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)

Contents:

I. Executive Summary
II. Report Scope
III. Share of stomach: full-service restaurant sales analysis
   Sales context
   - Full-service restaurant macroeconomic analysis
     The big picture
     Effect of HH income and employment trends on full-service restaurants
     Effect of consumer and commodity price trends on full-service restaurants
   - Full-service restaurant guest traffic trends
     Family restaurants
     Casual restaurants
   - Full-service restaurant menu trends
     Fresh and authentic marketing claim trends
     Preparation method trends
     Protein trends
     Beverage trends
   - Full-service restaurant health & wellness trends
     Kids
     Claims gaining and losing momentum
     Food Fit consumers versus Not Food Fit consumers
   - Full-service restaurant mobile & social media trends
   - Special dinner restaurant choice influencers
     Healthfulness
     Salad/veggies/fruit/sharing
     Bundled pricing/non-traditional hours
     Specialty cocktails and craft beer
   - Leading family restaurant chains
   - Leading casual bar & grill restaurant chains
   - Leading Casual non bar & grill restaurant chains

Chapter 1: Share of Stomach: Full-Service Restaurant Sales Analysis

- Market size and forecast
  Graph 1-1: Restaurant Sales, 2007-2015
  Graph 1-2: Restaurant Performance Index, 2007-2015
  - Restaurant Performance Index trending positive
  Graph 1-3: Restaurant Performance Index, 2007-2013
  - Same-store sales and guest traffic trends
  Graph 1-4: Restaurant Industry Same-Store Sales and Customer Traffic Trends, 2007-2013
  - Guest traffic trends
    The National Restaurant Association's take
    NPD Group's CREST point of view
  Table 1-1: Restaurant Industry Guest Traffic Share and Guest Traffic Growth by Restaurant Segment, 2011-2013
  - Unit growth
  - Same-store sales trends by brand and restaurant segment
    Reading the graphs
  - Family restaurant performance & outlook: trending positive
    Graph 1-5: Family/Midscale Restaurant Annual Same-Store Sales Index, 2007-2012
  - Casual bar & grill restaurants
    Graph 1-6: Casual Bar & Grill Restaurant Annual Same-Store Sales Index, 2007-2012
  - Casual non-bar & grill restaurants
    Graph 1-7: Casual Non Bar & Grill Annual Same-Store Sales Index, 2007-2012
  - Food for thought: consider the un-chain
    Does reimaging miss the point?
  - Consumer full-service restaurant spending trends
  - Food at home versus food away from home
    Food at home spending accelerates
Table 1-2: HH Income & Expenditures, Food, Food at Home, Food Away from Home: 2007-2011 Growth
Table 1-3: HH Income & Expenditures, Food, Food at Home, Food Away from Home: 2007-2011 Share
- Consumer restaurant spending trends
  Full-service restaurant share of spend decreases
Table 1-4: Consumer Expenditures on Limited-Service and Full-Service Meals and Drinks: 2007-2011 Growth
Table 1-5: Consumer Expenditures on Limited-Service and Full-Service Meals and Drinks: 2007-2011 Share
- Full-service restaurant spending trends
  Table 1-6: Consumer Expenditures on Full-Service Restaurant Meals, Non-Alcoholic Drinks & Alcoholic Drinks, 2007-2011
  Alcoholic drinks
  Table 1-7: Consumer Expenditures on Full-Service Restaurant Alcoholic Drinks: By Type of Alcohol, 2007-2011
  - Full-service restaurant spending trends, by HH Income
    Graph 1-8: Household Number/Share & Household Full-Service Restaurant Spend/Share by HH Income, 2007 vs. 2011
  Table 1-8: Number of Households & Household Full-Service Restaurant Spending by HH Income, 2007 vs. 2011
  - Full-service restaurant spending trends: day part analysis
  Table 1-9: Consumer Expenditures on Full-Service Meals and Non-Alcoholic Drinks by Daypart, 2007-2011
  - Lunch spend trending by HH income
    Graph 1-9: Household Number/Share & Household Limited-Service Restaurant Lunch Spend/Share by HH Income, 2007 vs. 2011
  Table 1-10: Number of Households & Household Full-Service Restaurant Lunch Spending by HH Income: 2007 vs. 2011
  - Dinner spend trending by HH income
    Graph 1-10: Household Number/Share & Household Full-Service Restaurant Dinner Spend/Share by HH Income, 2007 vs. 2011
  Table 1-11: Number of Households & Household Full-Service Restaurant Dinner Spending by HH Income, 2007 vs. 2011

