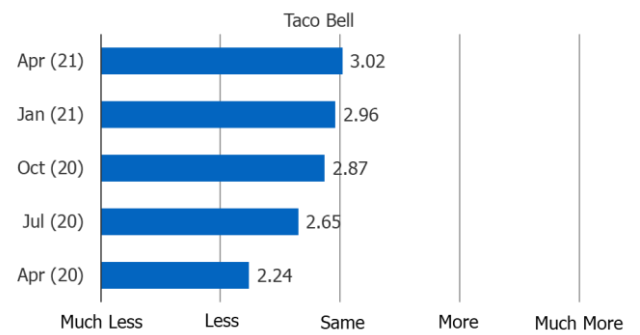
### Orders On Third Party Food Del. Apps



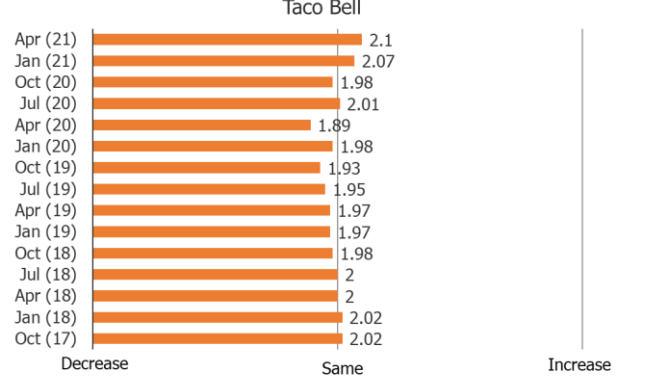
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



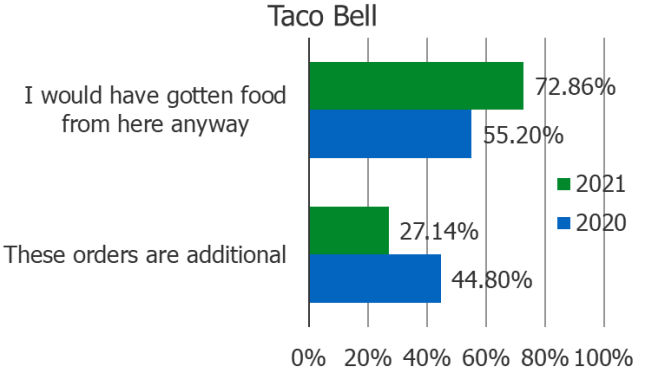
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



### Are Orders Additional or Replacement



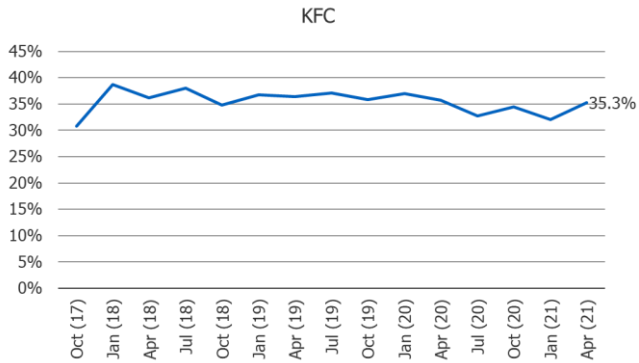
Posed to all respondents.



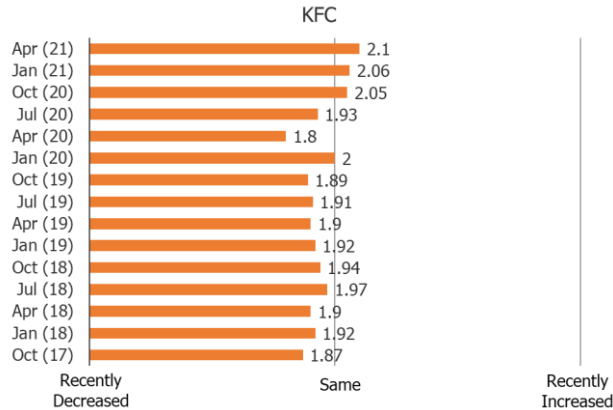
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



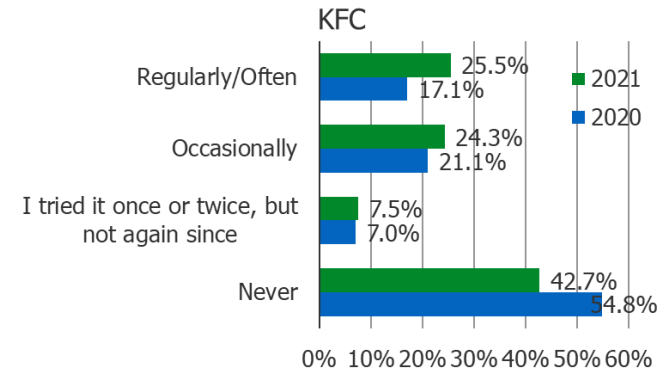
### % Who Uses Regularly or Occasionally



### Recent Usage



### Orders On Third Party Food Del. Apps



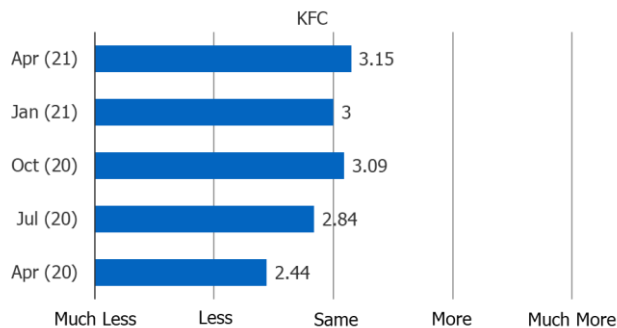
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



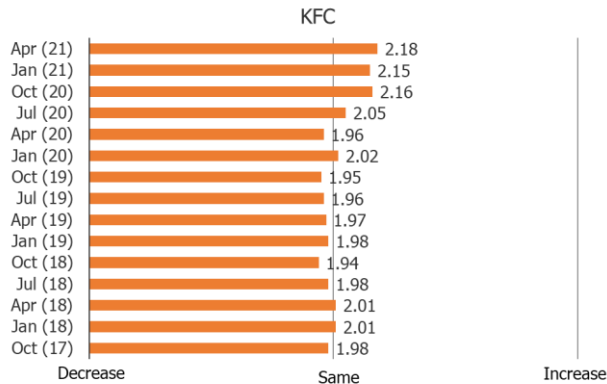
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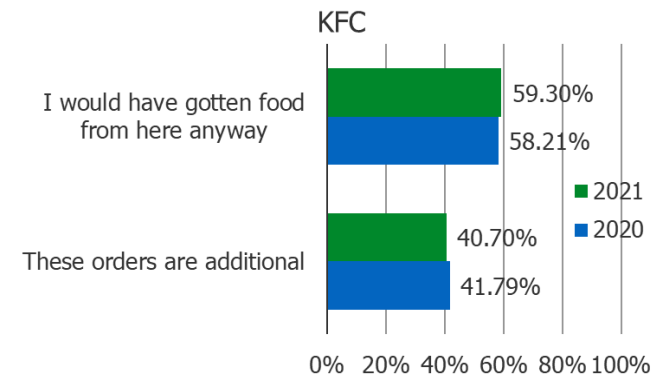
### Using More or Less Due To COVID



### Expected Usage



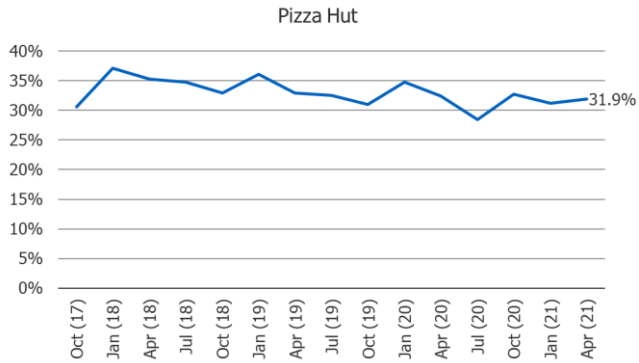
### Are Orders Additional or Replacement



Posed to all respondents.



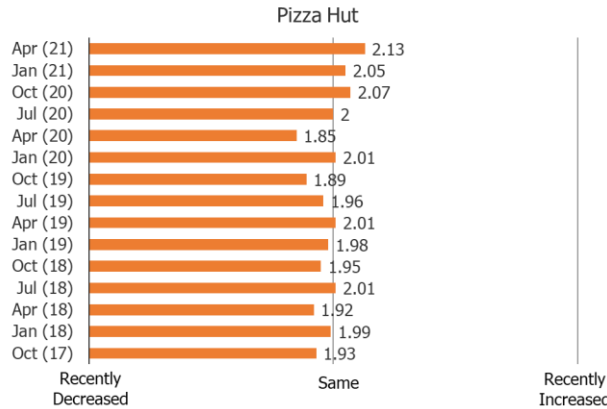
### % Who Uses Regularly or Occasionally



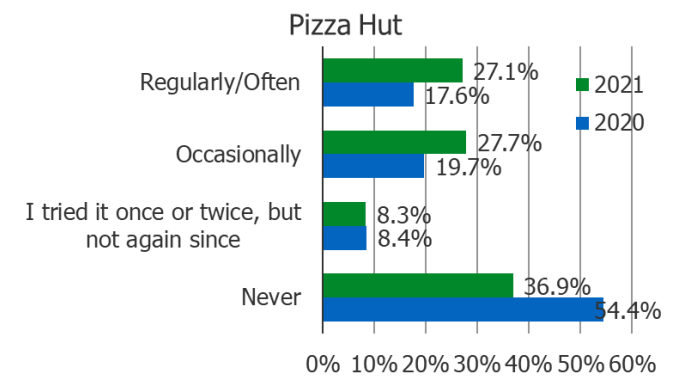
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### Recent Usage



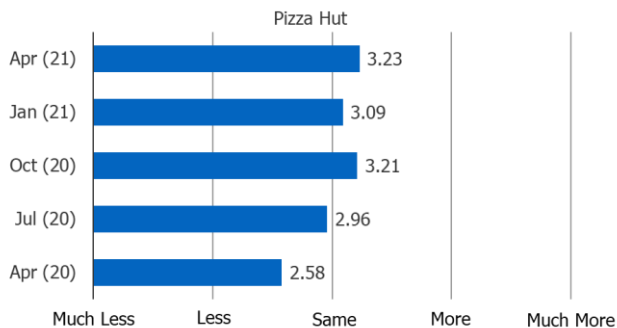
### Orders On Third Party Food Del. Apps



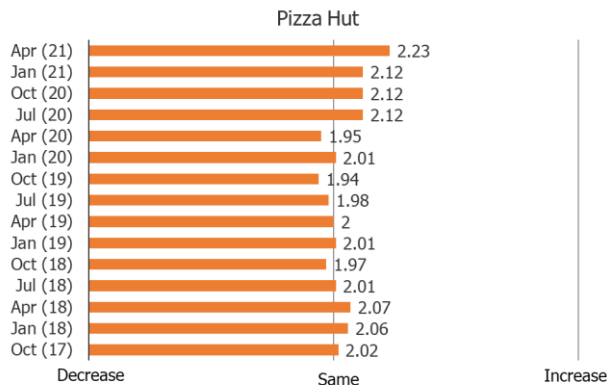
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### Using More or Less Due To COVID



