



Syndicated Tracking Study for Casual Dining Restaurants

Presented by: SANDELMAN
EDGE.com

Executive Report

Brand X
Sample Report
Jan – Jun 2008
Los Angeles

Methodology – General Markets

- Casual-Track® is a continuous and quantitative syndicated research study. Casual-Track monitors consumer awareness, usage and attitudinal measures for all major casual and family dining restaurant chains in 40+ major markets.
- Casual-Track is an online survey of past-month casual dining users. Each period data is collected at the DMA level from 500 respondents who are invited to participate from a panel of over 5 million Internet users. Respondents are males & females age 18 and older. Quotas are set by age, gender and ethnicity to reflect the proper distribution of the population. Interviewing is conducted continuously over all 26 weeks in a wave to best represent the period's activity. Heavy, moderate and light category users are recruited on an "as it falls" basis so that results reflect actual incidence.
- In addition to the basic measures, attribute ratings are also included in this study. Selected chains are now rated on 21 key attributes that define a chain's overall image -- quality, service, facilities, and value.



Methodology – Hispanic Markets

- Casual-Track® Hispanic is a continuous and quantitative syndicated research study. Casual-Track monitors consumer awareness, usage and attitudinal measures for all major casual and family dining restaurant chains in select markets.
- Data is collected from respondents via telephone interviews conducted on a continuous basis; results are reported semi-annually. Respondents are selected via a computer-generated random sample of listed and unlisted telephone numbers within the DMA. Respondents are males and females, age 18 and older, who purchase food from casual and family dining restaurants at least once in a typical month. The data is weighted slightly to reflect the proper distribution of the population by sex and age in the DMA.
- In addition to the basic measures, attribute ratings are also included in this study. These attribute ratings provide ratings for selected chains on 21 key attributes that define a chain's overall image -- quality, service, facilities, and value.
- Fieldwork is performed by Datascension, Inc. from their central telephone facilities.



Glossary-User Segments

Casual Dining Usage

- All Users -- Respondents who purchase food from casual dining restaurants (CDR) at least once in a typical month. This is the Total Sample of respondents. Casual dining restaurants include all types of full-service casual and family dining chains.
- Heavy Users -- Respondents who purchased food at all CDRs 12 or more times in the past 3 months.
- Moderate Users -- Respondents who purchased food at all CDRs 4-11 times in the past 3 months.
- Light Users -- Respondents who purchased food at all CDRs 0-3 times in the past 3 months.

Chain Type Usage

- Varied Chain Users -- Respondents who purchased food from any of the tracked Varied Menu chains at least once in the past 3 months.
- Steak/Beef Chain Users -- Respondents who purchased food from any of the tracked Steak/Beef chains at least once in the past 3 months.
- Seafood Chain Users -- Respondents who purchased food from any of the tracked Seafood chains at least once in the past 3 months.
- Mexican Chain Users -- Respondents who purchased food from any of the tracked Mexican chains at least once in the past 3 months.
- Italian Chain Users -- Respondents who purchased food from any of the tracked Italian chains at least once in the past 3 months.
- Family Chain Users -- Respondents who purchased food from any of the tracked Family chains at least once in the past 3 months.
- All Other Casual-Dining Chain Users -- Respondents who purchased food from any other casual/family dining restaurant other than the specific chains tracked in this market (including small or emerging chains that are not on the chain list) at least once in the past 3 months.

Chain Usage

- *Chain X* Users -- Respondents who purchased food from *Chain X* at least once in the past 3 months.



Glossary-Tracking Measures

- Brand Awareness - The percentage of consumers in a given segment who know of a specific CDR chain. This measure is important in determining a chain's overall presence in consumers' minds. Brand awareness is also the first stage of consumer development - consumers must be aware of a chain before they can develop an opinion or choose to go to that chain. Brand awareness can be broken down into the following components:
 - First Mention -- The first CDR chain mentioned. This measure is often called top-of-mind awareness and is an indication of the chain's saliency in consumers' minds. The higher the percentage, the more the chain stands out in the casual dining restaurant category.
 - Other Unaided -- Other CDR chains that consumers can recall without being prompted. This measure is usually viewed as part of unaided brand awareness and is seldom used alone.
 - Unaided Brand Awareness -- The sum of a chain's first mentions and other unaided brand awareness. This measure can be used to define the percentage of consumers who currently consider the brand as part of their decision set. Respondents usually mention 4 to 5 chains that are most relevant to them.
 - Aided Brand Awareness -- After unaided awareness is collected, consumers are prompted with the names of chains that were not recalled on an unaided basis. This measure is rarely used alone, but is used in combination with unaided brand awareness to provide total brand awareness.
 - Total Brand Awareness -- The sum of first mention, other unaided, and aided brand awareness. This measure is a good indication of the chain's distribution and longevity in the market.



Glossary – Tracking Measures

- Advertising Awareness - The percentage of consumers in a given segment who have seen, heard, or read advertising for the chain within the past month or so. This measure is used to monitor the impact of recent advertising relative to other chains. Advertising awareness can be broken down into the following components:
 - First Mention -- The first CDR chain for which consumers recall advertising in the past month. This measure is often called top-of-mind advertising awareness and is an indication of the advertising's saliency in consumers' minds. The higher the percentage, the more the advertising stands out in the casual dining restaurant category.
 - Other Unaided -- Other CDR chains' advertising that consumers can recall without being prompted. This measure is usually viewed as part of unaided advertising awareness and is seldom used alone.
 - Unaided Advertising Awareness -- The sum of a chain's first mentions and other unaided advertising awareness. This measure can be used to monitor the impact or intrusiveness of an advertising message, especially relative to other chains with similar media spending.
 - Aided Advertising Awareness -- After unaided advertising awareness is collected, consumers are prompted with the names of chains for which advertising was not recalled on an unaided basis. This measure is rarely used alone, but is used in combination with unaided advertising awareness to provide total advertising awareness.
 - Total Advertising Awareness -- The sum of first mention, other unaided, and aided advertising awareness. This measure is a good indication of media reach, share of voice, and relative media spending.



Glossary – Tracking Measures

- **Purchase Levels** - The percentage of consumers of a given segment who have purchased at least once from a chain during a given time period. Purchase levels are used to measure the breadth of a chain's customer base. Other terms for purchase level could include "brand reach," "brand penetration," "customer base," and "user base". Purchase levels are also used to measure customer retention. Casual-Track monitors purchase levels with the following time periods:
 - Ever -- The percentage of consumers of a given segment who have ever purchased from a chain. This measure is synonymous with "trial." Trial is also an early phase of consumer development following brand awareness and consideration.
 - Past 6 Month Purchase Level --The percentage of consumers of a given segment who have purchased from a chain in the past 6 months. This measure provides a broad indication of a chain's customer base. Long-term customer retention can be calculated by dividing the percentage of past 6 month purchasers by the trial percentage. Considering the pace at which consumers purchase from various CDR chains, "trier-rejecters" are defined as those who have tried a chain but have not purchased from that chain in the past 6 months.
 - Past 3 Month Purchase Level -- The percentage of consumers of a given segment who have purchased from a chain in the past 3 months. This measure is important because it has the strongest correlation with share. This measure also represents the segment who could be considered a chain's current customers. Short-term customer retention can be calculated by dividing the percentage of past 3 month purchasers by the past 6 month purchase level. In addition, "lapsed-users" are defined as those who have purchased from a chain in the past 6 months but not in the past 3 months.
 - Past Month Purchase Level -- The percentage of consumers of a given segment who have purchased from a chain in the past month. This represents the segment who could be considered a chain's regular and most loyal customers.
- **Purchase Frequency** - The average number of times chain users purchased from that chain during a specified time period. Purchase frequency is an indication of chain loyalty. Often, as a chain's purchase level (base of customers) increases, purchase frequency will decline somewhat as a larger, less loyal customer base includes some newer users who purchase less frequently. The opposite is also often the case -- as a chain's customer base shrinks, its frequency increases because the chain is left with a smaller, more loyal base. The most successful marketing efforts both expand the customer base and increase purchase frequency among those customers.
 - Past 3 Month Frequency -- The average number of times past 3 month chain users purchased from that chain in the past 3 months.
 - Past Month Frequency – The average number of times past month chain users purchased from that chain in the past month.

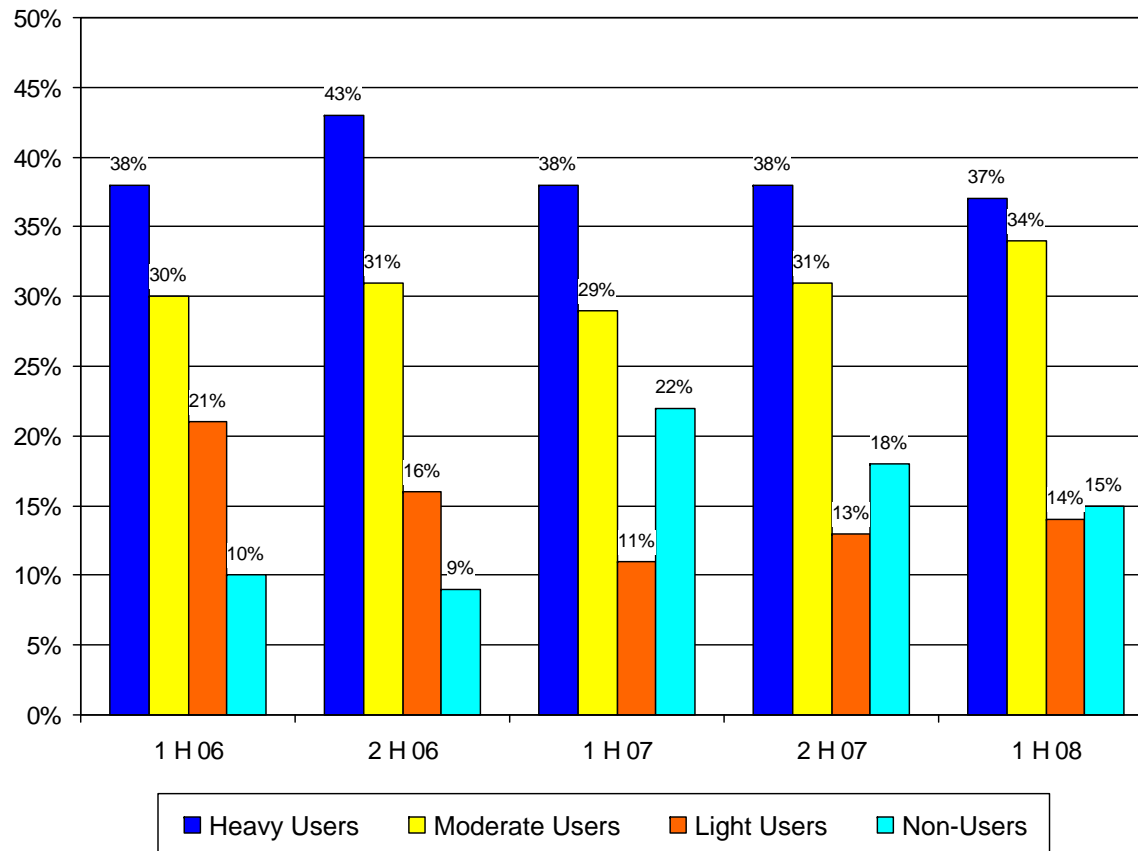


Glossary – Tracking Measures

- Share of Purchase Occasions - The percentage of occasions of a given segment that are dedicated to a particular chain. Share is the primary marketing measurement of success because share can vary independently from category changes. For instance, a chain can succeed by having a larger share of a shrinking category, or a chain may not be getting its fair share despite increased sales as the chain has a smaller share of a growing category. It is important to note that Casual-Track share is based on share of occasions, not share of dollars.
 - Past 3 Month Share -- The percentage of past 3 month occasions of a given segment that are dedicated to a particular chain. The base of past 3 month purchase occasions for any segment is the sum of all past 3 month users' occasions for that segment devoted to all chains.
 - Past Month Share -- The percentage of past month occasions of a given segment that are dedicated to a particular chain. The base of past month purchase occasions for any segment is the sum of all past month users' occasions for that segment devoted to all chains. Share of past month occasions are segmented by four meal dayparts (breakfast, lunch/brunch, dinner, snacks/appetizers/drinks/dessert) and two service modes (eat-in, carry-out/delivery).
- Overall Rating of the Last Purchase Occasion - Respondents rate their last occasion at each chain they have purchased from in the past 6 months on an overall basis using a five-point scale with “1” being “poor” and “5” being “excellent”. The overall rating is reported as the percentage of respondents who rate the chain either excellent or very good (top two box score). Mean ratings are also available in the detailed tabulations. This measure indicates the strength of a chain's overall brand image and customer satisfaction.
- Attribute Ratings - Respondents rate select chains they have patronized during the past 6 months on 16 key attributes using a five-point scale with “1” being “poor” and “5” being “excellent”. Each attribute rating is reported as the percentage of respondents who rated the chain either excellent or very good (top two box score). Mean ratings are also available in the detailed tabulations. Attribute ratings are used to show strengths and weaknesses relative to other chains on key aspects of a chain's brand image.



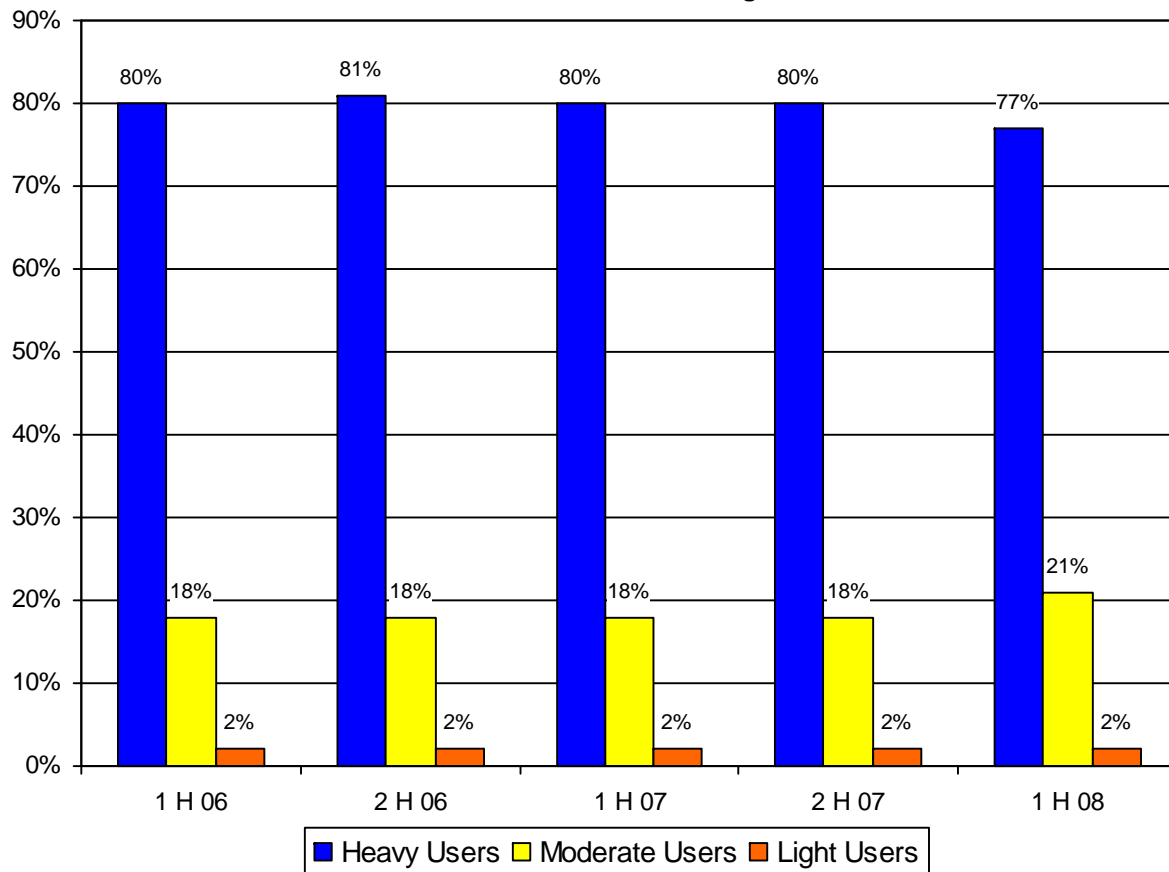
**Casual Dining Restaurant Incidence Among Those 18+ Yrs. Old
Based on Past 3 Month Usage**



- Casual-Track reports examine the CDR category overall.
- This chart shows the incidence of heavy, moderate and light CDR users over time.



