

CASUAL DINING

InView
Q3 2018

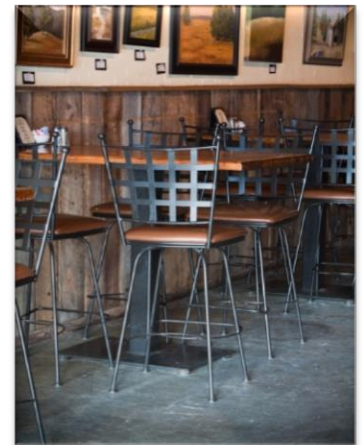


© 2018 by M/A/R/C® Research

All rights reserved. No part of this paper may be reproduced in any form of printing or by any other means, electronic or mechanical, including, but not limited to, photocopying, audiovisual recording and transmission, and portrayal or duplication in any information storage and retrieval system, without permission in writing from M/A/R/C® Research.

General News/Trends

- ◆ In a call with investors, Brinker International's CEO said the lunch daypart for the casual dining segment has seen traffic fall – especially on days at the beginning of the workweek – as the quality and convenience of fast-casual restaurants has improved. *(Source: Nation's Restaurant News, 5/2/18)*
- ◆ A survey of Millennial parents (ages 22-37) ranked the following chains as being the most kid-friendly (in order starting with most kid-friendly): Chick-Fil-A, Cici's, Cracker Barrel, Fuddrucker's and Friendly's (tied), Texas Roadhouse, Marco's Pizza, Joe's Crab Shack, Captain D's, McAlister's Deli, Perkins Restaurant & Bakery, Newk's Eatery, and Which Wich. *(Source: Restaurant Business, 5/23/18)*
- ◆ When asked about the impact of menu calorie counts on their dining habits, only 25% of casual dining customers said seeing calorie counts would influence their ordering decision, compared to 38% of fast food customers. Forty-four percent of casual dining customers said they did like seeing the calorie information on the menus though. *(Source: Marketing Daily, 6/14/18)*
- ◆ A mid-year review of restaurant traffic in the United States predicted the casual dining industry is on track for 3.3% growth in sales for 2018, while fast casual restaurants should see 8% growth, which is down from the double-digit growth that category has seen over the past few years. *(Source: Restaurant Business, 6/26/18)*
- ◆ Many restaurants are starting to replace their regular tables with tall "bar" tables that use barstools rather than traditional chairs. The bar tables only take up 3 square feet rather than 6 square feet and make it easier to squish customers together for faster turnover of the tables, and more customers for the restaurant. Many customers dislike the "stool seating," saying they can't sit at tables and eat without a back on the chair for support, plus parents find it more difficult to dine with their babies and small children at bar-style tables. The online restaurant booking tool OpenTable has begun offering users a way to search for restaurants that have traditional tables rather than the bar-style tables. *(Source: Wall Street Journal, 7/4/18)*
- ◆ The ten largest casual dining chains in the United States in terms of U.S. systemwide sales in 2017 are (in order): Applebee's, Olive Garden, Buffalo Wild Wing, Chili's Grill & Bar, Outback Steakhouse, Texas Roadhouse, Red Lobster, The Cheesecake Factory, LongHorn Steakhouse, and Red Robin Gourmet Burgers & Brews. *(Source: Nation's Restaurant News, 7/5/18)*



Chain Specific New

- ◆ Applebee's reported a 3.3% increase in same-store sales for Q1, the sharpest increase in sales since 2011. Applebee's president told investors the chain has seen some customers return who had been unhappy with the chain's attempt at moving upmarket, and that bringing back the chain's "Eatin' Good in the Neighborhood" slogan had also driven traffic. (Source: *Restaurant Business*, 5/3/18)
- ◆ Panera Bread announced it has expanded its in-house delivery program to be available at more than 1,300 restaurants across the United States. The restaurant is one of the few non-pizza chains to operate its own delivery service and now has roughly 13,000 drivers and employees supporting the delivery program. (Source: *Nation's Restaurant News*, 5/8/18)
- ◆ Chipotle reported its partnership with DoorDash has led to a 700% increase in delivery orders during the first week of the partnership being active. The average delivery time was 34 minutes and the most frequently ordered items were burrito bowls, burritos, and chips with guacamole. (Source: *QSR Magazine*, 5/9/18)
- ◆ The CEO of Potbelly Sandwich Shop told investors the chain had explored a potential sale of the company but ended up calling off the sale as it was determined the sale would not "be viable or in the best interest of the company and our shareholders." Instead, the company has come up with a turnaround plan which includes updated menus created by Michelin-starred chef Ryan LaRoche, pursuit of off-premise sales, and the hiring of a new marketing executive who will be responsible for "relevant" marketing of its delivery, takeout, and catering platforms. (Source: *Nation's Restaurant News*, 5/9/18)
- ◆ Chili's announced a data breach that occurred at corporate-owned locations during March and April 2018. A preliminary investigation found malware in Chili's payment systems for in-restaurant purchases gathered credit & debit card information such as the card numbers and cardholder names. (Source: *Indianapolis Star*, 5/13/18)
- ◆ Dickey's Barbecue Pit has teamed up with iOLAP to create a voice technology system for its back-of-the-house operations. The system uses the Amazon Alexa Echo Dot and a headset – employees can ask Alexa what items they need to order that week, how much longer should the brisket stay in the smoker, and other operational questions. (Source: *Hospitality Technology*, 5/15/18)
- ◆ Red Lobster partnered with the Monterey Bay Aquarium Seafood Watch® program as part of the restaurant chain's recently announce Seafood with Standards commitment to serve only "traceable, sustainable and responsibly-sourced seafood." Red Lobster will use the Monterey Bay program's data to assist in its seafood sourcing as well as educate team members and restaurant guests. (Source: *PR Newswire*, 5/15/18)
- ◆ Red Robin reported in the first quarter of the year, it saw its off-premise sales soar by 40% compared to the first quarter of 2017. The company has begun testing its own delivery service, citing problems with getting customer data from third-party delivery providers. (Source: *Nation's Restaurant News*, 5/23/18)