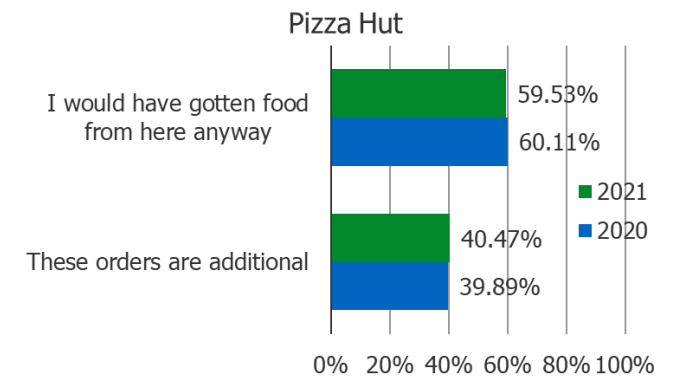
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



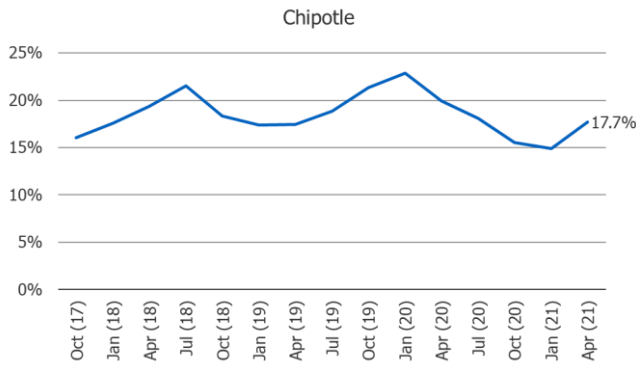
### Are Orders Additional or Replacement



Posed to all respondents.



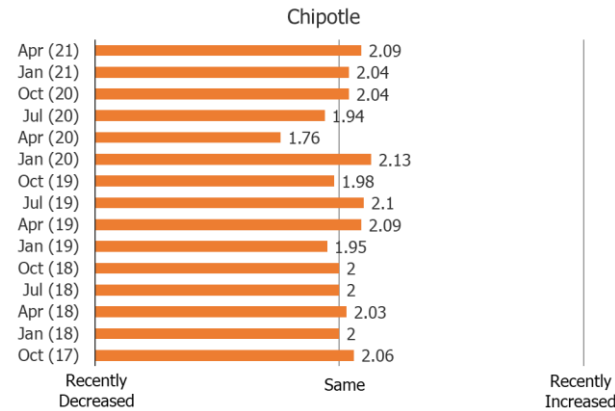
### % Who Uses Regularly or Occasionally



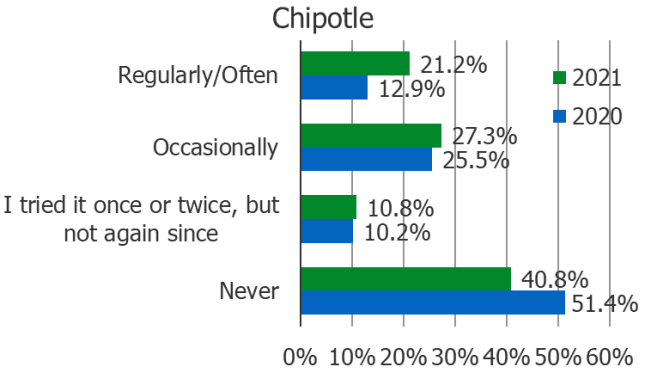
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### Recent Usage



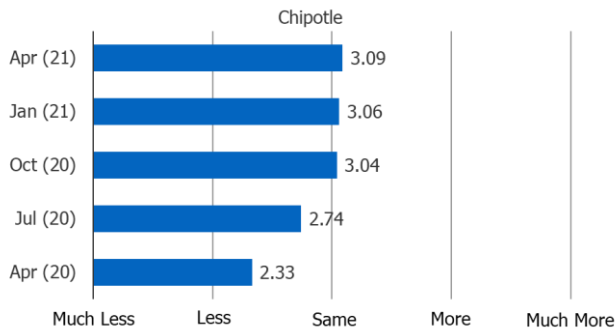
### Orders On Third Party Food Del. Apps



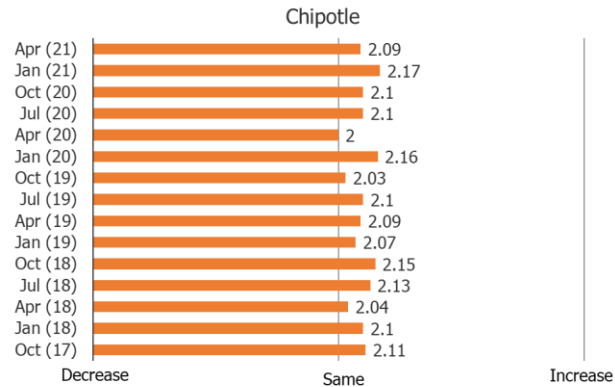
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### Using More or Less Due To COVID



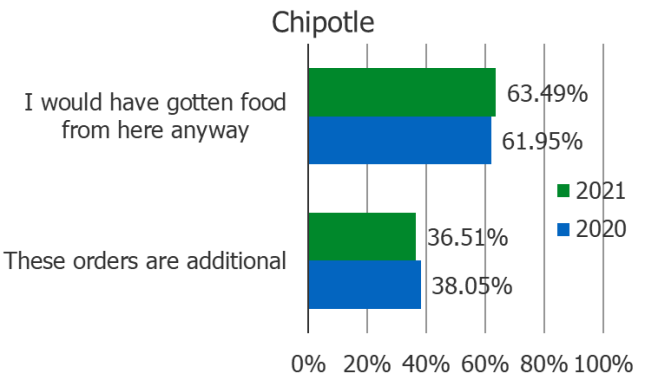
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



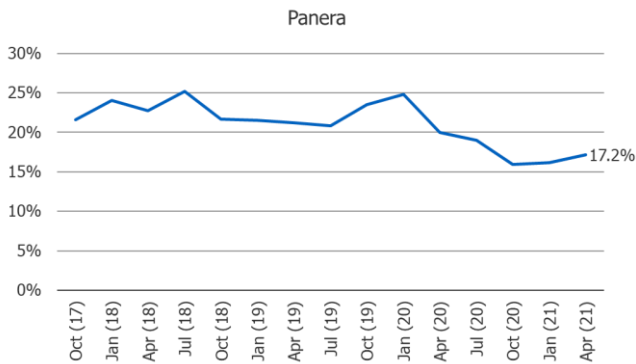
### Are Orders Additional or Replacement



Posed to all respondents.



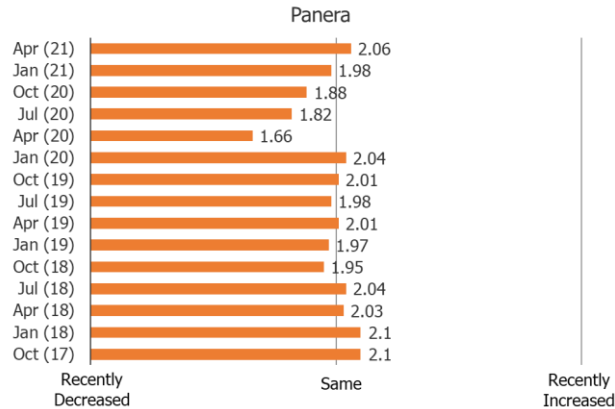
### % Who Uses Regularly or Occasionally



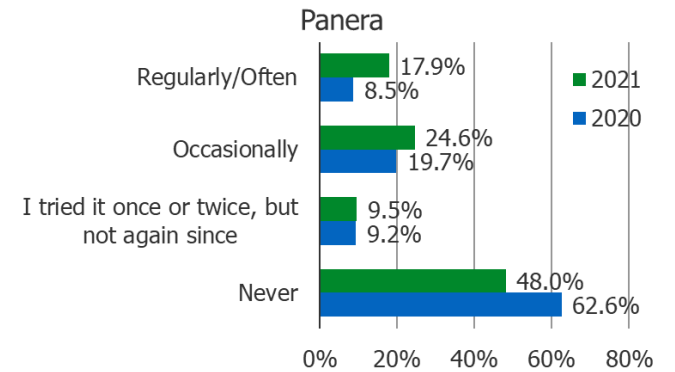
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### Recent Usage



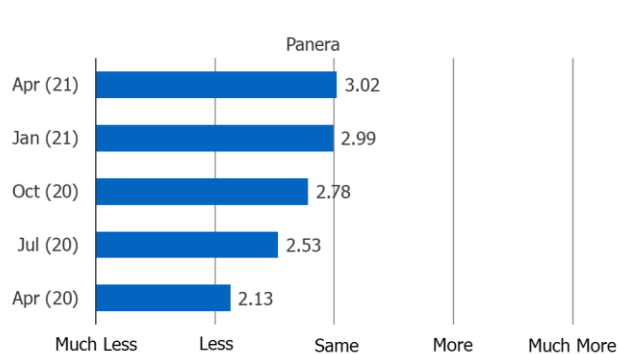
### Orders On Third Party Food Del. Apps



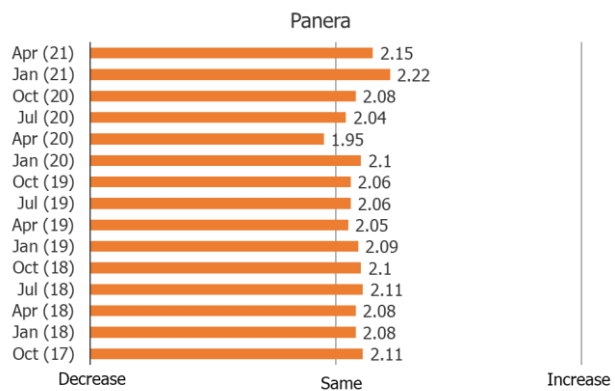
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



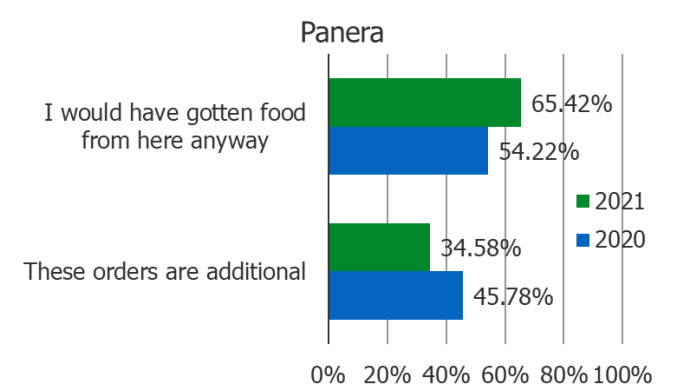
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



### Are Orders Additional or Replacement

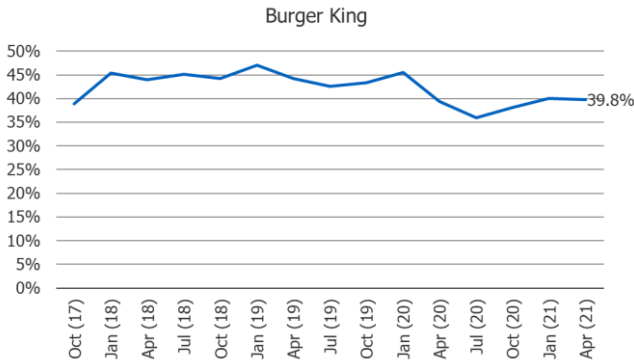




Posed to all respondents.