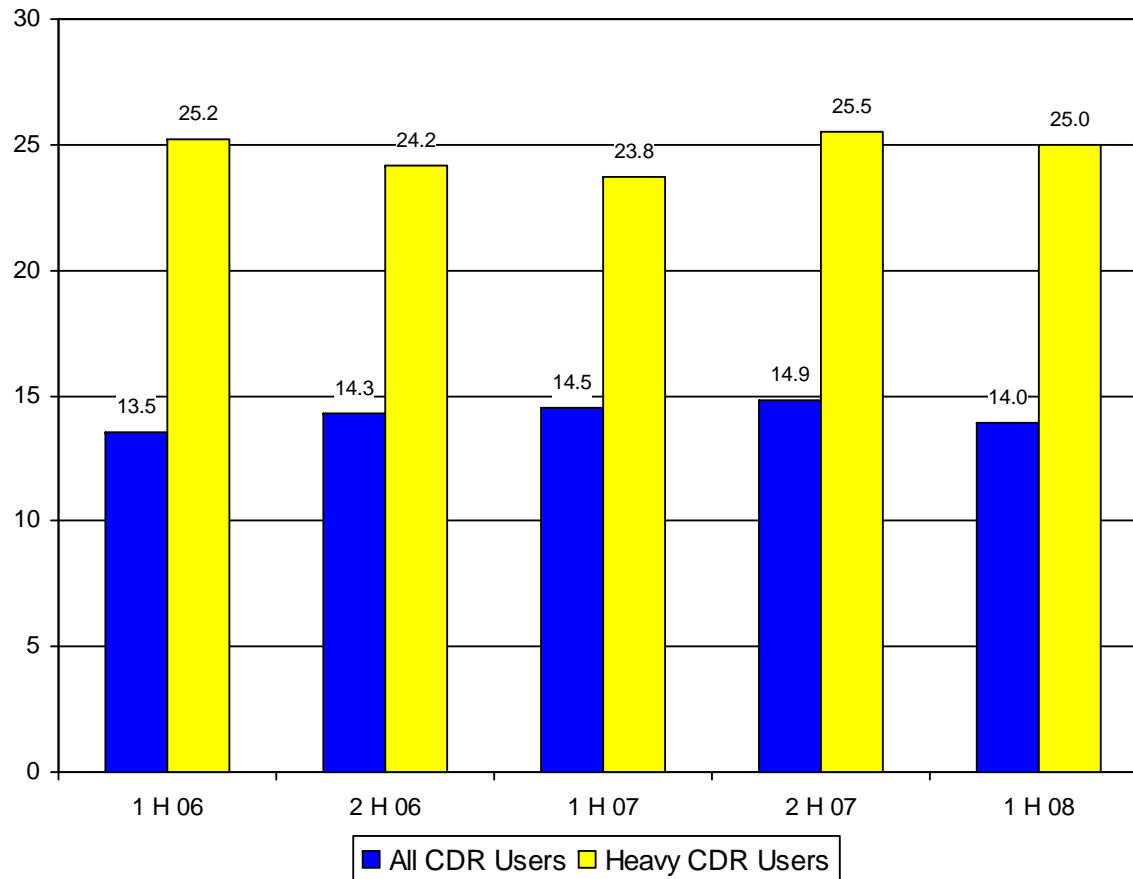
Contribution to Total Casual Dining Purchases
Based on Past 3 Month Usage



- CDR Contribution is the percentage of past month occasions accounted for by each usage group, in this case heavy, moderate and light CDR users.



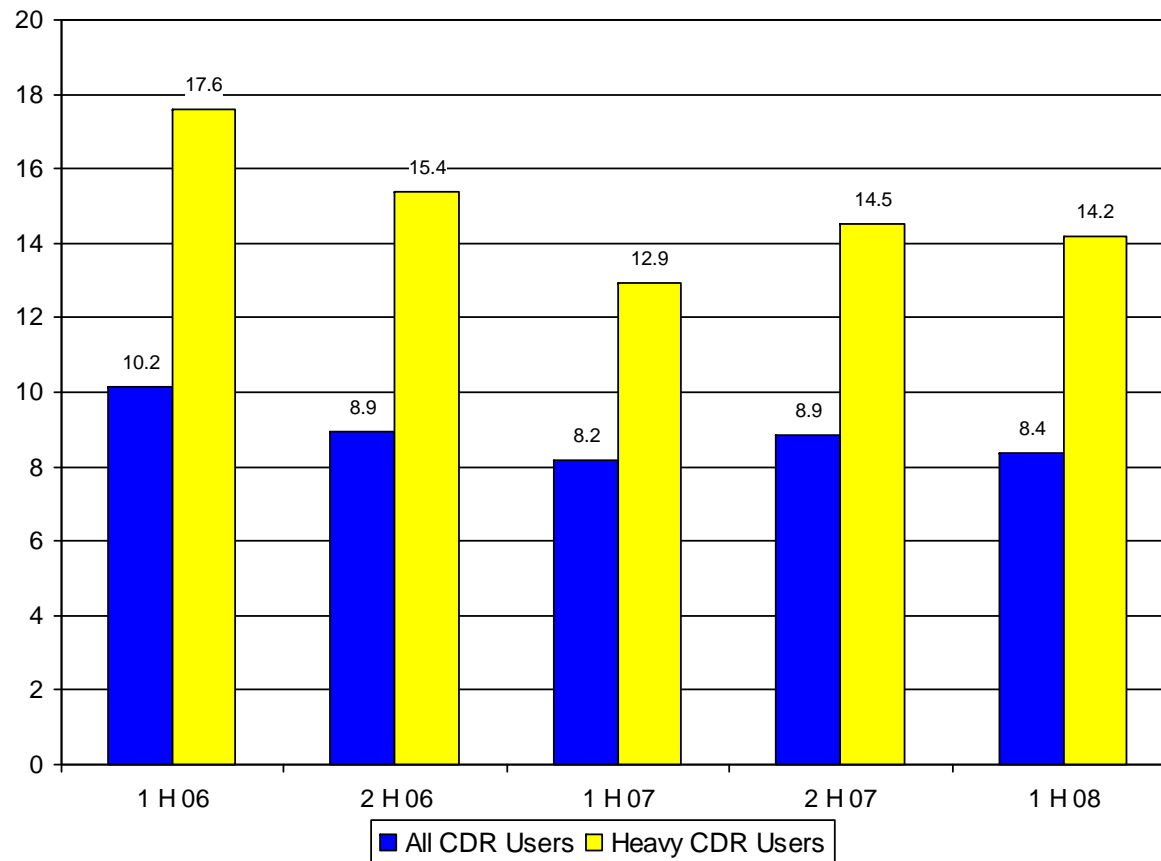
Past 3 Months Casual Dining Purchases Per Person



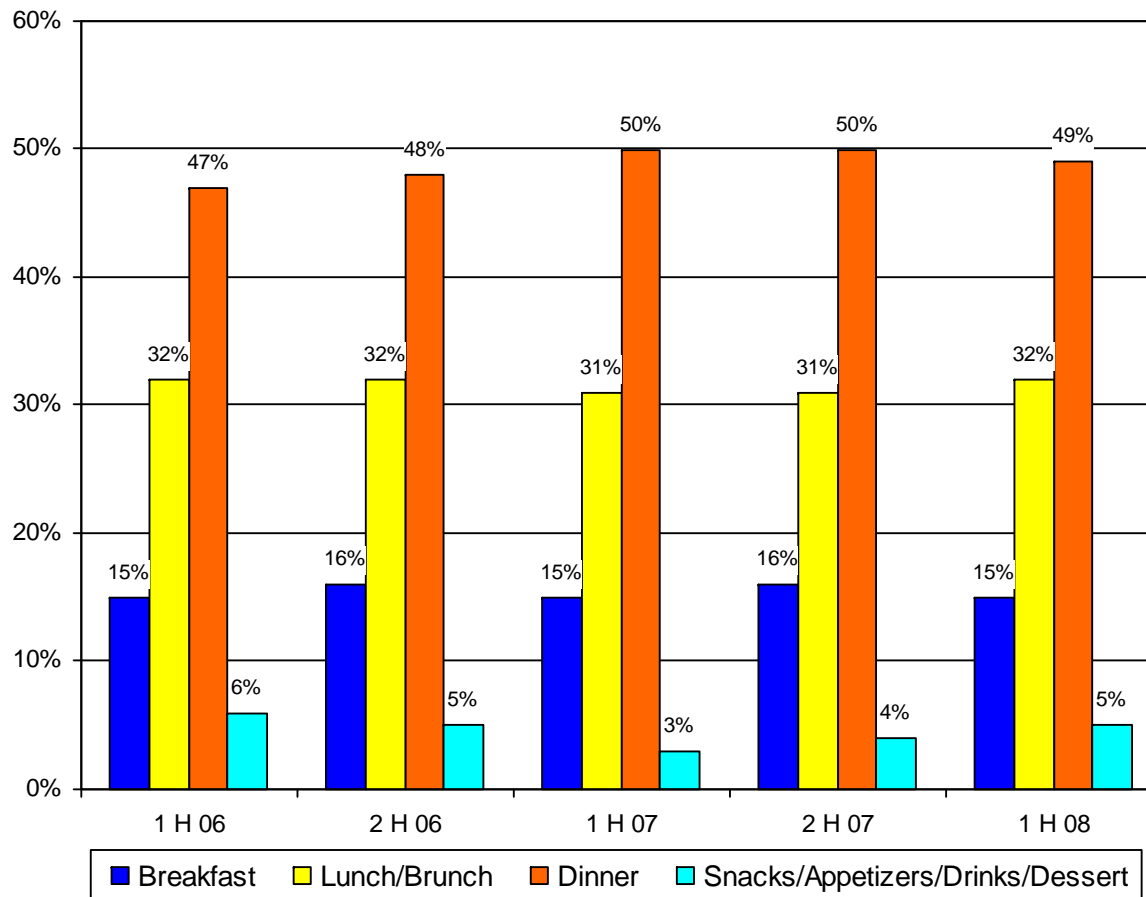
- CDR purchases per person provide an indication of the vitality of the category by market and period. Total past month occasions are provided here for all and heavy CDR users trended over time.



Past 1 Month Casual Dining Purchases Per Person



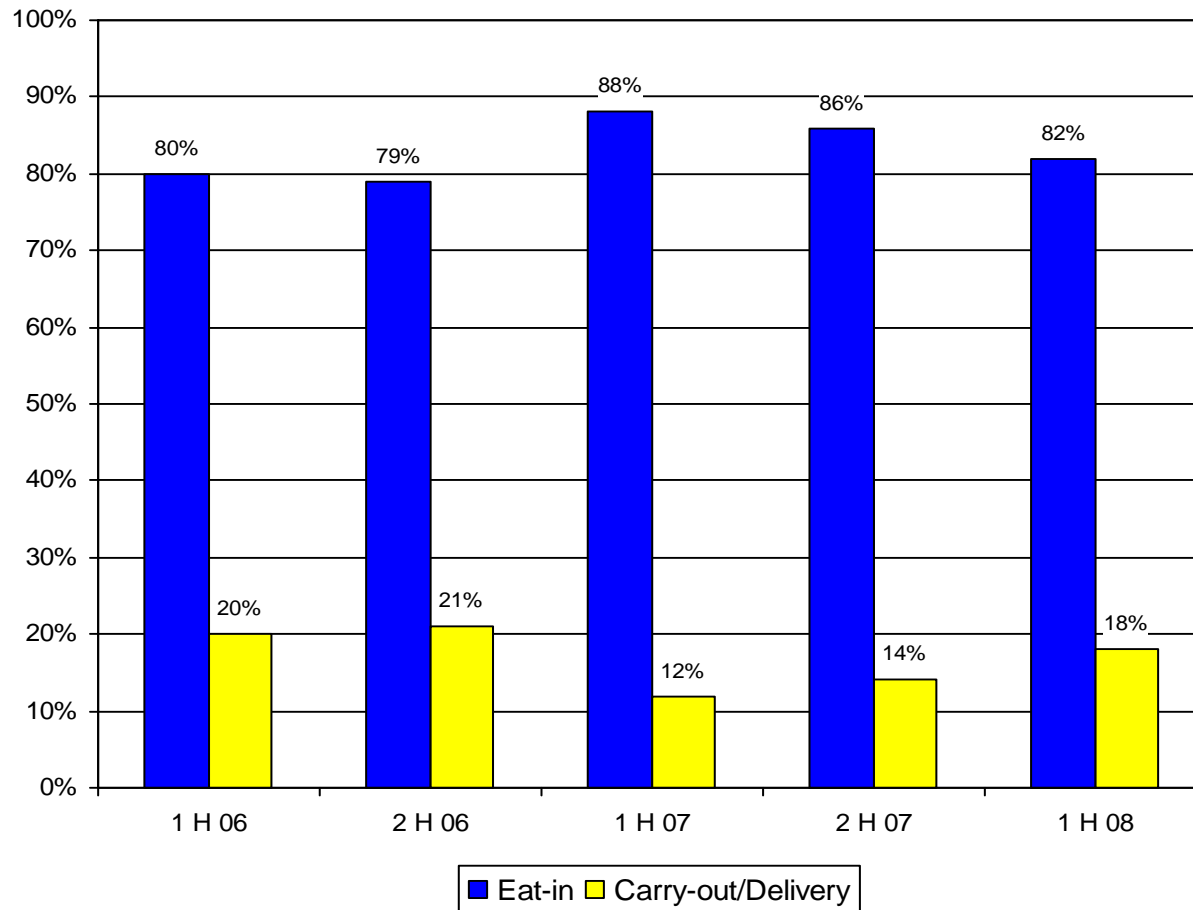
Share of Past Month Casual Dining Occasions by Meal Daypart



- Total CDR occasions can be sliced by daypart to show the size of each segment and changes over time. This information also can be provided by chain type and for a variety of demographic segments.



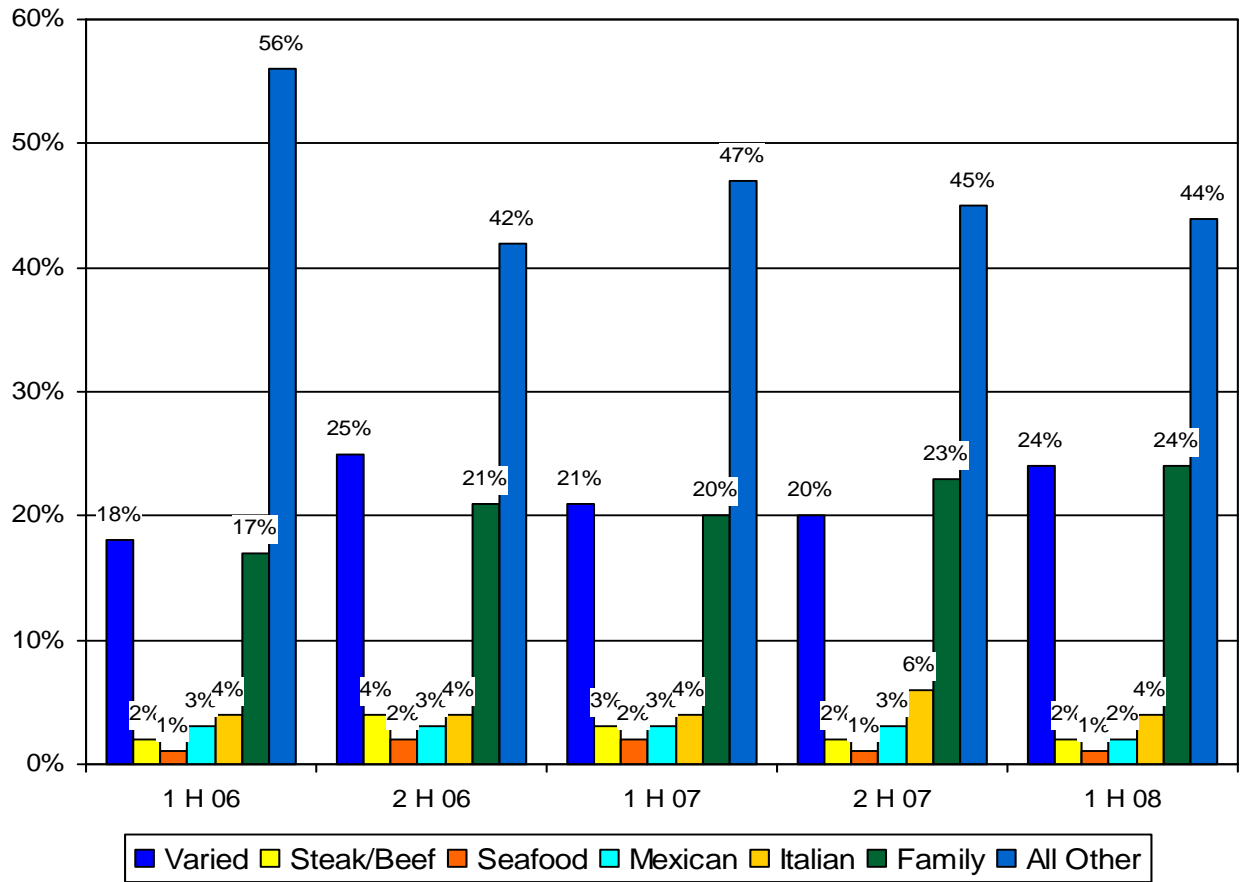
Share of Past Month Casual Occasions by Service Mode



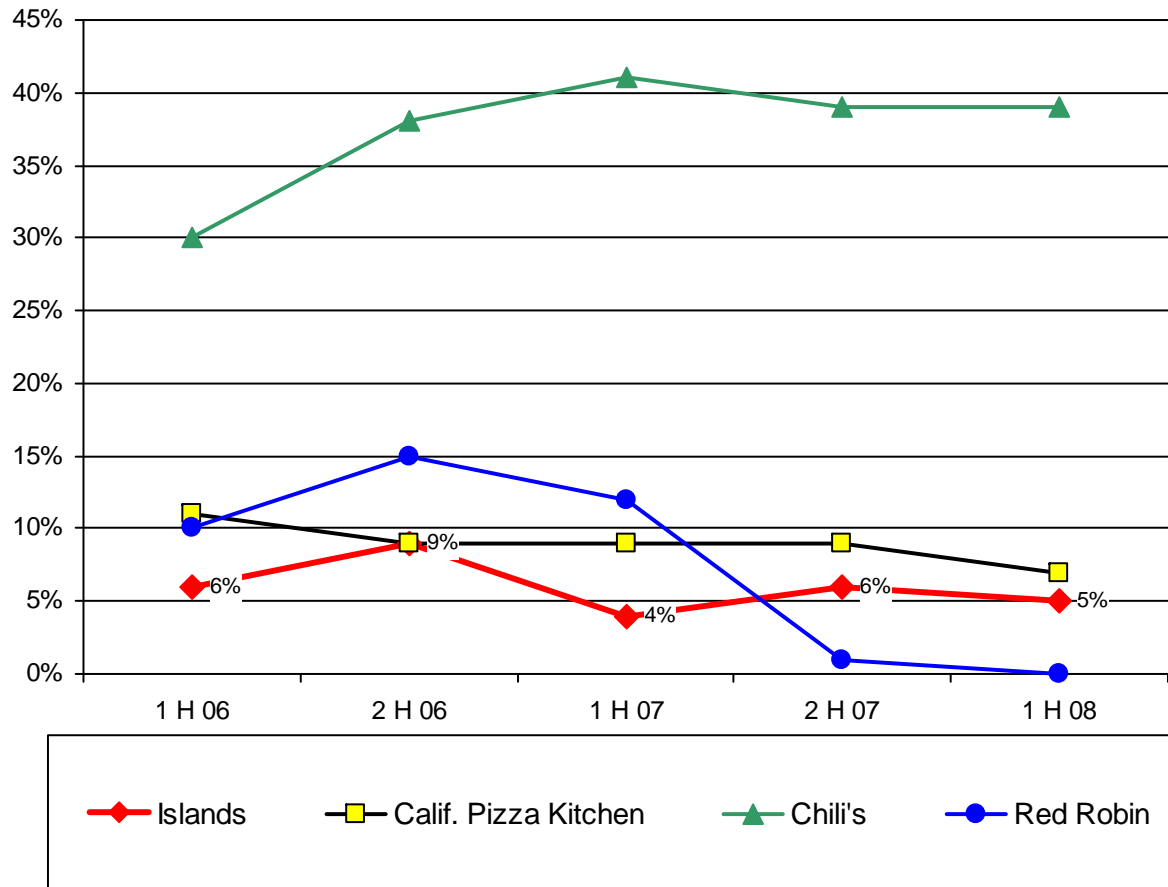
- CDR occasions can be sliced by service mode to show the size of each segment and changes over time. This information also can be provided by chain type and demographic.