Chapter 2: Full-Service Restaurant Macroeconomic Analysis
- Summary analysis
  - The Big Picture: Moderate economic growth
  - Continued gradual rates of improvement expected
    Graph 2-1: Unemployment, GDP & Inflation Forecast, 2013-2015
  - Supported by consumer confidence and employment gains
    Graph 2-2: Monthly Unemployment Rate & Consumer Confidence, 2007-2013
  - Supported by wealth and debt trends
  - Household wealth continues to rebound
    Wealth bedrocks follow two different paths
    Stock market doubles in value
    Home prices remain depressed but gains noted
    Graph 2-3: Wealth Effect: Wilshire 5000 and Case-Shiller Index, 2007-2013
    And households see almost 40% gain in real estate value
    Graph 2-4: Wealth Effect: Household Net Worth and Mortgage Equity, 2007-2013
  - Improving consumer debt picture: total consumer debt down by 12%
    Graph 2-5: Consumer Debt Balance and Its Composition, Q2 2006 - Q2 2013
    Skyrocketing student loan debt; lower credit card and mortgage debt
    Table 2-1: Consumer Debt Balance, by Type: Amounts, Share & Year-Over-Year Comparisons, Q2 2007 - Q2 2013
  - Influence of HH income trends on full-service restaurants
    - Economic recovery bypasses lower-income restaurant consumer
    - $150K+ income household growth explodes
    - Middle class shrinks and low-income groups rise
    Table 2-2: HH Income Segment Comparison by Number of Households & Percentage Change, 2009 vs. 2013
    Additional context
    Graph 2-6: HH Income Trends, by Income Segment: Number of Households & Percentage Share, July 2006 - July 2013
    Table 2-3: Leading Family Restaurant Brands: 2013 Usage Penetration & Usage Share by HH Income: 2011-12 Sales Growth
Table 2-4: Leading Casual Restaurant Brands: Usage Penetration & Usage Share by HH Income: 2011-12

Sales Growth
- Influence of employment trends on full-service restaurants
- Rise in the unemployment rate results in lower restaurant engagement
- Too many part-time jobs, not enough full-time jobs
- Reliance on value promotions

Graph 2-7: Full-Time, Part-Time & Total Employment, January 2007 - July 2013

Table 2-5: Full-Time, Part-Time & Total Employment: Number, Share & Year-Over-Year Comparisons: July 2007 - July 2013
- Demographic trouble spots persist

Trouble areas
Table 2-6: National Employment Rate by Demographic with Year-Over-Year Comparisons, July 2007 - July 2013

Food price outlook
Graph 2-8: Food at Home vs. Food away from Home Price Trends, 2007-2013

Food at home prices grow at meager rate
Graph 2-9: Food at Home & Alcoholic Beverages at Home, 2007-2013

Full-service restaurant price increases growing faster than overall inflation rate
Graph 2-10: Food & Alcoholic Beverages Away from Home, Full-Service & Limited-Service Meal/Snack Price Trends, 2007-2013
- Wholesale food and beverage price trends

Where we've been
Table 2-7: Producer Price Index by Food and Beverage Type with Year-Over-Year Comparisons, 2007-2013

Where we're going

Steakhouses to feel the pinch?
Table 2-8: Livestock, Dairy, and Poultry Price Outlook, 2012-2014

Chapter 3: Full-Service Restaurant Industry Guest Traffic Trends

- Summary analysis
Family restaurants
Casual restaurants
- Family restaurant guest traffic volume
- Daypart and chain/independent status
Graph 3-1: Family Restaurant Guest Traffic Share by Daypart and Chain/Independent Status, 2013

- Key demographics
Table 3-1: Family Restaurant Guest Traffic Volume Comparisons by Demographic, 2013
- Guest traffic volume: daypart and chain/independent status, by demographic
Table 3-2: Family Restaurant Guest Traffic Volume Comparisons by Daypart and Chain Status by Demographic, 2013
- Guest traffic trending negative
Denny's bucks the trend
Table 3-3: Leading Family Restaurant Chain Monthly & High-Frequency Use, 2009-2013

- Guest traffic growth trends by HH income

Leading family restaurant brands skew to lower-income consumer usage
In some cases, higher proportion of seats filled by people with thinner wallets
Table 3-4: Leading Family Restaurant Chains: 2013 Usage Share by HH Income & 2009-2013
HH Income Share Trends
- Casual restaurant guest traffic volume
Daypart and chain/independent status
Graph 3-2: Casual Restaurant Guest Traffic Share by Daypart and Chain/Independent Status, 2013