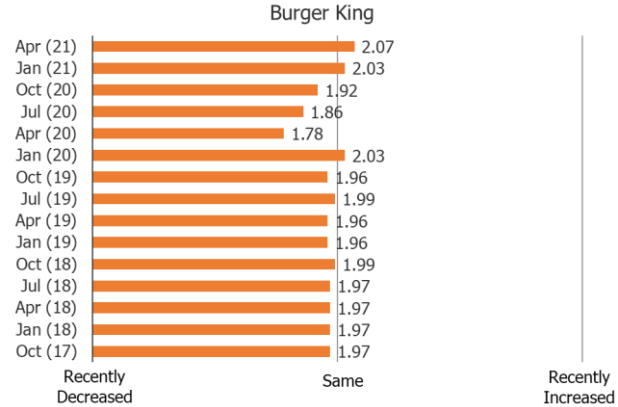
### % Who Uses Regularly or Occasionally



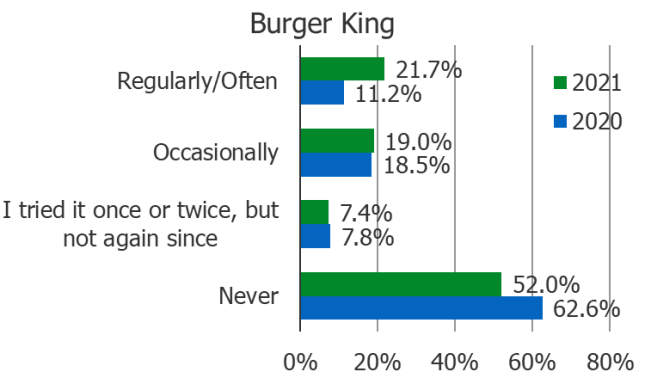
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



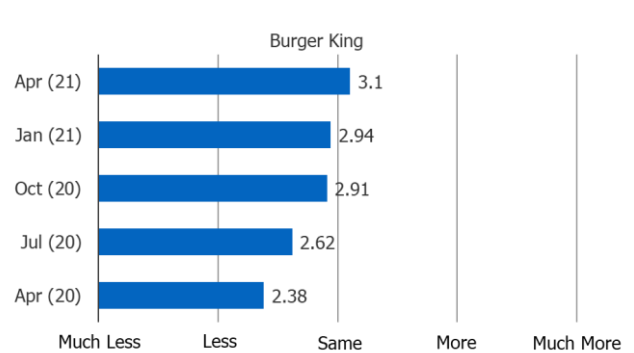
### Orders On Third Party Food Del. Apps



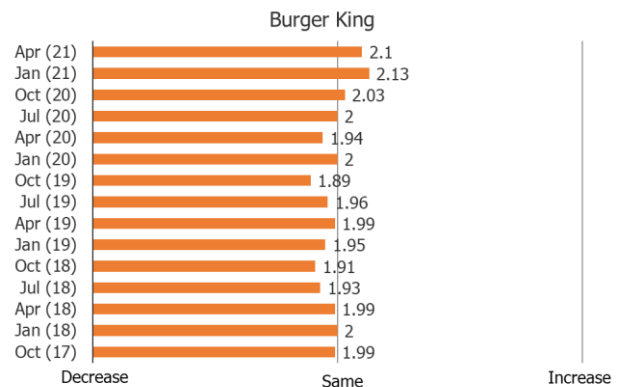
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



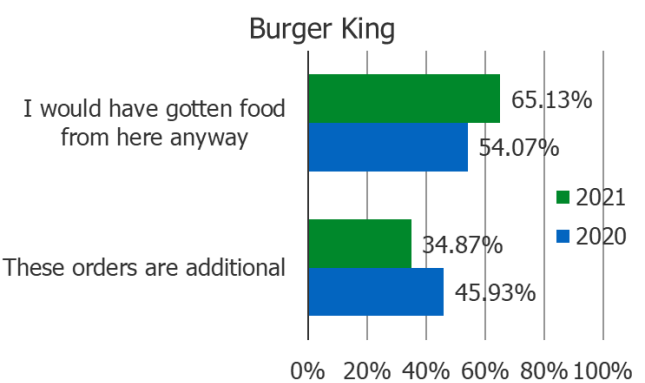
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



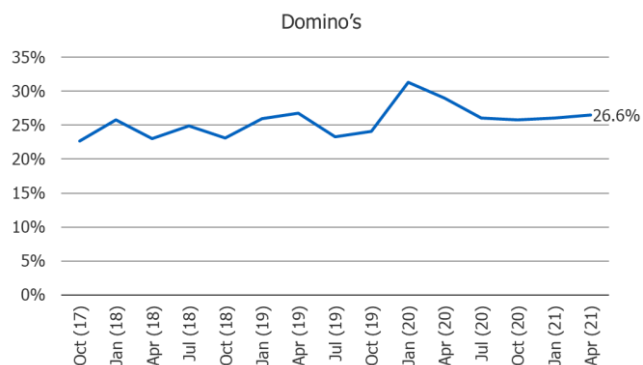
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Posed to all respondents.



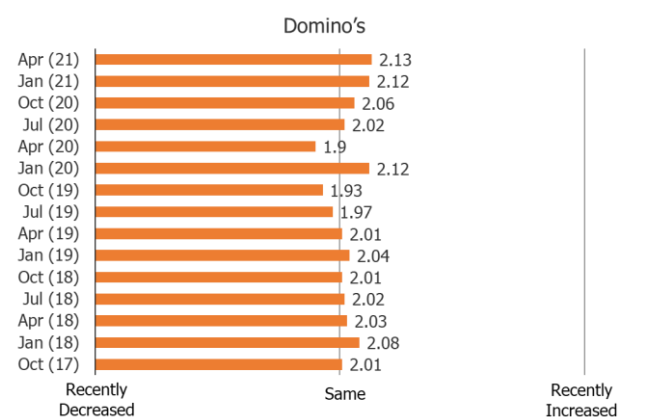
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Posed to Respondents Who Use Restaurant Regularly or Occasionally.



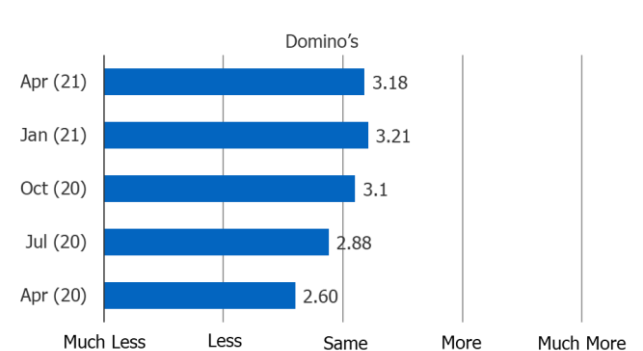
### Recent Usage



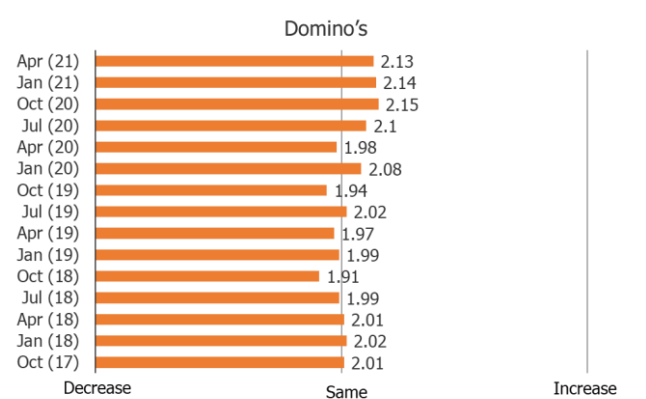
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



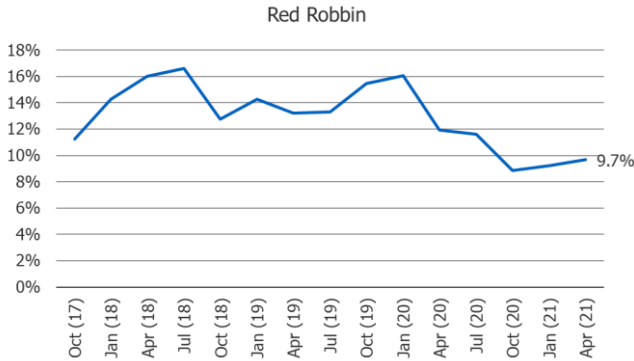
### Expected Usage



Posed to all respondents.



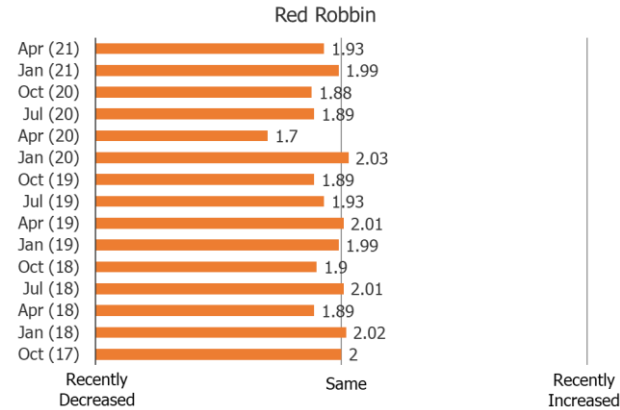
### % Who Uses Regularly or Occasionally



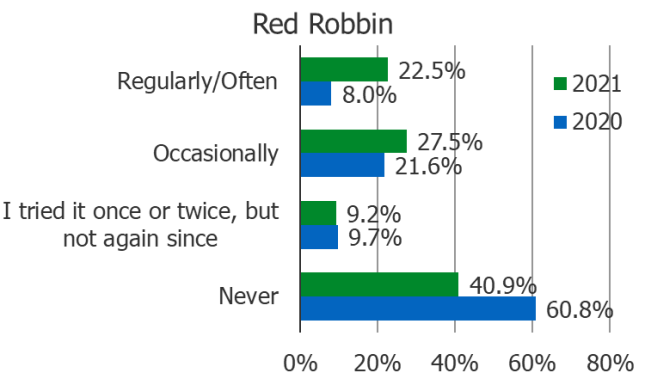
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



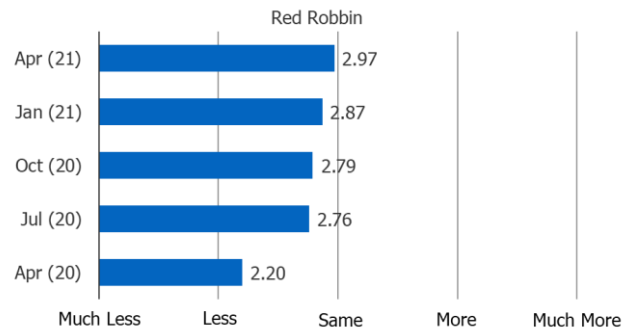
### Orders On Third Party Food Del. Apps



Posed to Respondents Who Use Restaurant Regularly or Occasionally.



