

curion

DRIVING CONSUMERS BACK TO CASUAL DINING

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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.

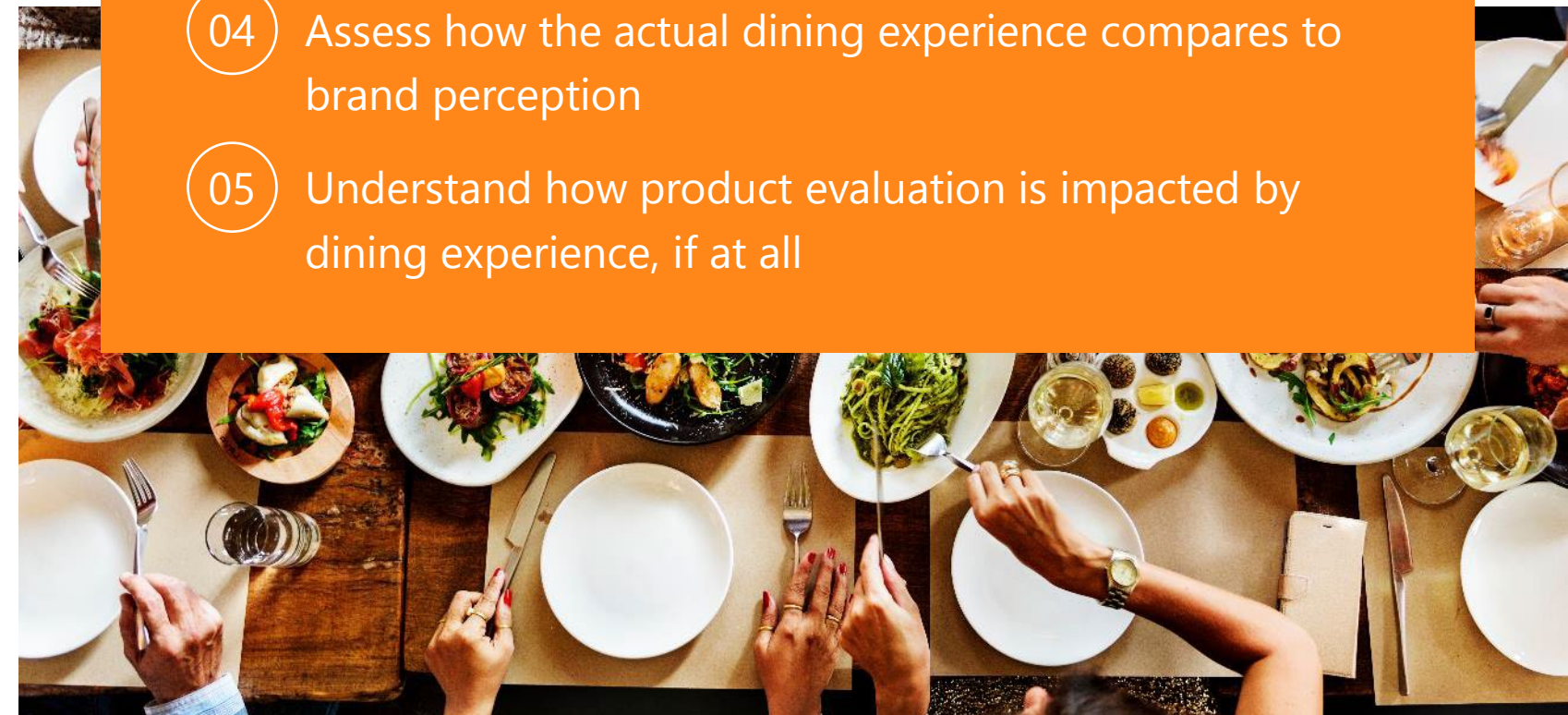
This playbook reveals what drives lapsed guests to dine-in at casual dining restaurants, the opportunities your brand can own, and the strategies to stand out in a crowded market.



1. **Source:** "2024: Casual Dining Hit the Reset Button," Restaurant Business Online, January 31, 2024. [restaurantbusinessonline.com](https://www.restaurantbusinessonline.com)

Objectives

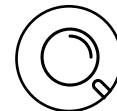
- 01 Determine the key casual dining attributes in driving interest and purchase among Lapsed Casual Diners
- 02 Reveal "ownable" opportunities and attributes in which brands could stand out from the competition
- 03 Uncover the "whys" behind value meal performance to inform optimization of these offerings
- 04 Assess how the actual dining experience compares to brand perception
- 05 Understand how product evaluation is impacted by dining experience, if at all



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

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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 Restaurant A
- Moderate Regard Restaurant B
- Lower Regard Restaurant C

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

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CONTACT US

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