Share of Past Month Casual Occasions by Chain Type



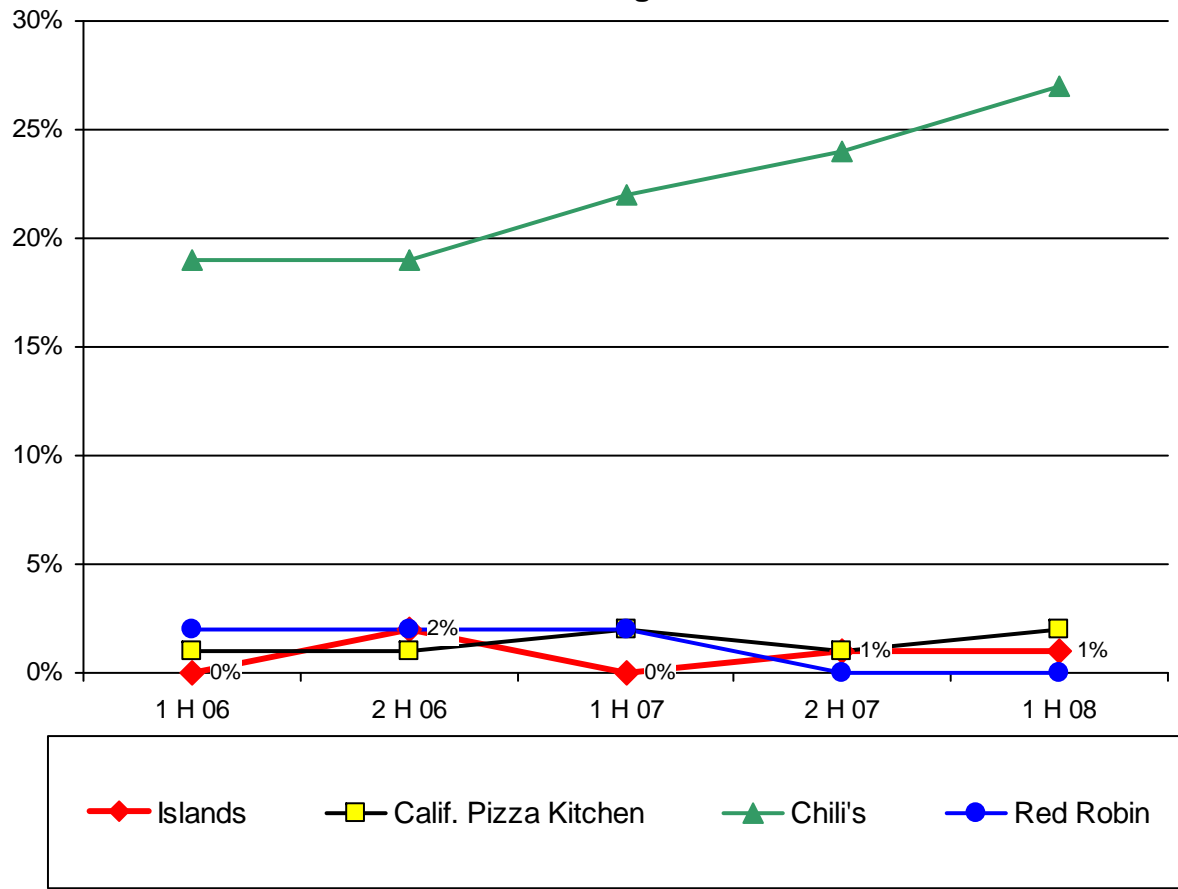
Unaided Brand Awareness



- Key awareness and usage measures are shown by chain over time. You can select which chains are charted. Subscribers have access to all awareness, usage and demo data for all 30-40 chains monitored in a market.
- This information also can be filtered by demographic and usage groups on your computer.



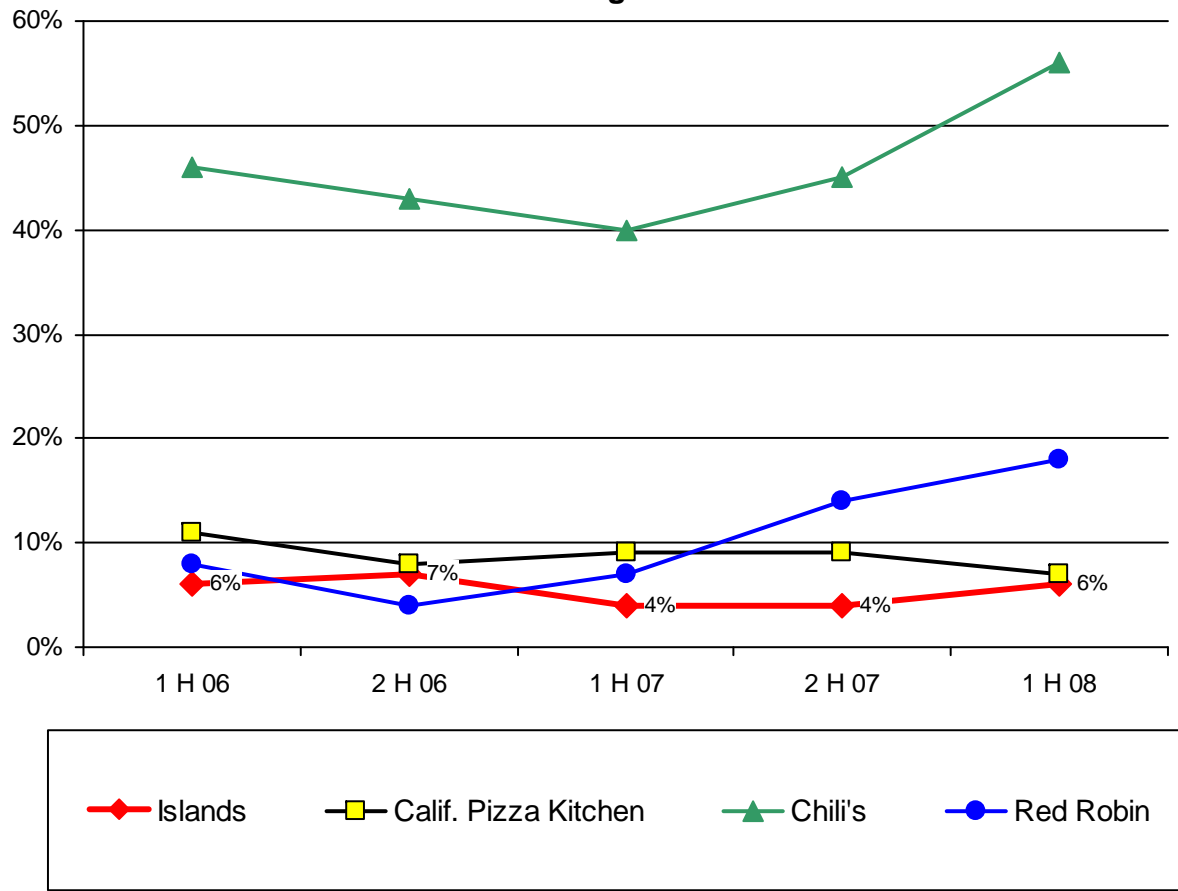
Unaided Advertising Awareness



- Unaided advertising awareness helps monitor the impact of the advertising message. More relevant and memorable creative executions tend to generate above average results at the chain level.



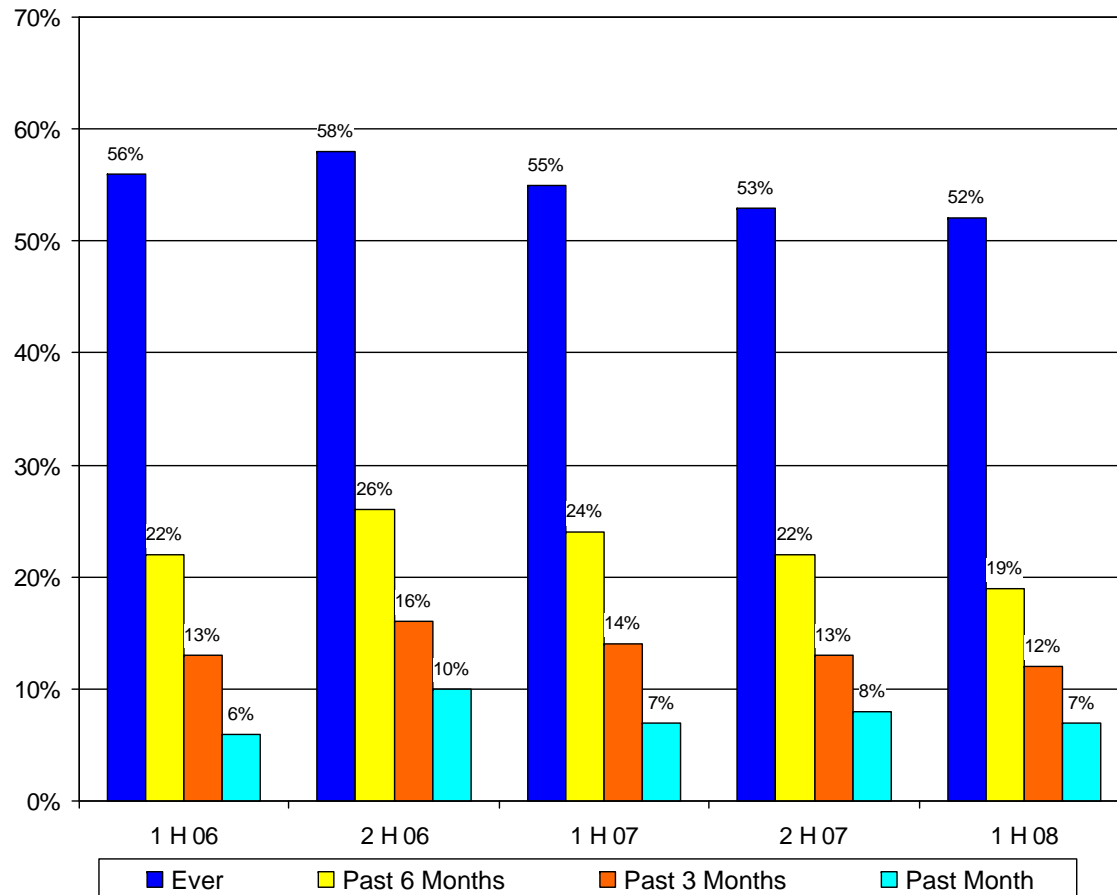
Total Advertising Awareness



- Casual-Track provides information on unaided and total brand and advertising awareness for up to 34 chains in each market.
- Total advertising awareness tends to measure media spending and share of voice. A strong, relevant message can also drive increases in this measure.



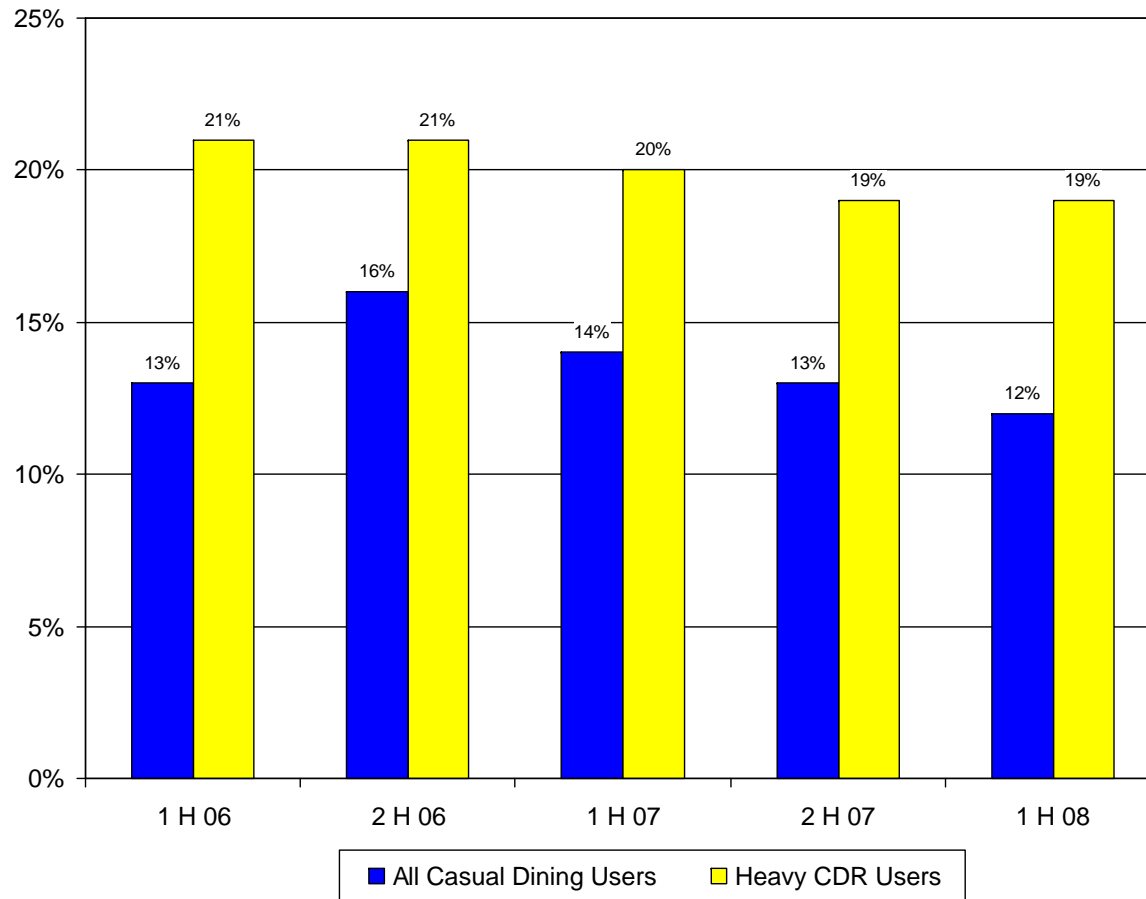
Brand X Purchase Levels



- Purchase levels include trial (ever purchased), past 6 month and past 3 month usage.
- This chart also shows customer retention levels over time.