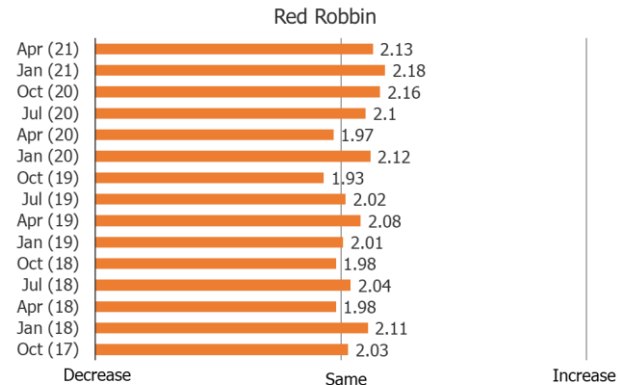
### Using More or Less Due To COVID



Posed to Respondents Who Order Restaurant on Third Party Apps.



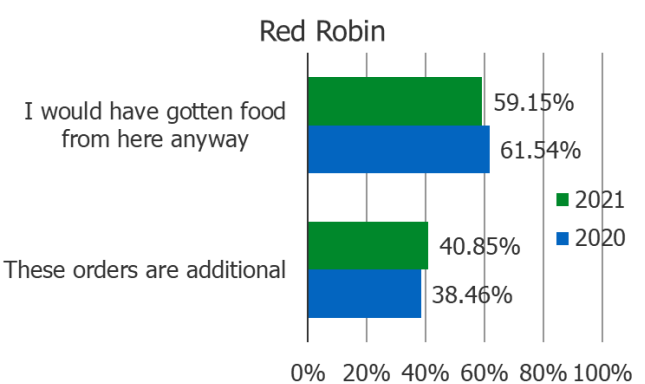
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



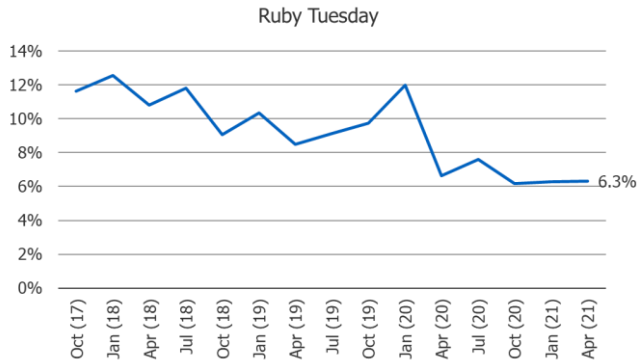
### Are Orders Additional or Replacement



Posed to all respondents.



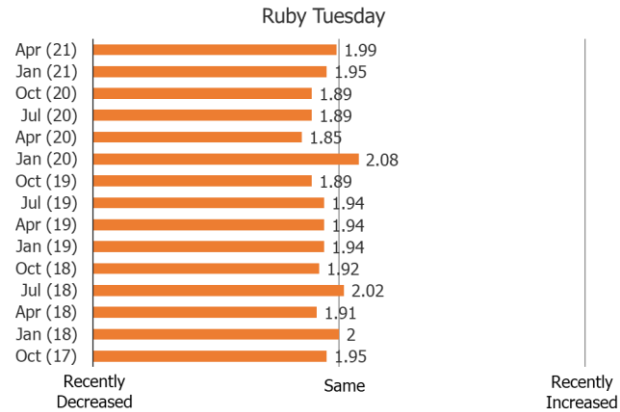
### % Who Uses Regularly or Occasionally



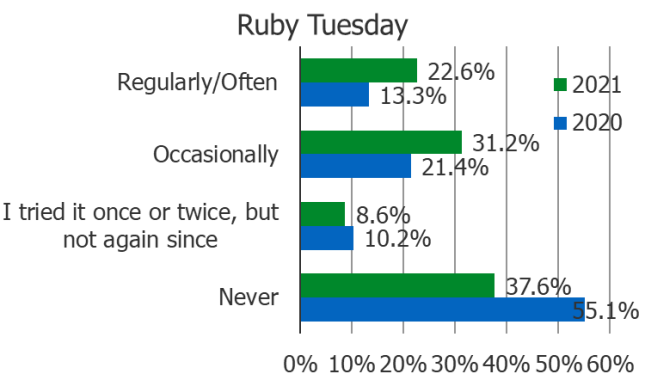
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



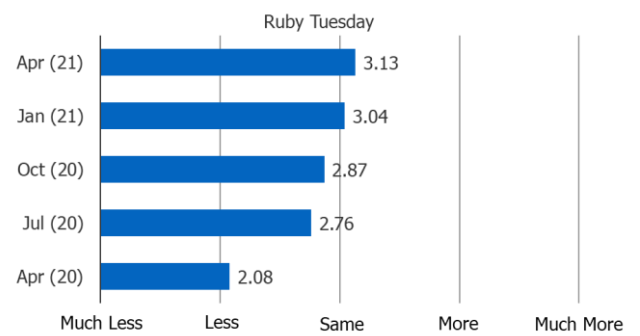
### Orders On Third Party Food Del. Apps



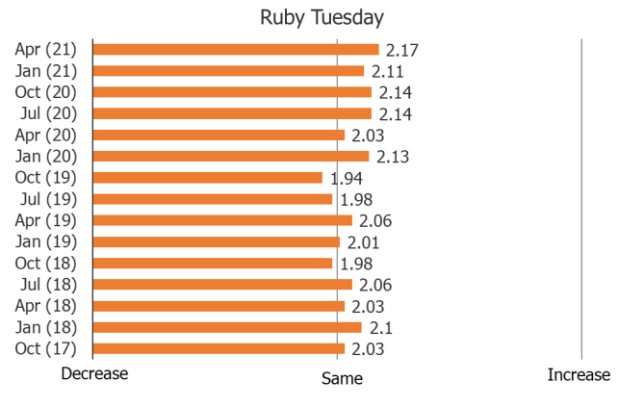
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



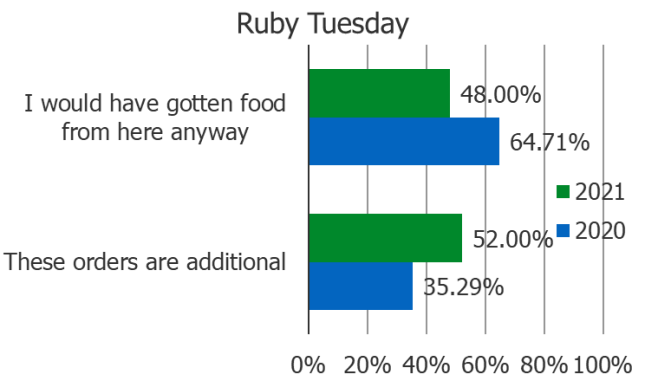
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Posed to Respondents Who Order Restaurant on Third Party Apps.



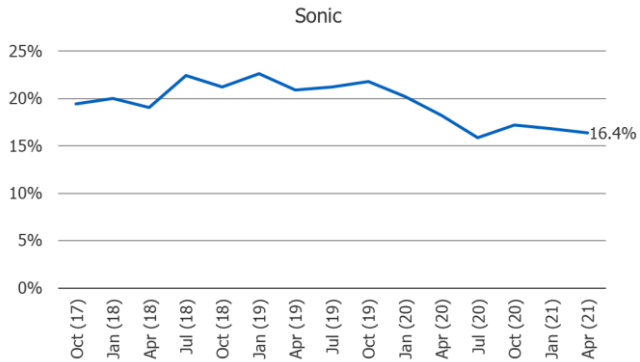
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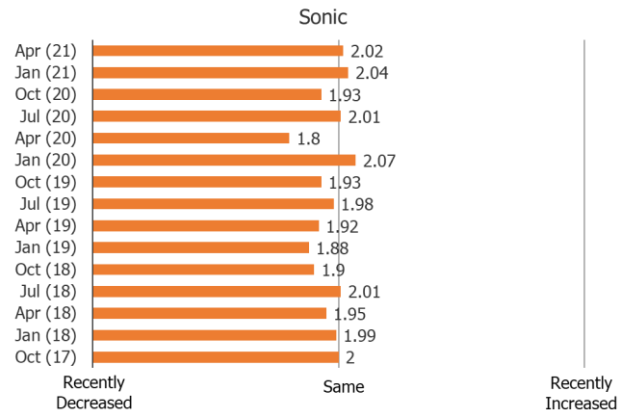
### % Who Uses Regularly or Occasionally



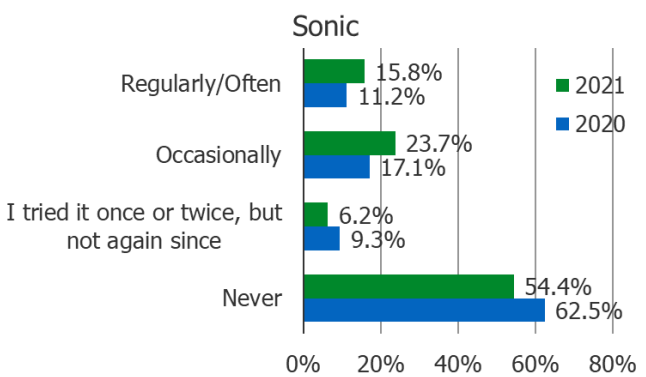
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



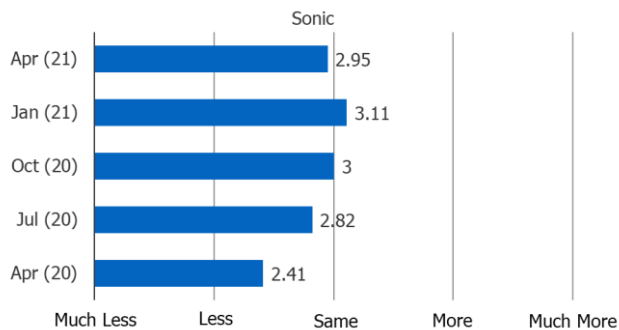
### Orders On Third Party Food Del. Apps



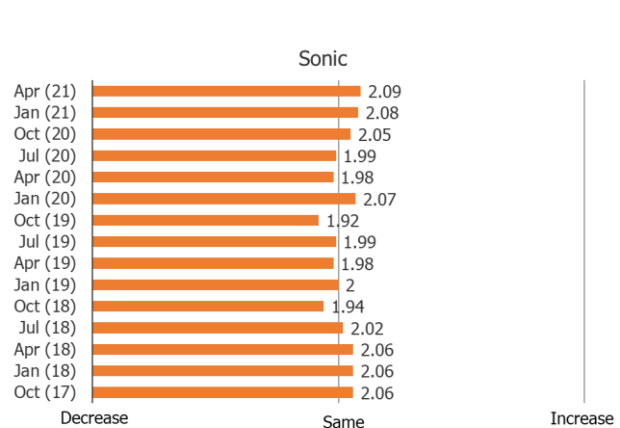
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



