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CURION INTELLIGENCE REPORTS

2025

DRIVING CONSUMERS BACK TO CASUAL DINING

TABLE FOR MORE







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OVERVIEW

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BACKGROUND

What's Shaping Casual Dining Today?

Casual dining is at a turning point. Traffic declined 1% in 2024, with sales growth fueled by higher menu prices—not more guests. Consumer spending in restaurants remains sluggish, making it harder than ever to earn loyalty.[1]

At the same time, value menus are everywhere, raising the bar for what diners expect at every price point, and growth in the restaurant industry continues to favor fast-casual chains.

We dug deep into what really drives casual diners—beyond just price. This research uncovers the emotional triggers, value perceptions, and in-restaurant experiences that keep guests coming back (or send them elsewhere) through a mix of methodologies, including advanced analytic techniques, in-context learning, and Curion Score™—our proprietary tool for measuring consumer experience and preference.

This playbook reveals what drives lapsed guests to dine-in at casual dining restaurants, the opportunities your brand can own, and the strategies to stand out in a crowded market.

Objectives

01 Determine the key casual dining attributes in driving interest and purchase among Lapsed Casual Diners

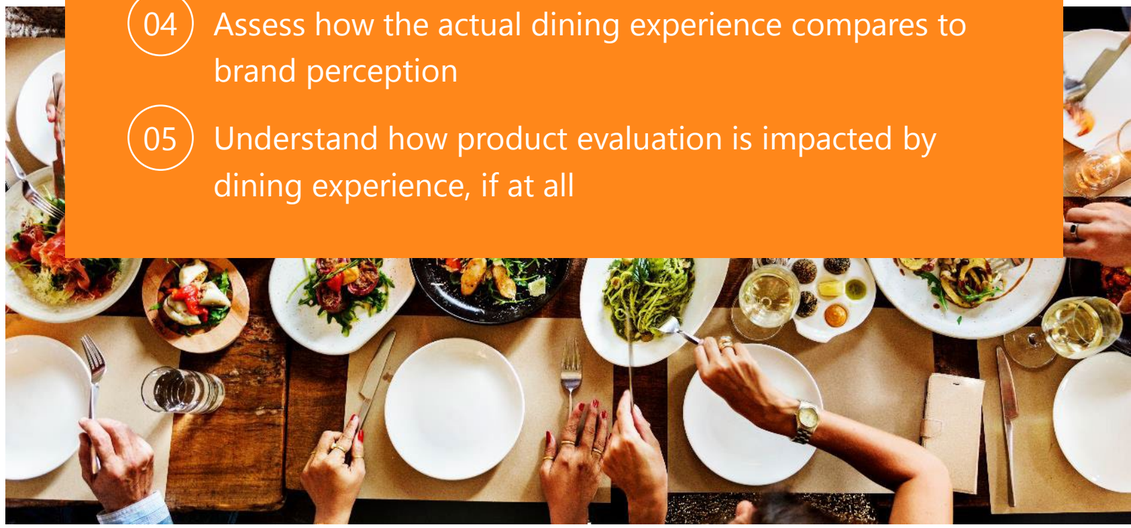
02 Reveal "ownable" opportunities and attributes in which brands could stand out from the competition

03 Uncover the "whys" behind value meal performance to inform optimization of these offerings

04 Assess how the actual dining experience compares to brand perception

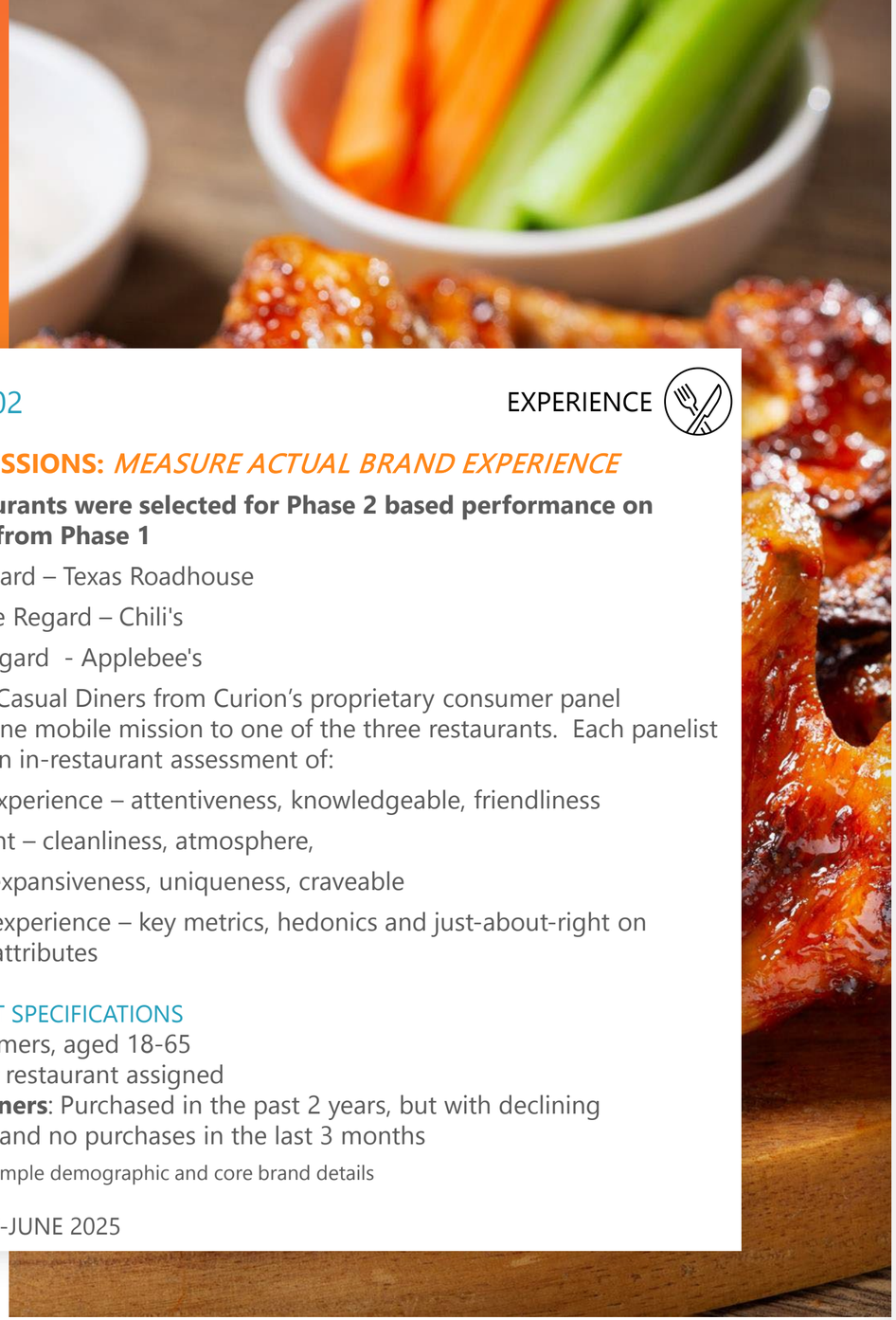
05 Understand how product evaluation is impacted by dining experience, if at all





1. **Source:** *"2024: Casual Dining Hit the Reset Button,"* Restaurant Business Online, January 31, 2024. restaurantbusinessonline.com

Methodology



PHASE 01 — PERCEPTION

ONLINE SURVEY: *UNCOVER DRIVERS & BRAND PERCEPTIONS*

459 Lapsed Casual Diners from Curion's proprietary consumer panel completed a 20-minute survey including:

- A MaxDiff exercise to determine stated importance of casual dining attributes
- A Brand Associations exercise for Key Driver Analysis to identify the attributes that drive brand consideration
- A section on value menus to explore expectations and preferences

RESPONDENT SPECIFICATIONS

- U.S. consumers, aged 18-65
- Aware of at least 3 of the 12 core restaurant brands
- Lapsed for at least 3 core restaurant brands
  - **Lapsed Diners**: Purchased in the past 2 years, but with declining frequency and no purchases in the last 3 months

Click here for sample demographic and core brand details

SAMPLE COMPOSITION

- Click-ins balanced to nationally representative U.S. 4-Region population rates (+/-3%)
- Respondents were assigned up to 5 brands for evaluation based on lapsed qualification and least-filled quotas

FIELDED MARCH 2025

PHASE 02 — EXPERIENCE

MOBILE MISSIONS: *MEASURE ACTUAL BRAND EXPERIENCE*

Three restaurants were selected for Phase 2 based performance on perception from Phase 1

- High Regard – Texas Roadhouse
- Moderate Regard – Chili's
- Lower Regard - Applebee's

203 Lapsed Casual Diners from Curion's proprietary consumer panel completed one mobile mission to one of the three restaurants. Each panelist completed an in-restaurant assessment of:

- Service Experience – attentiveness, knowledgeable, friendliness
- Restaurant – cleanliness, atmosphere,
- Menu – expansiveness, uniqueness, craveable
- Product experience – key metrics, hedonics and just-about-right on product attributes

RESPONDENT SPECIFICATIONS

- U.S. consumers, aged 18-65
- Lapsed for restaurant assigned
  Lapsed Diners: Purchased in the past 2 years, but with declining frequency and no purchases in the last 3 months

Click here for sample demographic and core brand details

FIELDED MAY-JUNE 2025

12 CORE BRANDS

Applebee's Grill + Bar
Chili's
Texas Roadhouse
Buffalo Wild Wings
Cracker Barrel Old Country Store
LongHorn Steakhouse
Olive Garden Italian Kitchen
Outback Steakhouse
Perkins American Food Co.
Red Lobster
Red Robin
The Cheesecake Factory

KEY DRIVERS & OWNABLE OPPORTUNITIES:
Where Brands Can Lead, Win, and Bring Guests Back

Not all attributes drive choice equally. Winning back Lapsed Casual Diners means doubling down on what matters—and standing out where it counts. To re-engage Lapsed Casual Diners, brands must first deliver on the fundamentals, and then differentiate through **experience**, **emotion**, and **execution**.

What Drives Interest and Purchase

KEY DRIVERS like *food quality*, *great flavor*, *good value*, and *attentive service* are foundational to casual dining success—but no brand owns them outright. These attributes are must-haves for relevance and consideration.

Where Brands Can Stand Out

VALUE-ADD attributes like *craveable signature dishes*, *special occasion appeal*, and *shareable formats* offer whitespace to differentiate. *Good for date nights and special occasions* is one of the few ownable emotional drivers in this category.

Meeting Expectations ≠ Winning Loyalty

TABLE STAKES like *menu variety*, *value pricing*, and *staff friendliness* are expected—but when elevated through thoughtful execution, they can become brand-building moments.

KEY DRIVERS	VALUE-ADDS	TABLE STAKES
Consistently delivers great taste and flavor	Features unique dishes I find appealing	Attentive and knowledgeable staff
Good value for the price paid	Features craveable signature dishes	Offers a wide variety of menu items
Offers high-quality food	Receives positive reviews and recommendations	Offers a value menu
Offers freshly prepared food	Good for date nights or special occasions	Fast service without feeling rushed
Friendly and welcoming service that makes me feel cared for and appreciated		
Orders are accurate/just as requested		
Comfortable and inviting dining environment		
Provides complimentary freshly baked bread, biscuits, rolls, or chips		

What this means for strategy:

To shift perceptions and re-engage lapsed guests, brands must:

- **Reinforce key drivers** through consistent delivery and messaging
- **Own an emotional edge** through occasion-based positioning or signature menu moments
- **Deliver value** in a way that feels fresh, craveable, and on-brand—not just affordable

OWNABLE OPPORTUNITIES are attributes that sit farther from any brand and represent whitespace or ownable opportunities – areas where no brand has yet established a ***strong***, ***distinct*** association. These can signal potential positioning territories for brands looking to stand out or better meet unmet needs.

BRAND PROMISE MEETS REALITY:

The Experience Gap that Decides Loyalty

Experience is the tiebreaker. In-the-moment dining experiences can shift perception, strengthen brand associations, and turn a lapsed guest into a future loyalist.

When we compared brand perceptions (Phase 1) to in-the-moment dine-in experiences (Phase 2), a clear pattern emerged: **brands that deliver on the experience drive higher future consideration**—even if their product performance lags.

Texas Roadhouse delivers an experience that **reinforces its brand promise at every touchpoint**—from complimentary bread to consistent hospitality—helping offset long wait times or lower burger ratings.

Guests are **more likely to recommend** and **more likely to return** than for any other brand tested.

Chili's shows positive momentum: post-visit scores reveal improved perceptions around **timely service**, **menu appeal**, and **value**.

There's opportunity to **build on these strengths** and close gaps in attentiveness and care—especially for a brand competing on value.

Applebee's impresses on product—especially burger quality and value menu appeal—but struggles with emotional connection and ambiance.

Despite leading on a few key food-related attributes, Applebee's lags on return intent—reinforcing that even strong food performance can't overcome a weak experience.

KEY DRIVER IN ACTION

Warm, attentive service and thoughtful environmental cues build goodwill and elevate the entire experience—even at higher price points.

"**When I first started, it was all about price.** Now, it's about consumers' willingness to pay more, **but you've got to give them more**. Consumers have shown they're willing to pay a higher price—at fine dining or steakhouses and such—but **you've got to prove to (them) that it's worth it, whether through crave-ability, high quality, atmosphere, or environment. People will pay more if they feel like it's worth it.**" [2]

– Joe Pawlak, Technomic Managing Principal

What this means for strategy:

Even for brands starting behind in perception, **a standout experience can build momentum**. It's not just about what you say your brand delivers—it's what guests walk away remembering.

Brands that pair *strong menu performance* with a *warm, attentive, and consistent experience* are more likely to win back Lapsed Casual Diners and earn long-term loyalty.

Sources:
2. *"How the Value Proposition Has Evolved for Restaurant Consumers,"* Nation's Restaurant News, March 4, 2025. https://www.nrn.com/restaurant-operations/

Value Menus Create Consideration, Not Commitment

Among Lapsed Casual Diners, **value menus are a must-have**—but having one **isn't enough to drive repeat visits.** To make a real impact, value menus need to do more than signal affordability.

The most effective value menus share **three core ingredients**:

What Works	Why It Matters to Lapsed Casual Diners
Meaningful Savings Expect at least 25% off	Helps justify dining out more often, trying new items, or inviting others along—without financial hesitation.
Bundled, High-Quality Meals Better than fast food, cheaper than full-price	Feels like the best of both worlds: satisfying, higher-quality (and healthier) meals at a price that doesn't feel like a splurge.
Promote a Shared Experience Shareables, limited selections, flexible choices	Encourages connection, simplifies decision-making, and reinforces hospitality, warmth, and making guests feel cared for, especially during group occasions.

> "A value menu makes me feel like I'm getting the full dining experience without breaking the bank. I can treat my family and still feel good about what I spent."
>
> – Lapsed Casual Diner

"**When you look at who's winning today**, it's not the players that have value menus or deals, **it's the ones innovating and ideating on the 'what you get' side**." [2]

– Eric Blumenthal, Coca-Cola's SVP of Foodservice Commercial Leadership and Growth

WHAT WE'RE SEEING IN THE MARKET

Value menus are doing their job, helping brands stay relevant and drive traffic:

In Q4, 2024:

- **Chili's:** Its $10.99 value meal and Triple Dipper bundle made up for **34% of total sales**.[3]
- **Applebee's:** Value menus and limited-time offers drove 27-28% of transactions.[4]

But relevance doesn't always equal loyalty. **Even with strong value menu associations**, both brands underperform on deeper experience metrics among Lapsed Diners.

What this means for strategy:

Value menus work, but only when they reflect your brand and deliver more than just a discount.

To win back Lapsed Diners, use your value menu to elevate the entire dining experience: meaningful savings, bundled meals that feel like a treat, and moments that bring people together.

An opportunity to differentiate—beyond price.

Infuse *freshness*, *crave-ability*, and *hospitality* into every element. A thoughtfully crafted value menu doesn't just drive traffic—it reinforces what makes your brand memorable and **worth coming back for**.

Sources:

2. "*How the Value Proposition Has Evolved for Restaurant Consumers,*" Nation's Restaurant News, March 4, 2025. https://www.nrn.com/restaurant-operations/
3. *"Chili's Is Popular Again, and It's Working to Stay That Way,"* Wall Street Journal, February 6, 2025. https://www.wsj.com/
4. *"Applebee's Takes the Lead on Refreshing its Footprint,"* FSR Magazine, March 18, 2025. https://www.fsrmagazine.com/

OWNABLE OPPORTUNITIES are attributes that sit farther from any brand and represent whitespace or ownable opportunities – areas where no brand has yet established a ***strong***, ***distinct*** association. These can signal potential positioning territories for brands looking to stand out or better meet unmet needs.

THE DETAILS

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This section highlights insights from **Phase 1: UNCOVERING DRIVERS AND BRAND PERCEPTIONS,** an online survey with Lapsed U.S. Casual Dining Consumers.

Through Key Drivers Analysis and Opportunity Mapping, we identified the **most essential attributes** influencing dine-in decisions.

We also used Perceptual Mapping to pinpoint **ownable opportunities**—areas where brands can **meaningfully differentiate** on what matters most.

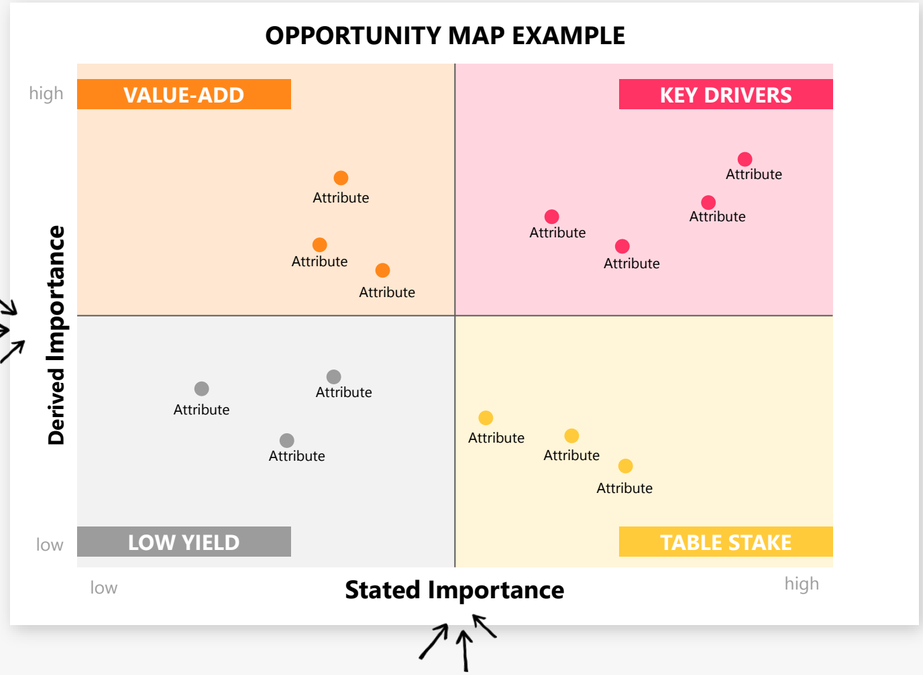
Key Drivers for Dine-in

Opportunity Mapping, Explained

Levitt Opportunity Mapping, combines stated and derived importance to identify and prioritize attributes that **most influence purchase decisions** and reveal **opportunities for your product to stand out** from competing brands in the marketplace.

Next, we'll deep-dive into the insights revealed in mapping Casual Dining attributes.

Key Driver Analysis (KDA) measures the **impact each attribute has on likelihood to consider** (based on regression analysis). Increasing performance on high-scoring attributes typically leads to a direct increase in consideration.



MaxDiff measures the **relative importance of each attribute to the dine-in decision**. The ratio-based scores demonstrate greater discrimination between items, and, since respondents make choices rather than expressing strength of importance on a rating scale, the scores are free from common scale-usage biases.

