Chain Full-Service Restaurants in the U.S.

Description: Driven by aggressive menu innovation, value-driven price point strategies, positive momentum from macroeconomic drivers, and a brighter consumer outlook, full-service restaurant sales will increase 3.4% in 2013.

The recovery is bypassing more “middle class” casual chains, such as Olive Garden, Red Lobster and Chili's. Thanks in part to value pricing and aggressive menu innovation, same-store sales performance at these types of destinations has at least been mixed. Many family restaurant chains, which rely disproportionately on lower-to-middle-income consumers, remain vulnerable to price sensitivity and reduced guest traffic. However, 2013 sales trends suggest building momentum, which could result in sales above our current expectations.

Foodservice Landscape in the U.S.: Chain Full-Service Restaurants can assist industry participants in understanding industry and consumer trends shaping this highly competitive environment, focusing on the family and casual restaurant segments.

Key content includes:

- Studying the degree to which 17 different factors influence consumers’ decisions to select a restaurant for a special dinner with friends, family or colleagues and which are the most important factors in that decision, with accompanying demographic analysis and industry responses/examples.

- Provides up-to-date guest traffic analysis for family restaurants and casual restaurants by demographic, with daypart and chain vs. independent share; and 2009-2013 HH income trends by restaurant brand.

- Full-service restaurant menu trending, focusing on menu item penetration by restaurant segment, including analysis of menu terms relating to freshness & authenticity, top proteins, preparation methods, and beverages. Analysis is supported by a wealth of examples.

- Health and wellness trending, including calorie count trends and impact; healthy menu claim trends; clean food trends; kids’ menu health; and healthful restaurant concepts to watch. We also present analysis of two consumer groups who hold divergent views regarding the importance of nutritional value, regular exercise, healthy diet and weight management. We gauge their restaurant, health and diet preferences, and the relationship to their restaurant brand choices.

- Assessing family and casual restaurant visitors' Facebook use by restaurant brand; and family and casual restaurant usage by mobile phone usage segmentation groups.

- Studying the impact of macro-economic drivers on full-service restaurant industry growth, including an economic forecast through 2014, with supporting macroeconomic analysis; the effect of HH income (with added emphasis) and employment trends; and the effect of consumer and commodity price trends; with price trends and forecasts.


The report also provides analysis of leading restaurant brands operating in the family and casual restaurant segments: family, casual bar & grill, and casual non-bar & grill (distinguished by major cuisine). For each brand, we assess competitive differentiation; growth strategy; menu development and trending; consumer food lifestyle consumer segmentation analysis; guest traffic trending, by demographic; and sales performance and outlook.

Brands analyzed, by segment, include:

- Steak 'n Shake
- Applebee’s, Buffalo Wild Wings, The Cheesecake Factory and Chili’s
- California Pizza Kitchen (pizza); Mimi’s Café (French), Olive Garden (Italian); Outback Steakhouse (steakhouse); P.F. Chang’s (Asian); and Red Lobster (seafood)

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