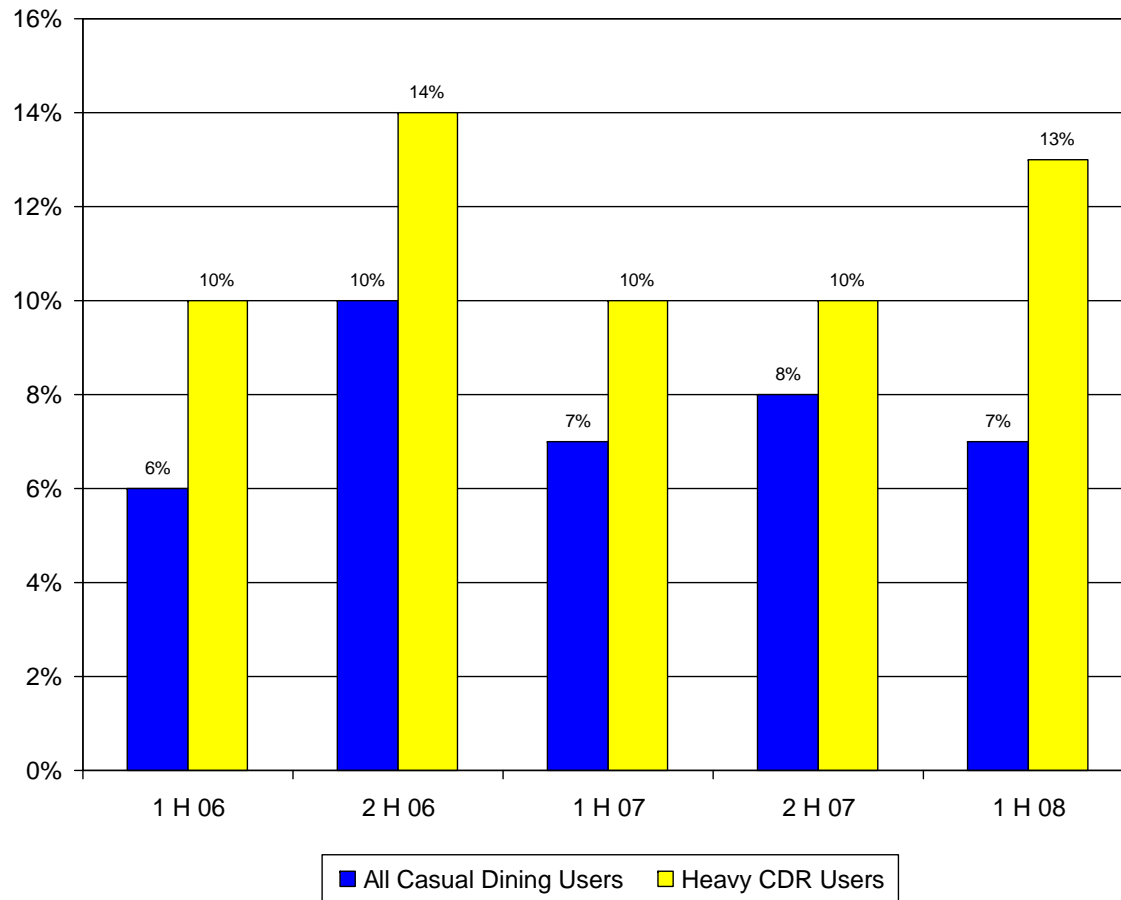
Brand X Past 3 Months Purchase Levels



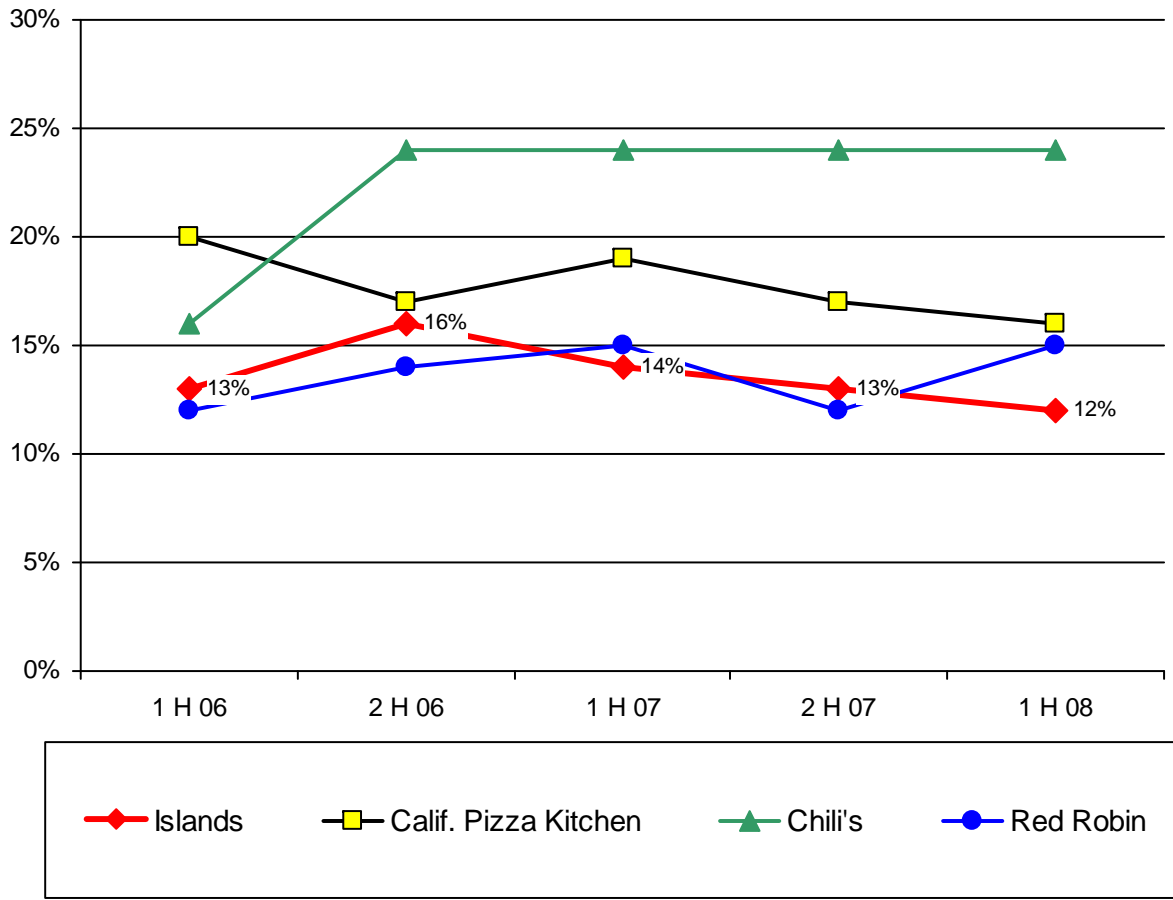
- Key information is charted for heavy CDR users to show how chains are performing with this important segment.



Brand X Past 1 Month Purchase Levels



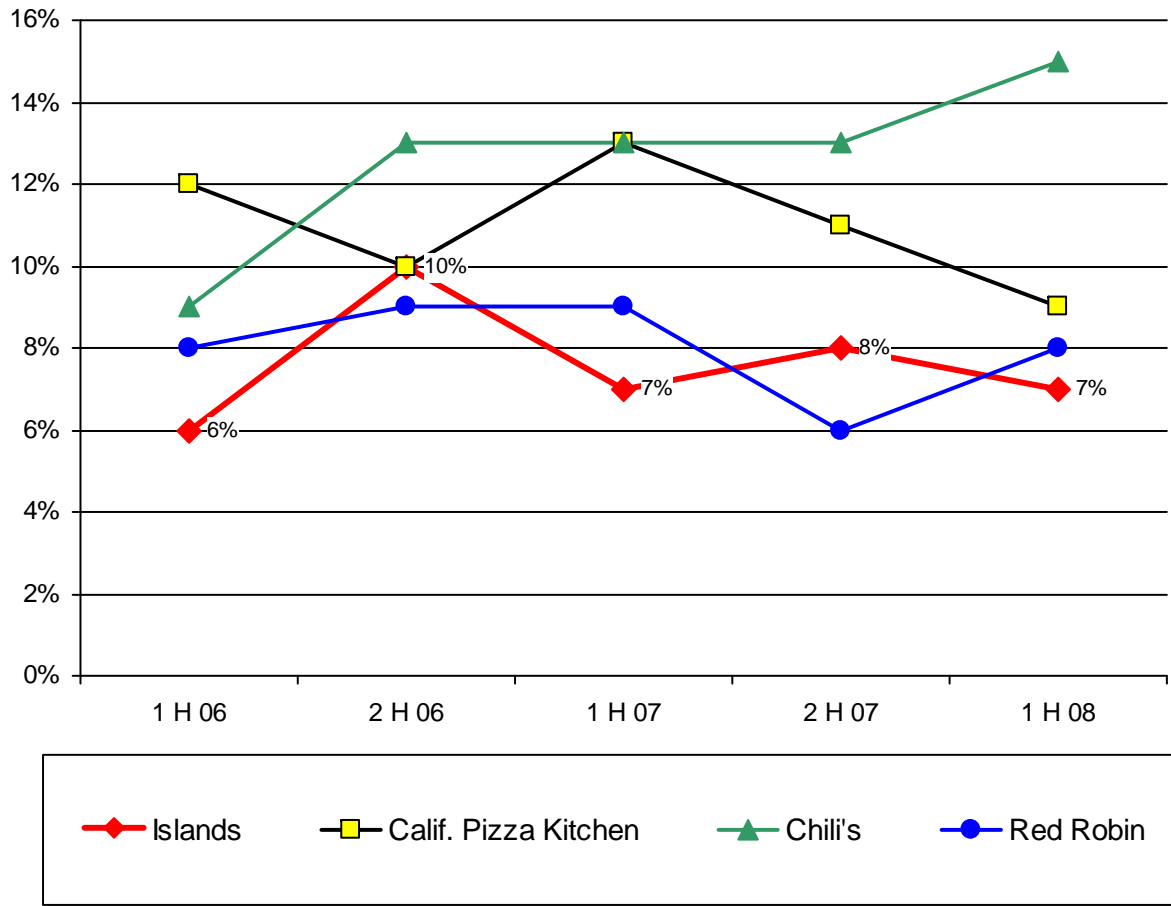
Past 3 Months Purchase Levels

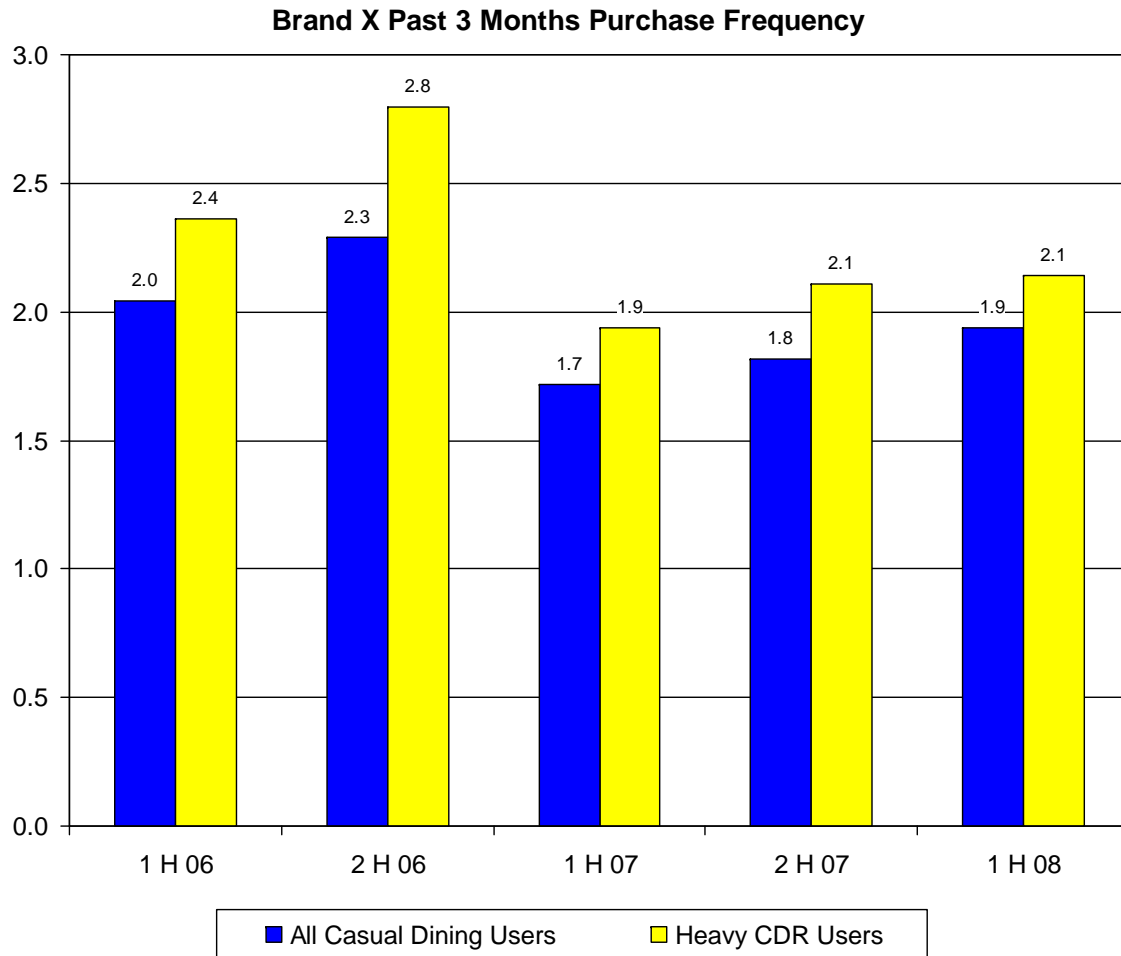


- Past 3 month purchase/usage level monitors the breadth of a chain's customer base or how many CDR users are visiting the chain on a past 3 month basis.
- This chart shows trend over time for a set of competitors.



Past 1 Month Purchase Levels

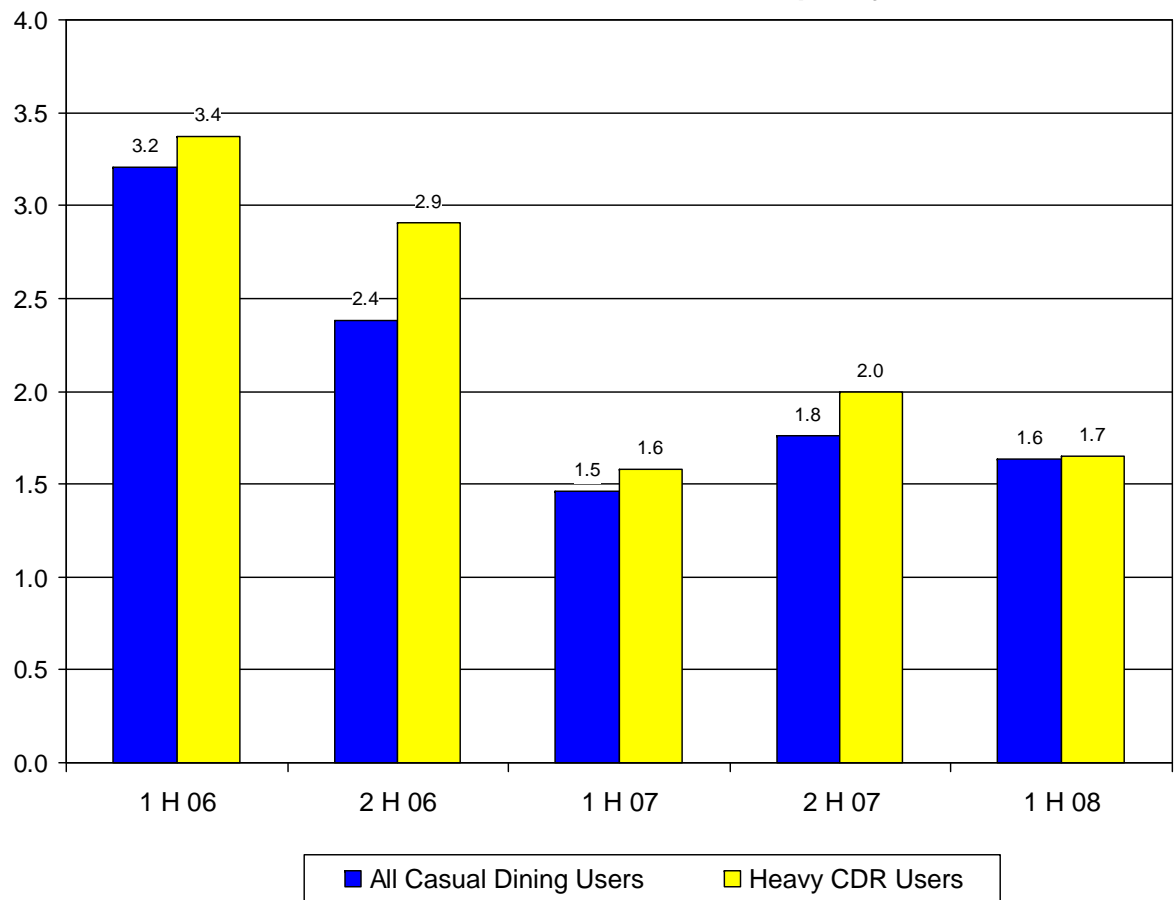


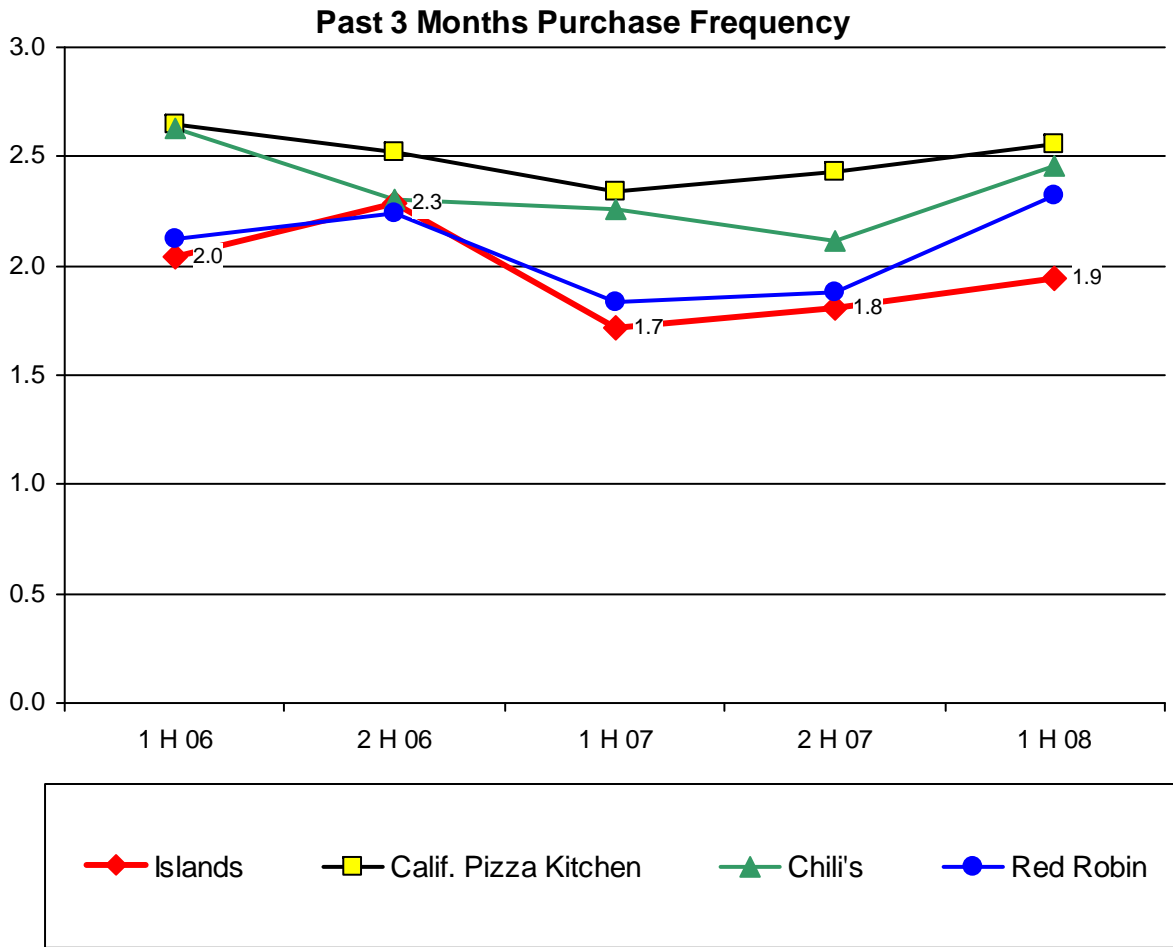


- A brand's past-3-month purchase frequency, a good measure of loyalty, is examined by usage groups.