CATEGORY EXPLANATIONS

KEY DRIVERS are the most influential factors in Casual Dining brand consideration, ranking highest in both stated and derived importance. These attributes have the **strongest impact** on consumer decisions—**prioritizing them will be most effective in driving consideration**.
High stated importance, high derived importance

VALUE-ADD attributes, also known as "hidden drivers," may not be top-of-mind for consumers but still **increase the likelihood of consideration**. These present **opportunities to stand out** from competitors.
Low stated importance, high derived importance

TABLE STAKE attributes are **expected** by consumers. While important to maintain competitiveness, they **do not strongly differentiate** one brand from another.
High stated importance, low derived importance

LOW YIELD attributes have minimal influence on consumer decisions, ranking low in both stated and derived importance. Focusing on these is unlikely to drive preference or impact.
Low stated importance, Low derived importance

Click here to see the detailed Opportunity Map for this research in the Appendix.

To win back Lapsed Casual Diners, brands must deliver a high-quality experience anchored in fresh food, attentive service, and thoughtful details.

KEY DRIVERS are the most influential factors in Casual Dining brand consideration (high stated importance, high derived importance). These attributes have the **strongest impact** on consumer decisions—**prioritizing them will be most effective in driving consideration**.



Ordered highest to lowest on Stated Importance	Stated Importance[1]	Derived Importance[2]	Category
Consistently delivers **great taste and flavor**	79	9.7	Food & Beverage
Good value for the price paid	78	15.7	Value & Affordability
Offers **high-quality food**	71	7.0	Food & Beverage
Offers **freshly prepared food**	68	3.0	Food & Beverage
Friendly and welcoming service that makes me **feel cared for and appreciated**	62	3.8	Service & Experience
Orders are **accurate**/just as requested	61	3.8	Service & Experience
Comfortable and inviting dining environment	46	6.0	Ambiance & Atmosphere
Provides **complimentary** freshly baked bread, biscuits, rolls, or chips	38	3.1	Food & Beverage

1. Stated Importance: *MaxDiff Analysis (min 1, max 79)*
   Q200: When deciding whether to dine in at a casual dining restaurant, which of these attributes would be MOST influential in your decision and which would be LEAST influential?
2. Derived Importance: *Key Driver Analysis (min 0.1, max 15.7)*
   Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
   Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?

BASE: Online Survey Total Sample (n=459)

Indicates degree of importance (stated) or impact (derived)

Max

Min

The most influential attributes remain largely unclaimed across major players in the casual dining category.

Brands have a clear opportunity to own what matters most—*if* they can deliver these attributes with **consistency and authenticity**.

This includes dialing up **emotional hospitality** and **executional precision**—areas that remain underleveraged despite their outsized impact on brand consideration.

While a few brands (e.g., Olive Garden, Red Lobster, and Outback) are relatively close to top drivers like great taste, caring service, and order accuracy, no single brand owns them outright.

Ordered highest to lowest on Stated Importance		Stated Importance[1]	Derived Importance[2]	Category
Consistently delivers great taste and flavor	★	79	9.7	Food & Beverage
Good value for the price paid	★	78	15.7	Value & Affordability
Offers high-quality food	★	71	7.0	Food & Beverage
Offers freshly prepared food		68	3.0	Food & Beverage
Friendly and welcoming service that makes me feel cared for and appreciated	★	62	3.8	Service & Experience
Orders are accurate/just as requested	★	61	3.8	Service & Experience
Comfortable and inviting dining environment		46	6.0	Ambiance & Atmosphere
Provides complimentary freshly baked bread, biscuits, rolls, or chips	★	38	3.1	Food & Beverage

★ **OWNABLE OPPORTUNITIES** are attributes that sit farther from any brand represent and whitespace or ownable opportunities – areas where no brand has yet established a ***strong***, ***distinct*** association. These can signal potential positioning territories for brands looking to stand out or better meet unmet needs.

Click here to see brand perceptual map.

1. Stated Importance: *MaxDiff Analysis (min 1, max 79)*
   Q200: When deciding whether to dine in at a casual dining restaurant, which of these attributes would be MOST influential in your decision and which would be LEAST influential?
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   Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?

BASE: Online Survey Total Sample (n=459)

Indicates degree of importance (stated) or impact (derived)

Max

Min

Unique, craveable dishes and a memorable, special-occasion feel can be what sets a brand apart in this crowded category.

VALUE-ADD attributes, also known as "hidden drivers," may not be top-of-mind for consumers but still **increase the likelihood of consideration** (high stated importance, high derived importance). These present **opportunities to stand out** from competitors.



Ordered highest to lowest on Stated Importance	Stated Importance[1]	Derived Importance[2]	Category
Features **unique dishes** I find appealing	36	2.7	Food & Beverage
Features **craveable signature dishes**	34	3.9	Food & Beverage
Receives **positive reviews** and recommendations	33	2.5	Service & Experience
Good for date nights or special occasions	21	6.7	Occasion-Based Factors

Click here for a definition and to see brand perceptual map.

OWNABLE OPPORTUNITY

"Good for date nights or special occasions" is the only Value-Add attribute that remains largely unclaimed—offering a whitespace to own a relevant, emotionally resonant occasion.

It also stands apart as the **only occasion-based factor** that meaningfully drives brand consideration among Lapsed Diners.

THOUGHT STARTER

What does an ideal "special occasion" experience look like for your target guests? Think beyond ambiance: how do food, service, and small touches elevate the moment?

1. Stated Importance: *MaxDiff Analysis (min 1, max 79)*
   Q200: When deciding whether to dine in at a casual dining restaurant, which of these attributes would be MOST influential in your decision and which would be LEAST influential?
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   Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
   Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?

BASE: Online Survey Total Sample (n=459)

Indicates degree of importance (stated) or impact (derived)

Max

Min

Casual dining brands must deliver on core expectations like fast, attentive service and a broad, value-driven menu.

☑ **TABLE STAKES** attributes are **expected** by consumers. While important to maintain competitiveness, they **do not strongly differentiate** one brand from another.



Ordered highest to lowest on Stated Importance	Stated Importance[1]	Derived Importance[2]	Category
Attentive and knowledgeable staff	43	2.3	Service & Experience
Offers a wide variety of menu items	39	0.3	Food & Beverage
Offers a value menu	39	1.1	Value & Affordability
Fast service without feeling rushed	38	1.6	Service & Experience

1. Stated Importance: *MaxDiff Analysis (min 1, max 79)*
   Q200: When deciding whether to dine in at a casual dining restaurant, which of these attributes would be MOST influential in your decision and which would be LEAST influential?
2. Derived Importance: *Key Driver Analysis (min 0.1, max 15.7)*
   Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
   Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?

BASE: Online Survey Total Sample (n=459)

Indicates degree of importance (stated) or impact (derived)

Max

Min

Menu variety and value may be table stakes, but few brands deliver them in a way that feels distinct or memorable.



Ordered highest to lowest on Stated Importance	Stated Importance[1]	Derived Importance[2]	Category
Attentive and knowledgeable staff	43	2.3	Service & Experience
Offers a wide variety of menu items ★	39	0.3	Food & Beverage
Offers a value menu ★	39	1.1	Value & Affordability
Fast service without feeling rushed	38	1.6	Service & Experience

★ *Ownable Opportunities; Click here for a definition and to see brand perceptual map.*

THOUGHT STARTERS

The challenge—and opportunity—is to lead by **elevating what guests expect**.

- What does a value menu with **real stopping power** look like—one that cuts through the noise and becomes a true reason to choose your brand?
- If everyone offers variety and a value menu, what makes *yours* worth talking about? What would it look like to make these signature strengths?

(Check out the Value Menu section of this report for more on this topic!)

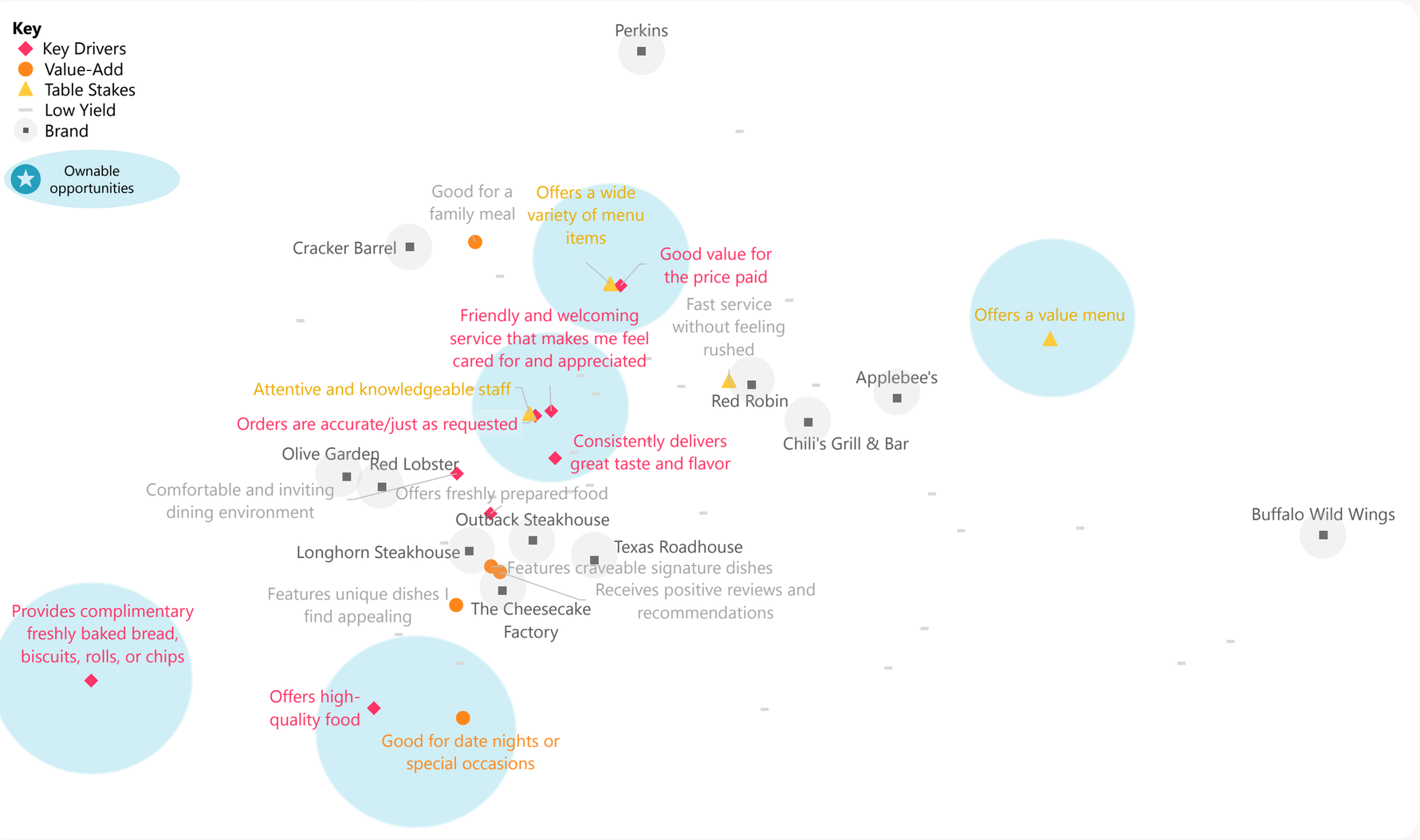
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   Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?

BASE: Online Survey Total Sample (n=459)

Indicates degree of importance (stated) or impact (derived) — Max / Min

Brand Perceptual Mapping

Lapsed Casual Diners



HOW TO INTERPRET

This map shows **how Lapsed Casual Diners *think* about dine-in brands**. The closer a brand is to an attribute (like "good for a family meal" or "craveable signature dishes"), the more consumers link them together.

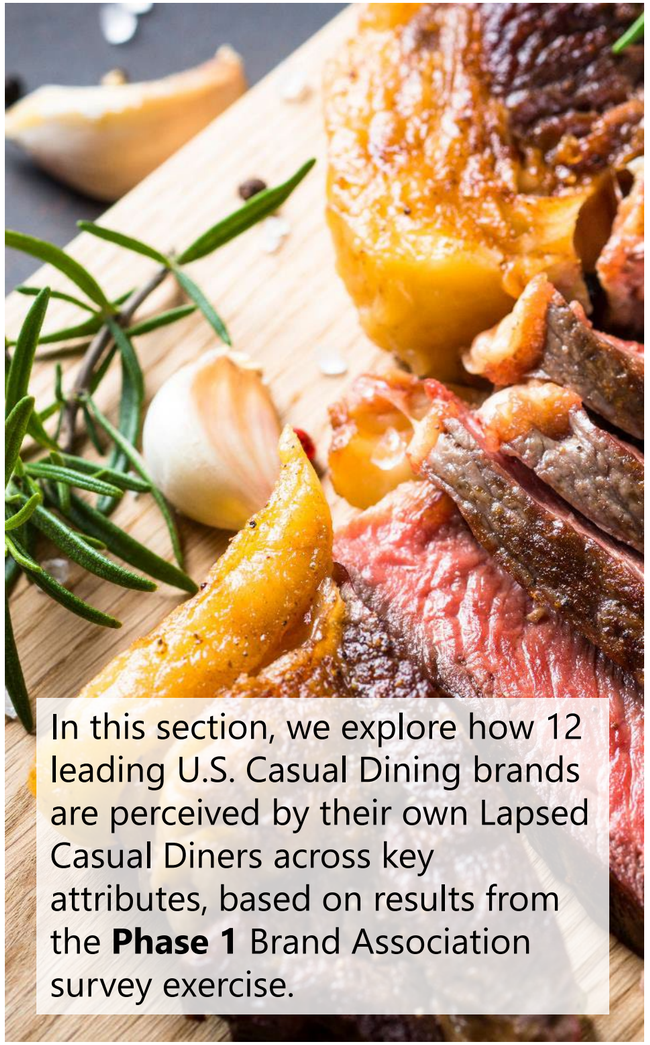
If a brand is far from an attribute – or no brands are near it – it may be an opportunity to stand out by better owning that space.

Don't worry about axes; just focus on the closeness between brands and words. Closer = stronger connection.

Spotting "ownable opportunities":

Attributes that sit farther from any brand and represent whitespace or ownable opportunities – areas where no brand has yet established a ***strong***, ***distinct*** association. These can signal potential positioning territories for brands looking to stand out or better meet unmet needs.

Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
BASE: Online Survey Assigned to Brand (n varies)



In this section, we explore how 12 leading U.S. Casual Dining brands are perceived by their own Lapsed Casual Diners across key attributes, based on results from the **Phase 1** Brand Association survey exercise.





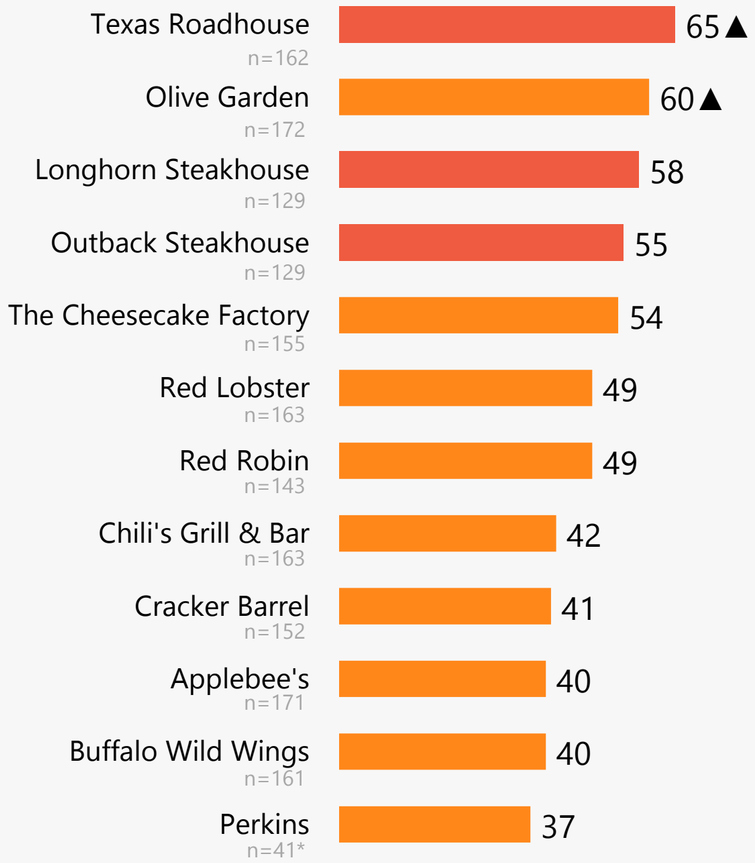


Top Casual Dining Brand Perceptions

Even among their Lapsed Diners, some brands stay top of mind.

Likelihood to Consider Dine-in (T2B %)

BASE: Lapsed Diners of Each Brand





Steakhouses are still winning mindshare.

Three of the top four most-considered brands point to the staying power of steakhouse-style offerings.

THOUGHT STARTER

How are the top brands creating a distinct experience, craveable core offerings, and emotional familiarity to remain relevant, even after guests have lapsed?

Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?
BASE: Online Survey Lapsed Diners of Each Brand (n varies)

▲/▼ indicates significantly higher or lower for more than half of the other Casual Dining brands.
Significance tested at 95% confidence level.
* Indicates small sample size, use for directional purposes only

The four top-performing casual dining brands deliver on Key Drivers among Lapsed Diners.

Olive Garden and casual steakhouses are more likely to offer *complimentary food* compared to more than half of the other casual dining restaurants.

Associate Brand with Key Driver (%)	Texas Roadhouse	Olive Garden	LongHorn Steakhouse	Outback Steakhouse	The Cheesecake Factory	Red Lobster	Red Robin	Chili's	Cracker Barrel	Applebee's Grill + Bar	Buffalo Wild Wings	Perkins American Food Co.
Likelihood to Consider Dine-In (T2B %)	**65**	**60**	**58**	**55**	**54**	**49**	**49**	**42**	**40**	**41**	**40**	**37**
Consistently delivers great taste and flavor	54 ▲	48	48	41	45	37	34	30	43	33	38	32
Good value for the price paid	54	58	50	49	42	44	50	48	64 ▲	54	45	54
Offers high-quality food	47 ▲	38	55 ▲	39	45 ▲	31	28	25	25	24	17 ▼	5 ▼
Offers freshly prepared food	53 ▲	44	46	44	51 ▲	40	31	29	38	30	31	27
Friendly and welcoming service that makes me feel cared for and appreciated	54 ▲	54 ▲	48	41	46	40	41	37	50	44	35	34
Orders are accurate/just as requested	50	53	47	46	52	45	41	32	44	42	36	39
Comfortable and inviting dining environment	53	66 ▲	53	56	52	48	42	50	52	45	29 ▼	27 ▼
Provides complimentary freshly baked bread, biscuits, rolls, or chips	53 ▲	63 ▲	46 ▲	51 ▲	32	55 ▲	17 ▼	23	26	11 ▼	9 ▼	10 ▼
BASE: Lapsed Diners, n=	*156*	*172*	*129*	*162*	*155*	*163*	*143*	*163*	*152*	*171*	*161*	*41 **

Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?
Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
BASE: Online Survey Assigned to Brand (n varies)

Relative Percentage: Max / Min

▲/▼ indicates significantly higher or lower for more than half of the other Casual Dining brands.
Significance tested at 95% confidence level.
* Indicates small sample size, use for directional purposes only

Leading on Value-Add attributes isn't enough without strength in Key Drivers.

Cheesecake Factory outperforms many peers on value-add factors but doesn't lead in overall consideration, showing that value-adds alone aren't enough to drive choice.

Brands that consistently deliver on core expectations—like taste, quality, and service—are more likely to stay top of mind. To truly reconnect with guests, brands must first get the fundamentals right, then stand out by thoughtfully integrating emotionally resonant value-adds, such as date-night appeal.

	Texas Roadhouse	Olive Garden	LongHorn Steakhouse	Outback Steakhouse	The Cheesecake Factory	Red Lobster	Red Robin	Chili's	Cracker Barrel	Applebee's Grill + Bar	Buffalo Wild Wings	Perkins American Food Co.
Likelihood to Consider Dine-In (T2B %)	**65**	**60**	**58**	**55**	**54**	**49**	**49**	**42**	**40**	**41**	**40**	**37**
Features unique dishes I find appealing	27	33	23	25	41 ▲	30	27	21	25	22	17	5 ▼
Features craveable signature dishes	42	46 ▲	35	42	45	40	28	26	27	34	26	17 ▼
Receives positive reviews and recommendations	41	34	35	31	39 ▲	25	24	23	27	19	24	15
Good for date nights or special occasions	47	52	56	54	60 ▲	54	24	33	12 ▼	37	30	15▼
BASE: Lapsed Diners, n=	*156*	*172*	*129*	*162*	*155*	*163*	*143*	*163*	*152*	*171*	*161*	*41 **

Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?
Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
BASE: Online Survey Assigned to Brand (n varies)

Relative Percentage: Max / Min

▲/▼ indicates significantly higher or lower for more than half of the other Casual Dining brands.
Significance tested at 95% confidence level.
* Indicates small sample size, use for directional purposes only

Chili's and Applebee's use value menus to attract guests, but deeper loyalty remains a challenge.