- ◆ Bravo Brio Restaurant Group Inc. rejected a purchase offer from Romano's Macaroni Grill and announced it would instead accept an offer from Spice Private Equity Ltd. as it was all-cash and did not rely on third-party financing. Spice Private Equity later announced the creation of FoodFirst Global Restaurants Inc. to manage the Brio Tuscan Grille and Bravo Cucina Italiana brands as well as create new restaurant brands and possibly acquire others later on. According to FoodFirst's new CEO Brad Blum – former CEO of Romano's Macaroni Grill – the first goal of the company will be to rebrand both Bravo and Brio as “polished-casual” concepts. (Sources: *Nation's Restaurant News*, 5/15/18, 5/29/18)



- ◆ QDOBA named Keith Guilbault as its Chief Executive Officer and Susan Daggett as Chief Financial Officer. Mr. Guilbault had been QDOBA's Brand President while the chain was owned by Jack in the Box and had previously been Jack in the Box's Chief Marketing Officer. Ms. Daggett had been interim Chief Financial Officer at Noodles & Company. (Source: *Business Wire*, 5/14/18)
- ◆ The main owner of Landry's Restaurants, Tillman Fertitta, purchased Waitr, a delivery company that operates in the southeastern United States. Mr. Fertitta said customers will be able to use Waitr to have orders delivered from any of the Landry's Inc. restaurants, including Joe's Crab Shack, Claim Jumper, Rainforest Café, and Saltgrass Steak House. (Source: *Restaurant Business*, 5/18/18)
- ◆ Chipotle announced plans to relocate its headquarters from Denver to Newport Beach, California. The move will impact about 400 employees at Chipotle's headquarters in Denver as well as an office in New York. Chipotle's recently hired CEO Brian Niccol lived in Newport Beach when he was CEO of Taco Bell. (Source: *Nation's Restaurant News*, 5/23/18)
- ◆ Chipotle has begun building drive-thru lanes at some of its locations, but customers can only use the lanes to pick up orders made online or through the Chipotle app, not place orders. The digital orders usually take about 12 minutes to fill, but customers ordering through the app can preselect a time for pickup several hours in advance. (Source: *CNBC.com*, 5/24/18)
- ◆ Zoës Kitchen announced it is the first and only national Mediterranean restaurant to be Whole30 approved. The Whole30 lifestyle does not allow any added sugars, grains, dairy, legumes, or alcohol but does focus on high-quality protein in its meals. To promote the new partnership with Whole30, Zoës launched a “Mediterranean Goodness Tour” with pop-up lounges in four cities where consumers can learn about Zoës Kitchen's food philosophy and the benefits of following the Whole30 meal plan, plus get samples of Zoës Kitchen Whole30 compliant food and participate in free yoga classes. (Source: *Business Wire*, 5/15/18)
- ◆ Jersey Mike's revealed it is working with a designer to reconfigure its restaurants to better handle online and delivery orders, with the goal of creating a more defined area for pickup. (Source: *Restaurant Business*, 6/7/18)



- ◆ Zoës Kitchen executives told investors the company will evaluate its current restaurants with the possibility of closing as many as ten of them by the end of 2018 and will slow down planned new restaurants. Zoës Kitchen's board of directors has also created a panel which will explore "strategic alternatives." The chain saw a decline in same-store sales of 2.5% in the first quarter this year. *(Source: Nation's Restaurant News, 5/25/18)*
- ◆ JAB Holding Co. acquired a majority stake in Pret A Manger from the private equity firm Bridgepoint, with the deal estimated to be valued at almost \$2 billion. JAB bought Panera Bread and Au Bon Pain in 2017, and also owns Krispy Kreme, Einstein Bros. Bagels, Caribou Coffee, Peet's Coffee, Bruegger's Bagels, Intelligentsia Coffee and Stumptown Coffee Roasters, plus Keurig Green Mountain and Dr Pepper Snapple Group. *(Source: Restaurant Business, 5/29/18)*