Brand X Past 1 Month Purchase Frequency

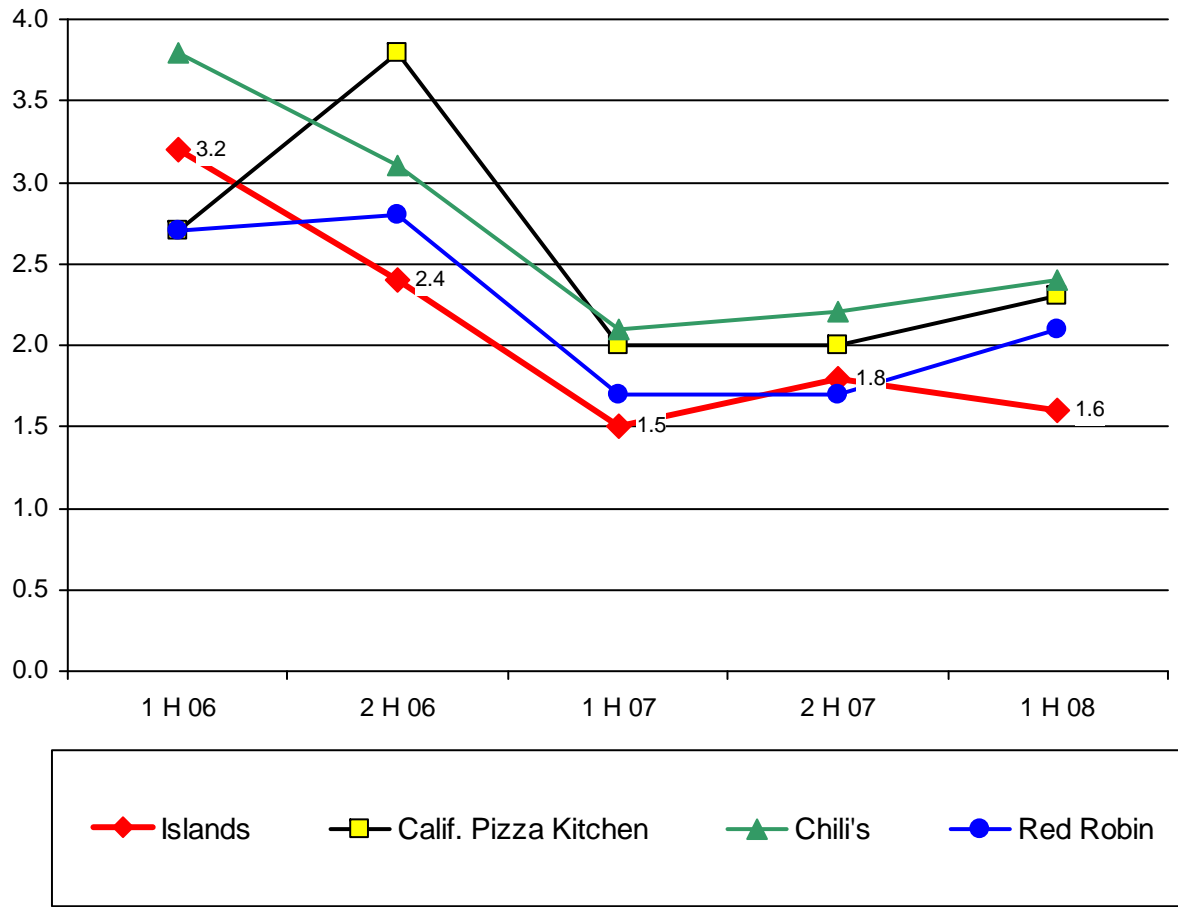




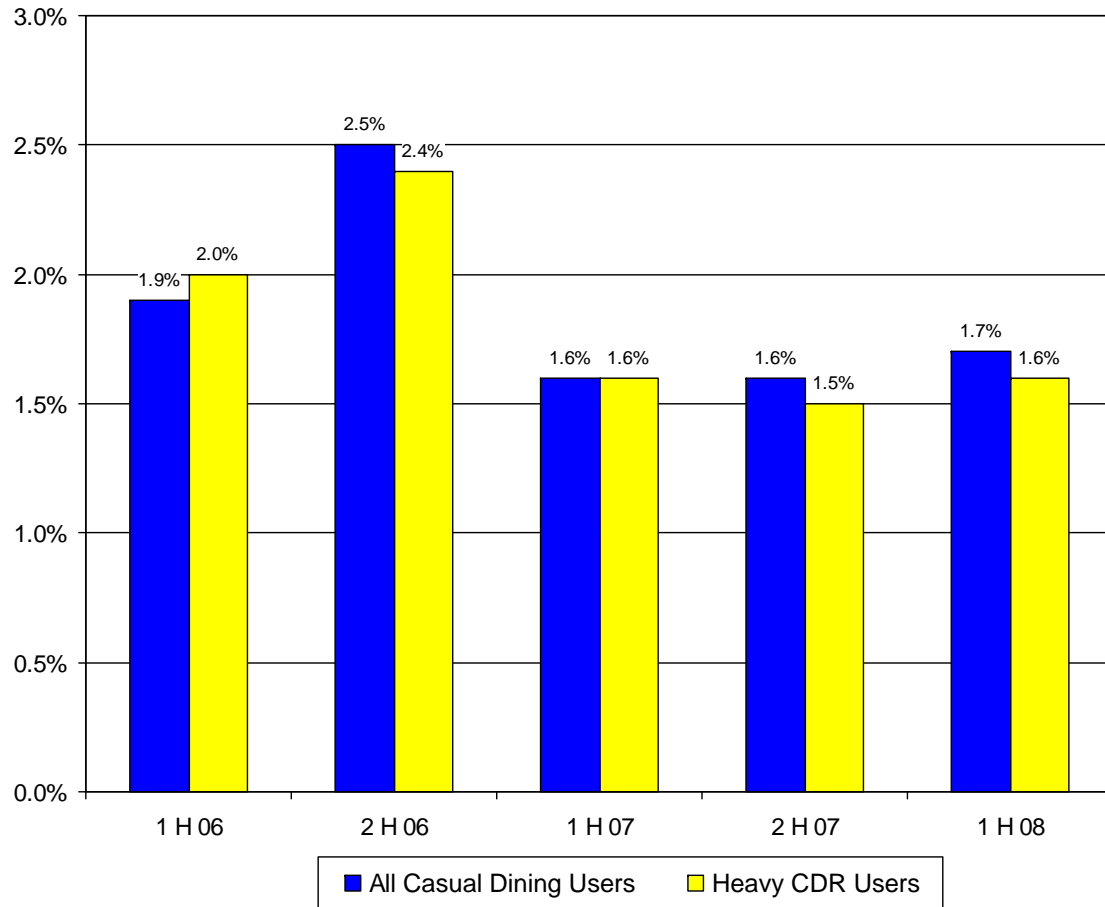
- Past 3 month purchase frequency monitors customer loyalty.
- This chart shows trend over time for a set of competitors.



Past 1 Month Purchase Frequency



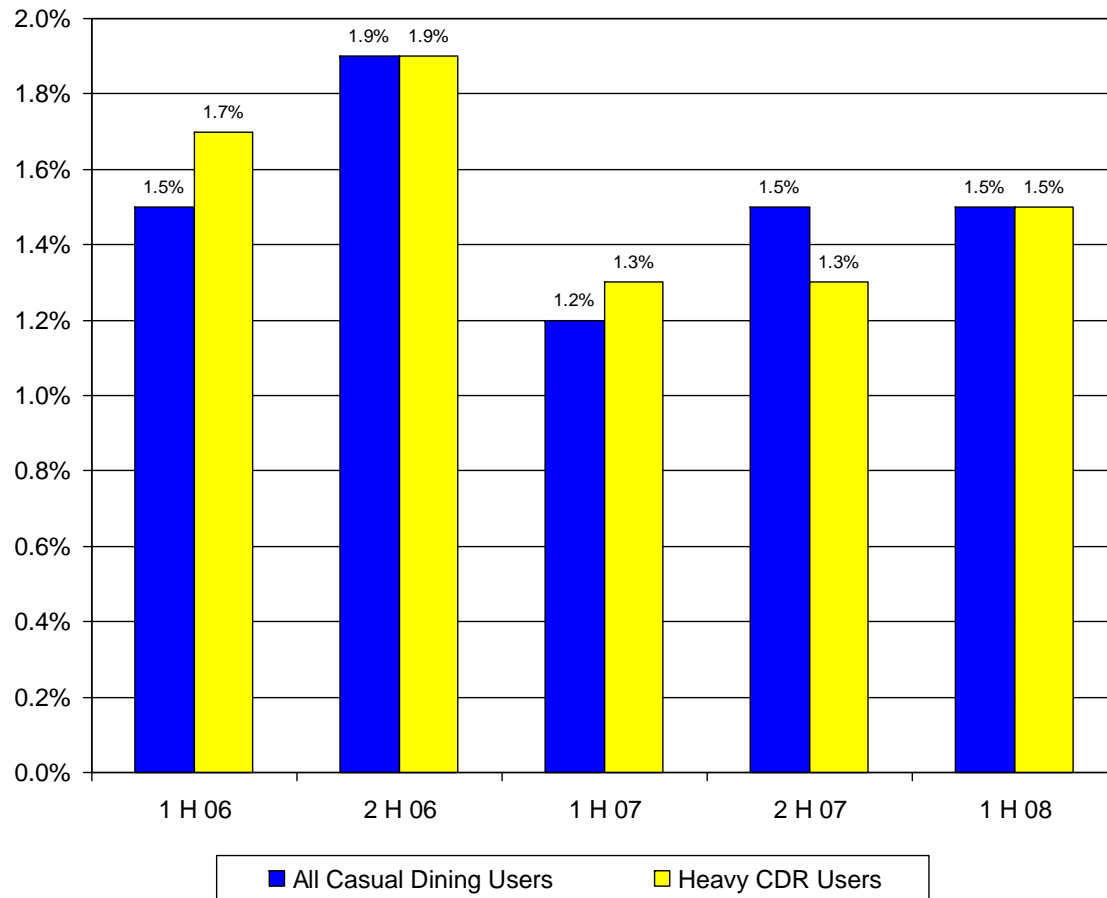
Brand X Share of Past 3 Months Purchases



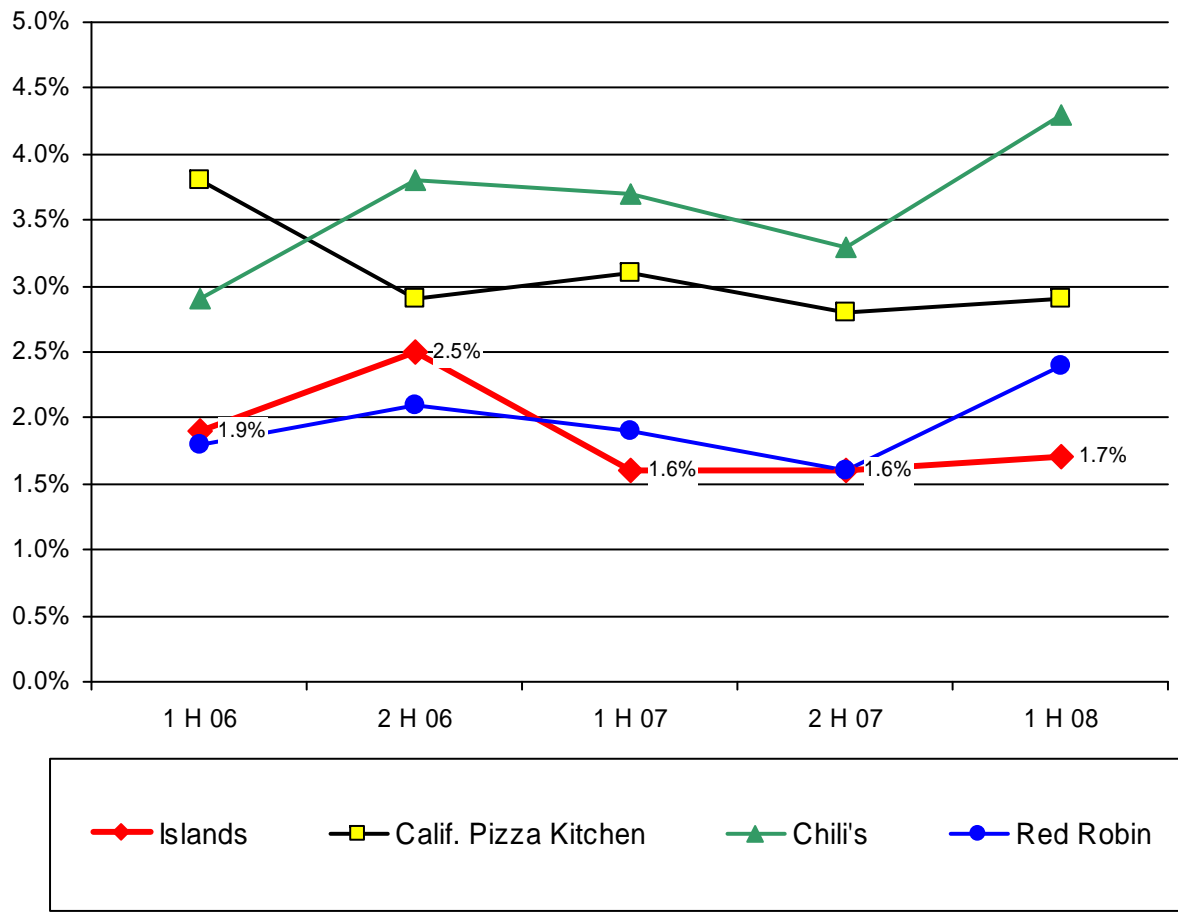
- Share of occasions is a primary indicator of marketing success.
- This chart is based on all CDR occasions, but the information also can be provided by chain type to show how chains are performing in their segment.
- This information can also be sliced by chain to show what other chains your users patronize.