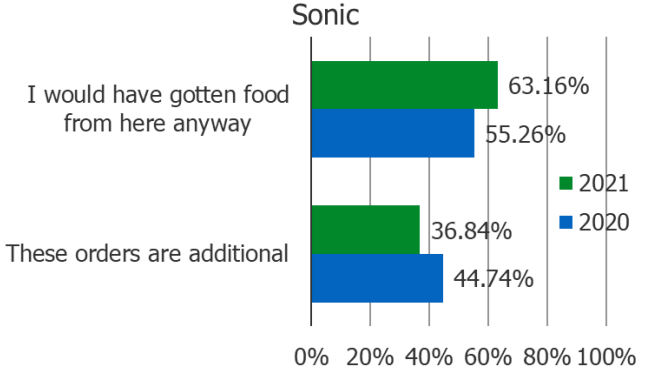
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



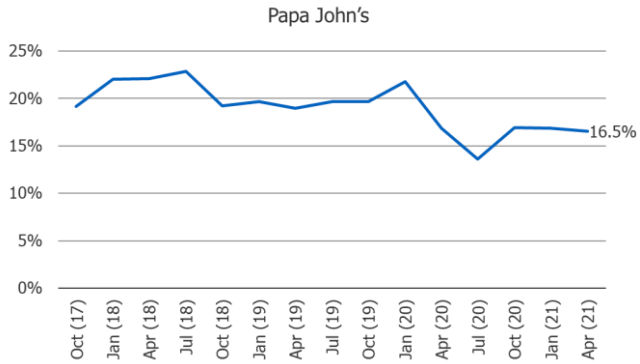
### Are Orders Additional or Replacement



Posed to all respondents.



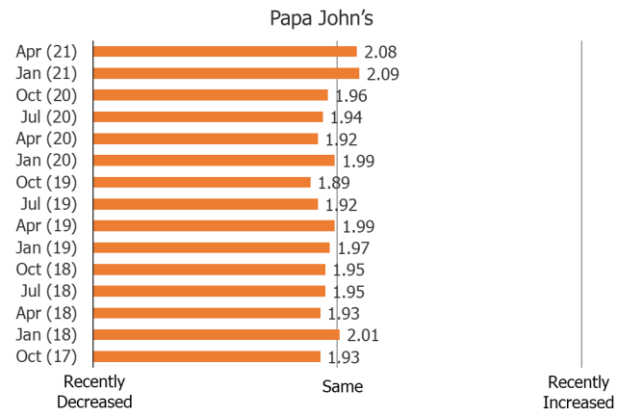
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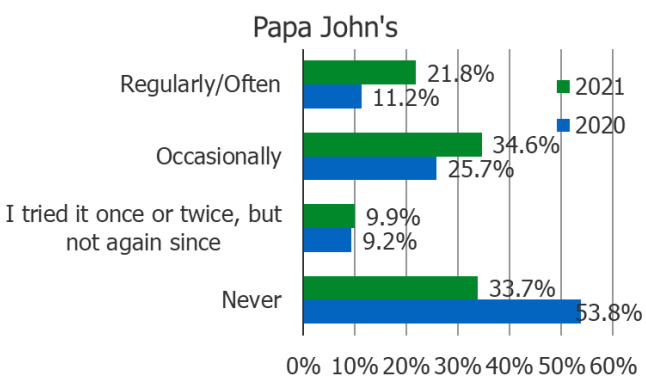
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### Recent Usage



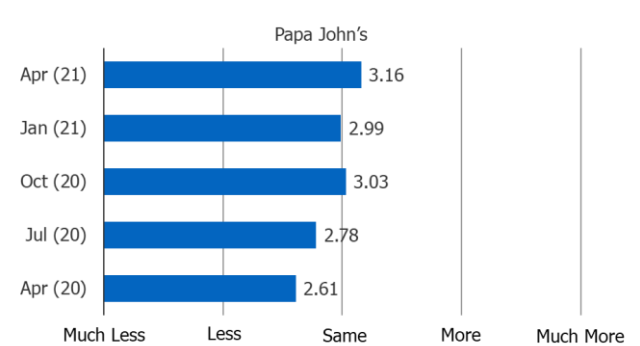
### Orders On Third Party Food Del. Apps



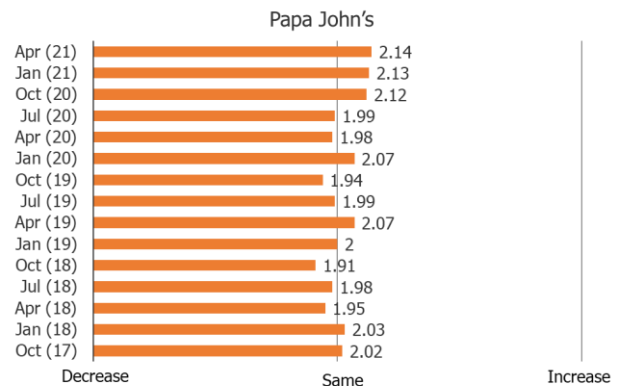
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



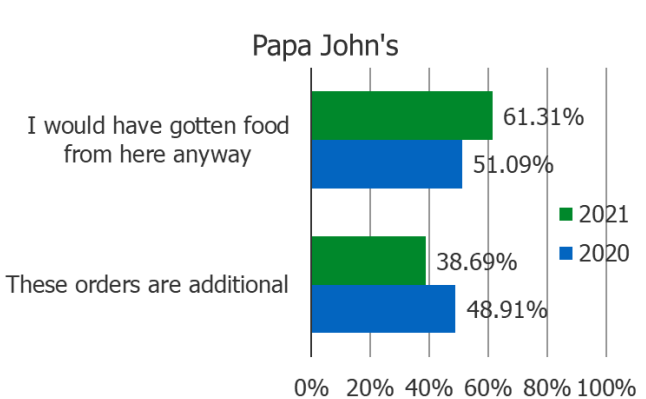
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



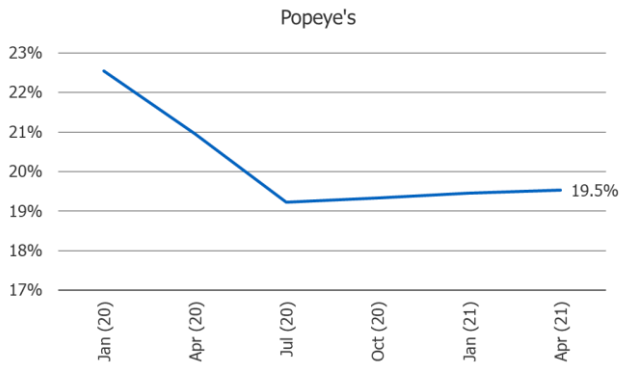
### Are Orders Additional or Replacement



Posed to all respondents.



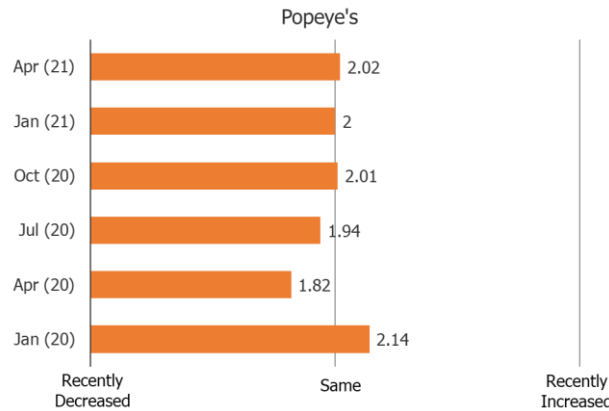
### % Who Uses Regularly or Occasionally



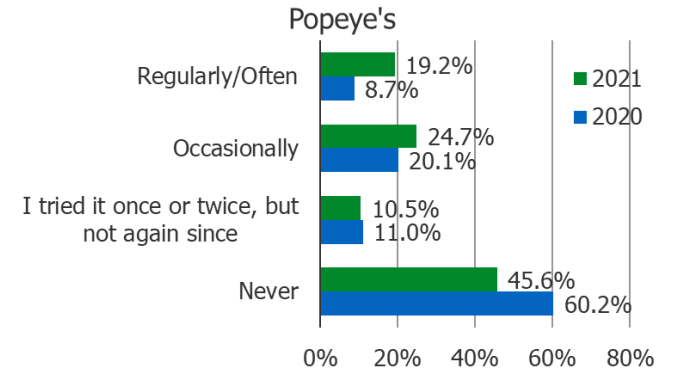
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Recent Usage



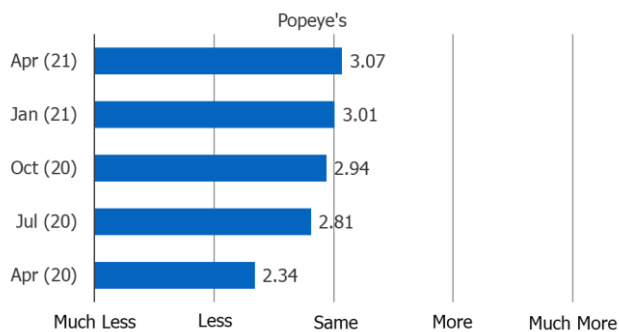
### Orders On Third Party Food Del. Apps



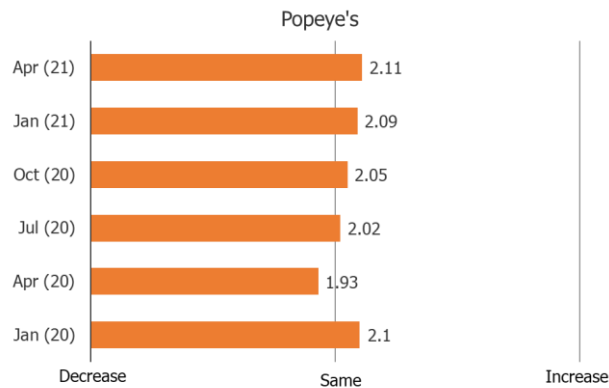
Posed to Respondents Who Use Restaurant Regularly or Occasionally.



### Using More or Less Due To COVID



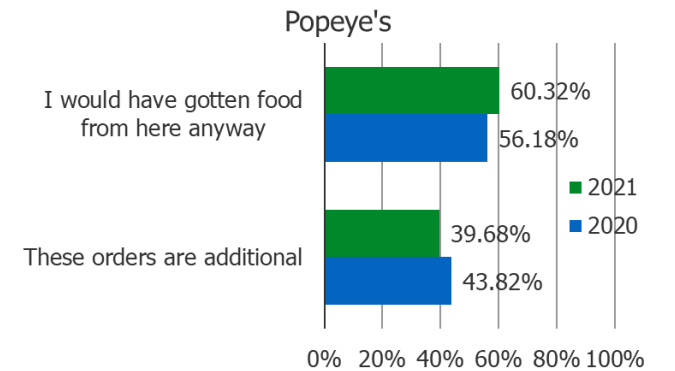
### Expected Usage



Posed to Respondents Who Order Restaurant on Third Party Apps.