- ◆ The private investment firm High Bluff Capital Partners acquired Quiznos' parent company QCE LLC for an unknown amount of money. Quiznos' CEO & President Susan Lintonsmith will continue holding those positions and said she thinks the acquisition will be the "infusion we need to take the brand to the next level." *(Source: Nation's Restaurant News, 6/11/18)*
- ◆ In an interview, IHOP's president said the chain wants to expand in Chicago and other urban markets like Washington DC and New York City. One issue the chain will have to deal with first is the average size of its restaurants, as 5,000 square feet is too large for a restaurant in an urban location, but any smaller restaurant sizes would have to be approved by the company's owner-operators first. *(Source: Chicago Tribune, 6/13/18)*
- ◆ Potbelly announced it hired Brandon Rhoten to be its new Chief Marketing Officer. Mr. Rhoten comes to Potbelly from Papa John's. The sandwich chain also hired Jeff Welch to be its SVP of Franchise Development, Debbie White as VP responsible for off-premise sales, and Chef Ryan LaRoche as Vice President of culinary development. *(Source: Nation's Restaurant News, 6/13/18)*
- ◆ Pei Wei unveiled a new prototype restaurant in a suburb of Dallas. The new design has the ordering line queue past the open kitchen, so guests can see the food being made, while the front of the house has new wall graphics, new digital menu boards, and bright furniture. Employees sport new uniforms and there is an updated music playlist. A separate area has been dedicated for take-out & delivery order pickup. The updated restaurant held a special grand re-opening on June 14th and the first 100 dine-in customers received a free small order of Wei Better Orange Chicken and a free order of Thai Donuts with the purchase of any entrée. *(Source: QSR Magazine, 6/14/18)*
- ◆ Wingstop Restaurants' CEO and CFO told attendees at a conference hosted by Jefferies LLC that the chain will begin offering delivery nationwide next year on a specially developed in-house delivery platform rather than the Olo platform it currently uses. The chain will also roll out a new mobile app and update its Internet presence to optimize delivery. *(Source: Nation's Restaurant News, 6/20/18)*



- ◆ Darden CEO Gene Lee said his company has outlined a three-pronged “turnaround program” for Cheddar’s Scratch Kitchen, which was acquired in April 2017. The plan includes “hiring aggressively” to make up from understaffing at the restaurant unit level; teaching Cheddar’s workers how to use new management and operational tools; and simplifying the Cheddar’s menu. Mr. Lee said menu simplification was a major reason for Olive Garden’s strong performance in the most recent quarter. *(Source: Restaurant Business, 6/21/18)*

- ◆ Cheesecake Factory Inc. announced it will open the first unit of its new fast-casual Social Monk Asian Kitchen concept in Thousand Oaks, California. No exact details about the concept have been released, but the menu will reportedly “span across several Asian countries” and guests will order at a counter but have the food served to them at the table. *(Source: Nation’s Restaurant News, 6/22/18)*



- ◆ The Cheesecake Factory and DoorDash launched an exclusive delivery partnership nationwide. To promote the DoorDash delivery option, the delivery fee was waived on all Cheesecake Factory customer orders (as well as orders from its sibling brand Grand Lux Café) from August 1st through August 5th. *(Source: Business Wire, 8/1/18)*

- ◆ Red Lobster expanded the footprint for its delivery partnership with DoorDash, making the delivery service available from more than 300 restaurants across the United States and Canada. DoorDash will be fully integrated into Red Lobster’s point of sale system by mid-July, and the restaurant said it would also update its My Red Lobster Rewards mobile app to incorporate online ordering. *(Source: PR Newswire, 6/26/18)*

- ◆ Chipotle said it will close anywhere from 55 to 65 units as part of its recovery plan, including five locations of its Pizzeria Locale concept. *(Source: Nation’s Restaurant News, 6/27/18)*

- ◆ The private equity owners of P.F.Chang’s Bistro announced they had hired Bank of America, Merrill Lynch, and Barclays to explore the possibility of selling the restaurant, saying they had received “multiple unsolicited indications of interest” after the recent positive performance of the chain and the separation of Pei Wei Asian Diner. *(Source: Business Wire, 6/29/18)*

- ◆ IHOP teamed up with DoorDash to offer delivery from more than 300 locations nationwide. To promote the service, the delivery fee was waived on all IHOP orders of \$10 or more made through DoorDash from July 18th through July 22nd. *(Source: PR Newswire, 7/17/18)*

- ◆ Luby’s, Inc. told investors in an earnings conference call that it will close additional restaurants this year due to the “competitive restaurant environment.” Luby’s saw a 6.6% drop in guest traffic at its namesake restaurants and a 9.6% drop in traffic at its Fuddrucker’s brand. *(Source: QSR Magazine, 7/17/18)*



- ◆ Hooters of America was put up for sale by the three investment firms that own it. The company had been on the market briefly in 2015 before being taken off the market. Industry experts speculate some buyers might like the idea of buying Hooters now because it has launched a fast-casual concept called Hoots which primarily serves chicken wings and could be a competitor to Wingstop. *(Source: Restaurant Business, 7/18/18)*