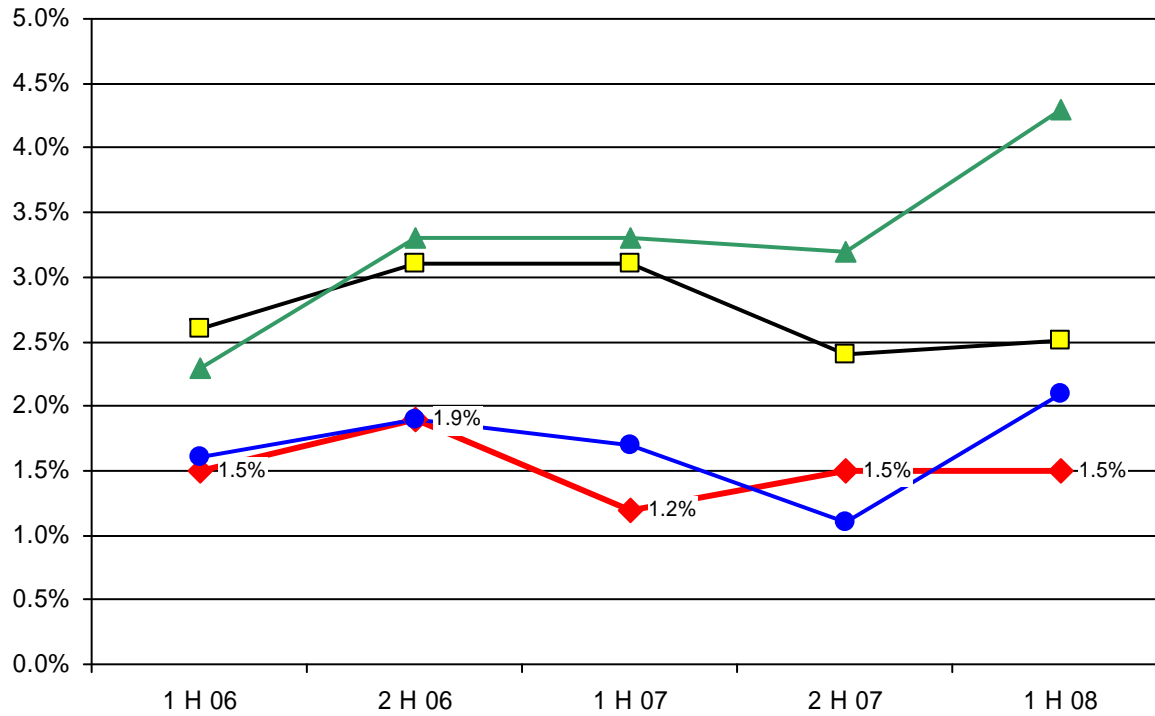
Brand X Share of Past 1 Month Purchases



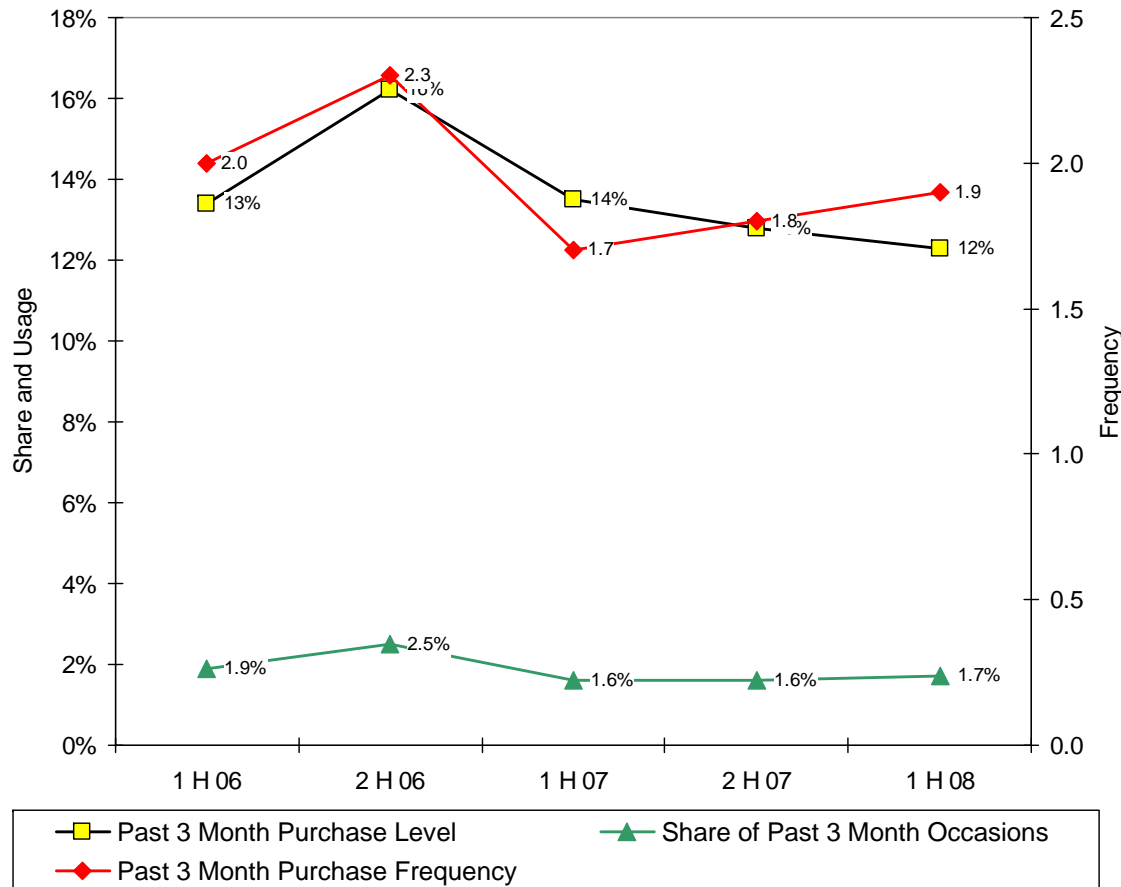
Share of Past 3 Months Purchases



Share of Past 1 Month Purchases



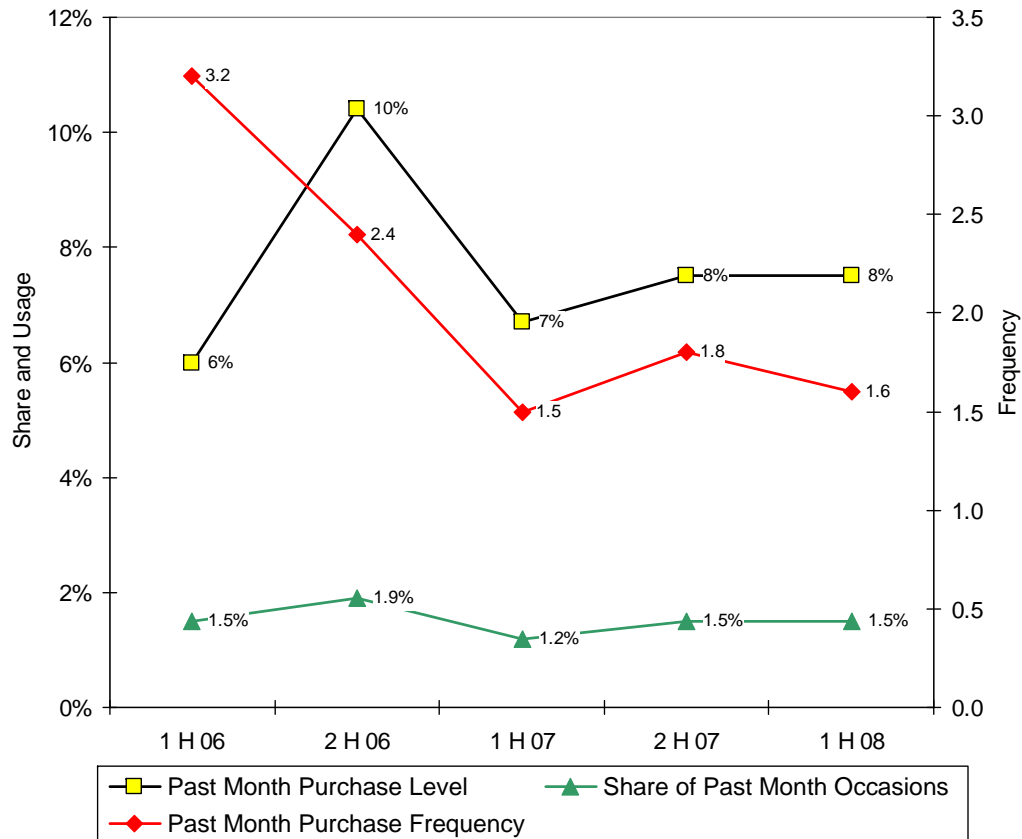
Brand X Share/Usage/Frequency Trend Analysis (Past 3 Mos.)



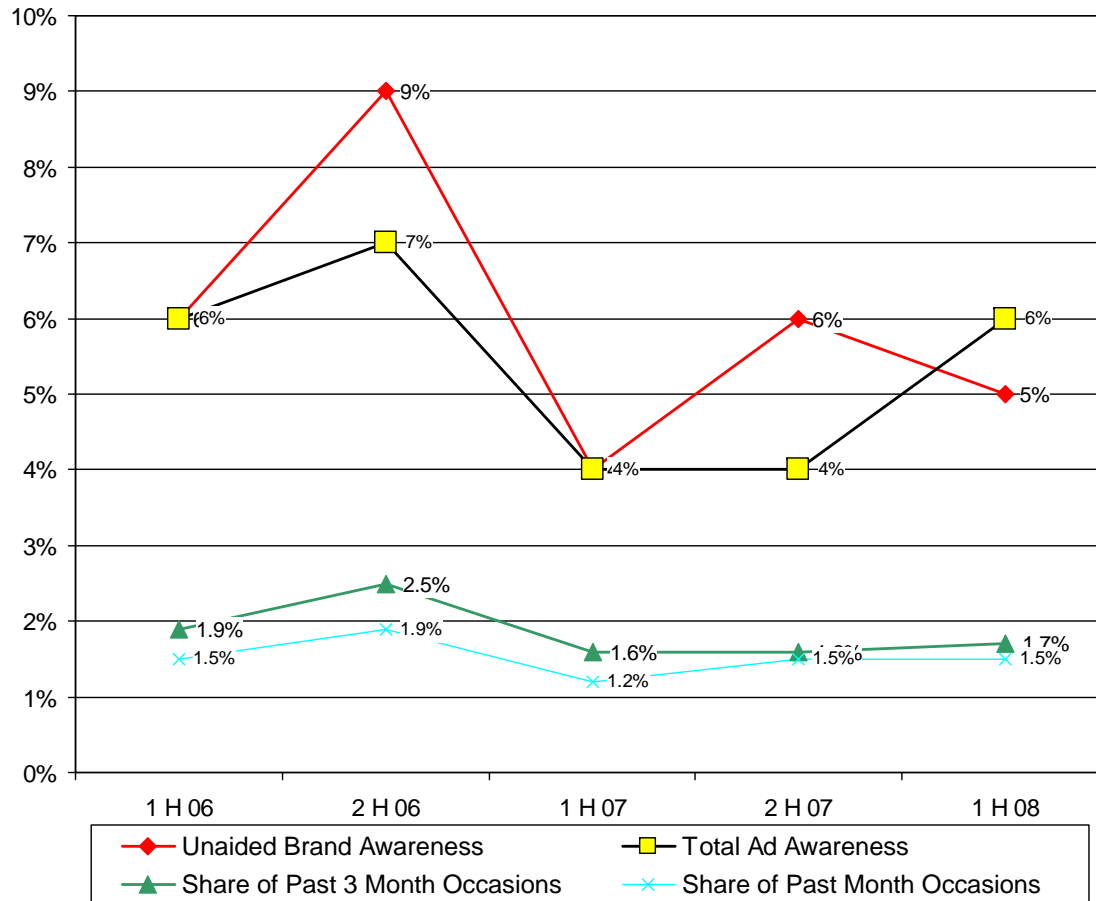
- Casual-Track reports include charts that show how market penetration (past month usage) and customer loyalty (frequency) impact share.
- Other charts compare awareness levels and share.



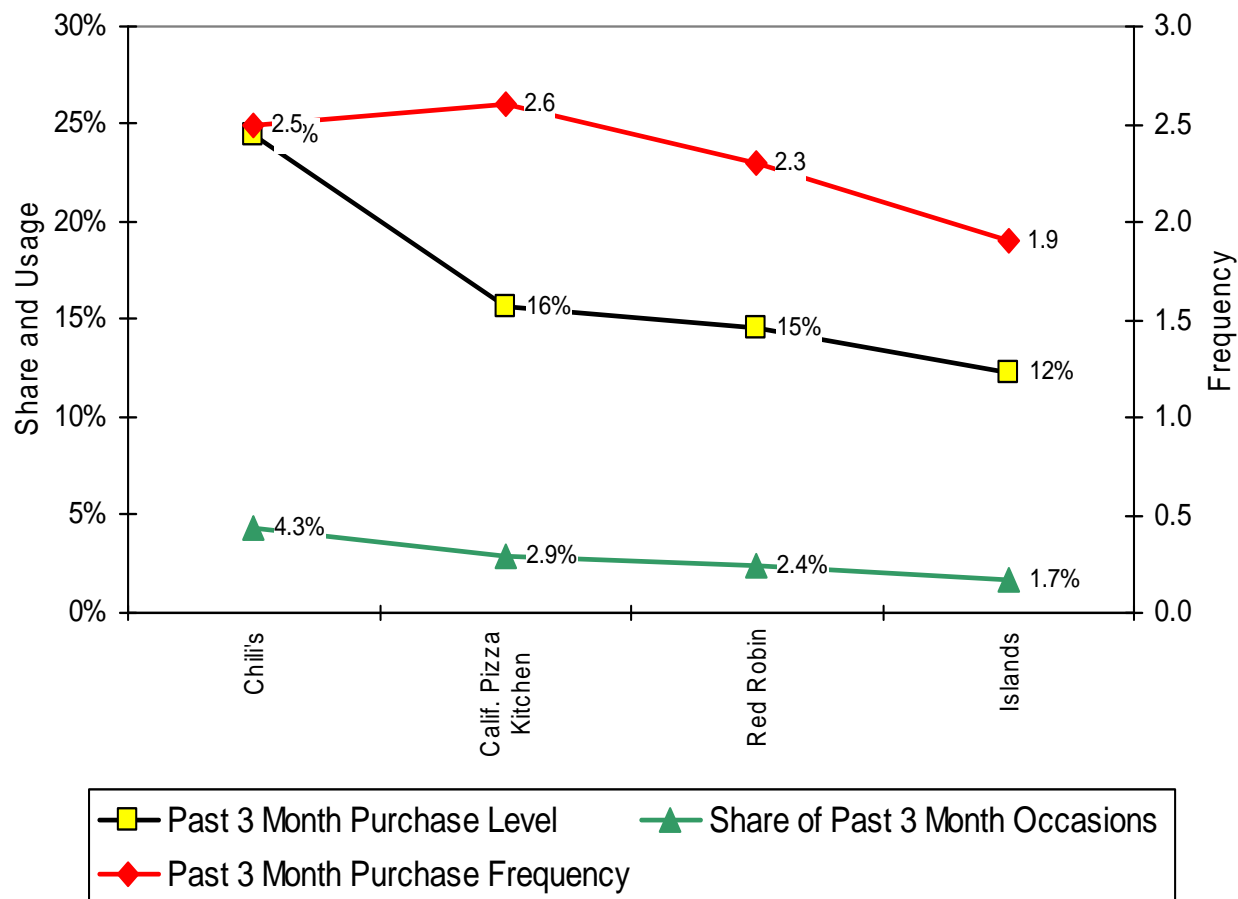
Brand X Share/Usage/Frequency Trend Analysis (Past 1 Mo.)



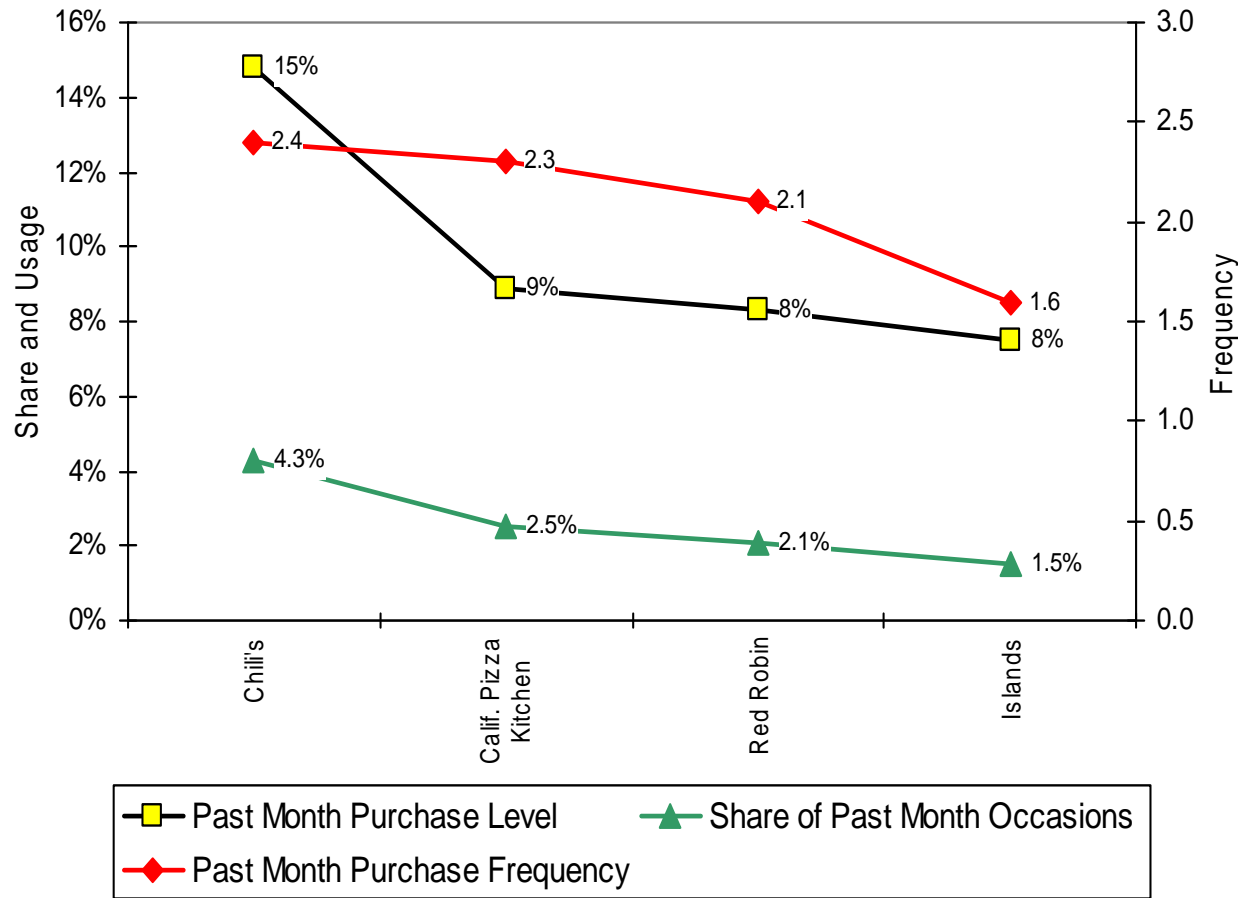
Brand X Share/Awareness Trend Analysis



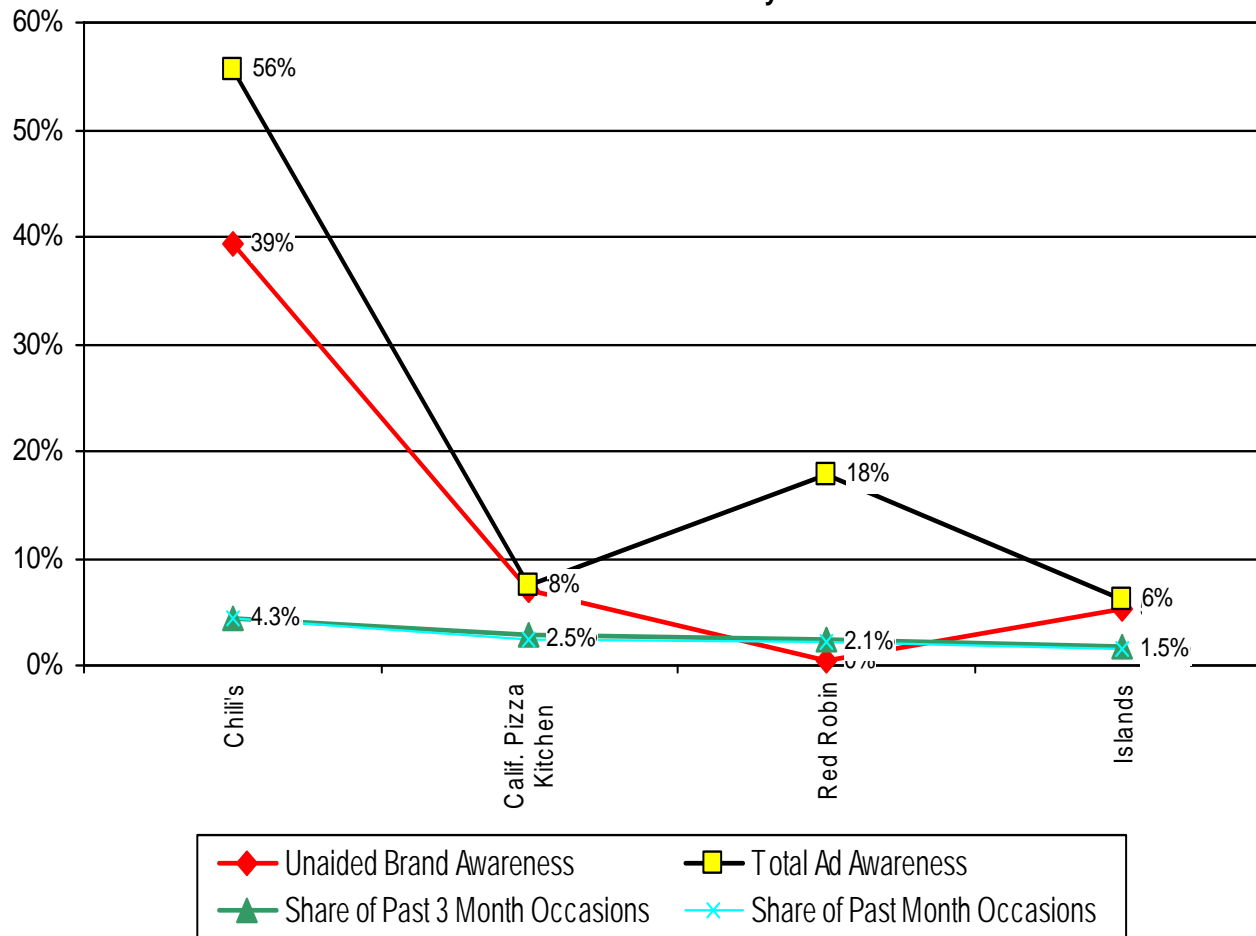
Share/Usage/Frequency Analysis (Past 3 Mos.)