- Key demographics
Table 3-5: Casual Restaurant Guest Traffic Volume Comparisons by Demographic, 2013
Guest traffic volume: daypart and chain/independent status, by demographic
Table 3-6: Casual Restaurant Guest Traffic Volume Comparisons by Daypart and Chain Status by Demographic, 2013
- Guest traffic trending a mixed bag
Table 3-7: Leading Casual Restaurant Chain Monthly & High-Frequency Use, 2009-2013

Guest traffic growth trends: Casual bar & grill restaurant chains
The Cheesecake Factory helps set the pace
Applebee's, Chili's and the high-frequency customer
Table 3-8: Leading Casual Bar & Grill Restaurant Chain Monthly & High-Frequency Use Trends, 2009-2013
- Guest traffic growth trends: Casual non-bar & grill restaurant chains
- Table 3-9: Leading Casual Non-Bar & Grill Restaurant Chain Monthly & High-Frequency Use Trends, 2009-2013
  - Guest traffic growth trends by HH income
  - Not immune to down drift in HH income trends
  - California Pizza Kitchen bucks the trend

- Table 3-10: Leading Family Restaurant Chains: 2013 Usage Share by HH Income & 2009-2013 HH Income Share Trends

Chapter 4: Full-Service Restaurant Menu Trends

- Summary analysis
  - Fresh and authentic marketing claim trends
  - Preparation method trends
  - Protein trends
  - Beverage trends
- Menu terms
  - Fresh is a ubiquitous term on restaurant menus
  - Give credibility to freshness via authentic claims
  - Table 4-1: Fresh & Authentic Menu Terms: Penetration & Incidence by Restaurant Segment, 2013
  - More family restaurants using the term original
  - Table 4-2: Fresh & Authentic Menu Terms: Penetration & Incidence, Family/Midscale Restaurants, 2009 vs. 2013
  - Casual restaurants are increasingly using “house” menu terms
  - Table 4-3: Fresh & Authentic Menu Terms: Penetration & Incidence, Casual Restaurants, 2009 vs. 2013

- Preparation methods
  - Family/midscale operators continue to use comfort food preparation methods
  - Table 4-4: Family/Midscale Restaurant Preparation Method Penetration, 2009 vs. 2013
  - Casual operators leverage unique preparations to communicate quality
  - Table 4-5: Casual Restaurant Preparation Method Penetration, 2009 vs. 2013

- Menu items
  - Rotisserie and half chicken entrées gaining traction
  - Table 4-6: Top Chicken Entrees, Family Midscale & Casual Restaurants, 2009 vs. 2013
  - Short rib beef entrées are a hot trend
  - Table 4-7: Top Beef Entrees, Family Midscale & Casual Restaurants, 2009 vs. 2013

- Beverages
  - Tea, coffee and juice offer beverage opportunity
  - Table 4-8: Nonalcoholic Beverage Penetration & Beverage Item Share, Family/Midscale Restaurants, 2013
  - Alcoholic beverage menu allows for point of differentiation
  - Table 4-9: Alcoholic Beverage Penetration & Beverage Item Share, Casual Restaurants, 2013

Chapter 5: Full-Service Restaurant Health & Wellness Trends

- Summary analysis
  - Kids
    - Claims gaining and losing momentum
    - Food Fit consumers versus Not Food Fit consumers
    - Health and wellness trends impact restaurant menus
    - Menu transparency mandated to help Americans make better choices
    - Technology assistance
    - Which will win—knowledge or desire?
  - Health on the kids' menu
    - Kids' health a top trend
  - Healthy menu claims: Overview
    - Gluten free—hot trend on full-service menus
    - Clean food movement—gaining traction

- Healthy menu claims: Family/midscale restaurants
  - Table 5-1: Family/Midscale Restaurant Healthy Menu Claims, 2009, 2011 & 2013
  - Family/midscale segment comparison
  - Table 5-2: Family/Midscale Restaurant Healthy Menu Claims: American, Chinese & Pizza Segments, 2013
  - Concepts to watch

- Healthy menu claims: Casual restaurants
  - Table 5-3: Casual Restaurant Healthy Menu Claims, 2009, 2011 & 2013
  - Casual segment comparison
Table 5-4: 2013 Casual Restaurant Healthy Menu Claims: American, Italian & Steakhouse Segments