Chili's and Applebee's stand out among the 12 core casual dining brands for their value menus, suggesting this table stakes offering still plays a role in brand perception.

However, both brands underperform in overall consideration—highlighting that value menus alone aren't enough to bring lapsed guests back. The opportunity remains open: to deliver a value menu that not only signals affordability, but also feels fresh, craveable, and uniquely tied to your brand.

	Texas Roadhouse	Olive Garden	LongHorn Steakhouse	Outback Steakhouse	The Cheesecake Factory	Red Lobster	Red Robin	Chili's	Cracker Barrel	Applebee's Grill + Bar	Buffalo Wild Wings	Perkins American Food Co.
Likelihood to Consider Dine-In (T2B %)	**65**	**60**	**58**	**55**	**54**	**49**	**49**	**42**	**40**	**41**	**40**	**37**
Attentive and knowledgeable staff	48	50	46	46	48	45	41	37	39	38	32	39
Offers a wide variety of menu items	44	40	34	42	54	29 ▼	38	47	49	47	29 ▼	49
Offers a value menu	21	27	15	19	15	17	33	40 ▲	14	47 ▲	32	20
Fast service without feeling rushed	44	40	42	38	34	41	50	49	39	40	43	34
BASE: Lapsed Diners, n=	*156*	*172*	*129*	*162*	*155*	*163*	*143*	*163*	*152*	*171*	*161*	*41 **

Lapsed Casual Diners are also ***most likely*** to have purchased from a value menu at Applebee's (60%) and Chili's Grill & Bar (51%) than all the other casual dining restaurants evaluated.
Click here for more information.

Q215: Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?
Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
BASE: Online Survey Assigned to Brand (n varies)

Relative Percentage: Max / Min

▲/▼ indicates significantly higher or lower for more than half of the other Casual Dining brands.
Significance tested at 95% confidence level.
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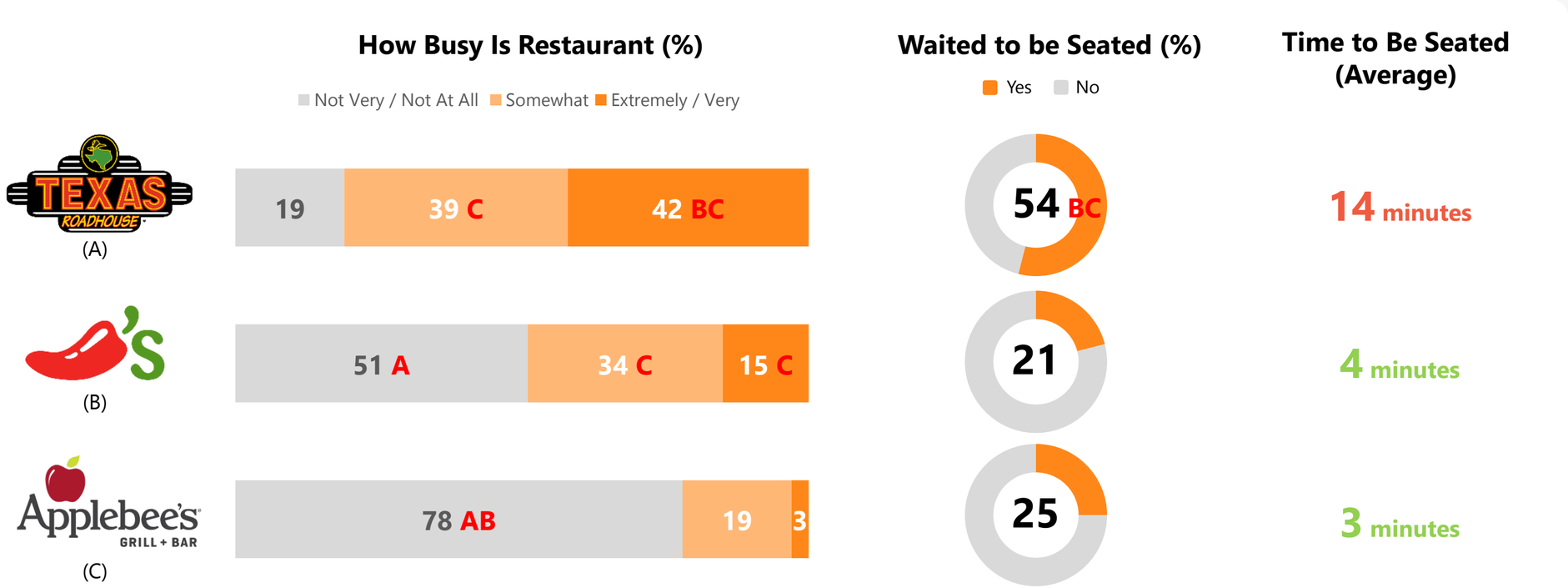


This section highlights insights from **Phase 2: MEASURE ACTUAL BRAND EXPERIENCE**, a mobile mission with Lapsed Casual Dining Consumers.
Participants visited one of three focus brands—Texas Roadhouse, Chili's Grill & Bar, or Applebee's—and evaluated their dine-in experience as it happened.
The goal: to **capture in-the-moment reactions**, identify experience gaps, and uncover what's helping (or hurting) efforts to win guests back.

Dine-in Experience

Texas Roadhouse turns high volume into a branded moment—not a barrier.

Significantly more Lapsed Diners describe Texas Roadhouse as *very* or *extremely busy*, with longer average wait times to be seated. But instead of letting that become a friction point, the brand creates an experience that feels intentional, energized, and welcoming—setting the tone for the visit from the start.



KEY DRIVER IN ACTION

Texas Roadhouse offers **complimentary bread** to 97% of guests (compared to just 7% at Chili's and 3% at Applebee's). This simple gesture reinforces multiple top dine-in drivers: *consistently great flavor*, a *warm welcome*, and *complimentary touches* that elevate the experience.

It's a small moment that makes a lasting impact, **turning operational pressure into a brand-building opportunity**.

Click here for more information.

Q8: How busy is the restaurant?
Q1: Did you have to wait to be seated?
Q2: How long did you wait to be seated? Enter the time in minutes.
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicates significance.
Significance tested at 95% confidence level.

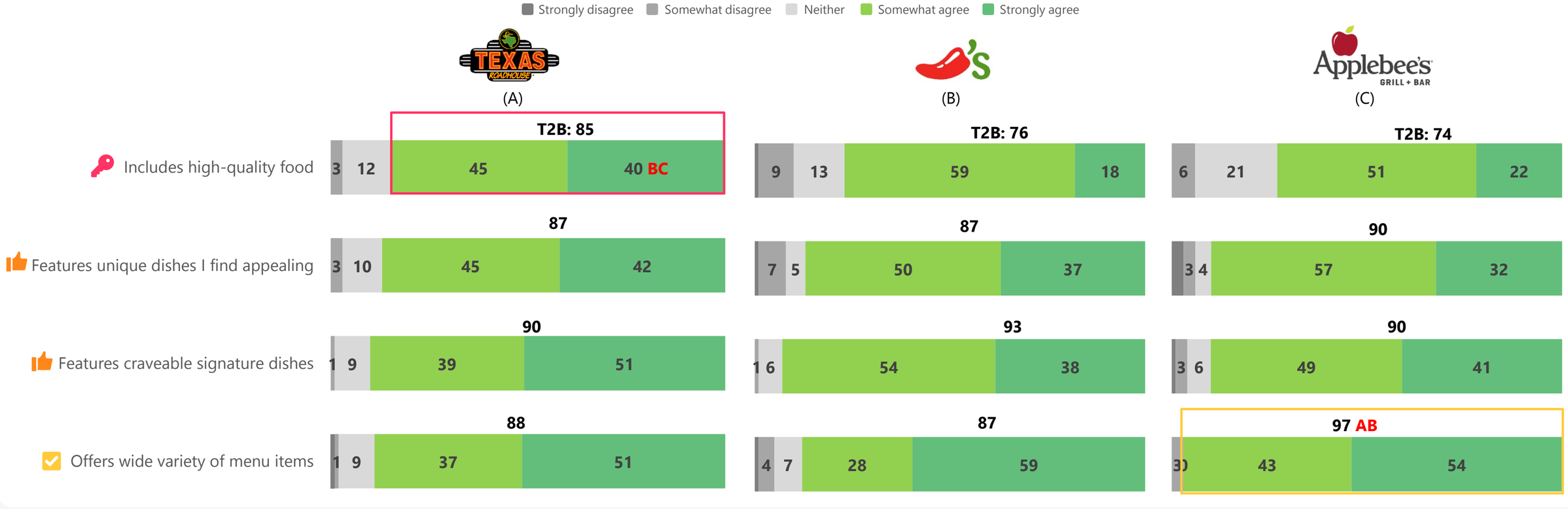
EXPERIENCE
- Key Drivers
- Value-Add
- Table Stakes

All three brands meet expectations on menu quality and variety, with Texas Roadhouse and Applebee's showing key strengths.

More than 75% of Lapsed Diners agree with key menu statements during their dine-in visit, suggesting that core expectations are being met across the board.

KEY DRIVER IN ACTION
The dine-in experience confirms what matters most. Texas Roadhouse leads on **high-quality food**, a core driver of consideration, while Applebee's stands out for **menu variety**, a table stakes attribute that remains important but is less likely to drive choice.

Menu Assessment (%)



THOUGHT STARTER
Guests may say your brand meets expectations, but are you reinforcing what matters most in the moment? How can dine-in experience elevate drivers like food quality, so they're not just noticed, but remembered?

Q10: Looking through the menu, how much do you agree or disagree with each of the following statements? This menu ...
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicates significance.
Significance tested at 95% confidence level.

EXPERIENCE
Key Drivers
Value-Add
Table Stakes

Timely service matters—but expectations matter more.

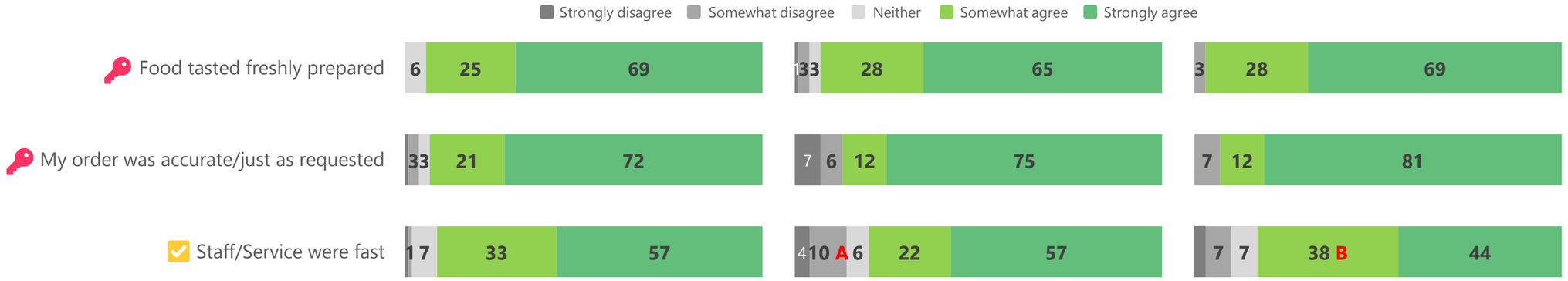
Texas Roadhouse guests were significantly less likely to say the wait to order was longer than expected. Still, about 1 in 4 diners across all brands felt food took longer than expected to arrive.

Yet *freshness* and *order accuracy*—both key drivers—were consistent across brands. This suggests that perceptions of wait time aren't always about performance, but expectations. Brands that communicate clearly and offer small hospitality cues during downtime can shape how the wait feels—even if service takes longer.

Wait Time vs. Expectation MUCH/SOMEWHAT LONGER THAN EXPECTED (% Bottom 2 Box:, 5-pt. scale)

	(A)	(B)	(C)
TO ORDER	7	19 A	19 A
TO RECEIVE FOOD	25	18	31

Freshness and Order Accuracy Assessment (%)



KEY DRIVER IN ACTION

Texas Roadhouse set the tone early, with fewer guests reporting long waits to order, reinforcing key drivers like *feeling cared for* and *well-served*, even in a busy setting.

Click here for more information

THOUGHT STARTER

What small touches could shift how your guests feel about the wait—and turn downtime into a branded moment?

Q9: Thinking about how long you waited before your server took your order, was the wait … ?
Q13: Thinking about how long you waited between the server taking your order and when you received your food, was the wait … ?
Q40/Q41: Thinking about your experience today, how much do you agree or disagree with each of the following statements?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

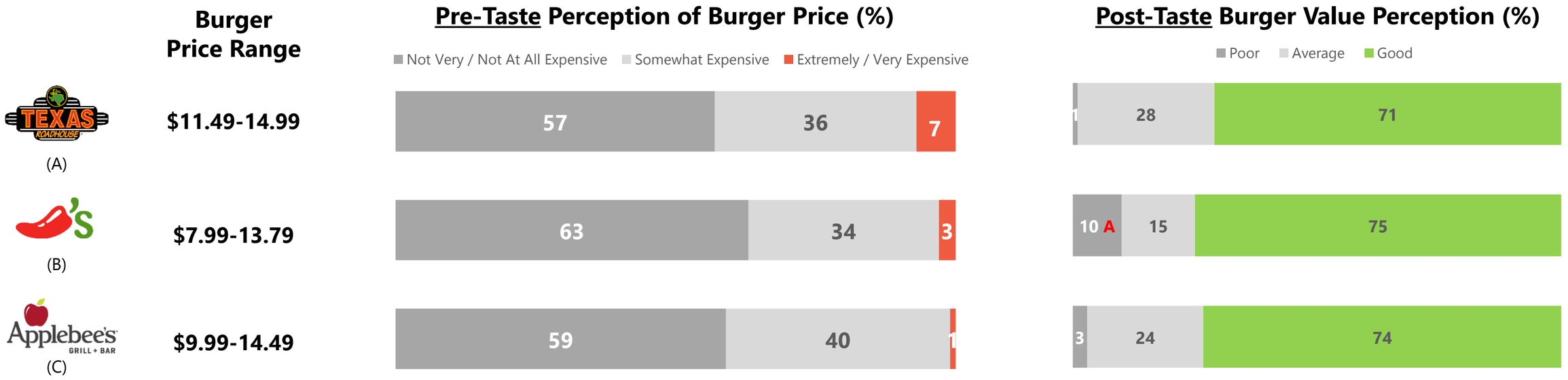
A/B/C indicates significance.
Significance tested at 95% confidence level.

Even at a higher price, Texas Roadhouse holds its own on value.

Texas Roadhouse had the highest average burger price, but Lapsed Casual Diners were just as likely to consider purchasing it again as those dining at Chili's or Applebee's. In fact, Chili's had the lowest price yet received significantly more poor post-taste ratings than Texas Roadhouse.

This reinforces that **value isn't defined by price alone**—it's earned through the overall experience. When the food and service deliver, guests are more likely to feel good about what they paid, even if it costs more.

NOTE TO READER
As part of the mobile mission, all Lapsed Diners were asked to order a *cheeseburger* from their assigned restaurant.



KEY DRIVER IN ACTION
When it comes to *Good value for the price paid*, Texas Roadhouse shows that strong flavor **and** execution can make a higher price feel justified.

Q6: What is the price of the [cheeseburger]? Please enter dollars and cents below.
Q7: How do you perceive the price of this burger?
Q22: At the price you paid today, how do you feel about the value of this cheeseburger at [RESTAURANT]?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

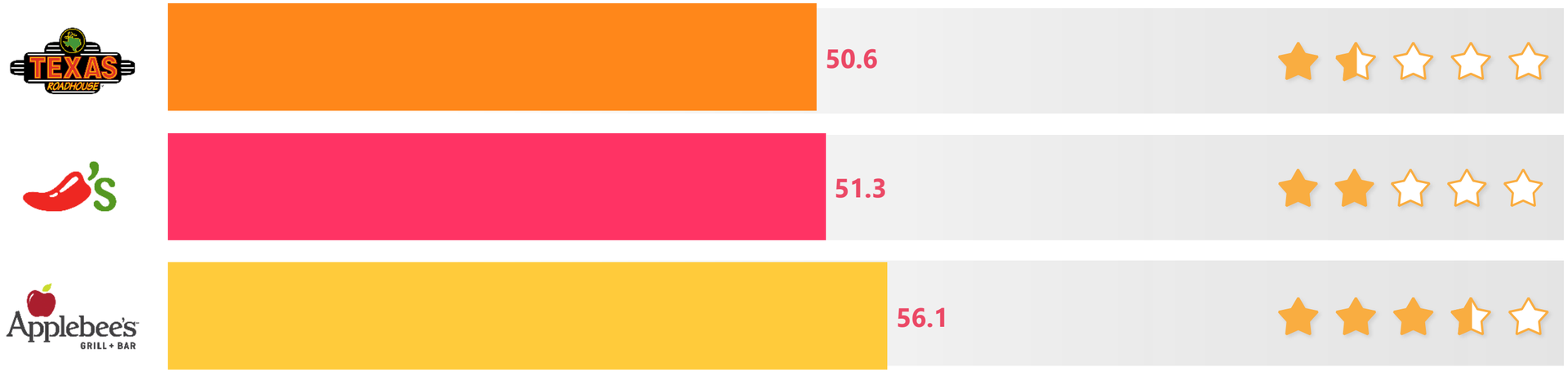
A/B/C indicates significance.
Significance tested at 95% confidence level.

Applebee's burger wins on sensory appeal, outperforming category and competitors.

Applebee's beef burger received the highest Curion Score™ among the three test brands—and scored above the overall category average. Its 3.5-star rating reflects clear strengths in **bun and patty appearance** and **bun texture**, which drove its preference over Chili's and Texas Roadhouse.

While it didn't lead on value or consideration, Applebee's shows that **nailing the details of presentation and texture can create a standout product experience**.

Curion Score™ Beef Burger Patty Category Average: 52.8



Click here for more information



VALUE-ADD ADVANTAGE

Craveable signature dishes may be a value-add, but Applebee's demonstrates how strong execution on food visuals and texture can elevate a core menu item and drive preference, even among Lapsed Casual Diners.

Click here for to jump to Taste Evaluation section

BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

The right atmosphere does more than set the mood: Texas Roadhouse is owning the experience visually and emotionally.

How Dine-In Environment Compares to Expectations (%)		(A)	(B)	(C)
Cleanliness	Better	61 B	44	49
	Same	33	47	44
	Worse	6	9	7
Ambiance	Better	**60 BC**	28	31
	Same	39	62 A	62 A
	Worse	1	10 A	7
Noise Level	Better	34	38	54 A
	Same	52 C	49	35
	Worse	13	13	10
Comfort of Seating	Better	43	34	31
	Same	46	63 A	62
	Worse	10	3	7
Inviting Decor	Better	**51 BC**	32	34
	Same	48	59	53
	Worse	1	9	13 A
Level of Lighting	Better	51 B	34	35
	Same	43	56	59
	Worse	6	10	6
Temperature	Better	48 B	29	35
	Same	48	62	60
	Worse	4	9	4

Texas Roadhouse consistently meets or **exceeds expectations** across key environmental cues, with especially strong performance on *ambiance* and *inviting decor*—two areas where competitors fall short.

Applebee's, in contrast, is significantly more likely to be rated **worse than expected** on *inviting decor*, signaling how atmosphere can quietly shape overall impressions—even when food or service deliver.

Less noise, but also less buzz—Applebee's quiet atmosphere may signal more about foot traffic than ambiance. (78% rate the restaurant not at all or not very busy.)

KEY DRIVER IN ACTION

While *a comfortable and inviting dining environment* may seem like a background detail, when brands get it right, it becomes part of what makes guests want to return. Texas Roadhouse consistently creates that feeling, while others leave room for improvement.

Q5: So far, how well does the restaurant compare to your expectations on each of the following attributes?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicates significance.
Significance tested at 95% confidence level.