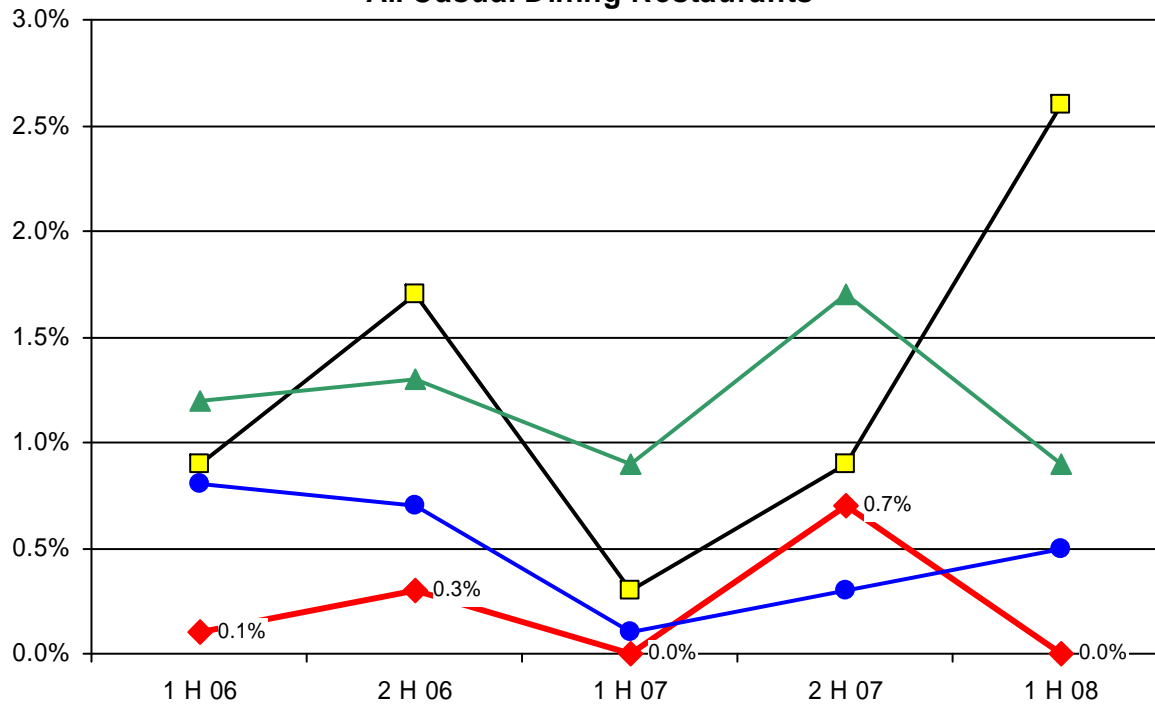
Share/Usage/Frequency Analysis (Past 1 Mo.)



Share/Awareness Analysis



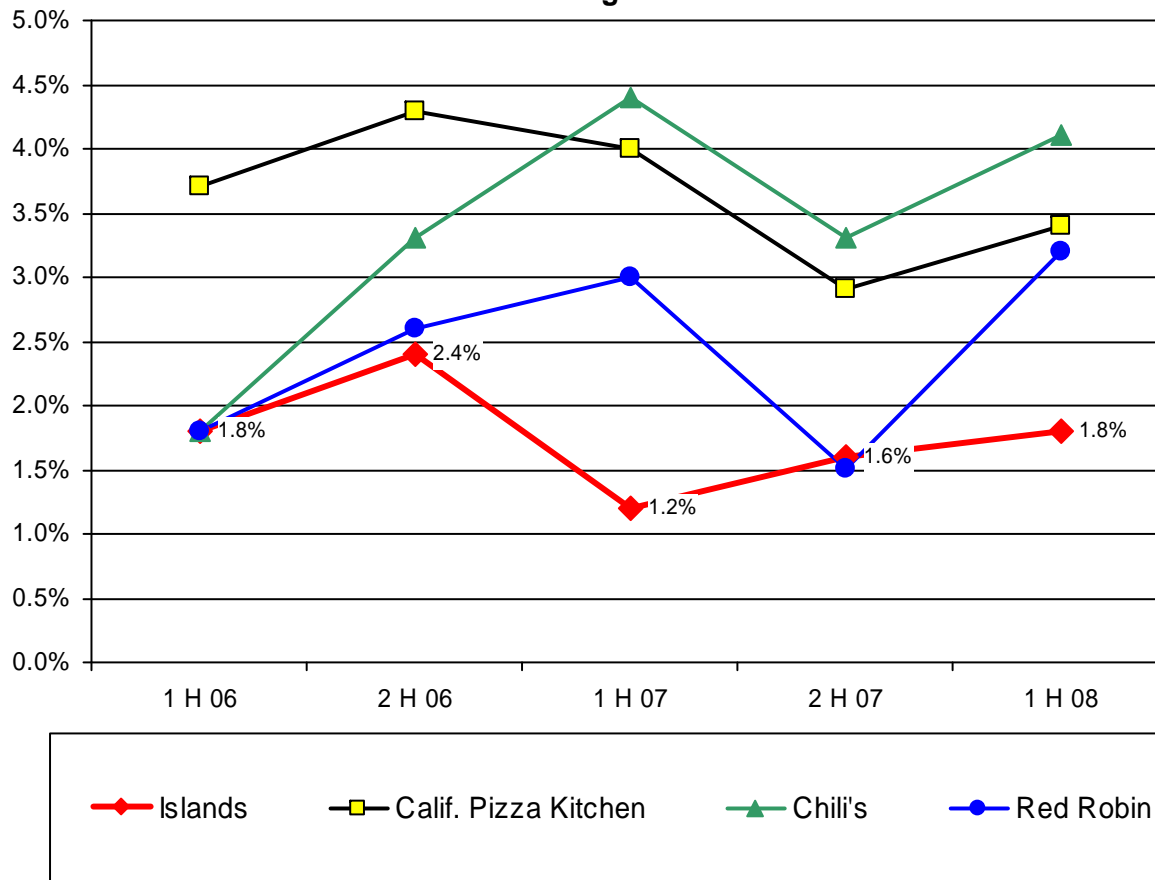
Share of Past Month Occasions - Breakfast
All Casual Dining Restaurants



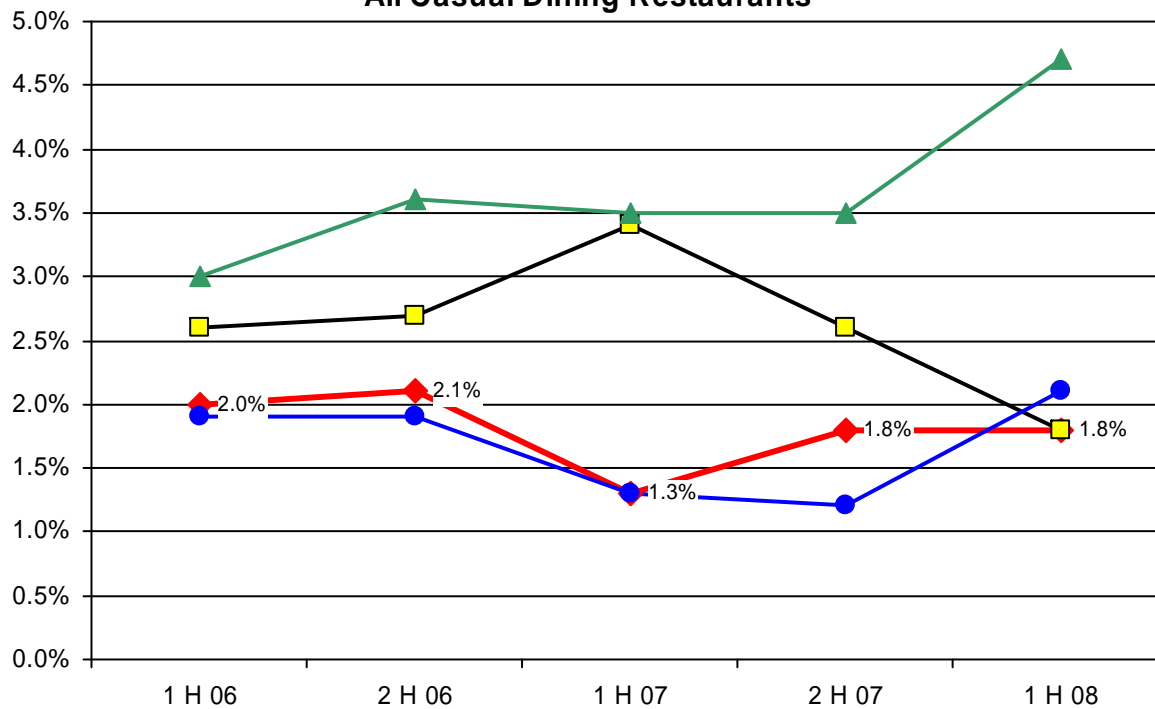
■ Share is provided by daypart for All CDR Users.



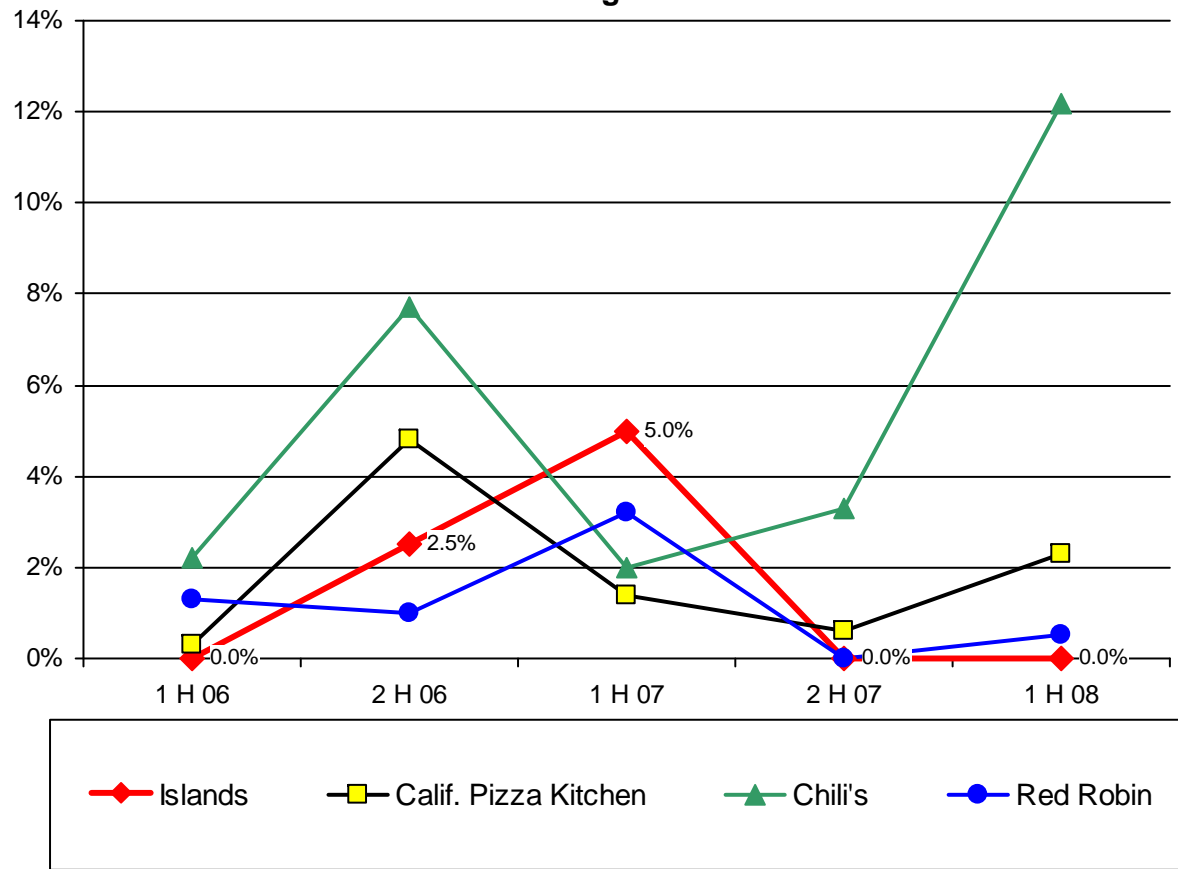
**Share of Past Month Occasions - Lunch/Brunch
All Casual Dining Restaurants**



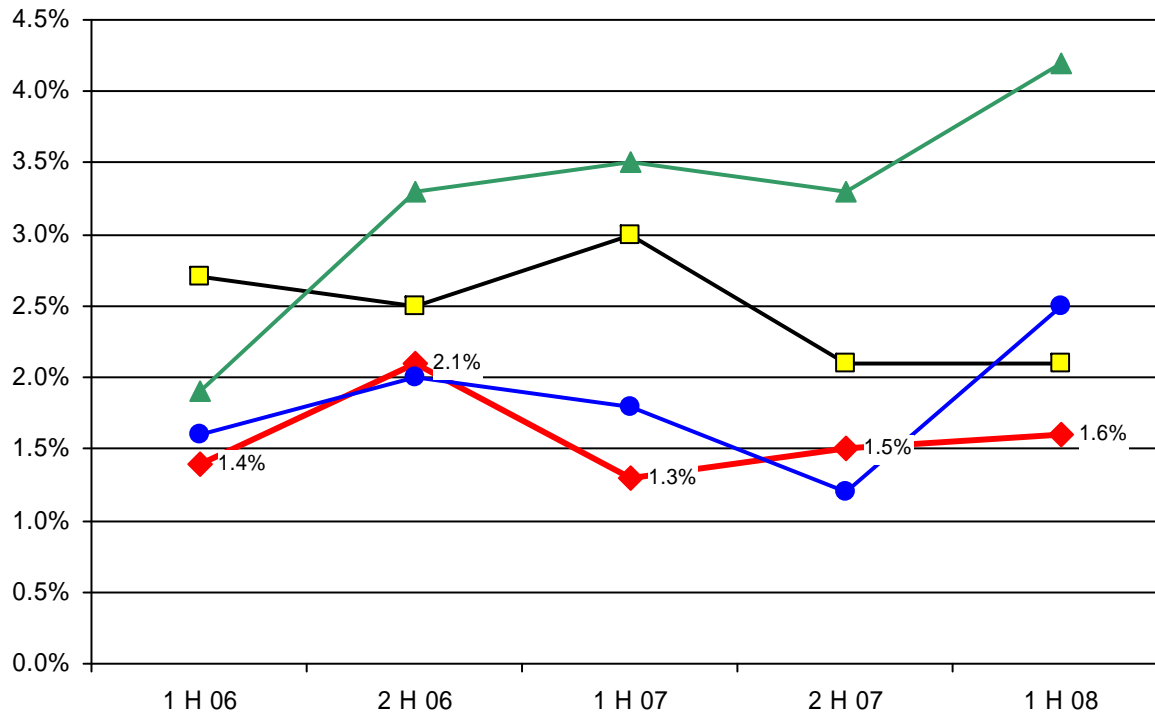
**Share of Past Month Occasions - Dinner
All Casual Dining Restaurants**