Concepts to watch
- Food Fit Consumers versus Non-Food Fit Consumers

Food Fit
Not Food Fit

Table 5-5: Food Fit and Not Food Fit Consumer Groups: Demographic Analysis

Food Fit members watch what they eat

Table 5-6: Food Fit and Not Food Fit Consumer Groups: Fast Food, Calories, Nutrition Attitudes

Food Fit members over index in usage of Italian casual restaurants

Table 5-7: Food Fit and Not Food Fit Consumer Groups: Indexed Usage of Full-Service Casual (w/ Bar & Grill, Italian & Steakhouse) & Family Restaurants

Most family restaurants attract Not Food Fit consumers

Table 5-8: Food Fit and Not Food Fit Consumer Groups: Percentage and Indexed Usage of Family Restaurant Brands

Food Fit users favor casual restaurants with BFY menus/healthy brand equity

Table 5-9: Food Fit and Not Food Fit Consumer Groups: Percentage and Indexed Usage of Casual Restaurant Brands

Food Fit users two times more likely to visit CPK 3+ times per month

Table 5-10: Food Fit & Not Food Fit Consumer Groups: Indexed Use of Selected Casual Restaurant Brands by Usage Frequency

Chapter 6: Full-Service Restaurant Mobile & Social Media Trends

- Summary analysis
- Connecting to restaurant users via social media
  - Facebook usage among adults age 18+
    - Table 6-1: Social Media/Networking Use, Facebook Use in Last 30 Days and 16+ Timesper Month: By Demographic
  - Facebook use by family restaurant brand
    - Table 6-2: Family Restaurant Brand Users: Facebook Use in Last 30 Days and 16+ Times per Month: By Brand
  - Facebook use by casual restaurant brand
    - Table 6-3: Casual Restaurant Brand Users: Facebook Use in Last 30 Days and 16+ Times per Month: By Brand
- Mobile Segmentation Groups
  - Table 6-4: Mobile Segmentation Groups Share by Demographic
  - Mobile segmentation by family restaurant brand
    - Table 6-5: Mobile Segmentation Groups: Use of Family Restaurants by Brand
  - Mobile segmentation by casual restaurant brand
    - Buffalo Wild Wings
    - Outback Tablemates
    - Table 6-6: Mobile Segmentation Groups: Use of Casual Restaurants by Brand

Chapter 7: Special Dinner Restaurant Choice Influencers

- Summary analysis
  - Insights
    - Drilling down, by theme
      - Healthfulness
      - Salad/veggies/fruit/sharing
      - Bundled pricing/non-traditional hours
      - Specialty cocktails and craft beer
- Overview
  - The fresh factor
    - Integrating freshness into the brand
      - Restaurant examples: Chevys Fresh Mex & Whisky Cake
      - Healthy kids meals
    - A hot trend
      - Restaurant examples: Mimi's Café & Red Lobster
    - Price bundling also a driver in restaurant selection
  - Graph 7-1: Special Dinner Restaurant Choice Influencers, Degree of Importance & Average Rank, 2013
  - Graph 7-2: Special Dinner Restaurant Choice Influencers, Average Rank: All Adults vs. Casual Restaurant
Users, 2013

Graph 7-3: Special Dinner Restaurant Choice Influencers, Degree of Importance & Average Rank: Casual Restaurant Users, 2013

- Healthfulness-driven decision influencers
  Graph 7-1: Healthful/Local Food-Driven Special Dinner Restaurant Choice Influencers: By Demographic, 2013
  All-natural and organic are most influential among healthy diners
  Table 7-2: 2013 Healthful/Local Food Special Dinner Restaurant Choice Influencers: By Health/Price Attitude, 2013
  - Salad/veggies/fruit/sharing decision influencers
    Graph 7-3: Salad/Veggies/Fruit/Sharing Special Dinner Restaurant Choice Influencers: By Demographic, 2013
    Flavorful, fresh salads and vegetarians are more important to healthy diners
    Graph 7-4: Salad/Veggies/Fruit/Sharing Special Dinner Restaurant Choice Influencers: By Health/Price Attitude, 2013
  - Bundled pricing/non-traditional hours decision influencers
    Graph 7-5: Special Dinner Restaurant Choice Influencers: Bundled Pricing/Non-Traditional Hours by Demographic, 2013
  - Specialty cocktail and craft beer decision influencers
    Graph 7-6: Special Dinner Restaurant Choice Influencers: Specialty Cocktails & Craft Beer: By Demographic, 2013
    Foodies are far more interested in specialty cocktails and craft beers
    Graph 7-7: Special Dinner Restaurant Choice Influencers: Specialty Cocktails & Craft Beer: By Demographic, 2013