### Are Orders Additional or Replacement



### 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%



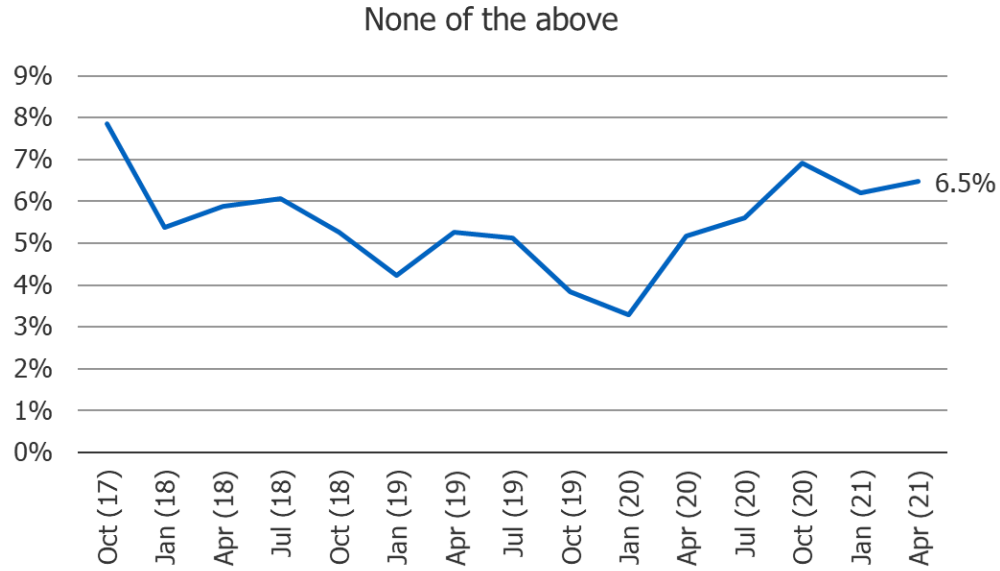
## II

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### Overall Casual Dining Trends

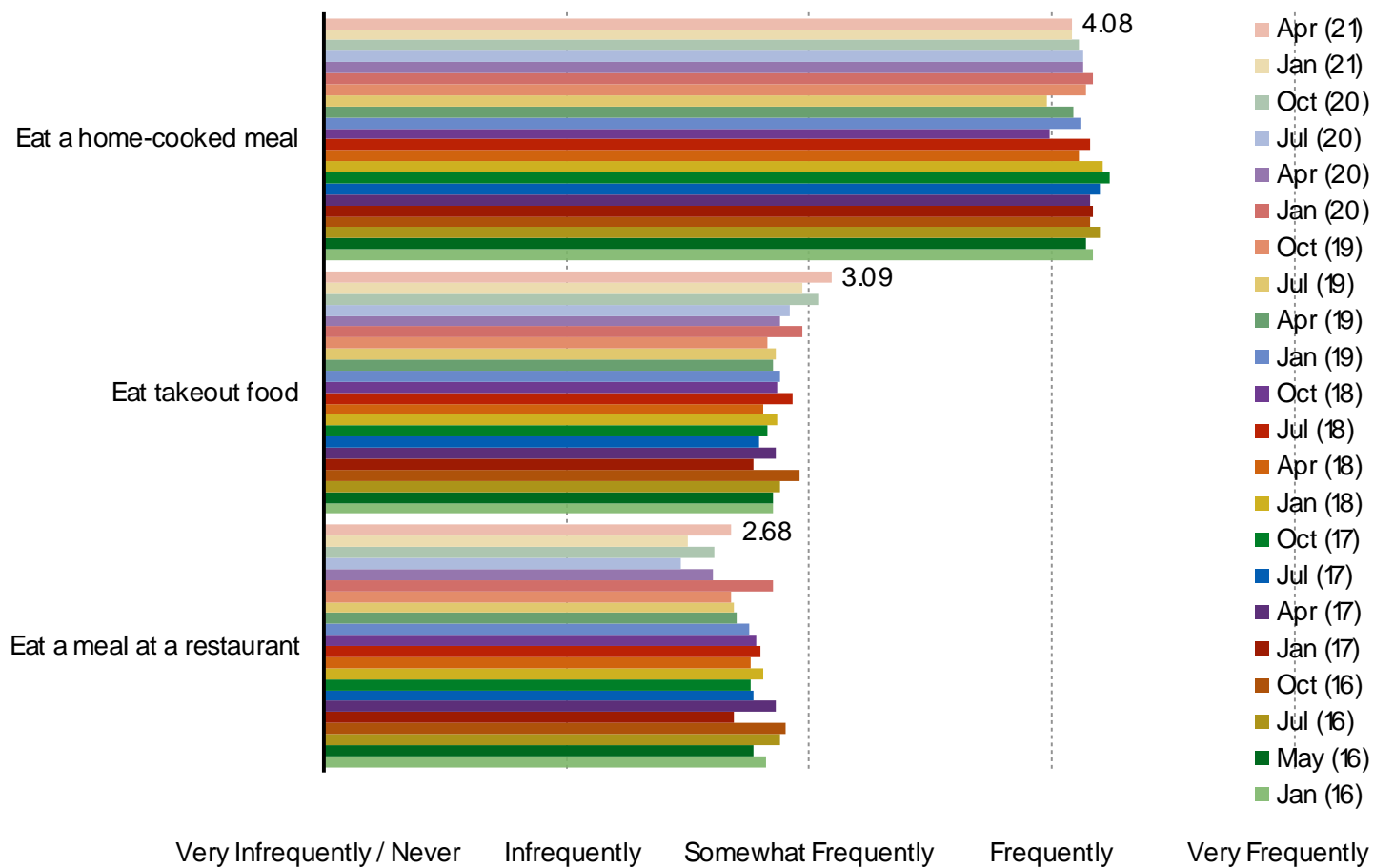
## % of respondents who replied “none of the above” when we asked which of the following restaurants they use regularly or occasionally.

*Posed to all respondents.*



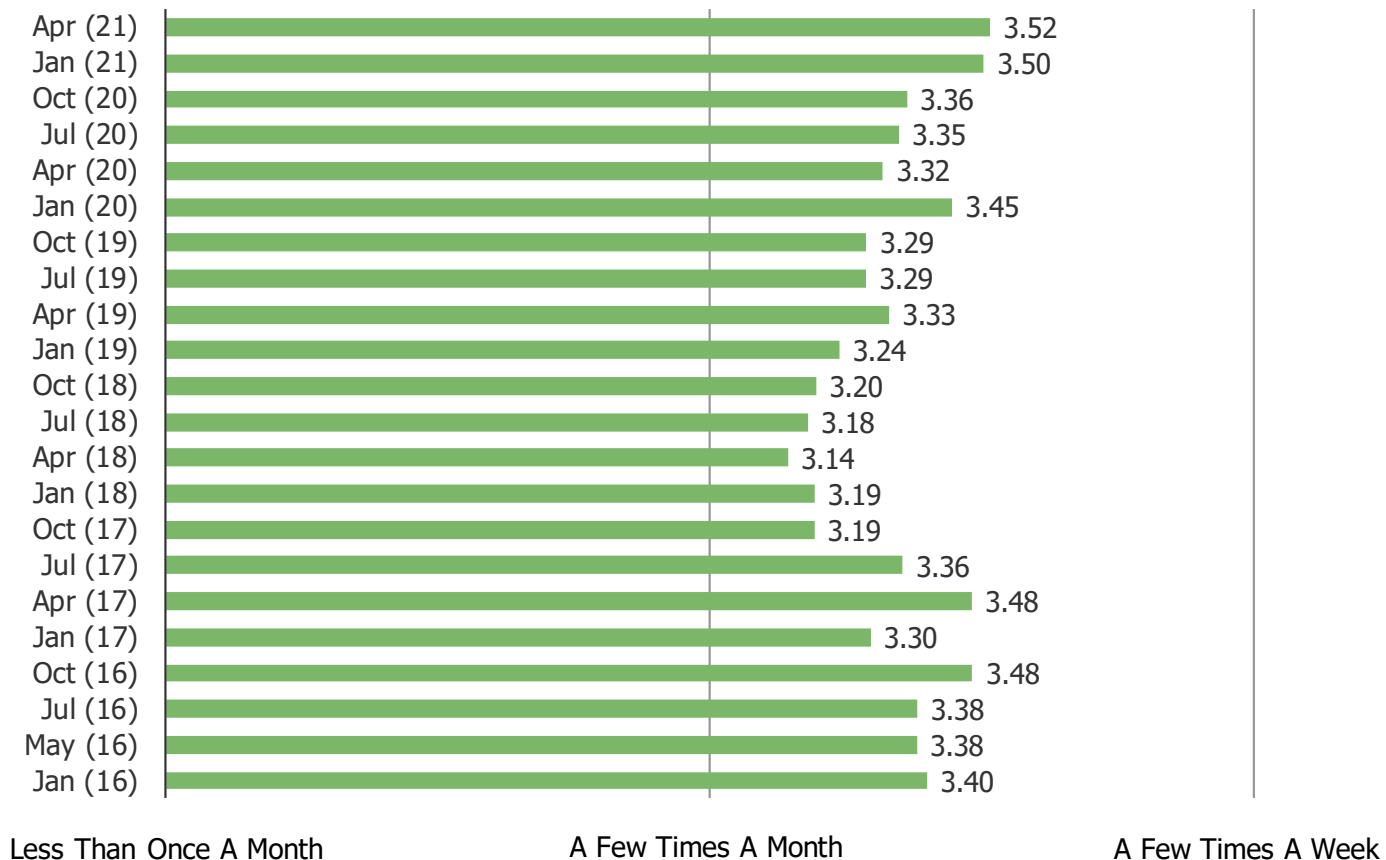
### How often do you do the following?