Texas Roadhouse shows that genuine, attentive service can turn a standard expectation into a standout experience.

All three brands meet expectations on server friendliness and knowledge, but **Texas Roadhouse stands out—earning near-universal agreement on both attributes.** Guests at Texas Roadhouse also report **more server check-ins on average** and are significantly more likely to say the frequency felt *just right.* In contrast, up to **1 in 5 guests at Applebee's** felt the service wasn't attentive enough.

Server Attributes

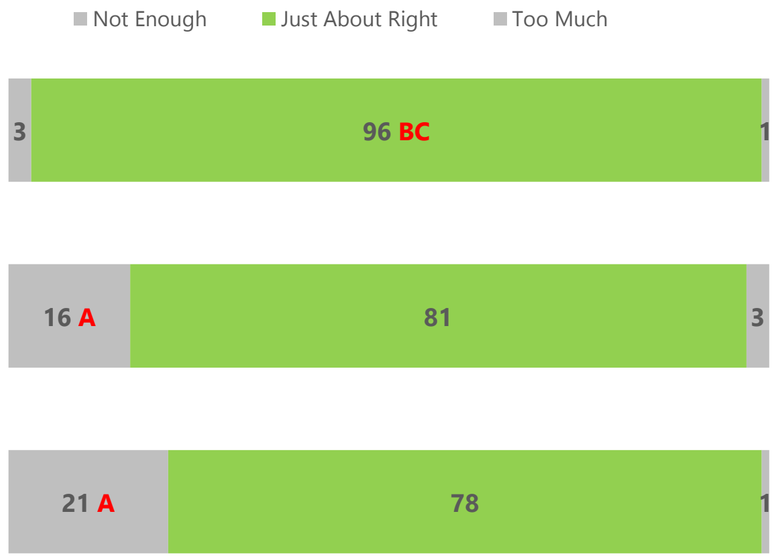
(Somewhat/Strongly Agree %)

	Friendly	Knowledgeable
(A)	99 C	94 B
(B)	93	82
(C)	88	84

Server Check-Ins

	Number (Average count)
(A)	3.8 BC
(B)	2.7
(C)	2.9

Perception (%)



Lapsed Casual Diners **satisfied** with server check-ins were typically visited **3 times** (or more) while dissatisfied guests averaged **just one**.

TABLE STAKES, ELEVATED

Friendly, knowledgeable staff may be table stakes, but when service is warm, attentive, and proactive, it becomes something guests remember. Texas Roadhouse turns everyday interactions into branded moments that reinforce hospitality and care.

Q41: Thinking about your experience today, how much do you agree or disagree with each of the following statements?
Q42: About how many times did your server check in?
Q43: For you, was this … ?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicates significance.
Significance tested at 95% confidence level.

Texas Roadhouse builds loyalty by delivering a full experience, not just a meal.

Despite higher traffic and a lower burger Curion Score™, **Texas Roadhouse earns the highest likelihood of recommendation and return** among Lapsed Casual Diners.

It's also the brand most associated with **emotionally resonant occasions**, like date nights, special occasions, and meeting up with friends—highlighting the role of *hospitality and brand atmosphere* in creating reasons to return.

Likelihood of Recommending to Others (%)



Occasions Would Return (% Yes)

Meeting up with Friends	Family Dinners	Date Night	Special Occasions	Drinks Only	Business Dinner
84	**84 B**	**67 C**	**57 BC**	24	**42 BC**
82	60	51	25	**44 A**	16
78	74	41	21	35	6

KEY DRIVER IN ACTION

Texas Roadhouse demonstrates how delivering on *service* and *value* builds loyalty even when the product isn't the standout.

VALUE-ADD ADVANTAGE

Occasions like *date nights and special gatherings* may not be top of mind, but they help Texas Roadhouse stand apart. These underleveraged value-adds can turn a typical visit into something more memorable and brand-defining.

Q49: For what occasion(s) would you consider returning to dine-in at this restaurant?
Q50: How likely would you be to recommend this restaurant to others?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicate significance.
Significance tested at 95% confidence level.







Perception vs. Dine-in Experience

PERCEPTION EXPERIENCE

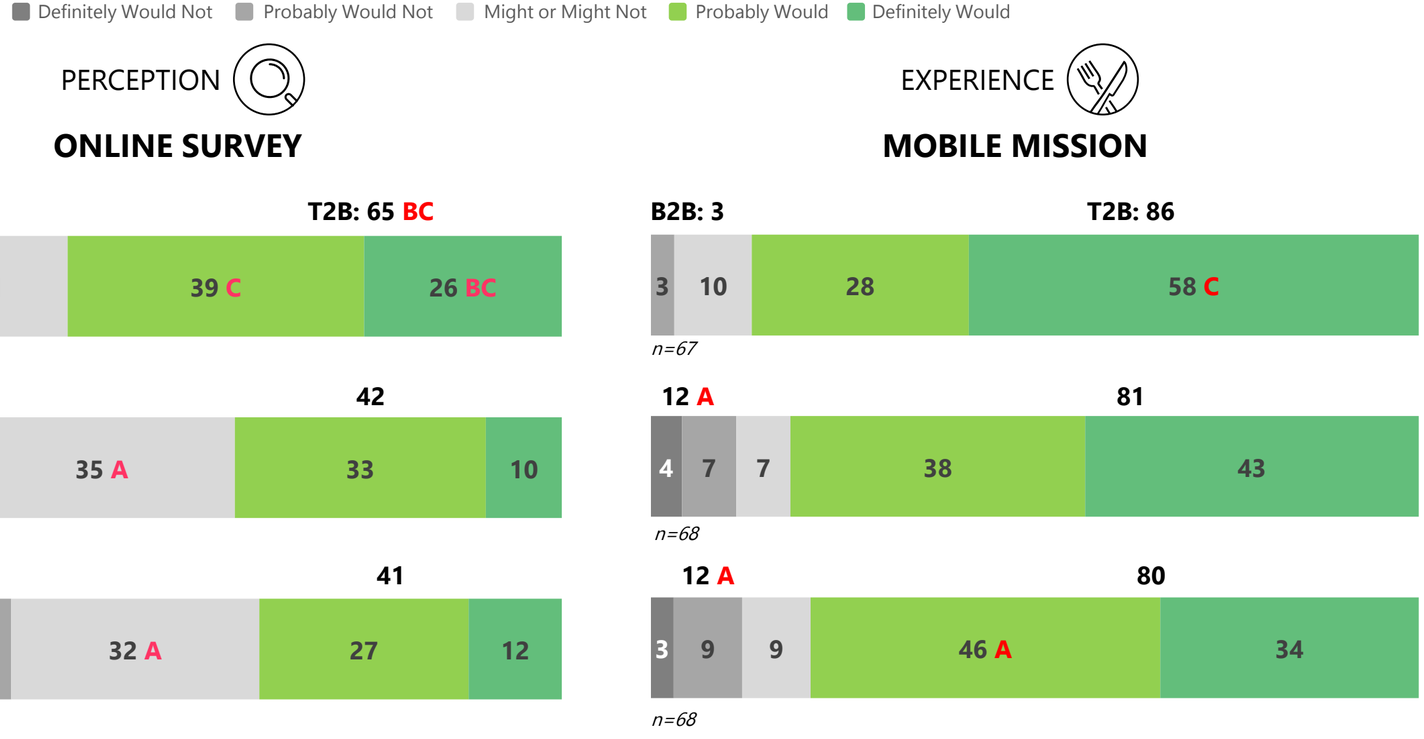
One visit can change everything: dine-in experiences shift brand consideration.

Across all three brands, post-visit likelihood to dine-in increased significantly—proving the power of a well-executed in-person experience.

- Texas Roadhouse starts strong and climbs even higher, with 86% of Lapsed Diners saying they're likely to return.
- Chili's and Applebee's see the most dramatic improvement—despite lower initial consideration, their in-person experiences shifted perception for the better.

This reinforces what we'll see next: brands that deliver on key drivers during the visit—not just in brand perceptions—win back lapsed guests.

Likelihood of Dining at Restaurant in Future (%)





Online Survey: Q215. Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?
BASE: Online Survey Assigned to Brand: Texas Roadhouse (n=156); Chili's Grill & Bar (n=163); Applebee's (n=171)
Mobile Mission: Q48: How likely would you be to dine at this restaurant again?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicate significance.
Significance tested at 95% confidence level.

PERCEPTION EXPERIENCE

A single experience can reinforce, or rewrite, what Lapsed Casual Diners think they know about your brand.

Chili's and Applebee's close the gap on key attributes, but only when Lapsed Casual Diners experience them firsthand.

Perception vs. Dine-In Experience

● Ranked 1st ● Ranked 2nd ● Ranked 3rd

▨ Went up in rank ▨ Went down in rank

Attribute	Category	Texas Roadhouse Perception	Texas Roadhouse Dine-In Experience	Chili's Perception	Chili's Dine-In Experience	Applebee's Perception	Applebee's Dine-In Experience
Good value for the price paid*	Key Driver	1st	3rd	3rd	1st	2nd	1st
Offers freshly prepared food*	Key Driver	1st	2nd	3rd	3rd	2nd	1st
Friendly and welcoming service that makes me feel cared for and appreciated	Key Driver	1st	1st	3rd	2nd	2nd	3rd
Orders are accurate/just as requested	Key Driver	1st	1st	3rd	3rd	2nd	1st
Features unique dishes I find appealing	Value-Add	1st	2nd	3rd	2nd	2nd	1st
Features craveable signature dishes	Value-Add	1st	2nd	3rd	1st	2nd	2nd
Good for date nights or special occasions	Value-Add	1st	1st	3rd	2nd	2nd	3rd
Offers a wide variety of menu items	Table Stake	3rd	2nd	1st	3rd	1st	1st
Offers a value menu	Table Stake	3rd	1st	2nd	1st	1st	1st
Fast service without feeling rushed	Table Stake	2nd	1st	1st	3rd	3rd	2nd
BASE: Lapsed Diners Assigned to Brand, n=		*156*	*67*	*163*	*68*	*171*	*68*

NOTE TO READER

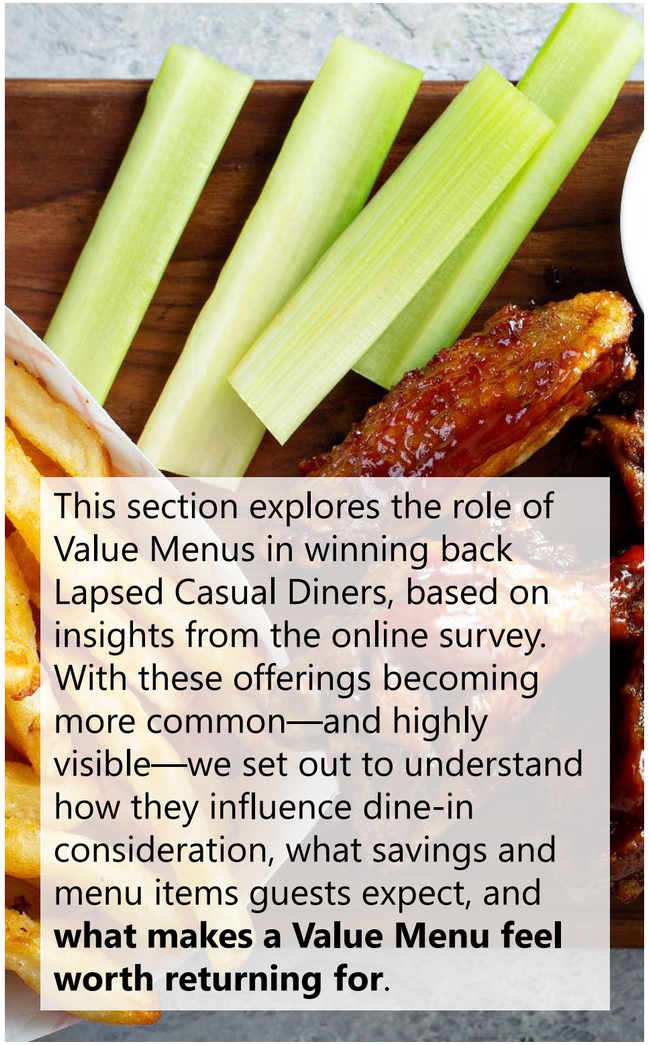
As part of the mobile mission, all Lapsed Diners were asked to order a *cheeseburger* from their assigned restaurant.

*indicates attributes asked specific to the cheeseburger.

Texas Roadhouse continues to lead on most key attributes across perception and experience, but its first-place standing slips in a few important areas, including *good value* and *freshly prepared food*.

Chili's and Applebee's show signs of positive momentum, moving up in the rankings on several key drivers and value-adds during the dine-in experience. For both, **the visit helped narrow the gap between perception and performance**, highlighting opportunities to build on experiential strengths.

Online Survey: Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
Mobile Mission: Q10: Looking through the menu, how much do you agree or disagree with the following statements? This menu…
Q11: Were you offered any value menu option, either as part of the main menu or a separate one? A value menu could include bundled meals or value combos, happy hour specials, lunchtime meal deals, sample platters, or other promotions.
Q40: Thinking about your experience today, how much do you agree or disagree with each of the following statements? [RESTAURANT] …
Q41: Thinking about your experience today, how much do you agree or disagree with each of the following statements? Overall, the staff and service was/were…
Q49: For what occasion(s) would you consider returning to dine-in at this restaurant?









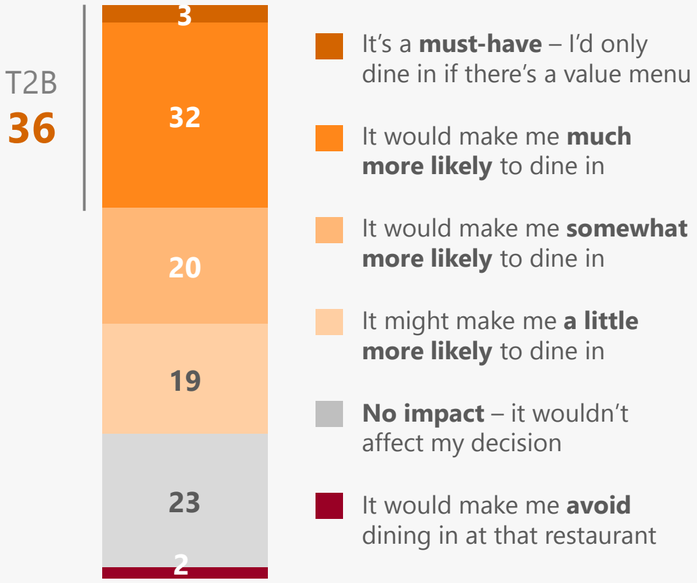
This section explores the role of Value Menus in winning back Lapsed Casual Diners, based on insights from the online survey. With these offerings becoming more common—and highly visible—we set out to understand how they influence dine-in consideration, what savings and menu items guests expect, and **what makes a Value Menu feel worth returning for**.

Value Menus

THE ONLINE SURVEY

Value menus aren't the only factor in the decision to dine-in, but they can strongly influence brand consideration and choice.

Effect on Dine-In Consideration (%)



THE IDEAL VALUE MENU

According to Lapsed Casual Diners

Key Themes from Open-End Responses

Three key ingredients make for an *irresistible value menu*.

Enticing Savings

"Special affordable pricing on various options. It could rotate monthly. Vary main menu options and possible appetizers."

Bundled, High-quality Meals

*"I would like to see a **meal option** with a burger, fries, and a drink… I would be more inclined to go to a sit-down restaurant if the price and **quality** were better than a fast-food restaurant."*

Promotes a Shared Experience

*"**Shareable meal** or **family style** for a larger group instead of individual meals."*

DRIVER IN ACTION

For Lapsed Diners, a value menu can tip the scales—not just in deciding *whether* to dine in, but *where*.

"If there are comparable places and one has a value menu and the other doesn't, then I'd pick the place with a value menu."





THOUGHT STARTER

In a crowded category, how can your value menu give guests a clear reason to choose your brand over the next best option?

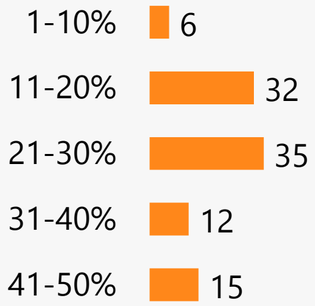
Q315. How does having a value menu affect your likelihood of dining in at a casual dining restaurant instead of choosing takeout, delivery, or eating elsewhere?
Q300. Imagine you're creating a new value menu for a casual dining restaurant, designed specifically for people like you to make dining in at a casual dining restaurant more appealing. What would it be? Please provide specific details around what's important to you—what's included, what the promotion is, when it's offered, any special features, etc.
BASE: Online Survey Total Sample (n=459)

Meaningful savings spark more visits, bigger parties, and broader exploration.

Enticing Savings

Expected Minimum Amount of Savings (%)

MEAN **27%**



THE REAL APPEAL OF VALUE MENUS

According to Lapsed Casual Diners

Key Themes from Open-End Responses

When Lapsed Casual Diners save money through value menus, they feel **empowered** to:

Dine Out More Frequently

"[Value menus] save money, making it more possible to eat out."

"I can actually afford to eat out regularly as opposed to saving up for a special occasion."

Expand their Group Size

"Can take the whole family out."

"If I am inviting friends or family out to eat, I don't want them to feel that they have to spend a lot of money."

Explore More Menu Items

"A value menu makes me feel like I am saving money on a meal that I might not usually order."

"It softens the blow to my wallet and allows me treat my wife and myself to new things on the menu. We enjoy trying new menu options and value menus help us do that."

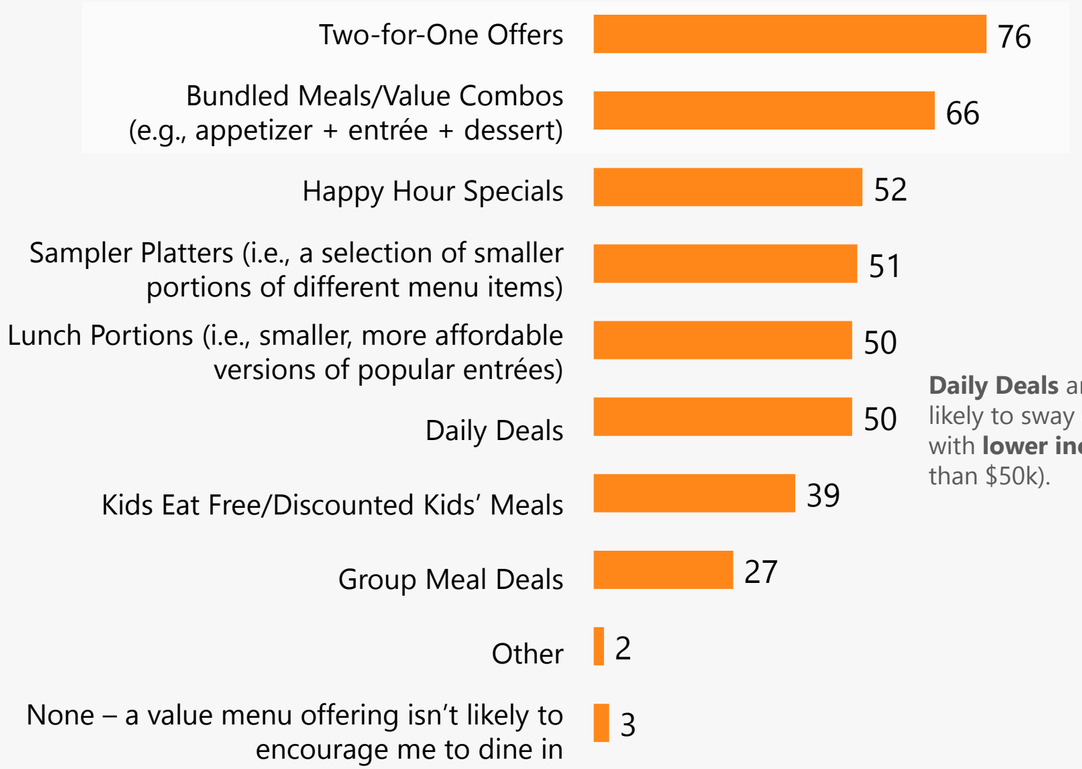


Q310. What's the minimum amount of savings you'd expect from a value menu versus a full-priced menu? (Scale: 0-50%)
Q320. Is there anything a value menu could offer that would make you much more likely to dine in? If so, what?
Q325. What do you find most appealing about a value menu? How does it encourage you to dine in or dine in more often?
BASE: Online Survey Total Sample (n=459)

Complete meal bundles strike the perfect balance of affordability and quality.