- ◆ Schlotzsky's announced it is adding "Austin Eatery" to its name as it begins to shift into the "fast fine" dining category. Eighteen locations have already been converted to the "Schlotzsky's Austin Eatery" concept and the rest of the chain's units should be switched over by the end of 2019. The restaurant buildings will have roll-up garage doors, outdoor patio seating, a mismatched furniture look "inspired by Austin's spirit of originality." The menu will also be expanded to include tacos and sliders, as well as beer and wine. Orders will be brought out to customers' tables and the staff will describe the food being delivered, such as "This is the Sweet n' Sassy with cream cheese and apricot jam." According to Schlotzsky's president, employees will also tell customers "we're glad you're here" and the chain wants to "own" that phrase similar to how Chick-Fil-A employees always say, "My pleasure." (Source: QSR Magazine, 7/23/18)



- ◆ On its second-quarter earnings call with investors, Bloomin' Brands' CEO Elizabeth Smith said the company will expand delivery services for its Outback Steakhouse and Carrabba's Italian brands, as "it is becoming increasingly evident that the potential for off-premise and delivery provides a large and incremental tailwind for casual dining." The parent company is also moving away from discounted limited-time offers or coupons. (Source: Nation's Restaurant News, 7/30/18)
- ◆ Chipotle closed a unit in Ohio after seven people contacted the local health department to say they had gotten sick after eating at that location. The health department's inspection after the reports found no violations of food safety standards or any employees that had been working while sick. (Source: Restaurant Business, 7/31/18)
- ◆ Newk's Eatery announced its Newk's Express Market will be available in all of its restaurants by the end of September 2018. The Express Market section in Newk's offers five prepared protein options ready to be taken home and heated up by consumers: flash-seared Ahi tuna slices; two-dozen broiled shrimp; one pound of sliced grilled Petite Tenderloin Steak; two char-grilled Atlantic Salmon Fillets; and one pound of sliced chicken. Consumers can also pick up prepared sides, soups, Newk's Q Take & Bake Pizza, entrée salads, sandwiches, bottled salad dressing and slices of Newk's Dozen-Layer Cake. (Source: QSR Magazine, 8/1/18)



Branding/Marketing Efforts

- ◆ Quiznos celebrated National BBQ Day (May 16th) by offering a BOGO deal to members of its Toasty Points loyalty program. The program's members could access a digital coupon through the Toasty Points app which let them buy either a Southern Style BBQ Pulled Pork or Spicy Chipotle BBQ Pulled Pork sandwich and get a second pulled pork sandwich for free. (Source: PR Newswire, 5/3/18)
- ◆ The Cheesecake Factory ran a special promotion for Mother's Day. For every \$50 in eGift Cards purchased at its website from May 7th through May 13th, The Cheesecake Factory gave the purchaser a complimentary \$10 eCard (maximum \$40 in complimentary eGift Cards per customer). (Source: Business Wire, 5/7/18)
- ◆ To promote the expansion of its delivery service, Panera offered a free cup of soup with any order of \$5 or more placed online. The chain also started running three television ad campaigns about the availability of delivery. (Source: MarketingDaily, 5/8/18)
- ◆ Chili's Grill & Bar celebrated the royal wedding of Prince Harry & Meghan Markle by creating a very limited number of Chili's-themed fascinators (hats) and cufflinks. Fans of the brand were told to follow Chili's on social media and tag them using #ChilisRoyalWedding and they "just might be delighted" to receive one of the special items. (Source: PR Newswire, 5/9/18)
- ◆ Applebee's posted an hour-long video on YouTube that just shows steak, chicken, shrimp, and ribs cooking on a red-hot grill. The video is tagged with #ASMR, or autonomous sensory meridian response, which is the tingly feeling some people get on their neck & spine when listening to certain sounds. The video had been watched roughly 3,500 times in the first two weeks it was online. (Source: Restaurant Business, 5/18/18)
- ◆ Moe's announced the selection of its Chief Taco Officer, Kate Munoz. Ms. Munoz will lead the Moe's Taco Tour this summer which will take a Moe's food truck to twelve cities, giving out samples of the new Three Amigos Tacos, which are authentic Southwestern street-style tacos. (Source: PR Newswire, 5/21/18)
- ◆ Red Robin Gourmet Burgers & Brews celebrated the end of the school year by offering teachers and school administrators a free Tavern Double Burger and Bottomless Steak Fries when they present their school ID for dine-in or to-go orders on June 5th. (Source: PR Newswire, 5/29/18)
- ◆ Taco Cabana launched "Margarita Mondays" – a special summer promotion which offers a rotating menu of seasonal margaritas for just \$3 every Monday. (Source: QSR Magazine, 5/14/18)
- ◆ Applebee's kicked off summer with the return of its \$1 Long Island Iced Tea, also known as the DOLLAR L.I.T. The summery drink was available through the entire month of June. (Source: PR Newswire, 6/1/18)
- ◆ Boston Market brought back its popular promotion offer of a rotisserie chicken for just \$1.99 with the purchase of any Family Meal, for a limited time only. (Source: PR Newswire, 6/4/18)



- ◆ McAlister's Deli celebrated National Iced Tea Month (June) with several promotions. The first 20 guests in line at each McAlister's on June 1st received a free 32-ounce reusable tea tumbler. From June 1st through June 10th, members of the McAlister's Rewards program could get coupons for 32-cent iced tea through the McAlister's app. On June 21st, McAlister's celebrated Free Tea Day and gave away a complimentary 32-ounce glass of iced tea to every guest, no purchase necessary.