*Posed to all respondents.*



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

*Posed to all respondents.*



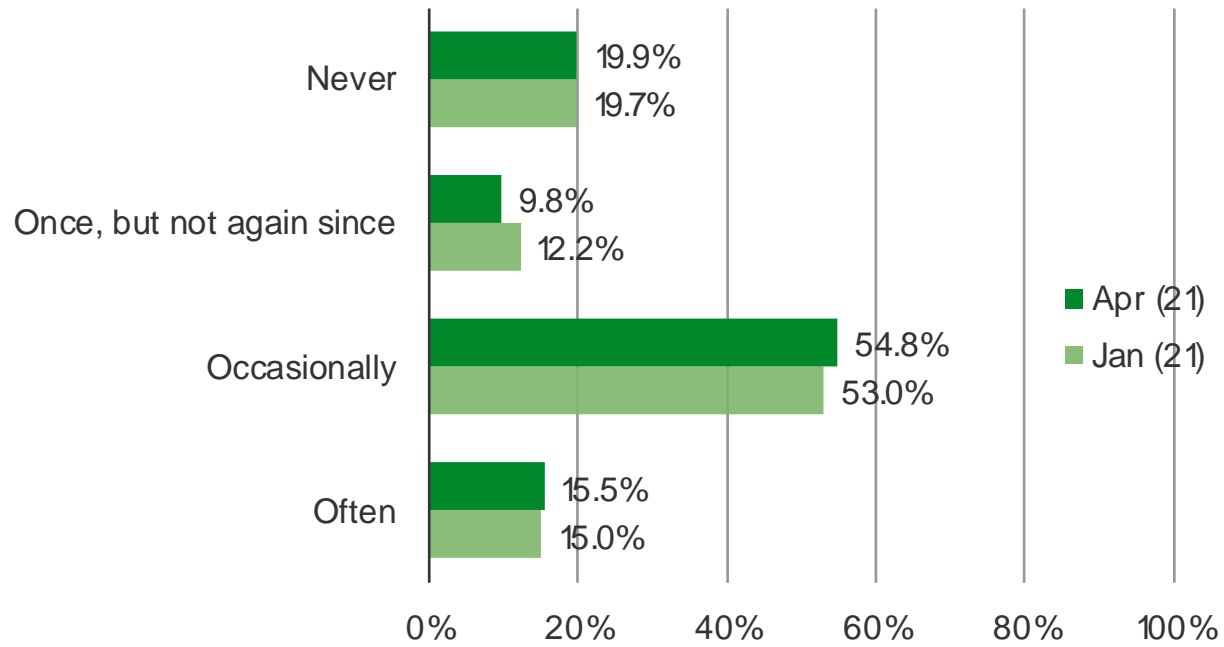
# III

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## Fried Chicken Sandwiches

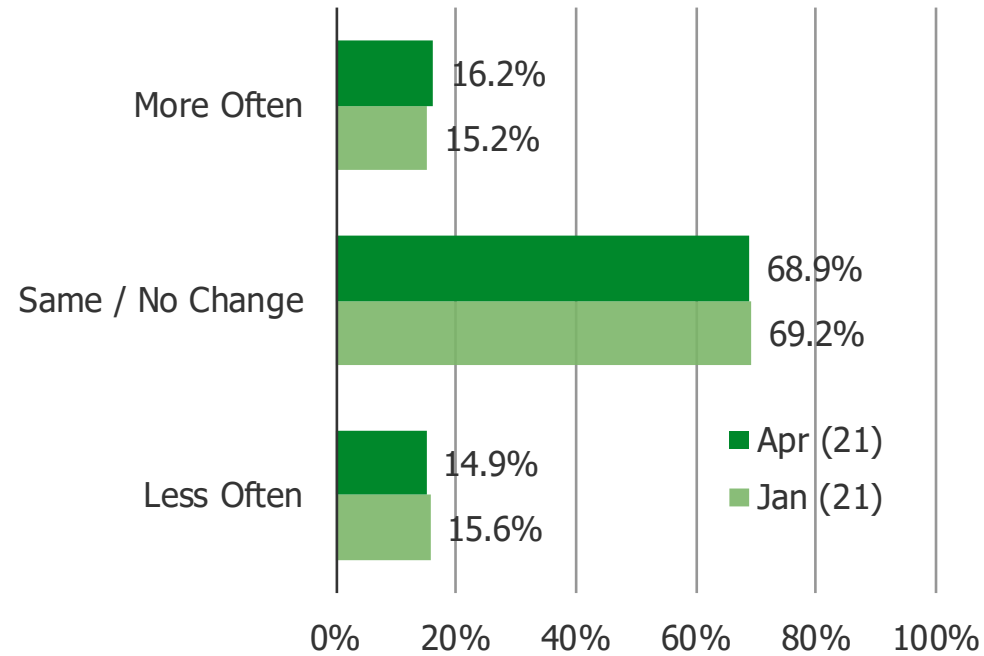
### How often do you eat fried chicken sandwiches?

*Posed to all respondents.*



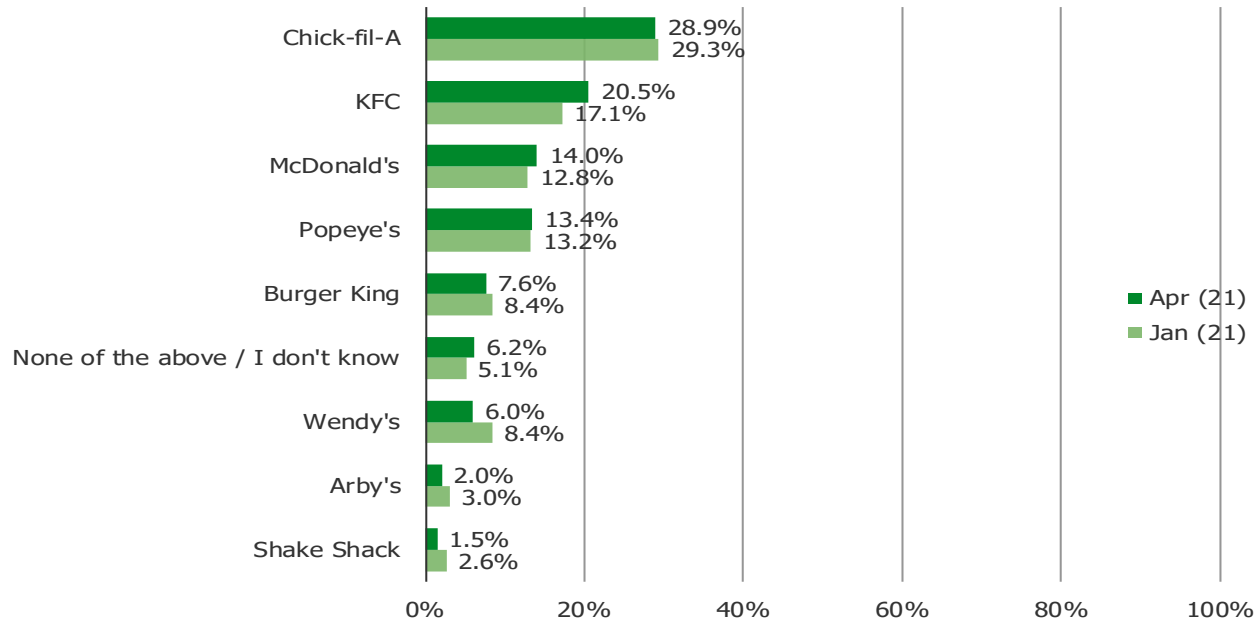
### Are you changing how often you eat fried chicken sandwiches?