Bundled High-quality Meals

Compelling Value Menu Offerings (%)



Daily Deals are more likely to sway consumers with **lower incomes** (less than $50k).

Among Lapsed Casual Diners, **two-for-one offers, or bundled meal deals** lead value menu preferences because they deliver a *complete, satisfying meal* that balances the convenience and price of fast food with the quality of a full sit-down experience.

*"What I find most appealing about a value menu is the combination of affordability, variety, and a full meal experience without feeling like I'm compromising on quality. Knowing that I can get a **well-balanced meal**—including a starter, entrée, and drink—at a **reasonable price** makes dining in feel like a smart choice rather than a splurge."*

Many also see value menus as a fresher, healthier, and more affordable alternative to fast food.

*"Fast food has gotten so expensive to the point it's way less healthy and you're almost paying the same price as a dine in. A value menu gives a **healthy, fresher alternative** to eating out and having a nice experience verses picking up and eating at home."*

The ability to make choices based on preference rather than budget is another key draw.

*"It's more appealing to people when they're allowed to make a choice based off preferences **rather than finances**."*

KEY DRIVER IN ACTION

Good value for the price and *high-quality food* are Key Drivers *and* ownable opportunities. Designing meal bundles that deliver a complete, quality dining experience can help deepen brand loyalty and stand out in a crowded market.

Q330. Which of these value menu offerings, if any, are most likely to encourage you to dine in at a casual dining restaurant?
Q320. Is there anything a value menu could offer that would make you much more likely to dine in? If so, what?
Q325. What do you find most appealing about a value menu? How does it encourage you to dine in or dine in more often?
BASE: Online Survey Total Sample (n=459)

Compelling value menus bring people to the table—for more than just the price.

Promotes a Shared Experience

Shareable appetizers make it easy to connect over food, while complete meal options keep everyone satisfied without overcomplicating the experience.

A compelling value menu fosters shared experiences through:

Menu Items with Broad Appeal

*"Something that would appeal to sharing items as a family. **Multiple items that can be shared**."*

*"The shareable apps and snacks are always popular & for good reason! Dining out is a social event, and shareable snacks add to that. It's easier to **find something the group can eat together** as you share in the energy & atmosphere of going out."*

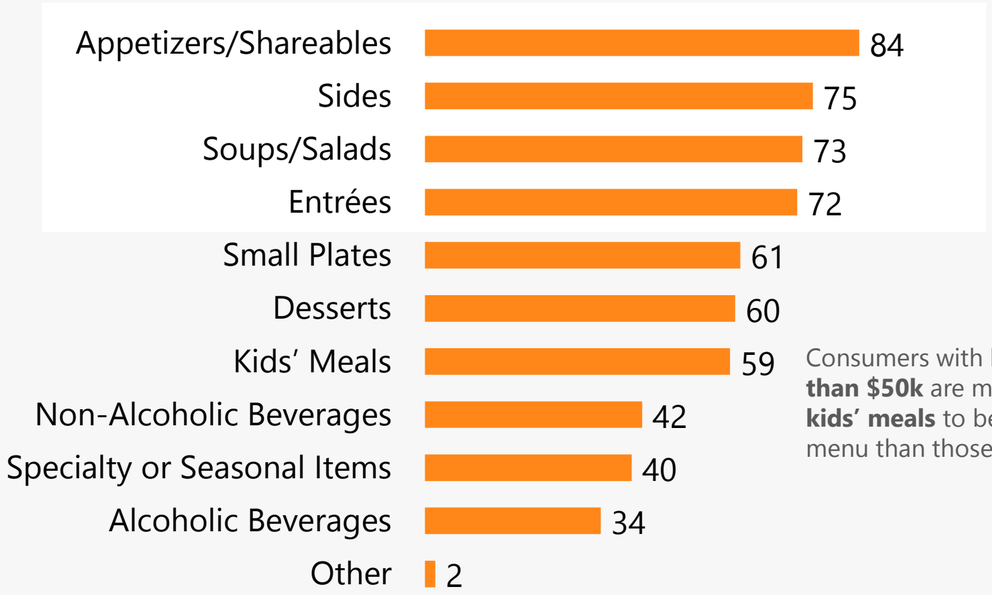
Limited Selection to Simplify Choice ...

*"To offer a **preselected menu** (appetizer, main course, and dessert) to make selections easier."*

... with Room for Customization

*"A choice of drink, appetizer, main meal and a dessert. If you're able to **choose from a selection** I'm more likely to order from it."*

Expected Items (%)



Consumers with household **incomes less than $50k** are more likely to expect **kids' meals** to be offered on a value menu than those $50k+ (68% vs. 53%).

KEY DRIVER IN ACTION

By making it easy to share and simple to choose, value menus can support key brand drivers like *hospitality*, *warmth*, and *making guests feel cared for*, especially during group occasions.

THOUGHT STARTER

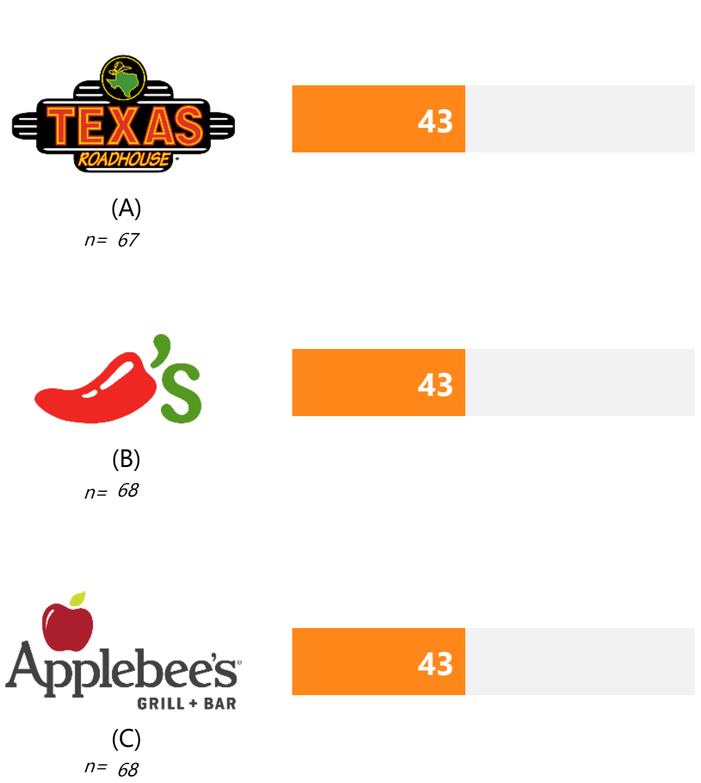
How can your value menu encourage connection, whether it's through dishes meant to share or easy choices that bring everyone to the table?

Q305. Which types of items do you expect to find on a casual dining restaurant value menu?
Q320. Is there anything a value menu could offer that would make you much more likely to dine in? If so, what?
Q325. What do you find most appealing about a value menu? How does it encourage you to dine in or dine in more often?
BASE: Online Survey Total Sample (n=459)

Value menus meet expectations and help bring Lapsed Casual Diners back.

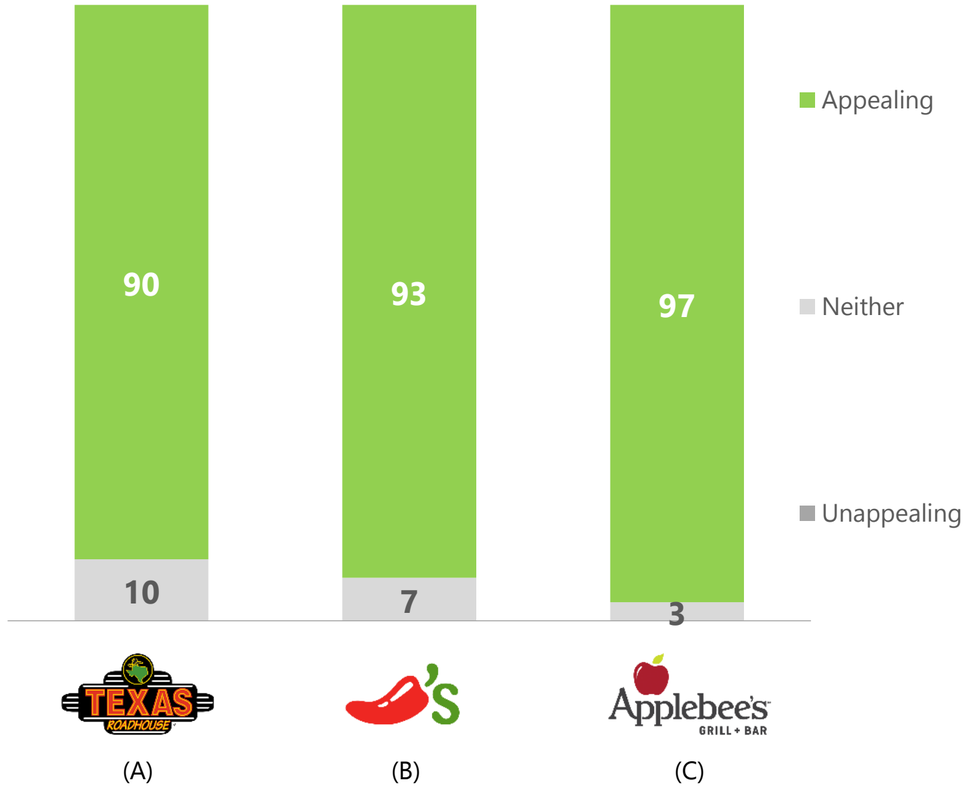
Lapsed Diners clearly expect value menus to be part of the dine-in experience—and when offered, they work. Over 90% of guests across brands found them appealing, reinforcing their role as an effective and satisfying tool to reconnect with Lapsed Diners.

Offered Value Menu (%)



Value Menu Appeal (%)

BASE: Offered Value Menu (n=29**)





THOUGHT STARTER

If value menus are table stakes, what does yours say about your brand, and how can you make it feel fresh, craveable, and worth coming back for?

Q11: Were you offered any value menu option, either as part of the main menu or a separate one? A value menu could include bundled meals or value combos, happy hour specials, lunchtime meal deals, sample platters, or other promotions.
Q12: Now we'd like you to specifically look at the value menu. How appealing is the value menu?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicate significance.
Significance tested at 95% confidence level
**Indicates very small sample size (n<32).

APPENDIX

CONSIDERATION DRIVERS:
Stated Importance Scores

MaxDiff

IMPORTANT

Consistently delivers great taste and flavor	79
Good value for the price paid	78
Offers high-quality food	71
Offers freshly prepared food	68
Friendly and welcoming service that makes me feel cared for and appreciated	62
Orders are accurate/just as requested	61

SOMEWHAT IMPORTANT

Comfortable and inviting dining environment	46
Attentive and knowledgeable staff	43
Offers a wide variety of menu items	39
Offers a value menu (e.g., meal bundles/combos, BOGO, happy hour menu)	39
Fast service without feeling rushed	38
Provides complimentary freshly baked bread, biscuits, rolls, or chips	38
Features unique dishes I find appealing	36
Consistency of experience across locations	35
Special promotions and discounts (e.g., daily, weekly, seasonal, or event-specific deals)	34
Features craveable signature dishes	34
Receives positive reviews and recommendations	33
Good for a family meal	33
Family-friendly setting	32
Offers indulgent, comfort-food offerings	31
Seated quickly	30
Offers dishes that aren't easy or convenient for me to make myself	30
Convenient locations	29
Offers consistent menu items regardless of time of day (e.g., offers breakfast menu for dinner)	29
Offers healthy and nutritious options	26
Portion size large enough for multiple meals	26
Good for date nights or special occasions	21

Category KEY

- Food & Beverage
- Service & Experience
- Ambiance & Atmosphere
- Convenience & Accessibility
- Value & Affordability
- Occasion-Based Factors

LESS IMPORTANT

Allows easy customization for dietary preferences or needs	18
Completely satisfied with resolution of issues	18
Loyalty rewards or frequent diner perks	17
Quiet enough to socialize	17
Offers menu options that cater to specific dietary needs	14
Good for a small gathering with friends (2-5 people)	13
Offers seasonal items, limited time offers, or a rotating menu	12
Late-night or extended hours	12
Lively and energetic atmosphere	10
Easy parking	10
Offers shareable menu options	10
Décor and lighting that enhances the experience	10
Outdoor or patio seating availability	8
Offers high-quality alcoholic beverages and cocktails	8
Offers a smaller, more focused menu selection	7
Good for social gatherings and celebrations (6 or more people)	7
Offers printed menus	7
Good for watching sports/events	5
Offers unique or specialty non-alcoholic beverages I find appealing	3
Offers digital menus (e.g., QR code menu or menu on tablet instead of printed ones)	1

Q200. When deciding whether to dine in at a casual dining restaurant, which of these attributes would be MOST influential in your decision and which would be LEAST influential? (MaxDiff)
BASE: Online Survey Total Sample (n=459)

High
Low
Indicates *degree of importance*

CONSIDERATION DRIVERS:
Derived Importance Scores

Key Driver Analysis

Category KEY
- Food & Beverage
- Service & Experience
- Ambiance & Atmosphere
- Convenience & Accessibility
- Value & Affordability
- Occasion-Based Factors

How to Read This Key Driver Analysis

Impact scores show how strongly each attribute predicts **Likelihood to Consider** dining in.

- **Positive scores**: The more a brand is associated with this attribute, the more likely people are to consider dining in.
- **Negative scores**: The stronger the association with this attribute, the less likely people are to consider dining in.

Higher absolute values indicate **stronger relationships**—whether positive or negative.

MOST IMPACTFUL

Good value for the price paid	15.7	Value & Affordability
Consistently delivers great taste and flavor	9.7	Food & Beverage
Offers high-quality food	7.0	Food & Beverage
Good for date nights or special occasions	6.7	Occasion-Based Factors
Comfortable and inviting dining environment	6.0	Ambiance & Atmosphere

SOMEWHAT IMPACTFUL

Features craveable signature dishes	3.9	Food & Beverage
Friendly and welcoming service that makes me feel cared for and appreciated	3.8	Service & Experience
Orders are accurate/just as requested	3.8	Service & Experience
Provides complimentary freshly baked bread, biscuits, rolls, or chips	3.1	Food & Beverage
Offers freshly prepared food	3.0	Food & Beverage
Features unique dishes I find appealing	2.7	Food & Beverage
Receives positive reviews and recommendations	2.5	Service & Experience
Good for a family meal	2.4	Occasion-Based Factors
Attentive and knowledgeable staff	-2.3	Service & Experience
Completely satisfied with resolution of issues	2.2	Service & Experience
Good for a small gathering with friends (2-5 people)	1.9	Occasion-Based Factors
Décor and lighting that enhances the experience	1.7	Ambiance & Atmosphere
Special promotions and discounts (e.g., daily, weekly, seasonal, or event-specific deals)	1.6	Value & Affordability
Fast service without feeling rushed	1.6	Service & Experience

LESS IMPACTFUL

Offers indulgent, comfort-food offerings	1.3	Food & Beverage
Offers dishes that aren't easy or convenient for me to make myself	1.3	Food & Beverage
Offers consistent menu items regardless of time of day (e.g., offers breakfast menu for dinner)	1.2	Food & Beverage
Offers healthy and nutritious options	-1.2	Food & Beverage
Good for social gatherings and celebrations (6 or more people)	1.2	Occasion-Based Factors
Consistency of experience across locations	-1.2	Service & Experience
Offers a value menu (e.g., meal bundles/combos, BOGO, happy hour menu)	1.1	Value & Affordability
Loyalty rewards or frequent diner perks	1.1	Value & Affordability
Convenient locations	-1.0	Convenience & Accessibility
Portion size large enough for multiple meals	-0.9	Food & Beverage
Lively and energetic atmosphere	0.7	Ambiance & Atmosphere
Offers high-quality alcoholic beverages and cocktails	-0.7	Food & Beverage
Offers unique or specialty non-alcoholic beverages I find appealing	0.6	Food & Beverage
Quiet enough to socialize	-0.6	Ambiance & Atmosphere
Family-friendly setting	-0.6	Ambiance & Atmosphere
Allows easy customization for dietary preferences or needs	-0.6	Food & Beverage
Offers menu options that cater to specific dietary needs	-0.5	Food & Beverage
Seated quickly	-0.5	Service & Experience
Offers seasonal items, limited time offers, or a rotating menu	-0.4	Food & Beverage
Offers a smaller, more focused menu selection	0.4	Food & Beverage
Easy parking	-0.3	Convenience & Accessibility
Offers a wide variety of menu items	-0.3	Food & Beverage
Offers shareable menu options	-0.3	Food & Beverage
Offers printed menus	-0.2	Convenience & Accessibility
Outdoor or patio seating availability	-0.1	Ambiance & Atmosphere
Offers digital menus (e.g., QR code menu or menu on tablet instead of printed ones)	-0.1	Convenience & Accessibility
Good for watching sports/events	-0.1	Occasion-Based Factors
Late-night or extended hours	-0.1	Convenience & Accessibility

Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
Q215. Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?
BASE: Online Survey Assigned to Brand (n varies)

High / Low — Indicates *degree of positive impact on consideration*

Opportunity Mapping

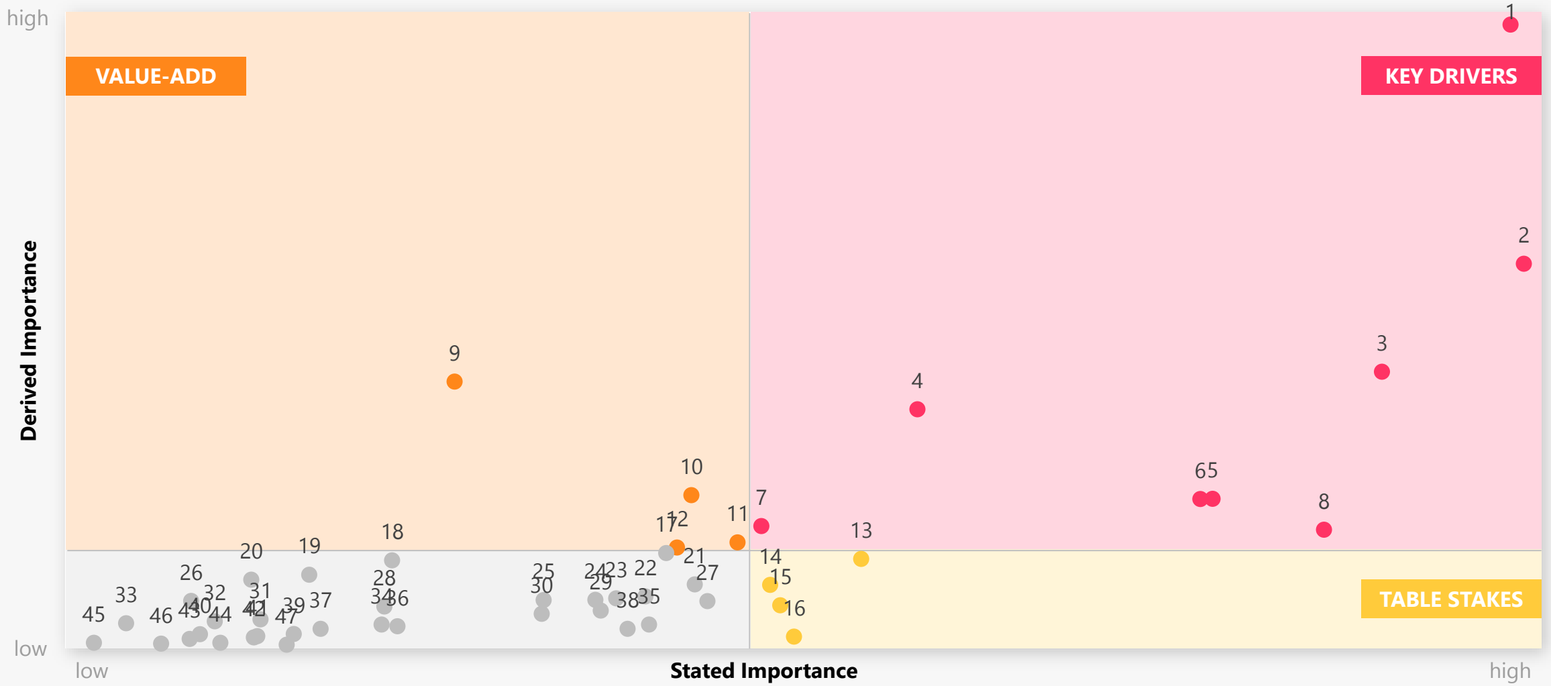
CATEGORY EXPLANATIONS

KEY DRIVERS are the most influential factors in Casual Dining brand consideration, ranking highest in both stated and derived importance. These attributes have the **strongest impact** on consumer decisions—**prioritizing them will be most effective in driving consideration**.