(Source: PR Newswire, 5/31/18)



- ◆ IHOP tweeted it was going to change its name to "IHOB" rather than "IHOP" and that the "B" would be revealed on June 11th. A spokesperson for the company told the New York Post that the tweet was serious, although many people on social media suspected it was a marketing trick. On June 11th, the chain said the B stood for Burgers and unveiled a new menu line of Ultimate Steakburgers. Wendy's, Burger King, Whataburger and other restaurants took to social media to respond to IHOP's "name change." Wendy's Twitter account – which is famous for its snark – said it was "not really afraid of the burgers from a place that decided pancakes were too hard." Burger King announced it would change its name to Pancake King, while Whataburger tweeted "as much as we love our pancakes, we'd never change our name to Whatapancake." One unexpected result of the "name change" was that it turns out a lot of its current customers don't know what the P stands for in the first place, as it changed its name from International House of Pancakes to IHOP back in 1973. *(Sources: Fortune.com, 6/5/18; PR Newswire, 6/11/18; Fox-31 KDVR, 6/11/18; Wall Street Journal, 6/11/18)*

- ◆ Taco Cabana celebrated National Children's Day (June 10th) by offering one free Kids' Meal with the purchase of any regular plate entrée and a 20-ounce drink. From June 11th through June 15th, Taco Cabana also donated \$1 for every Kids' Meal purchased to local children's hospitals in Austin, Dallas, El Paso, Houston, and San Antonio. *(Source: QSR Magazine, 6/6/18)*

- ◆ Jersey Mike's signed a sponsorship agreement for 2018 Summer Split of the North American League of Legends Championship Series, an e-sports league. Jersey Mike's will offer promotions tied to the league and League of Legends players will be able to redeem promo codes from Jersey Mike's purchases to open in-game items. *(Source: Restaurant Business, 6/13/18)*

- ◆ Chili's launched a mobile app game called "Chili's Stadium" which uses augmented reality to let customers play a soccer game on top of their placemats at the restaurant. *(Source: Marketing Daily, 6/18/18)*

- ◆ Dickey's offered a special 2 for \$22 meal deal during the month of July. Customers could get two 2-meat plates including two sides and a roll for just \$22. *(Source: QSR Magazine, 7/3/18)*

- ◆ To celebrate its 25th Anniversary, P.F. Chang's ran the "25 Days of P.F. Chang's" sweepstakes. From July 1st through July 25th, customers could visit a dedicated website to enter for the chance to win gift cards, branded products, discounts, or a trip to any one of P.F. Chang's locations worldwide. On every Saturday during the "25 Days of P.F. Chang's" promotion, each order of the Great Wall of Chocolate was served with birthday sparklers.

(Source: Business Wire, 7/2/18)



- ◆ Applebee's brought back its All You Can Eat Riblets & Chicken Tenders promotion. Dine-in guests can get an unlimited amount of smoked pork riblets or chicken tenders along with endless fries and a serving of coleslaw for just \$12.99. Guests can alternate between the two protein options. To find out which is more popular, Applebee's asked guests to vote on social media if they were #TeamRiblets or #TeamTenders (plus the tag #Sweeps or #Sweepstakes) from July 9th through July 31st. Twenty lucky winners would be selected and receive a VIP Team Card good for a year's worth of either Riblets or Chicken Tenders, plus branded gear to help them "represent their squad." (Source: PR Newswire, 7/9/18)



- ◆ IHOP announced it "officially" changed its name back from IHOb on July 10th. According to survey research, the name change paid off in word-of-mouth as the number of U.S. consumers who said they had talked about IHOP in the past two weeks PRIOR to the name change was only about 19%, but after the name change that rose to 30%. Data from Foursquare showed the promotion wasn't well received by women, as the number of women who visited "IHOb" dropped 2.2% after the name change promotion started, while the number of visits by men rose 4.6%. (Source: Marketing Dive, 7/10/18)
- ◆ IHOP celebrated its 60th anniversary by offering a short stack of pancakes for just 60 cents on Tuesday, July 17th. (Source: Restaurant Business, 7/10/18)
- ◆ Red Lobster unveiled a new Early Dining Specials offer. Customers who order from Red Lobster between 11am through 6pm, Monday through Friday, can get special daily offers: \$15 Endless Shrimp Monday (Shrimp Scampi, Fried Shrimp and Grilled Shrimp Skewers with a choice of side); To-Go Tuesdays (15% off all online To Go orders with the promo code TUESDAY); \$14 4-Course Feast Wednesday; \$20 Petite Ultimate Feast Thursday; and \$10 Fish Fry Friday. (Source: PR Newswire, 7/16/18)
- ◆ Maggiano's Little Italy and DoorDash teamed up to offer \$0 delivery fees on orders of the 2-for-1 Spaghetti & Meatballs deal on July 10th. The free delivery was also available on all other Maggiano's orders made through July 15th. (Source: PR Newswire, 7/10/18)