Chapter 8: Full-Service Family Restaurant Brand Analysis

- Steak ’n Shake
  - Competitive differentiation: Full-service with QSR characteristics
  - Growth strategy: Hitting the value-quality nexus
    Menu trends: Breakfast skillets, Mexican fare & chili provide differentiation
  Table 8-1: Top 15 Steak ’n Shake Menu Item Types, w/Family/Midscale Burger Restaurant Penetration Comparison: 2013
  - Consumer food lifestyle segmentation analysis
    Graph 8-1: Steak ’n Shake Usage Frequency Food Segmentation Analysis
  - Guest traffic analysis
    Graph 8-2: 2011-2013 Guest Traffic Usage Frequency Analysis: Steak ’n Shake
  - Sales performance
    Table 8-2: Steak n’ Shake Quarterly, Annual & Cumulative Same-Store Sales, 2009-2013

Chapter 9: Casual Bar & Grill Restaurant Brand Analysis

- Applebee’s
  - Competitive differentiation
  - Growth strategy: Continued brand revitalization
  - Menu trends: Diverse menu with shareable food opportunities
    Bar strength
    Table 9-1: Applebee’s Selected Alcoholic Specialty Drinks
    Shareable
    Table 9-2: Top 15 Applebee’s Menu Item Types by % of Dishes Featuring, with Casual American Restaurant Penetration Comparison, 2013
    Menu development integral to brand’s revitalization process
  - Consumer food lifestyle segmentation analysis
    Graph 9-1: Applebee’s Usage Frequency Food Segmentation Analysis
  - Guest traffic analysis
    Graph 9-2: 2013 Guest Traffic Usage Frequency Analysis: Applebee’s
  - Sales performance
    Table 9-3: Applebee’s Quarterly & YTD Same-Store Sales, 2010-2012
    Table 9-4: Applebee’s Annual Same-Store Sales, System-wide Sales, and Locations, 2010-2012
    - Buffalo Wild Wings
      - Competitive differentiation: Guest experience
      - Growth strategy
      Unit expansion
      Marketing programs that connect with restaurant-goers
- Menu trends: Food and drink that evoke fun
And more
Table 9-5: Top 15 Buffalo Wild Wings Menu Item Types with Casual American Restaurant Penetration Comparison, 2013
- Consumer food lifestyle segmentation analysis
Graph 9-3: Buffalo Wild Wings Usage Frequency Food Segmentation Analysis
- Guest traffic analysis
Graph 9-4: Guest Traffic Usage Frequency Analysis: Buffalo Wild Wings, 2013
- Sales performance
Table 9-6: Buffalo Wild Wings Systemwide, Company & Franchise Restaurant Sales, Units & Same-Store Sales, 2010-2012
- The Cheesecake Factory
- Competitive differentiation: Extensive menu
Table 9-7: Cheesecake Factory “SkinnyLicious” Menu: Selected Items, 2013
- Growth strategy: Refresh the menu
- Menu trends: Appetizers galore
Hitting a wide audience
Table 9-8: Top 15 Cheesecake Factory Menu Item Types with Casual American Restaurant Penetration Comparison, 2013
- Consumer food lifestyle segmentation analysis
Graph 9-5: The Cheesecake Factory Usage Frequency Food Segmentation Analysis
- Guest traffic analysis
Graph 9-6: Guest Traffic Usage Frequency Analysis: The Cheesecake Factory, 2013
- Sales performance
Table 9-9: The Cheesecake Factory Revenue, Same-Store Sales & Units, 2008-2013
- Chili’s
- Competitive differentiation: Value
- Growth strategy: Overhaul of restaurant image and operations
Kitchen upgrades provide menu expansion capabilities
Reimage restaurants
Menu innovation and value propositions
Upgraded restaurant technology and sales-building initiatives
- Menu trends: Combo meals capture large share of Chili’s menu
Table 9-10: Top 15 Chili’s Menu Item Types, with Casual American Restaurant Penetration Comparison, 2013
- Consumer food lifestyle segmentation analysis
Graph 9-7: Chile’s Usage Frequency Food Segmentation Analysis
- Guest traffic analysis
Graph 9-8: Guest Traffic Usage Frequency Analysis: Chili’s, 2013
- Sales performance