VALUE-ADD attributes, also known as "hidden drivers," may not be top-of-mind for consumers but still **increase the likelihood of consideration**. These present **opportunities to stand out** from competitors.

TABLE STAKES attributes are **expected** by consumers. While important to maintain competitiveness, they **do not strongly differentiate** one brand from another.

LOW YIELD attributes have minimal influence on consumer decisions, ranking low in both stated and derived importance. Focusing on these is unlikely to drive preference or impact.



KEY	ATTRIBUTE
1	Good value for the price paid
2	Consistently delivers great taste and flavor
3	Offers high-quality food
4	Comfortable and inviting dining environment
5	Friendly and welcoming service that makes me feel cared for and appreciated
6	Orders are accurate/just as requested
7	Provides complimentary freshly baked bread, biscuits, rolls, or chips
8	Offers freshly prepared food
9	Good for date nights or special occasions
10	Features craveable signature dishes
11	Features unique dishes I find appealing
12	Receives positive reviews and recommendations
13	Attentive and knowledgeable staff
14	Fast service without feeling rushed
15	Offers a value menu (e.g., meal bundles/combos, BOGO, happy hour menu)
16	Offers a wide variety of menu items
17	Good for a family meal
18	Completely satisfied with resolution of issues
19	Good for a small gathering with friends (2-5 people)
20	Décor and lighting that enhances the experience
21	Special promotions and discounts (e.g., daily, weekly, seasonal, or event-specific deals)
22	Offers indulgent, comfort-food offerings
23	Offers dishes that aren't easy or convenient for me to make myself
24	Offers consistent menu items regardless of time of day (e.g., offers breakfast menu for dinner)
25	Offers healthy and nutritious options
26	Good for social gatherings and celebrations (6 or more people)
27	Consistency of experience across locations
28	Loyalty rewards or frequent diner perks
29	Convenient locations
30	Portion size large enough for multiple meals
31	Lively and energetic atmosphere
32	Offers high-quality alcoholic beverages and cocktails
33	Offers unique or specialty non-alcoholic beverages I find appealing
34	Quiet enough to socialize
35	Family-friendly setting
36	Allows easy customization for dietary preferences or needs
37	Offers menu options that cater to specific dietary needs
38	Seated quickly
39	Offers seasonal items, limited time offers, or a rotating menu
40	Offers a smaller, more focused menu selection
41	Easy parking
42	Offers shareable menu options
43	Offers printed menus
44	Outdoor or patio seating availability
45	Offers digital menus (e.g., QR code menu or menu on tablet instead of printed ones)
46	Good for watching sports/events
47	Late-night or extended hours

Stated Importance: Q200. When deciding whether to dine in at a casual dining restaurant, which of these attributes would be MOST influential in your decision and which would be LEAST influential? (MaxDiff)
Derived Importance: Q210: Thinking about a dine-in experience at each of these restaurants, which attributes do you associate with each brand?
Q215. Thinking about the next time you dine-in at a casual dining restaurant, how likely are you to consider dining at each of these?
BASE: Online Survey Total Sample (n=459)

Recency of Last Visit by Brand (%)

	NET Core Brands	Texas Roadhouse	Olive Garden	LongHorn Steakhouse	Outback Steakhouse	The Cheesecake Factory	Red Lobster	Red Robin	Chili's	Cracker Barrel	Applebee's Grill + Bar	Buffalo Wild Wings	Perkins American Food Co.
Past 3 Months	15	20	23 ▲	12	14	12	6 ▼	9	22 ▲	17	18	22 ▲	4 ▼
4 months-2 years ago	43	46	58 ▲	38	48	44	43	41	47	43	56 ▲	47	10 ▼
More than 2 years ago	25	18 ▼	17 ▼	25	28	24	39 ▲	30 ▲	23	27	22	20	24
Never	9	10	1 ▼	14 ▲	5	16 ▲	8	15 ▲	6	9	1 ▼	8	11
Not sure/Don't remember	1	1	0	2	2	2	2	1	0	1	2	1	2





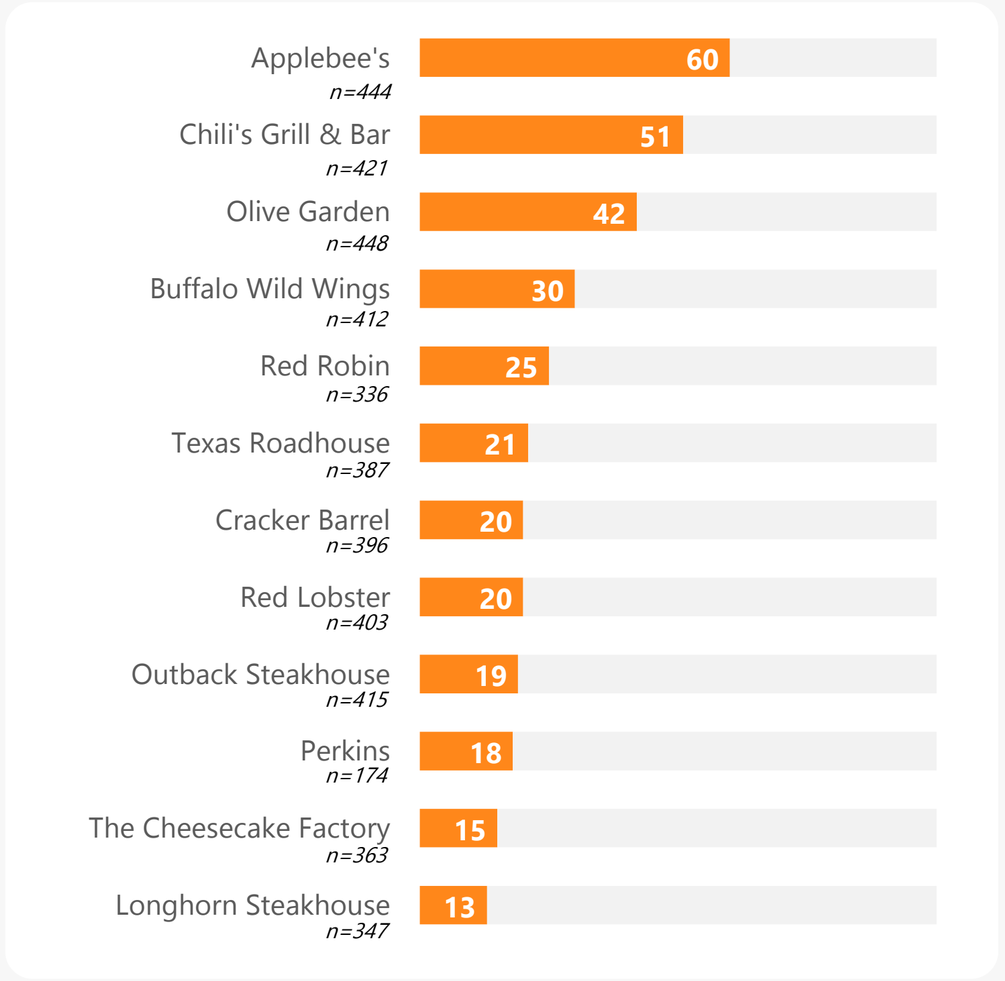


Q120. When was the last time you dined in at each of these restaurants?
BASE: Online Survey Total Sample (n=459)

Relative Percentage: Max / Min

▲/▼ indicates significantly higher or lower for more than half of the other Casual Dining brands.
Significance tested at 95% confidence level.

Ever Purchased Value Menu (% Yes)



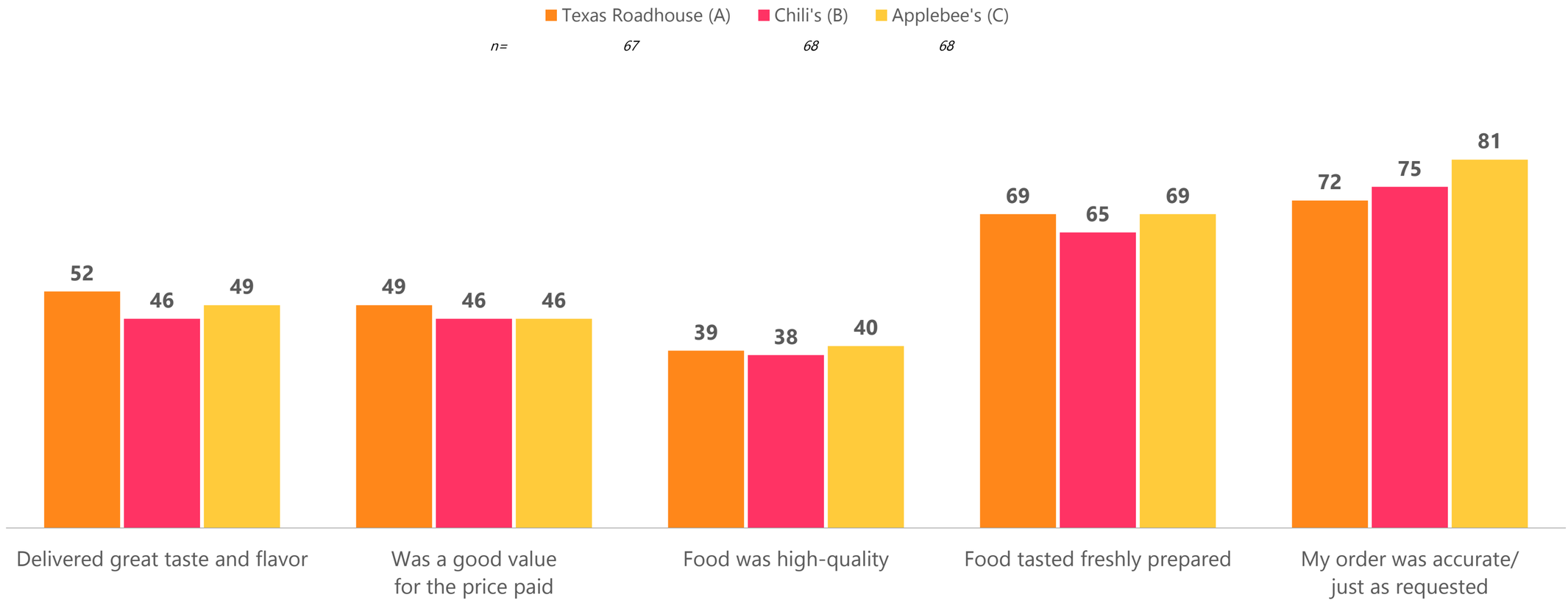






Q335: Have you ever purchased a value menu item at these restaurants?
BASE: Online Survey Ever Purchased at Each Brand (n varies)

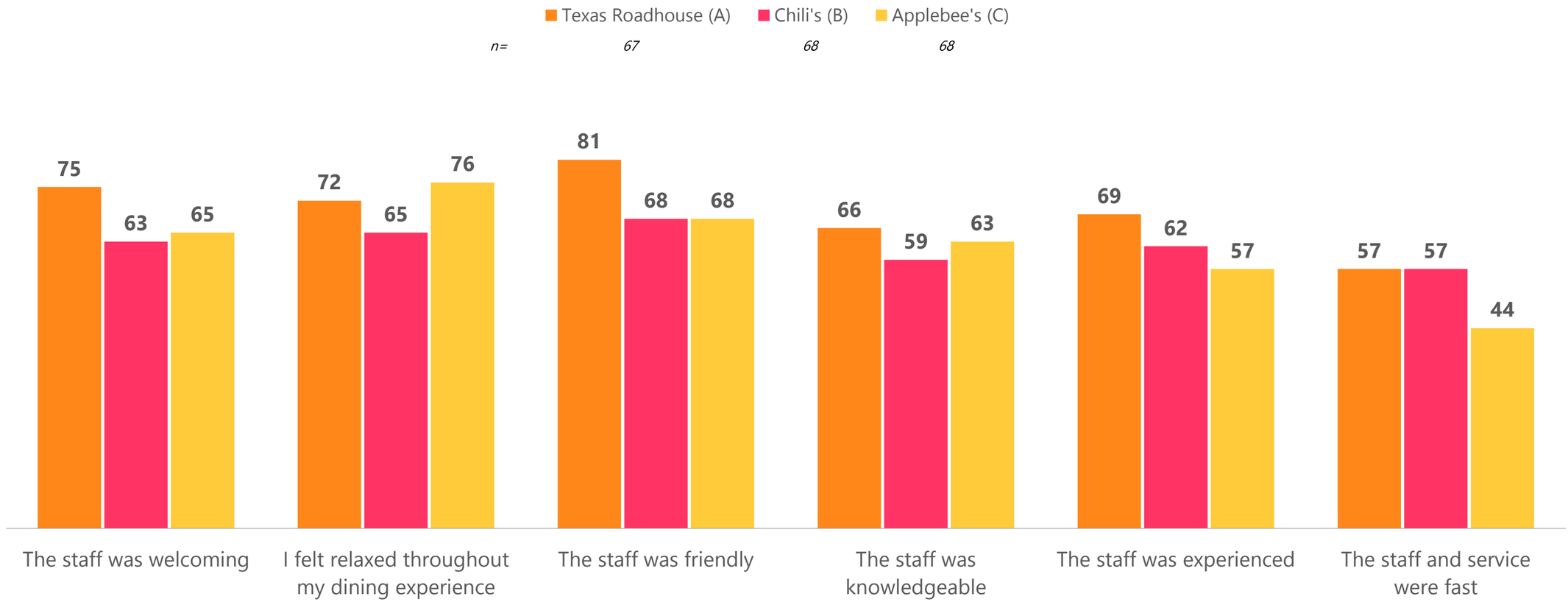
Food Quality & Order Accuracy Assessment



Q40: Thinking about your experience today, how much do you agree or disagree with each of the following statements? [RESTAURANT] ....
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicate significance.
Significance tested at 95% confidence level.

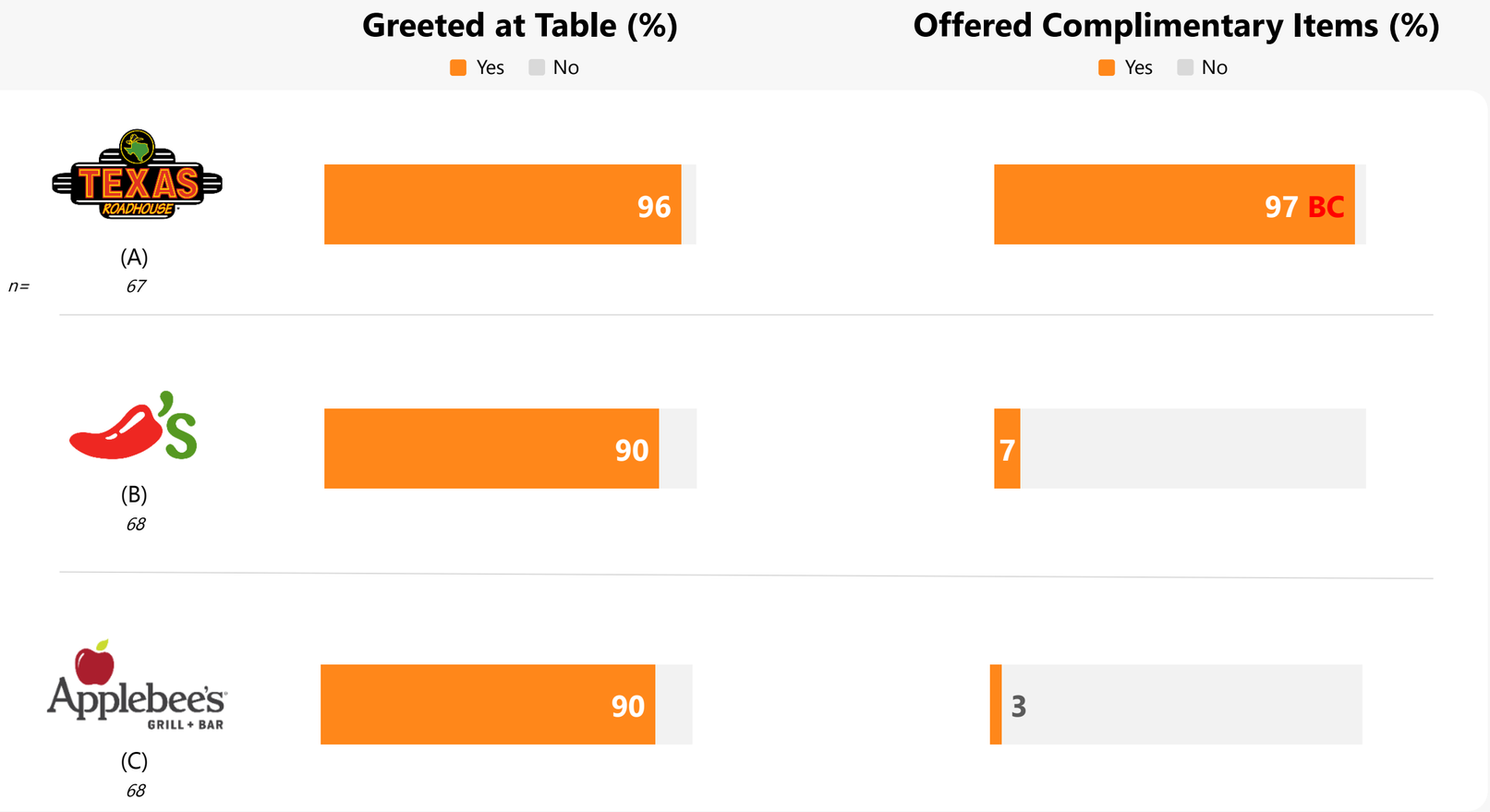
Staff & Service Assessment



Q41: Thinking about your experience today, how much do you agree or disagree with each of the following statements? Overall, the staff and service was/were …
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicate significance.
Significance tested at 95% confidence level.

Post-Seating Hospitality Assessment





Q3: Were you greeted after being seated at your table?
Q4: Were you offered complimentary food items (for example, baked bread, chips, or rolls)?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicates significance.
Significance tested at 95% confidence level.







This section highlights insights from **PHASE 2: Measure Actual Brand Experience**, a mobile mission with Lapsed Casual Dining Consumers. Participants visited one of three focus brands—Texas Roadhouse, Chili's Grill & Bar, or Applebee's—and evaluated both the dine-in experience and product performance. The Taste Evaluation explores how well each brand's cheeseburger delivers on expectations and influences purchase intent, with results covering Curion Score™ drivers, key metrics, hedonics, and just-about-right assessments of key product attributes.