- ◆ Dickey's Barbecue Pit offered a Collectible Big Yellow Cup for a limited time. Customers could post photos of their Big Yellow Cup on social media tagged #ShowUsYourCup #Contest from July 10th through September 3rd for the chance to win one of eight weekly prizes. A Grand Prize winner will be selected from the eight weekly prize winners and will receive a trip for two to Dallas to see the LANCO, Dierks Bentley and Brothers Osbourne concert. (Source: PR Newswire, 7/10/18)



- ◆ To promote its new Mix + Match lunch menu, Romano's Macaroni Grill offered a special Mix + Match Lunch Pass which gave the holder one Mix + Match lunch every day from August 1st through August 31st. The pass was priced at \$75 starting July 18th at 8:00am EDT but went up to \$100 starting on July 20th. (Source: Business Wire, 7/18/18)

- ◆ P.F. Chang's continued the celebration for its 25th Anniversary by offering one entrée for just 25 cents with the purchase of any other full-price entrée of equal or lesser value on Wednesday, July 25th. To take advantage of the promotion, customers needed to download the offer from P.F. Chang's website. *(Source: PR Newswire, 7/24/18)*
- ◆ Chipotle said it would give away its guacamole for free with orders placed online on Tuesday, July 31st (National Avocado Day). To get the free guacamole, customers needed to use promo code AVOCADO in the Chipotle app or online. Unfortunately, many customers who tried to place an order online that day received a "technical difficulties" message on both the app and website, causing angry customers to turn to social media to complain. Chipotle decided to continue the offer on August 1st to make up for the problems on July 31st. Competitor QDOBA took to social media to note at their restaurants guacamole is always free with the purchase of an entrée, and even had many crates of avocados delivered to Chipotle locations in Denver with signs saying, "Happy Smashing!" *(Sources: PR Newswire, 7/26/18; CNBC.com, 8/1/18)*



Menu Additions/Changes

- ◆ Corner Bakery added three new limited-time items to its summer seasonal menu: Strawberry Lemon Pancakes; a Caprese Panini; and Pasta Primavera. The restaurant also brought back its popular Berry Pecan Salad from last summer. *(Source: PR Newswire, 5/2/18)*
- ◆ Quiznos brought back their pulled pork BBQ sandwiches for a limited time offer. The Southern Style BBQ Pulled Pork sandwich had pulled pork topped with BBQ sauce, mustard, melted mozzarella & cheddar cheeses, and pickles. The Spicy Chipotle BBQ Pulled Pork had pulled pork topped with bacon, melted cheddar cheese, jalapenos, sautéed onions, Quiznos' signature Batch 83 four-pepper chili sauce, lettuce, tomatoes, and chipotle mayo served on jalapeno cheddar bread. *(Source: PR Newswire, 5/3/18)*
- ◆ Bennigan's added three menu items which used to be available at its now defunct sister-chain Steak & Ale. The three entrees are: the Kensington Club (8oz. sirloin steak served with roasted garlic mashed potatoes and maple-roasted Brussels sprouts); Smothered Chicken (two grilled chicken breasts topped with ale onions and Merlot mushrooms, cheddar cheese, and smoked bacon, served with roasted garlic mashed potatoes and maple-roasted Brussels sprouts); and Hawaiian Chicken (two chicken breasts topped with grilled pineapple rings and a "Hawaiian glaze" served with herb rice pilaf and sautéed broccoli.) Bennigan's also added several new items to its menu: Reuben Fritters; Sheela's Sriracha Shrimp; Flip's Crispy Fried Buffalo Chips; the St. Brigid Burger; the Irishman Whiskey Glazed Burger; and the Irishman Whiskey Glazed Chicken. *(Source: Nation's Restaurant News, 5/3/18)*



- ◆ BRAVO Cucina Italiana offered a special brunch menu on Mother's Day weekend (May 12th and 13th). In addition the restaurant's regular full menu, guests could also choose from: Bread Pudding French Toast; Eggs, Home Fries & Bacon; Filet Mignon with mashed potatoes and seasonal vegetables; Grilled Pork Chop with mashed potatoes and seasonal vegetables; Prosciutto Frittata with a field greens salad; Sicilian Omelette with brunch potatoes; New York Strip steak with mashed potatoes and seasonal vegetables; or Parmesan-Crusted Beef Medallions with sweet potato, bacon & crispy fingerling potato hash and grilled asparagus. (Source: PR Newswire, 5/3/18)

- ◆ Bonefish Grill celebrated National Shrimp Day (May 10th) with a special Bang Bang Bliss menu: the chain's signature Bang Bang Shrimp; Bang Bang Shrimp Tacos; Bang Bang Topped Savory Wood-Grilled Fish (add Bang Bang Shrimp as a topping on any grilled fish); Bang Bang Topped Half-Pound Wagyu Beef Burger; and the Bang Bang Topped Grilled Steak. (Source: PR Newswire, 5/7/18)