Chapter 10: Casual Non-Bar & Grill Restaurant Brand Analysis
- California Pizza Kitchen
- Competitive differentiation: Gourmet pizza and unexpected fare
- Growth strategy: Regain position as pizza authority
- Menu trends: Everything from pizza and pasta to Mexican and more
Table 10-1: Top 15 California Pizza Kitchen Menu Item Types, with Casual Pizza Restaurant Penetration Comparison, 2013
Appetizer differentiation
Table 10-2: California Pizza Kitchen: Selected Appetizers, 2013
- Consumer food lifestyle segmentation analysis
Graph 10-1: California Pizza Kitchen Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 10-2: Guest Traffic Usage Frequency Analysis: California Pizza Kitchen, 2013
- Sales performance
- Mimi’s Café
- Competitive differentiation: French-gourmet
Ambiance
Menu
Fresh and Fit
Value positioning
- Growth strategy: Back to its roots
Broadening alcoholic beverage selection and growing share of off-premise sales
- Enter LeDuff
- Menu trends: Fish has strong representation on Mimi’s menu

Table 10-3: Top 15 Mimi’s Cafe Menu Item Types, by % of Dishes Featuring, with Casual American Restaurant Penetration Comparison, 2013
- Consumer food lifestyle segmentation analysis
- Guest traffic analysis

Graph 10-3: Mimi’s Café Usage Frequency Food Segmentation Analysis

Graph 10-4: Guest Traffic Usage Frequency Analysis: Mimi’s Café, 2013

- Sales performance
- Olive Garden
- Competitive differentiation: Core values and authenticity
- Growth strategy: Elevate brand relevance
- Menu trends: Differentiating menu by dips, and C.O.P. proteins

Table 10-4: Olive Garden: Selected Dips and Soups, 2013
Table 10-5: Top 15 Olive Garden Menu Item Types with Casual Italian Restaurant Penetration Comparison, 2013
- Consumer food lifestyle segmentation analysis
- Guest traffic analysis
- Sales performance

Graph 10-5: Olive Garden Usage Frequency Food Segmentation Analysis

Graph 10-6: Guest Traffic Usage Frequency Analysis: Olive Garden, 2013

- Outback Steakhouse
- Competitive differentiation: No Rules, Just Right
- Weekend lunchtime promotion
- Growth strategy: Leverage limited-time offers
- Menu trends: Highlighting its Aussie culinary point of view

Beverage menu
Food menu

Table 10-7: Top 15 Casual Steakhouse Food Categories by Penetration and Variety, Outback Steakhouse Comparison, 2013
- Consumer food lifestyle segmentation analysis
- Guest traffic analysis
- Sales performance

Table 10-8: Outback Steakhouse Restaurant Sales, Same-Store Sales, & Menu Pricing Trends, 2010-2012
- P.F. Chang’s
- Competitive differentiation: Asian niche
- Happy hour promotion
- Growth strategy: Improve price-value proposition
- Promotional value-driven strategies

Menu innovation

Menu trends: Center-of-plate proteins are prominent
Veggie sides and salad entrées differentiate menu

Table 10-9: Top 15 P.F. Chang’s Menu Item Types, with Casual Chinese Restaurant Penetration Comparison, 2013
- Consumer food lifestyle segmentation analysis
- Guest traffic analysis
- Sales performance

Graph 10-9: P.F. Chang’s Usage Frequency Food Segmentation Analysis

Graph 10-10: Guest Traffic Usage Frequency Analysis: P.F. Chang’s, 2013

- Red Lobster
- Competitive differentiation: Fresh factor
- Growth strategy: Gain market share beyond seafood specialists Playing the health card
- Menu trends: Non-seafood dishes differentiate from other seafood specialists

Table 10-10: Red Lobster Selected Combo Plate Menu Offerings, 2013
Bread appetizers and vegetable center-of-plate entrées as differentiator

Table 10-11: Top 15 Red Lobster Menu Item Types with Casual Seafood Restaurant Penetration Comparison, 2013
- Consumer food lifestyle segmentation analysis

Graph 10-11: Red Lobster Usage Frequency Food Segmentation Analysis
- Guest traffic analysis
  Graph 10-12: Guest Traffic Usage Frequency Analysis: Red Lobster, 2013
- Sales performance
  Table 10-12: Red Lobster Monthly Same-Store Sales, Guest Traffic & Menu Pricing Trends, 2013

Appendix
Methodology
Consumer survey methodology
Market size and forecast
Report table interpretation
Consumer segmentation groups
Food Lifestyle
Mobile Users
Terms and definitions
Supermarkets
Restaurant categories
Limited-service restaurant definitions
Full-service restaurant definitions
Other definitions

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