Cheeseburger

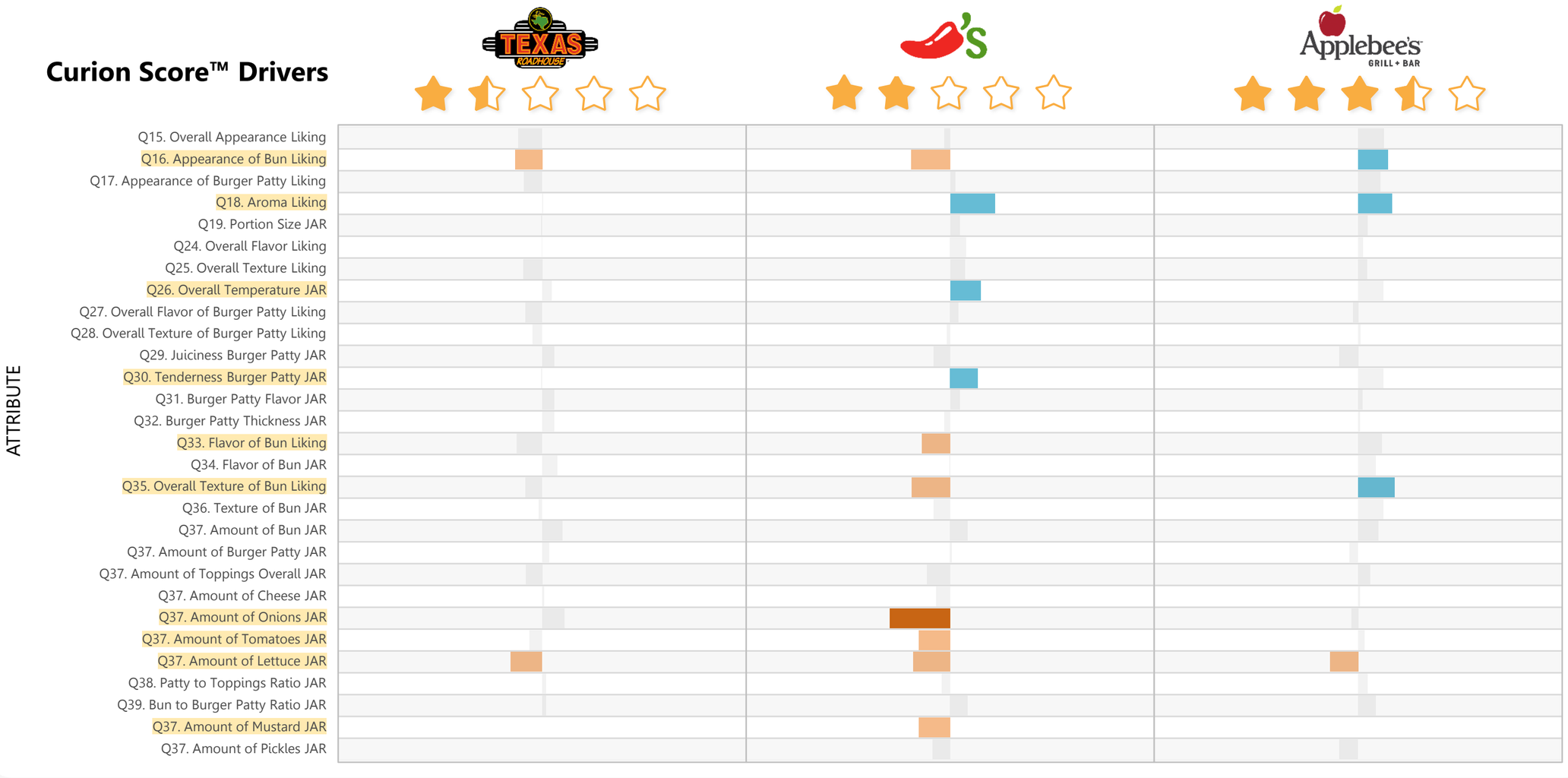
Taste Evaluations

A CRAVEABLE BURGER starts with appearance, but balance matters.

Applebee's delivers on both, while Chili's topping-heavy build weighs down the experience.

CURION SCORE
Product Performance Measurement.

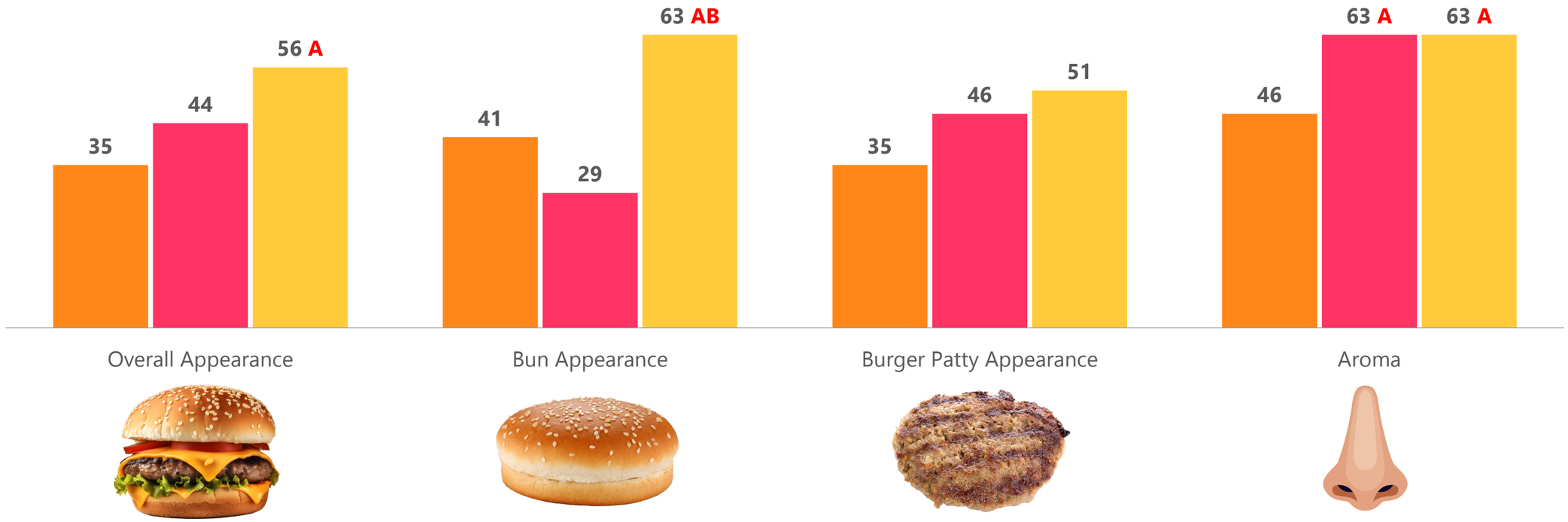
Curion Score™ Drivers





BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

Applebee’s bun leads the way, helping the burger stand out on appearance and aroma before the first bite.

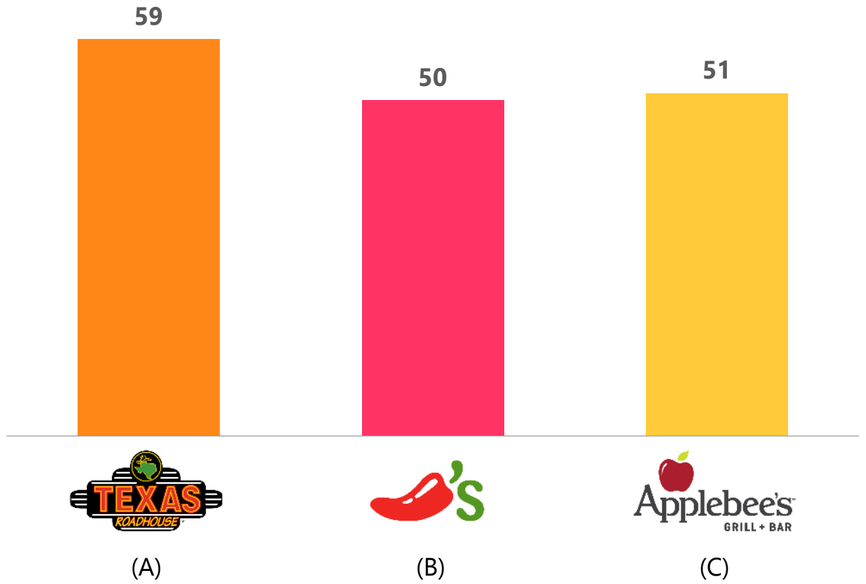


Q15: How much do you like or dislike the overall appearance of this cheeseburger? | Q16: How much do you like or dislike the appearance of the bun?
Q17: How much do you like or dislike the appearance of the burger patty? | Q18. How much do you like or dislike the aroma of this cheeseburger?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili’s Grill & Bar (n=68); Applebee’s (n=68)

A/B/C indicates significance.
Significance tested at 95% confidence level.

Burger performance levels the playing field: despite Applebee's stronger first impression, all three deliver similarly on overall taste and expectations.

Post-Taste Overall Liking (% Like Extremely)



THOUGHT STARTER

The high "better than expected" ratings likely reflect two factors: Lapsed Casual Diners arrived with modest expectations, and a positive dine-in experience elevated perceptions beyond the burger alone.

While appearance and execution matter, the environment surrounding the meal can influence how food is ultimately received.

Expectations (%)

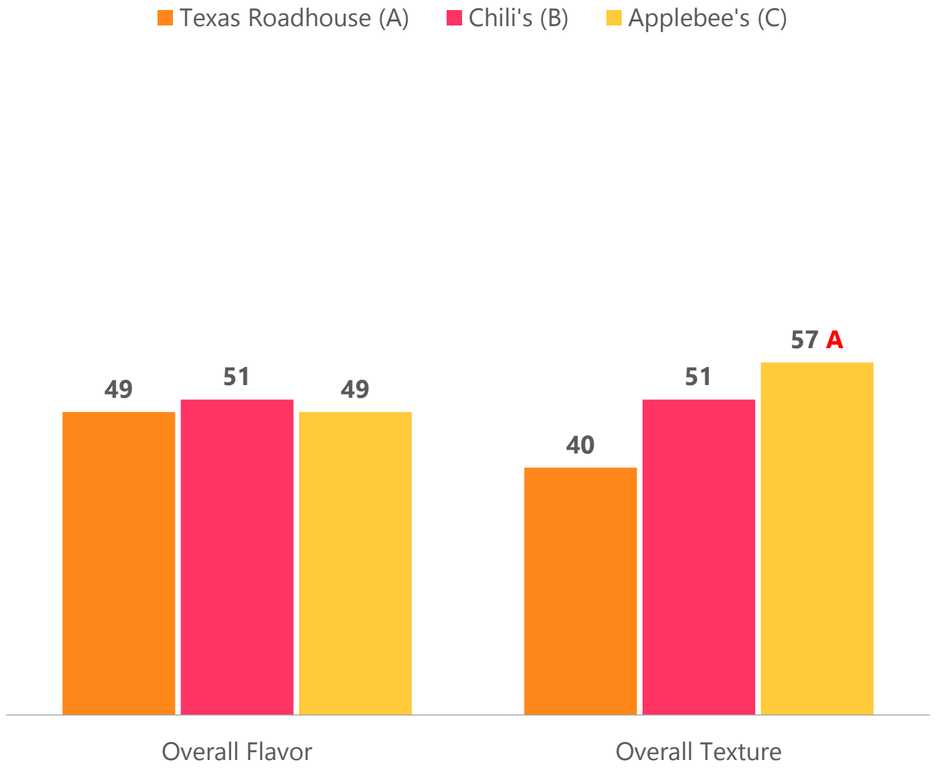


Q20: Which statement below best describes how much you like or dislike this cheeseburger overall?
Q23: How well does this item meet your expectations for a cheeseburger?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

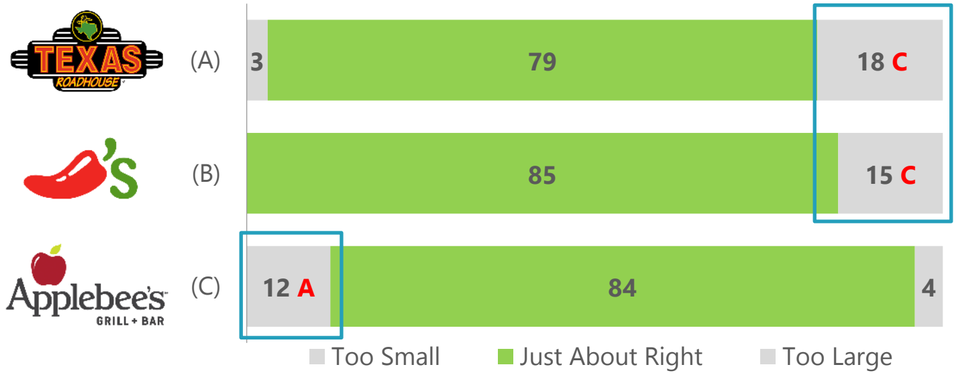
A/B/C indicates significance.
Significance tested at 95% confidence level.

Applebee’s delivers on overall texture, but all three brands satisfy on flavor, portion, and temperature.

Hedonics: Flavor & Texture (% Like Extremely)

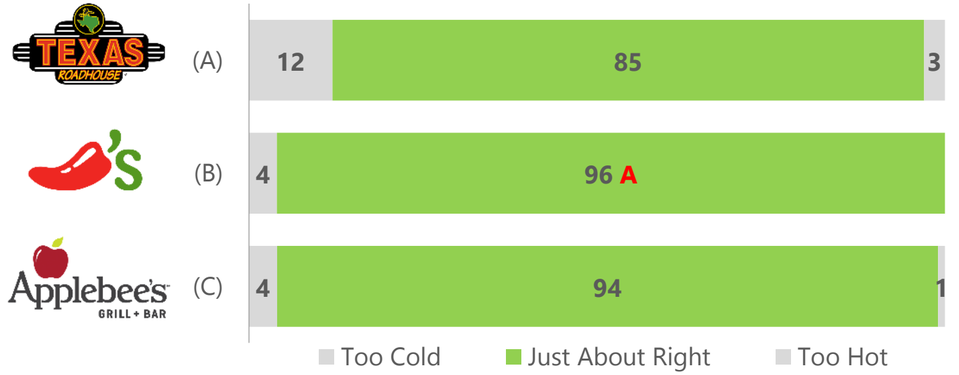


Portion Size JAR (%)



Despite small differences in portion perceptions—Applebee’s leaning smaller, Texas Roadhouse and Chili’s leaning larger—the majority agree all three brands deliver ‘just-right’ servings.

Temperature JAR (%)

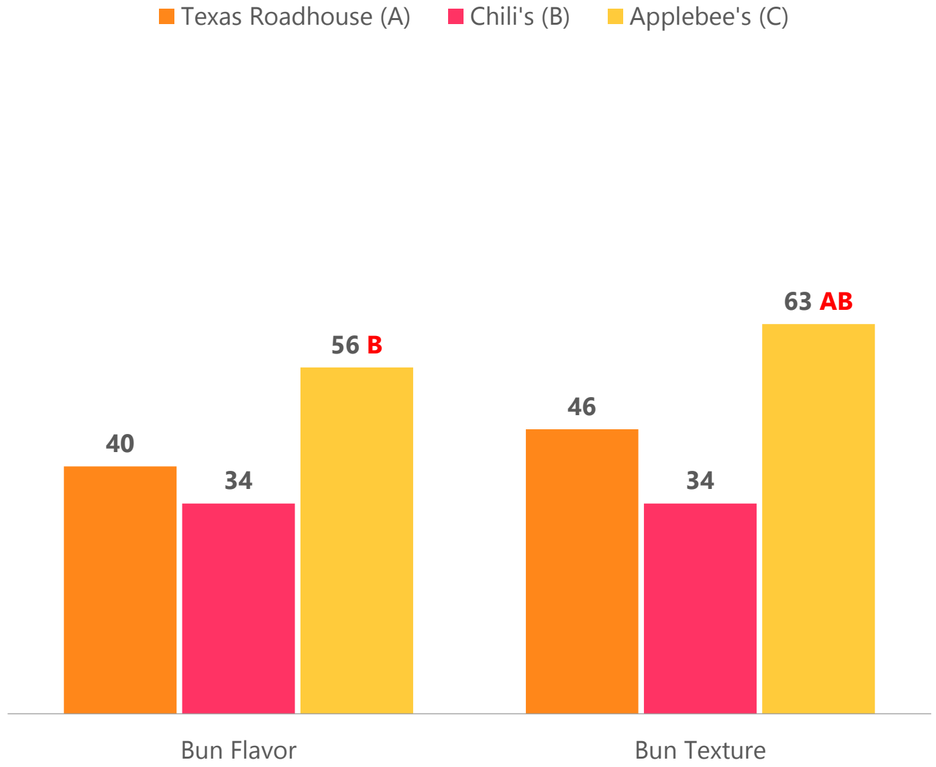


JAR skew 10%+ shown.
Q24: Which statement below best describes how much you like or dislike the overall flavor of this cheeseburger? | Q25: Which statement below best describes how much you like or dislike the overall texture of this cheeseburger?
Q19: Please rate the overall portion size of the cheeseburger. | Q26. Which statement below best describes the overall temperature of this cheeseburger?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili’s Grill & Bar (n=68); Applebee’s (n=68)

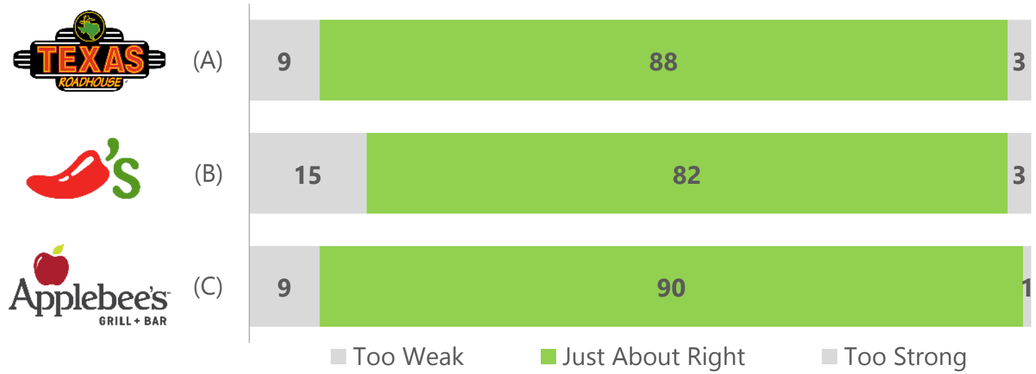
A/B/C indicates significance.
Significance tested at 95% confidence level.

Applebee’s bun crushes the competition in flavor and texture.

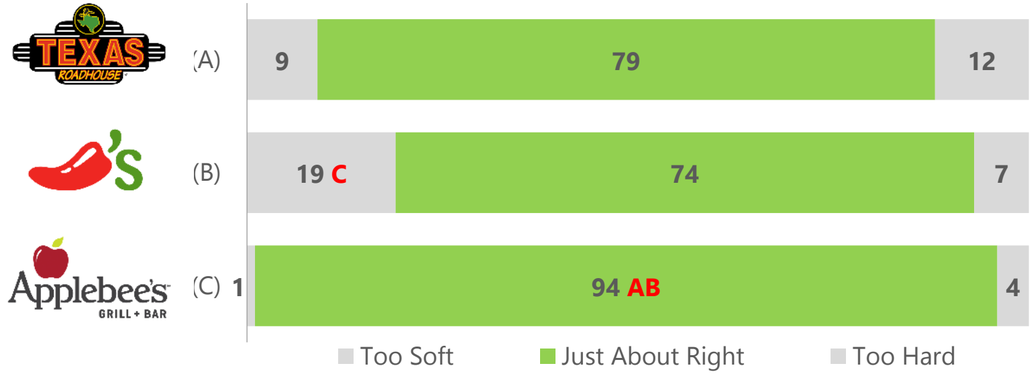
Hedonics: Bun Flavor & Texture (% Like Extremely)



Bun Flavor JAR (%)



Bun Texture JAR (%)

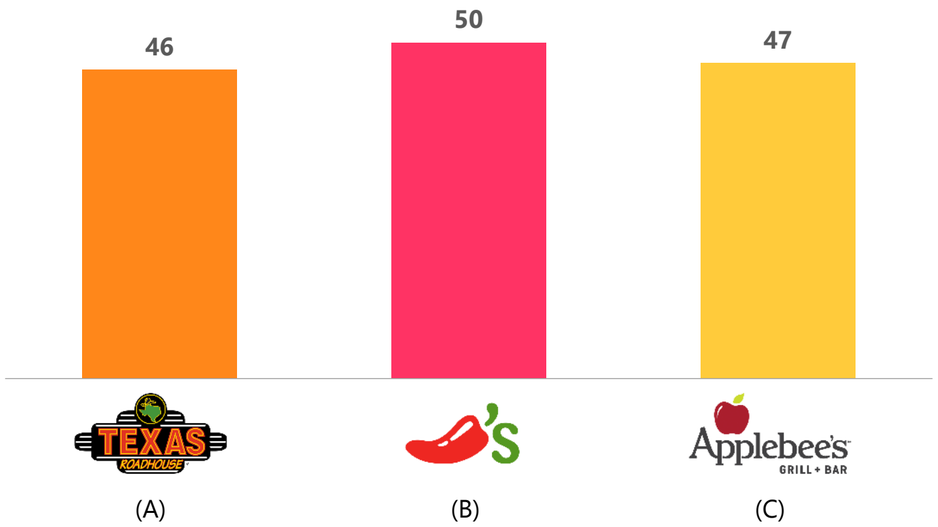


JAR skew 10%+ shown.
Q33: How much do you like or dislike the overall flavor of the bun? | Q34: How would you describe the flavor of the bun?
Q35: How much do you like or dislike the overall texture of the bun? | Q36. Is the texture of the bun…?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili’s Grill & Bar (n=68); Applebee’s (n=68)

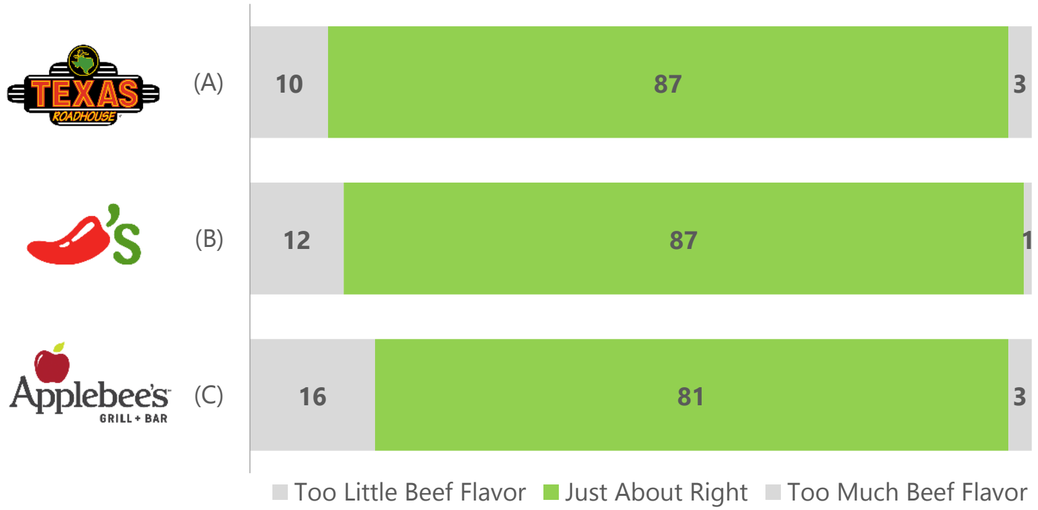
A/B/C indicates significance.
Significance tested at 95% confidence level.