*Posed to all respondents.*



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

*Posed to all respondents.*





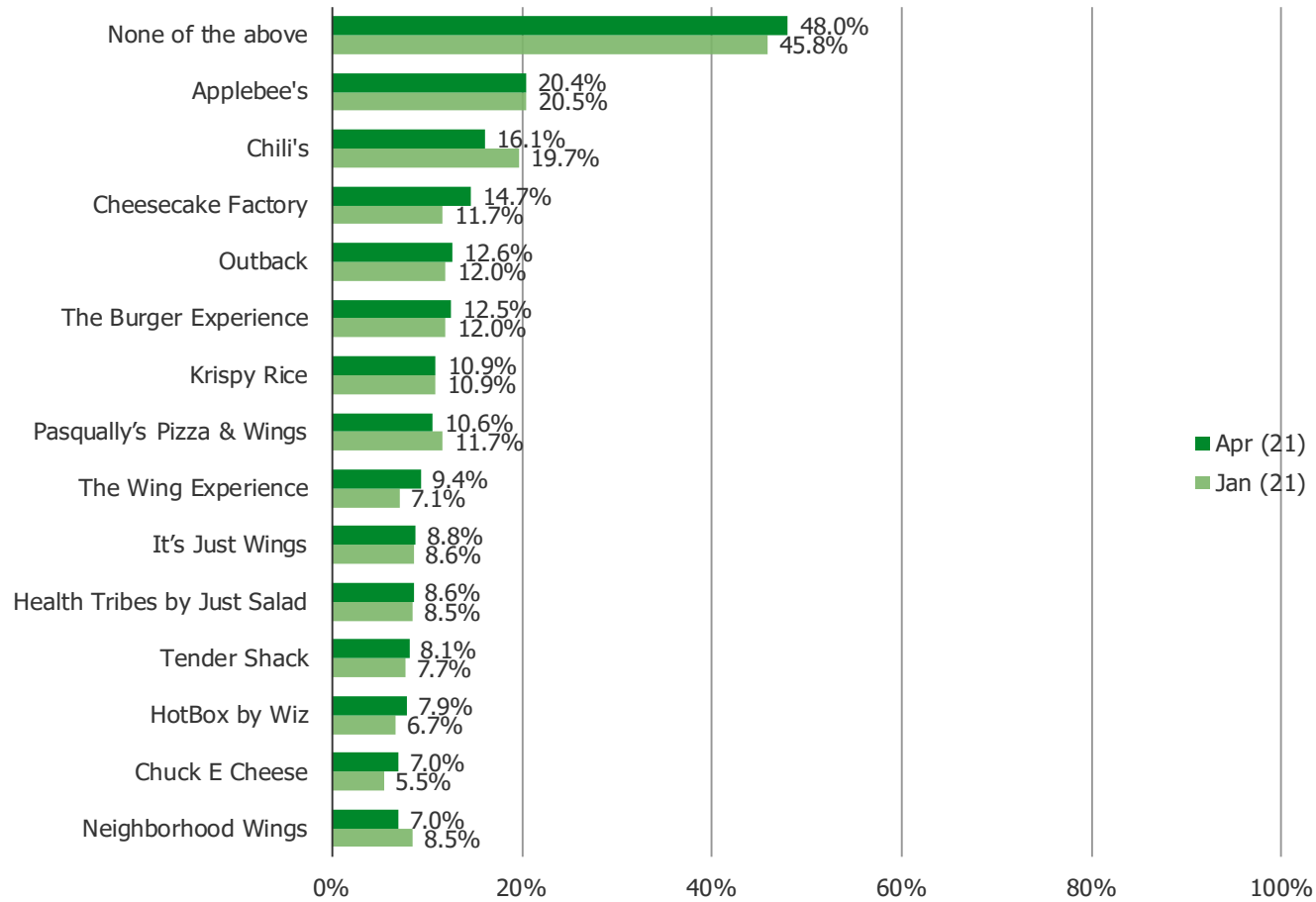
# IV

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## Ghost Kitchens

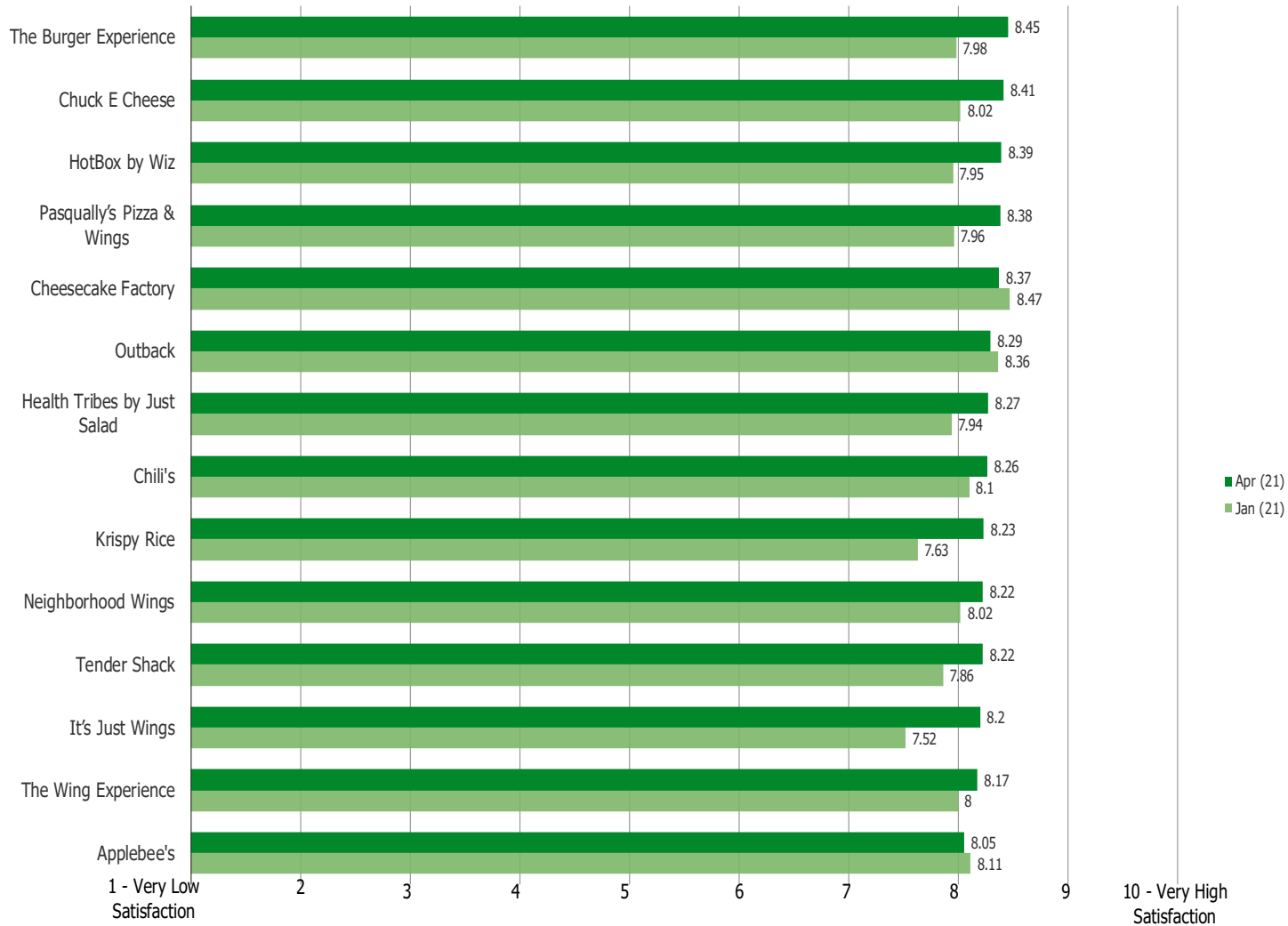
## Have you ordered from any of the following on food delivery apps that you use?

*Posed to respondents who use food delivery apps.*



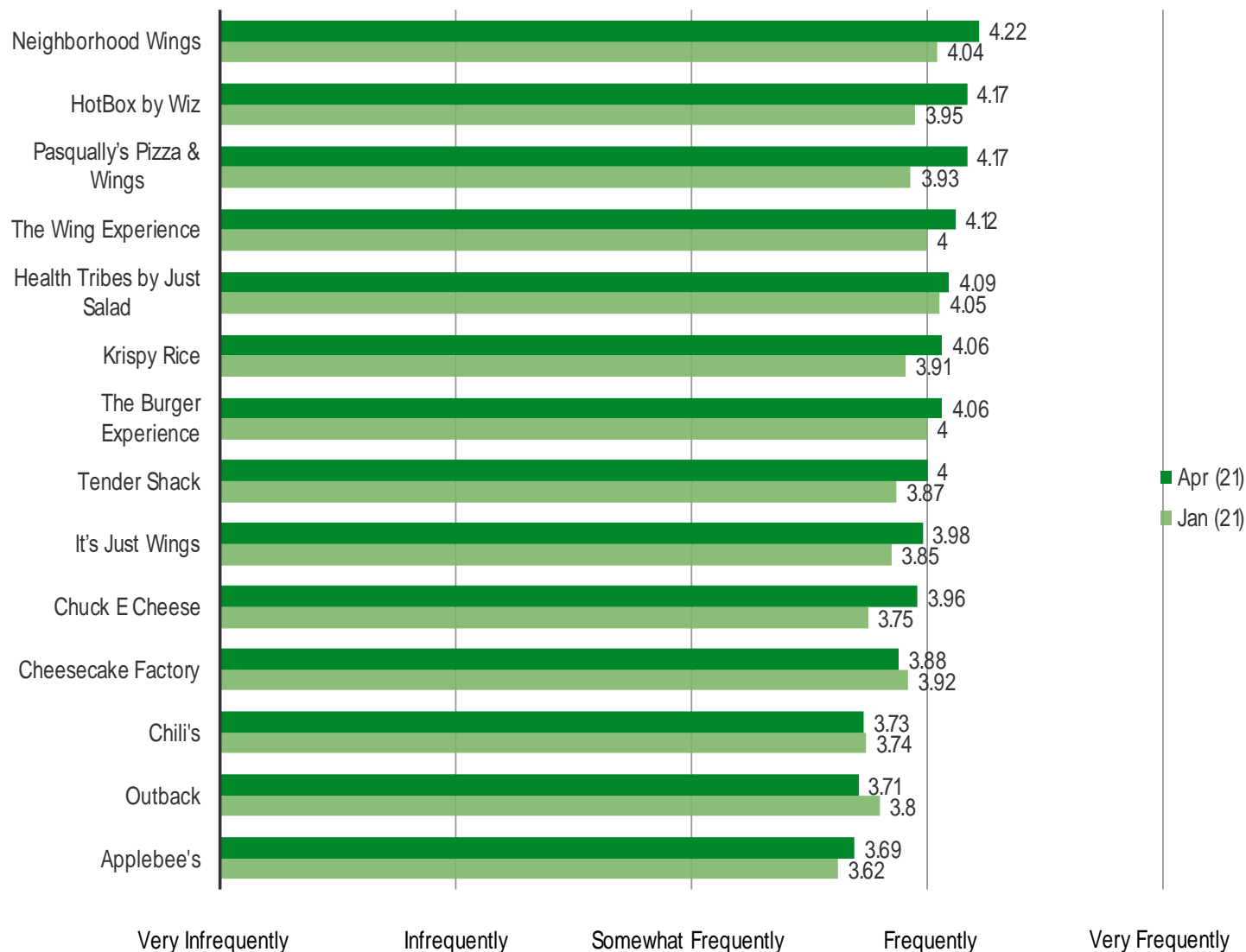
### How satisfied were you with your most recent order from the following:

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



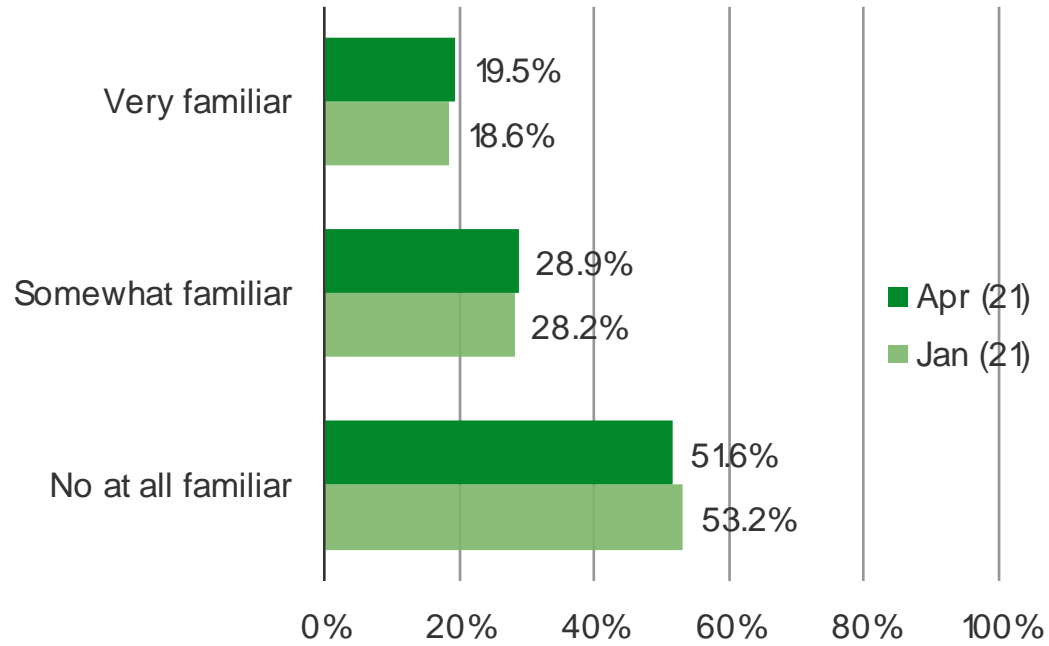
### How often do you expect to order again from the following going forward?

*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”?

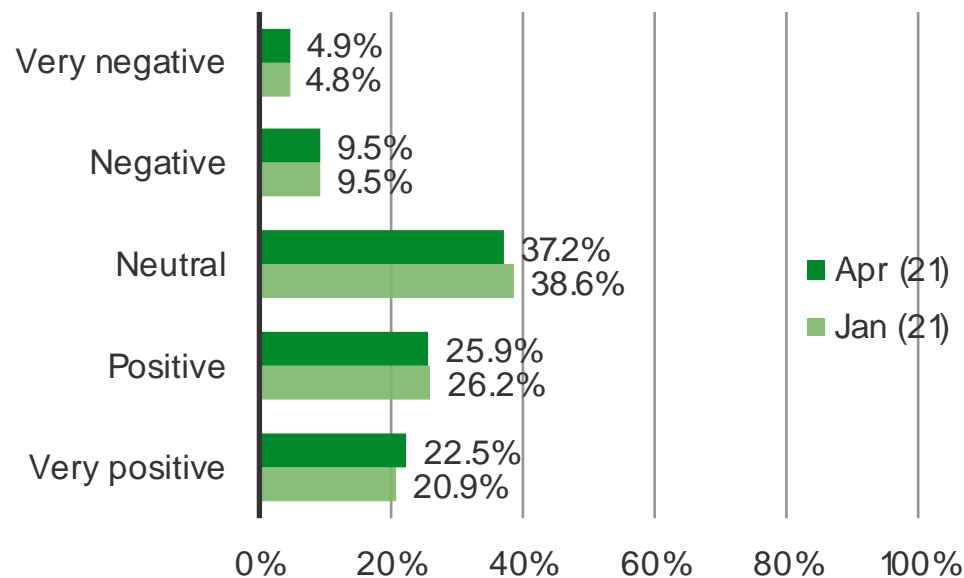
*Posed to respondents who use food delivery apps.*



### 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.*