- ◆ Taco Cabana added Steak Fajitas Tacos to its menu, available with queso & roasted jalapenos, grilled peppers & onions, or roasted poblano peppers with cheese and Ranchero sauce. Taco Cabana also added three new varieties of its Grilled Shrimp Tacos: Jalapeno Ranch, Lettuce & Tomato; Grilled Peppers & Onions; or Grilled Shrimp only. The chain launched a new version of its popular TC Time! Dozen Taco Box with six brisket tacos and six flame-grilled chicken fajita tacos for \$19.99. (Source: QSR Magazine, 5/14/18)

- ◆ Chili's rolled out its "The Boss Burger" to restaurants nationwide after a three-city pilot program. The gigantic burger has a beef patty, brisket, pulled rib meat, bacon, jalapeno sausage, cheddar cheese, tomato, lettuce, ranch dressing and barbeque sauce. (Source: PR Newswire, 5/21/18)

- ◆ Red Lobster brought back its popular Lobster & Shrimp Summerfest in which diners can choose from four menu items that combine shrimp & lobster. This year's lineup includes: Cedar-Plank Seafood Bake; Caribbean Lobster & Shrimp; Lobster and Shrimp Overboard; and Langostino Lobster & Shrimp Zoodle Pasta. (Source: PR Newswire, 5/29/18)

- ◆ Applebee's expanded its 2 for \$20 Menu to include a 6-ounce Top Sirloin Steak as an entrée option for a limited time. (Source: PR Newswire, 5/29/18)

- ◆ Boston Market added a new entrée and two new side options to its menu for a limited time: Bourbon Bacon Rotisserie Chicken, Creamy Parmesan Corn, and Roasted Garlic Mixed Greens. (Source: PR Newswire, 6/4/18)



- ◆ Rockfish Seafood & Grill unveiled a new menu which kept many "core" items from the previous menu while adding several new items such as: Deviled Eggs topped with Lobster; Crab & Artichoke Stuffed Salmon; Ahi Tuna Poke Bowl; Crab Topped Alaska Cod; a Lobster Roll; and the Bomb Burger. Items on the new menu also feature sushi-grade Ahi tuna, Alaskan Cod instead of pollock, an upgraded steak to a Beef Tenderloin Filet, and a homemade shellfish stock rather than pre-made stock base. (Source: PR Newswire, 6/4/18)

- ◆ Cracker Barrel Old Country Store brought back its popular summertime Campfire menu. This year's Campfire Menu included: Roasted Sweet Glazed Chicken, Smoky Beef Brisket Breakfast, Chocolate Chip Pancake Breakfast, Campfire Baked Beans, BBQ Pork, Campfire Beef, Campfire S'mores dessert and a S'mores Latte. *(Source: PR Newswire, 6/5/18)*

- ◆ Pollo Tropical added a new Crispy Chicken Sandwich line to its menu. The three new sandwiches feature an all-natural chicken breast marinated in Pollo Tropical's signature blend of citrus juices and spices, then battered and fried. The Crispy Chicken Sandwich line includes: the Classic Crispy (served topped with sliced tomato, romaine lettuce and Peppadew® sauce; the Crispy Chicken BLT (topped with Swiss cheese, bacon, sliced tomato, romaine lettuce and a chipotle mayonnaise); and Crispy Chipotle Chicken (same as the BLT but without the swiss and bacon). *(Source: PR Newswire, 6/5/18)*



- ◆ Panera Bread added a limited-time item to its menu, but it was only available on delivery orders. The Bacon Mac & Cheese was only available from June 6th through June 26th. *(Source: Nation's Restaurant News, 6/6/18)*
- ◆ Captain D's expanded its "5 Under \$5" menu to include three new entrée options: Captain's Seaside Fillet, Nashville Hot Fish, and Nashville Hot Popcorn Shrimp. The chain also added Lemon Pepper Steamed Shrimp and Key Lime Pie to its menu for a limited time offer. *(Source: PR Newswire, 6/11/18)*

- ◆ Romano's Macaroni Grill updated its menu add nine new permanent items: Stuffed Mushrooms; Spinach & Artichoke Dip; Italian Chopped Salad; Crunchy Lombard Salad; Pasta Milano; Sausage Rigatoni; Grilled Salmon; Steak & Potatoes; and Grilled Pork Chop. The chain also added four seasonal menu items: Salmon Piccata; Seafood Cioppino; San Marino Chicken; and Chianti Steak. *(Source: Business Wire, 6/11/18)*

- ◆ El Pollo Loco unveiled three new limited time "Loco Kickin" dipping sauces for its chicken. The Chili Lime, Tropical Habanero, and Chipotle BBQ sauces are free with the purchase of any 2, 3, or 4-piece combo meal or the \$20 Loco Kickin' Chicken family meal. *(Source: Nation's Restaurant News, 6/11/18)*

- ◆ Pei Wei added two small plates and one dessert to its menu, all priced at just \$2 each. The small plates include an individual serving of the chain's signature chicken lettuce wraps or a miso side salad. The dessert is Thai Donuts: six scratch-made donuts fried to order and tossed in a mixture of Saigon cinnamon and cane sugar, then served with a dipping sauce made from sweetened condensed milk. *(Source: QSR Magazine, 6/15/18)*