All three brands hit the spot with a burger patty flavor that's just right.

Hedonics: Burger Patty Flavor (% Like Extremely)



Burger Patty Flavor JAR (%)

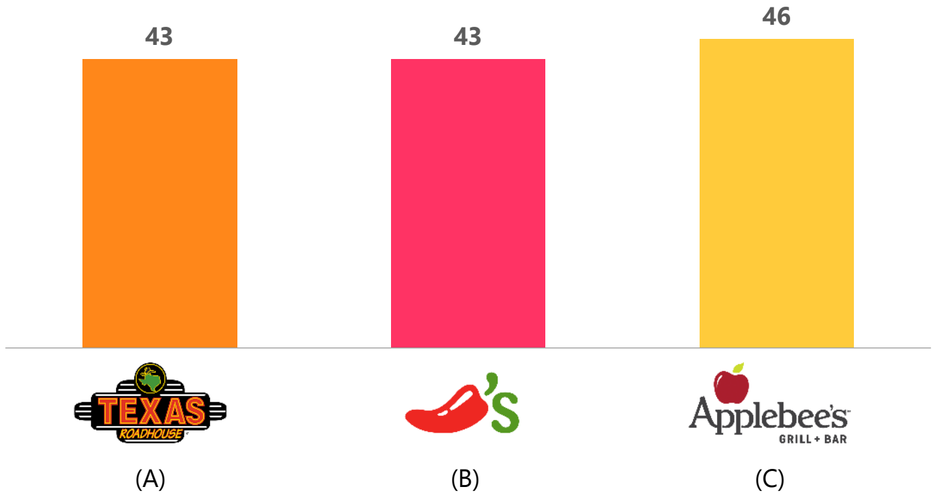


JAR skew 10%+ shown.
Q27: Which statement below best describes how much you like or dislike the overall flavor of the burger patty?
Q31: How would you describe this burger patty's flavor?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

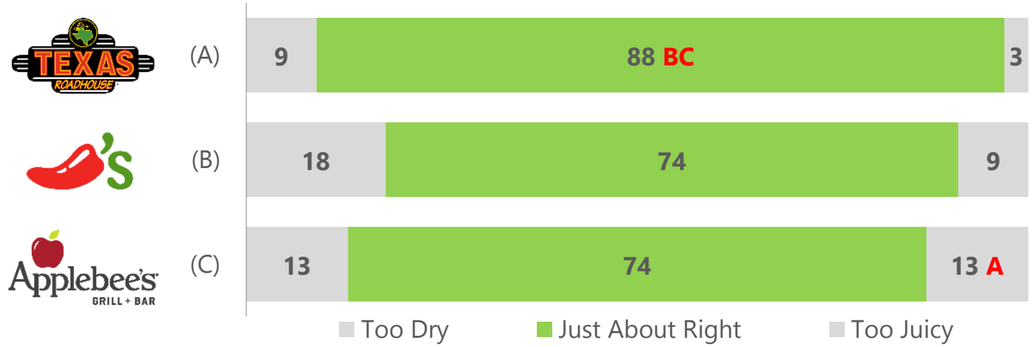
A/B/C indicates significance.
Significance tested at 95% confidence level.

Burger patty texture also resonates well.

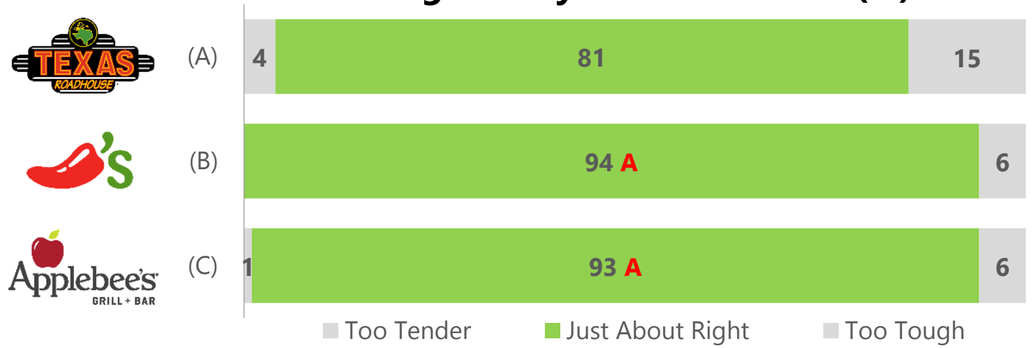
Hedonics: Burger Patty Texture (% Like Extremely)



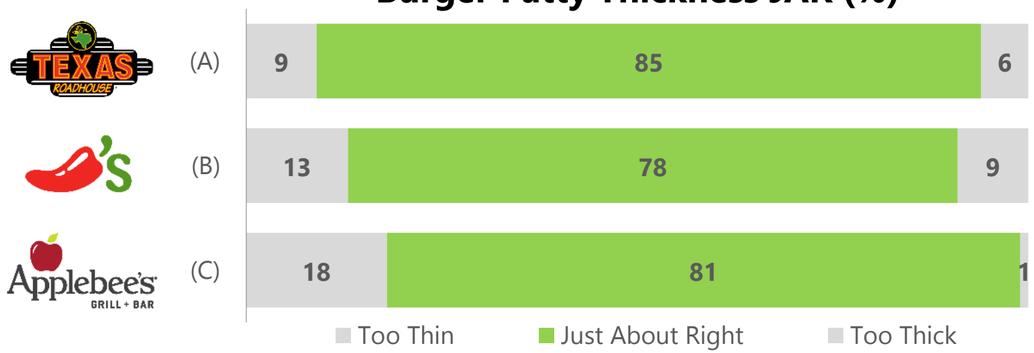
Burger Patty Juiciness JAR (%)



Burger Patty Tenderness JAR (%)



Burger Patty Thickness JAR (%)

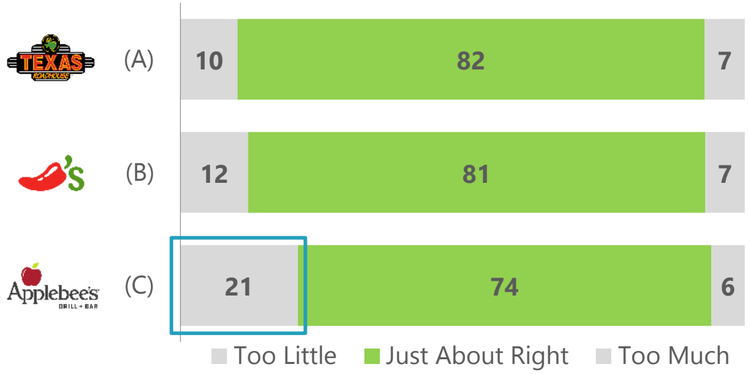


JAR skew 10%+ shown.
Q28: Which statement below best describes how much you like or dislike the overall texture of the burger patty?
Q29: How would you describe the juiciness of the burger patty? ● Q30: How would you describe the tenderness of this cheeseburger?
Q32: Is the thickness of the burger patty…?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

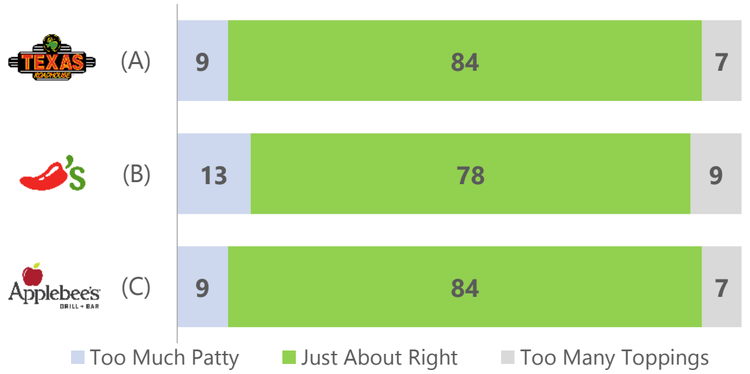
A/B/C indicates significance.
Significance tested at 95% confidence level.

All three brands deliver solid balance of patty, bun and toppings, with Applebee's leaning light on patty and Texas Roadhouse a bit heavy on patty-to-bun.

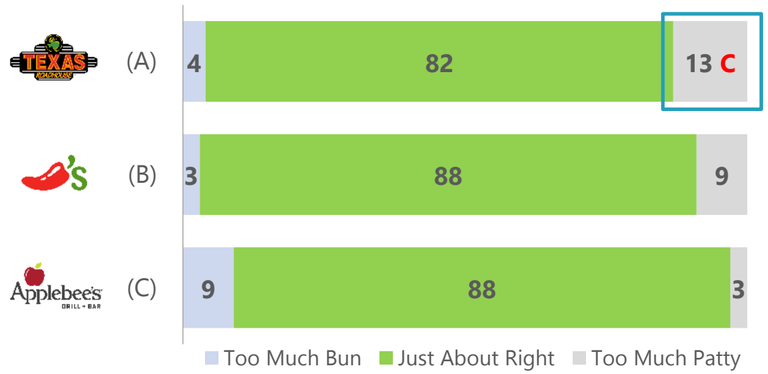
Burger Patty Amount JAR (%)



Burger Patty to Toppings Ratio JAR (%)



Bun to Burger Patty Ratio JAR (%)



JAR skew 10%+ shown.
Q37: Thinking about the different parts of this cheeseburger, is the amount of…
Q38: How would you describe the burger patty to toppings ratio for this cheeseburger?
Q39. How would you describe the bun to burger patty ratio for this cheeseburger?
BASE: Completed Mobile Mission at: Texas Roadhouse (n=67); Chili's Grill & Bar (n=68); Applebee's (n=68)

A/B/C indicates significance.
Significance tested at 95% confidence level.



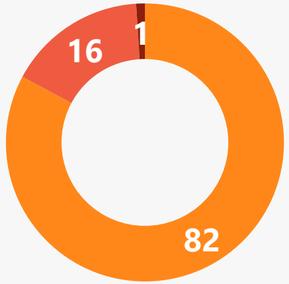




Demographics

DEMOGRAPHICS

Gender (%)



- Female
- Male
- Non-binary/third gender

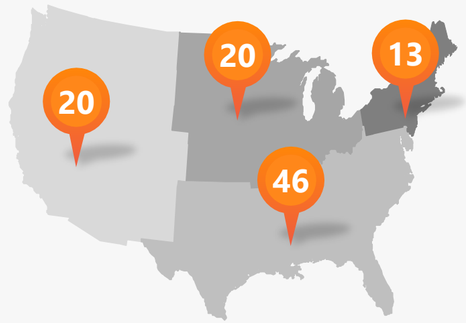
Age (%)

18-24	3
25-34	19
35-44	31
45-54	26
55-65	20

Generation (%)

Generation Z (18-28)	8
Millennial (29-44)	45
Gen X (45-60)	38
Baby Boomers (61+)	9

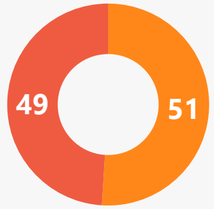
Region (%)



HHI (%)

Under $25,000	11
$25,000 to $49,999	21
$50,000 to $74,999	22
$75,000 to $99,999	15
$100,000 to $124,999	9
$125,000 to $149,999	5
$150,000 to $199,999	6
$200,000 or more	3
Prefer not to say	8

Children in Household (%)



- Have Kids
- Do Not Have Kids

Area Live (%)

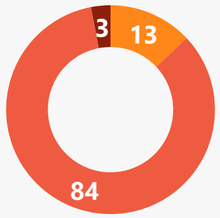
Suburban	47
Urban	24
Rural	20
Small city or town	10

Race (%)

White	70
Black or African American	17
Asian	5
American Indian or Alaska Native	2
Native Hawaiian or Pacific Islander	2
Middle Eastern or North African	1
Other	4
Prefer not to say	5

Ethnicity (%)

Hispanic, Latino, or of Spanish origin



- Yes
- No
- Prefer not to say

Lifestyle/Dietary Preferences/Restrictions (%)

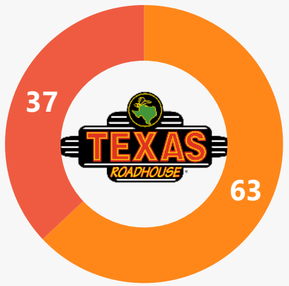
Low Sugar	17
Minimally Processed	14
Low Sodium	11
Organic	10
Intermittent Fasting	10
Low Calorie	8
Gluten-Free	7
Low Fat	7
Non-GMO	7
Dairy-Free	6
Vegetarian	6
Mediterranean Diet	6
Plant-Based	6
Keto	5
Intuitive Eating	3
Vegan	2
Paleo	1
Grain-Free	1
Whole30	1
Other	4
None	55

BASE: Total Sample (n=459)

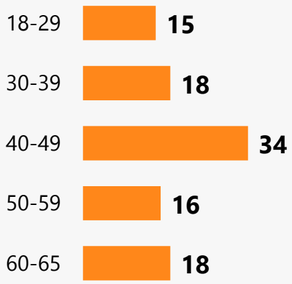
12 CORE BRANDS

DEMOGRAPHICS

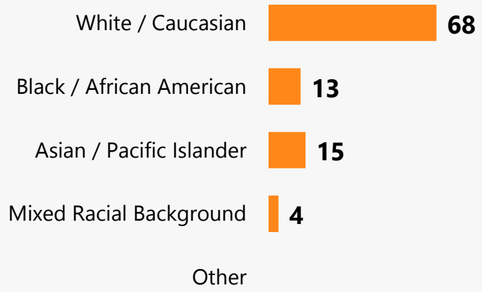
Gender (%)



Age (%)

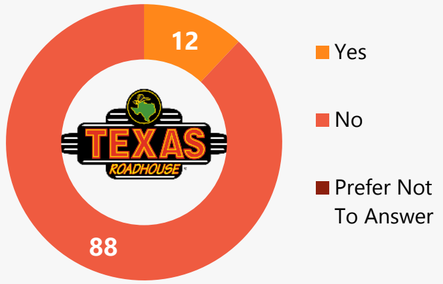


Race (%)

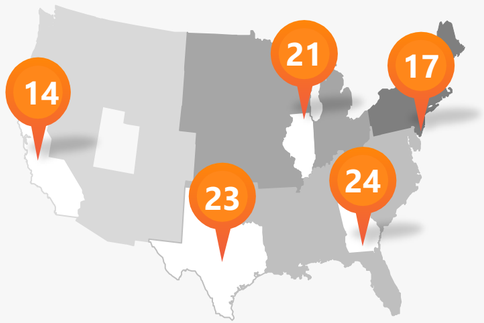


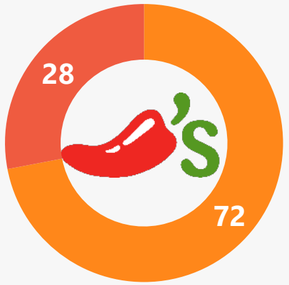
Ethnicity (%)

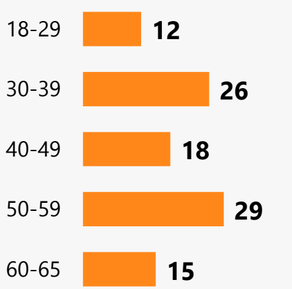
Hispanic, Latino, or of Spanish origin

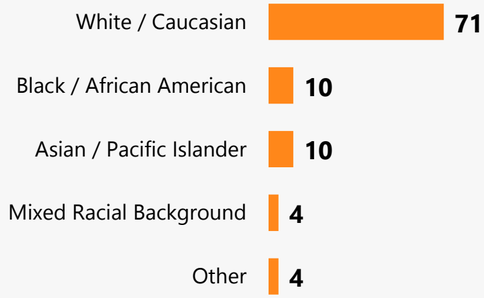


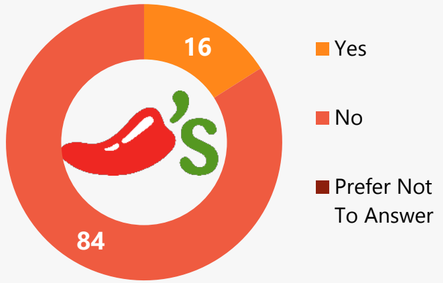
Region (%)

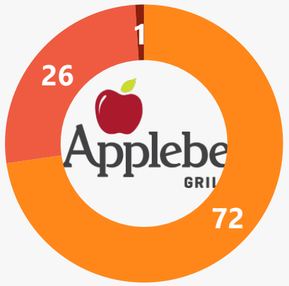


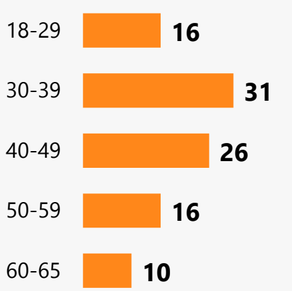


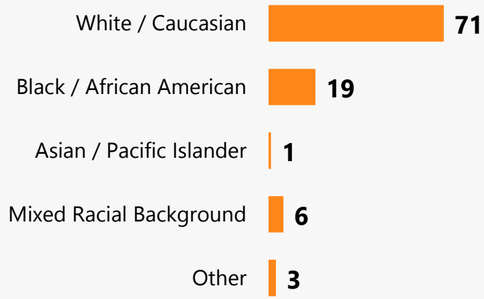


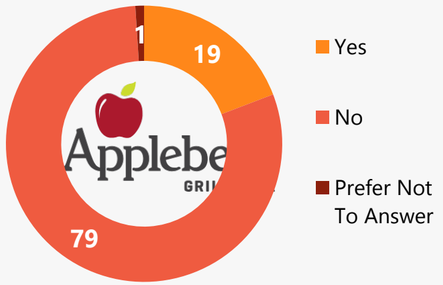












BASE: Total Sample (n=68)

SAMPLE COMPOSITION

- The majority of participants were recontacted from the online survey based on their responses, while the remaining sample was recruited from Curion panelists across key markets.

CONTACT US

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gahlstrom@curioninsights.com