- ◆ TGI Fridays launched a new Fridays Five bar menu with \$5 beer, wine, and premium cocktails plus "bar bites." The menu will vary by season and the summer menu includes the Shimmering Diva and Frozen Blue Hawaiian cocktails along with Fridays Long Island Tea, the Fridays 'Rita, 23oz light draft beers, 16oz Leinenkeugel Summer Shandy, 16oz local draft beers, 6oz Cupcake Rosé, 6oz Canyon Road Cabernet Sauvignon, 2 flavors of boneless chicken wings, cheeseburger sliders, giant onion rings, warm soft pretzels, and chicken quesadillas. *(Source: PR Newswire, 6/20/18)*



- ◆ Chipotle is reportedly testing five new menu items at its New York City test kitchen: nachos, quesadilla, avocado tostadas, an updated salad, and a chocolate milkshake. Quesadillas have long been an off-menu item at some locations, but Chipotle has not promoted them as an option because they take two and a half minutes to cook in the units that are used to steam the tortillas for burritos & tacos, which slows down the ordering line dramatically. (Source: QSR Magazine, 6/22/18)

- ◆ Logan’s Roadhouse rolled out its summer menu including appetizers (Bacon on a Stick, Rockin’ Onion Petals); entrées (St. Louis Spare Ribs, Turf & Turf Combo (ribs & steak), Hog Wild Sirloin, Lemon Herb Chicken, Brew-BQ Chicken, Cedar Plank Salmon, Triple Summer Platter) and dessert (Grilled Peaches ‘N Cream) and drink (5 Buck Logan’s Electric Lemonade). (Source: Nation’s Restaurant News, 6/27/18)



- ◆ McAlister’s Deli added four new limited time items to its menu for the summer: Jalapeno Turkey Crunch sandwich; Pecanberry Salad; McAlister’s Spud Chips (a line of potato chips); and Strawberry Lemonade. (Source: QSR Magazine, 7/2/18)

- ◆ Red Robin Gourmet Burgers & Brews rolled out new Bottomless Hop-Salt Fries to its restaurants nationwide after a trial period. The new version of its popular Bottomless Steak Fries is seasoned with a special blend of salt, orange peel, brown sugar and the same Hallertau and Tettnang hops used to flavor Samuel Adams Boston Lager. The chain also added: a limited time Island Heat Crispy Chicken sandwich; a Beer Flight featuring 4-ounce servings of Red Robin 1969 Lager, Boston Lager, and Lagunitas IPA; sparkling Strawberry Lemon Green Tea; sparkling Blackberry Hibiscus Herbal Tea; and the Dreamy Creamy Cake dessert. (Source: PR Newswire, 7/2/18)

- ◆ The Cheesecake Factory celebrated National Cheesecake Day by debuting two brand new cheesecake varieties: Very Cherry Ghirardelli Chocolate Cheesecake and Cinnabon Cinnamon Swirl Cheesecake. For every slice of the Very Cherry Ghirardelli Chocolate Cheesecake sold from July 5, 2018 through February 2019, The Cheesecake Factory will donate 25 cents to Feeding America. (Source: Business Wire, 7/5/18)

- ◆ Red Lobster’s popular Crabfest celebration returned for a limited run. This year’s Crabfest menu included fan favorites like Crab Lover’s Dream, Crab Linguini Alfredo, Crabfest “Ultimate Feast,” Wild-Caught Snow Crab Dinner, and the Crabfest Ultimate Surf & Turf plus several new items: Crabfest Combo (over a pound of Jumbo Snow Crab legs plus Dungeness crab), Crab-Topped Stuffed Shrimp & Salmon; and Crab-Topped Tilapia. (Source: PR Newswire, 7/9/18)

- ◆ Romano’s Macaroni Grill updated its lunch menu with a new Mix + Match option: guests can choose two items out of 25 options (two soups, six salads, two Calzonettos, four sandwiches, and eleven pasta dishes). Another new lunch option is Unlimited Soup, Salad & Rosemary Bread for less than \$11. (Source: PR Newswire, 7/18/18)

- ◆ Captain D’s brought back its Lobster Fest limited time offer. Customers could choose from North Atlantic Lobster Bites, Lobster “Scampi” served over pasta, lobster bisque, and lobster rolls. (Source: QSR Magazine, 7/30/18)





Snap this QR Code with your mobile phone to subscribe to other InView reports!

M/A/R/C® couples proven research models with innovative approaches to deliver targeted solutions to consumer, prescriber, channel, and B2B marketing questions. The result – stronger innovation, dedicated customers, and industry-leading brands.

What makes us different? Staffed with the most experienced research minds in the industry, we deliver research which provides answers instead of data. From one-on-one deep dives to accurate predictions of in-market outcomes, our seasoned professionals design research that targets the need and delivers the strategy.

For more information about M/A/R/C® Research contact your Account Manager, or send inquires to Merrill.Dubrow@MARCresearch.com.

**Strong brands start with smart research.
800.884.6272**