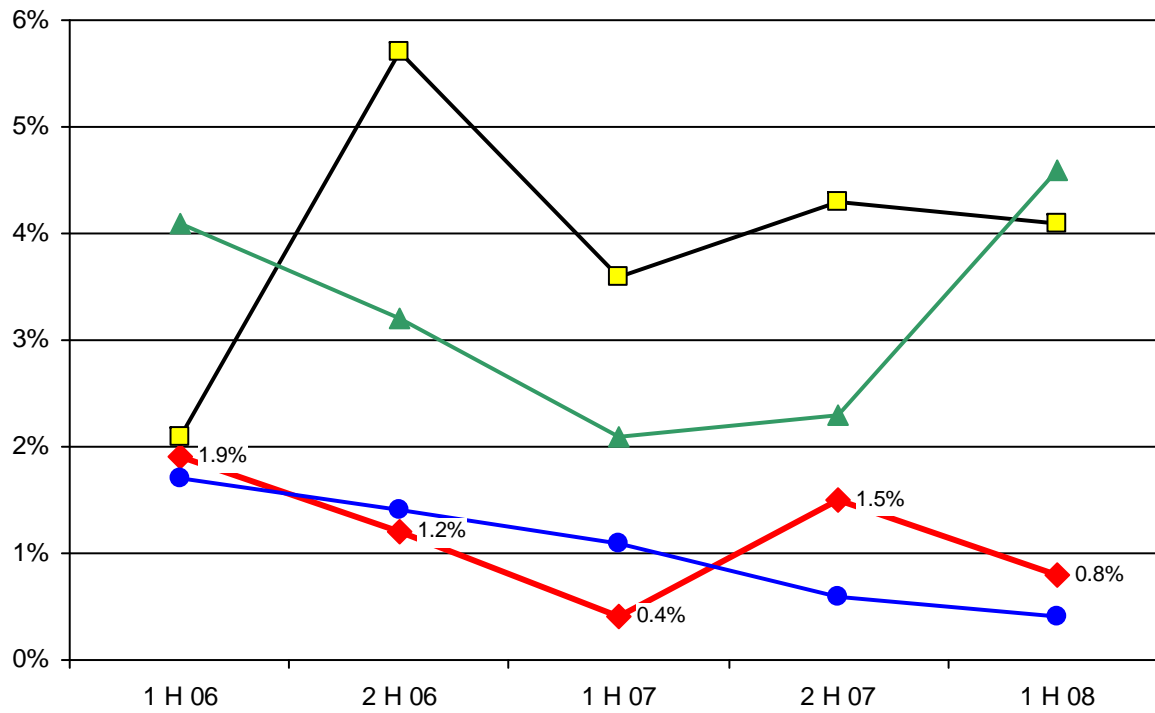
**Share of Past Month Occasions - Snacks/Appet/Drinks/Dessert
All Casual Dining Restaurants**



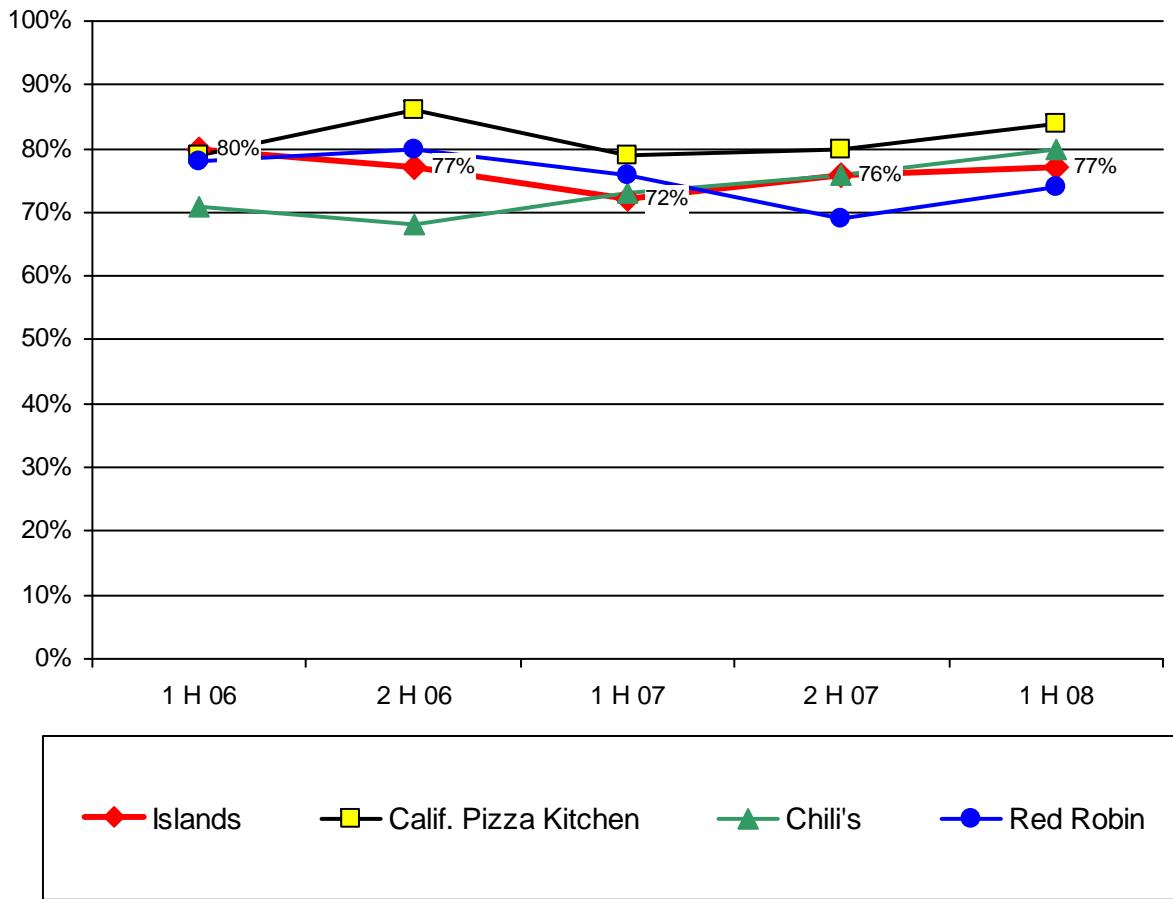
Share of Past Month Occasions -- Eat-In



Share of Past Month Occasions -- Carry-Out/Delivery



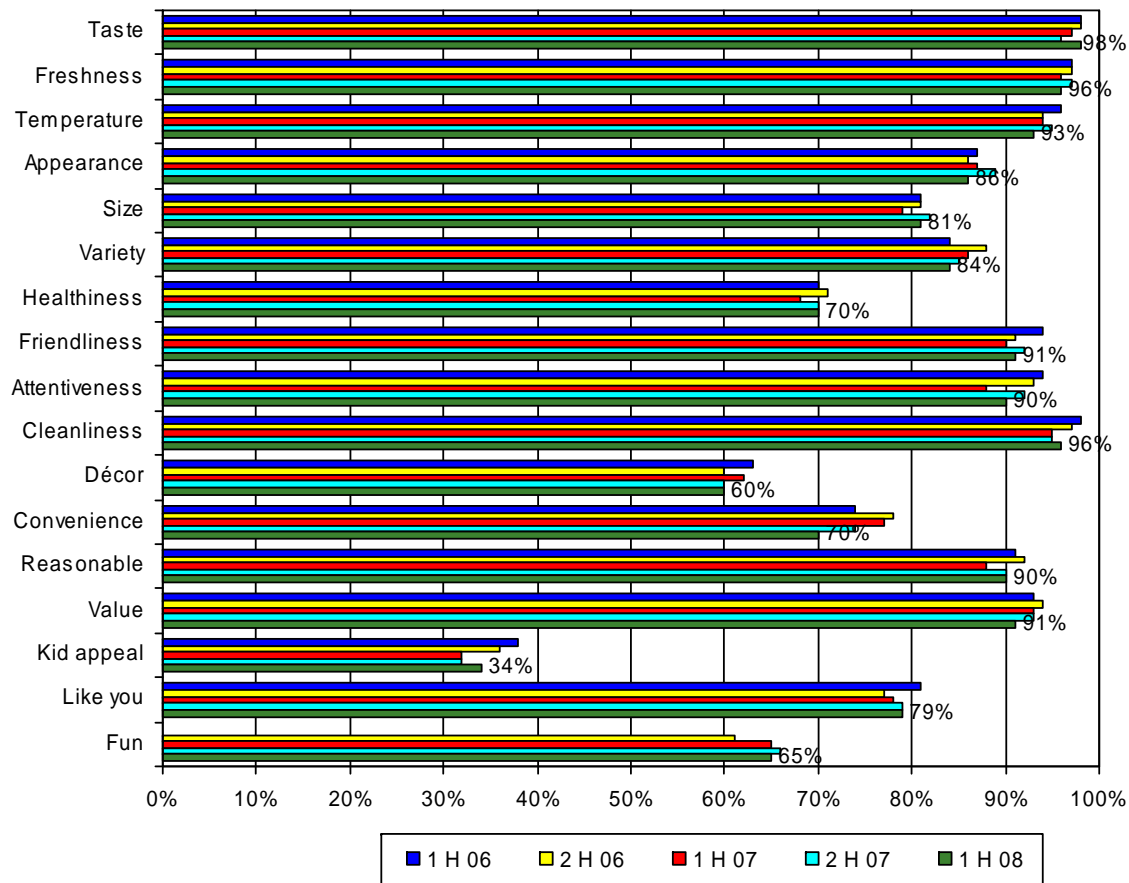
Rating of Last Occasion (Excellent/Very Good-Net)



- The rating of the last occasion is collected among past-6-month users of each monitored chain. Ratings are based on a 5-point scale, from poor to excellent.
- This chart reports top 2 box results (those rating the chain excellent or very good), an indication of overall satisfaction.



National Importance Trends (Extremely/Very Important-Net)



- Casual-Track market-level studies include national trends in customer satisfaction attribute importance. Respondents are asked to rate each attribute on a scale of 1 to 5 (1=not at all important, 5=extremely important).



Relative Ratings

	<u>Islands</u>	<u>Calif. Pizza Kitchen</u>	<u>Chili's</u>	<u>Red Robin</u>
<i>Sample Size</i>	[89]	[109]	[177]	[100]
Taste	99	<u>106</u>	101	93
Freshness	100	<u>109</u>	96	95
Temperature	98	<u>117</u>	96	90
Appearance	96	<u>115</u>	96	94
Portion size	<u>108</u>	<u>107</u>	92	93
Variety	69	<u>127</u>	<u>117</u>	92
Healthiness	68	<u>127</u>	<u>111</u>	99
Friendliness	105	<u>107</u>	95	93
Attentiveness	<u>106</u>	<u>115</u>	93	87
Cleanliness	96	<u>112</u>	105	88
Décor/Atmosphere	103	102	97	97
Convenient locations	102	97	<u>106</u>	96
Reasonable prices	101	97	99	103
Value	102	102	98	98
Kid appeal	99	87	94	<u>122</u>
A place for you	102	<u>113</u>	99	87
Fun place to go	96	105	97	102

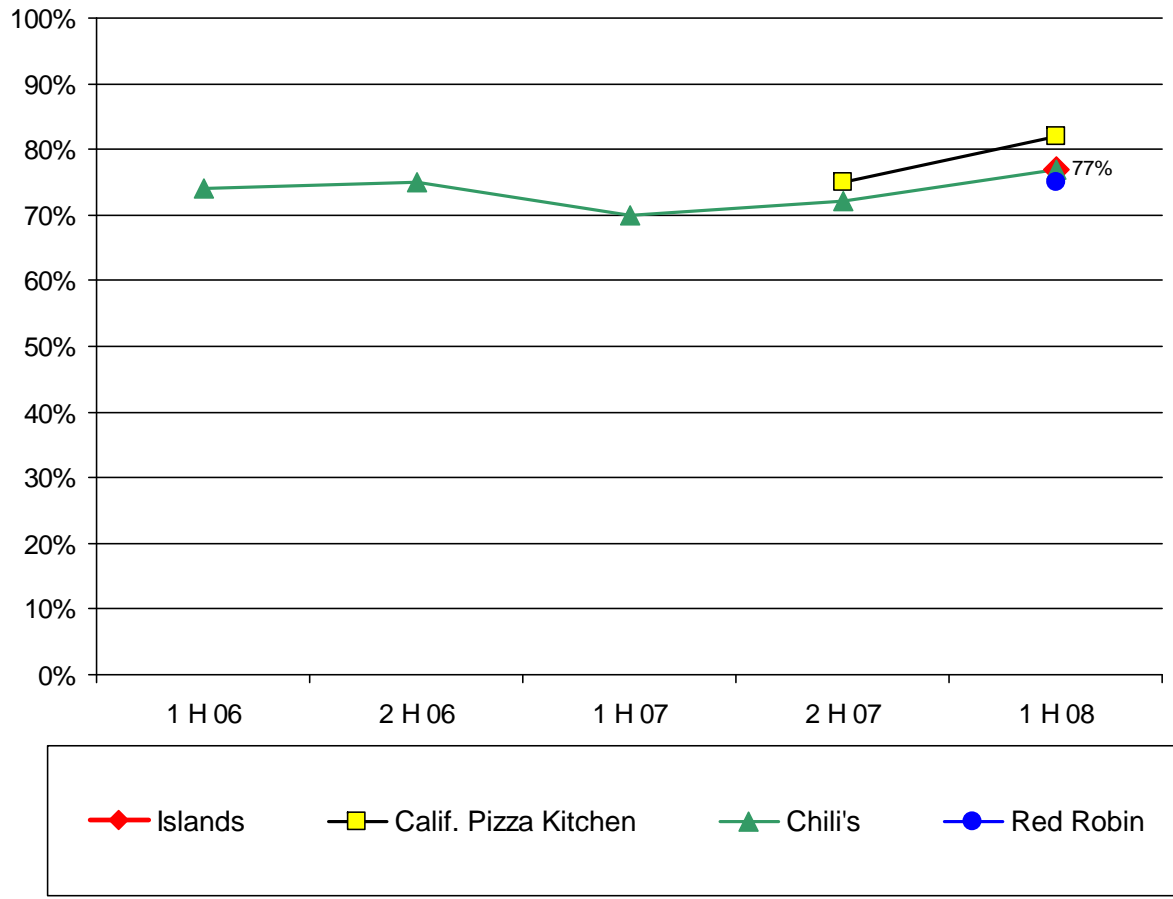
- Relative ratings provide an overview of competitive strengths and weaknesses.
- Each chain's ratings are indexed to the average of the other chains in the competitive set.
- Casual-Track now includes trended information on the 22 key attributes.

Above Average

Below Average



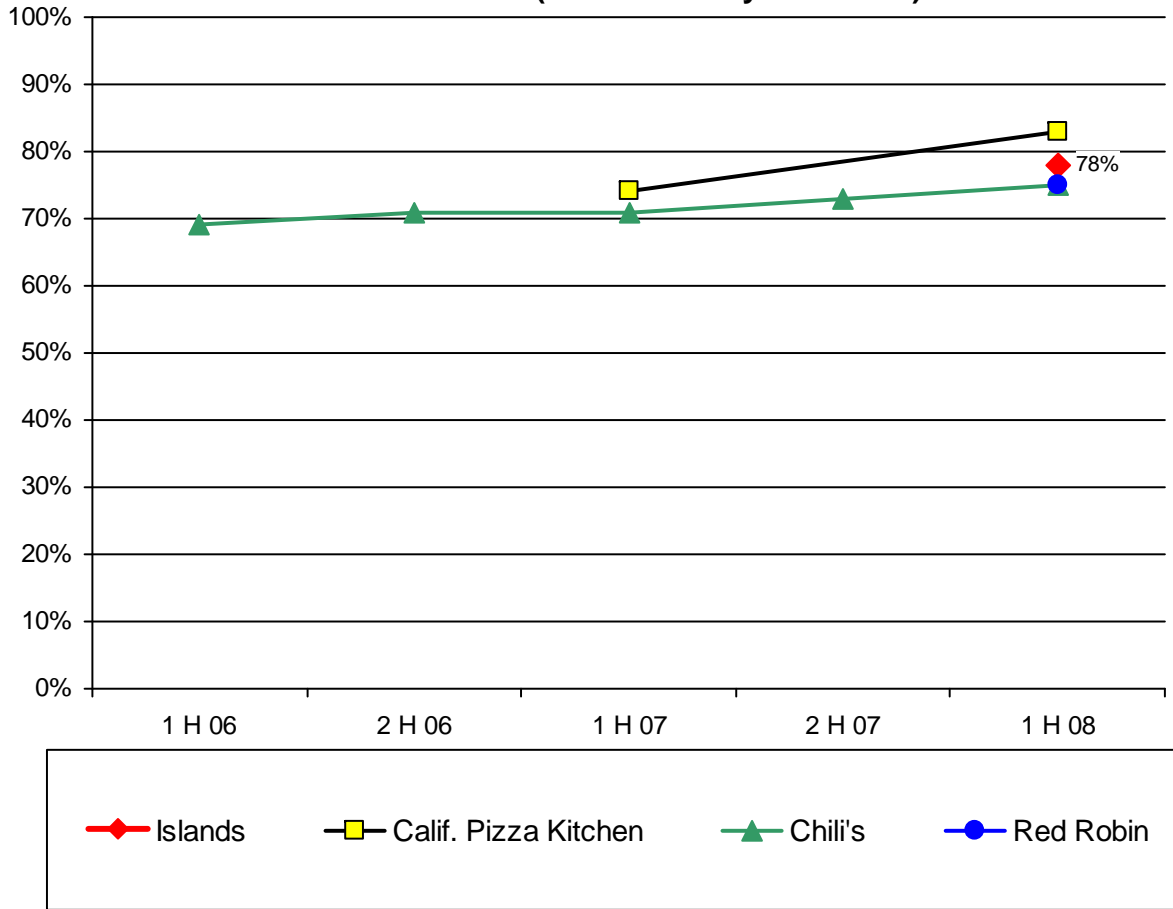
Taste or Flavor of Food (Excellent/Very Good-Net)



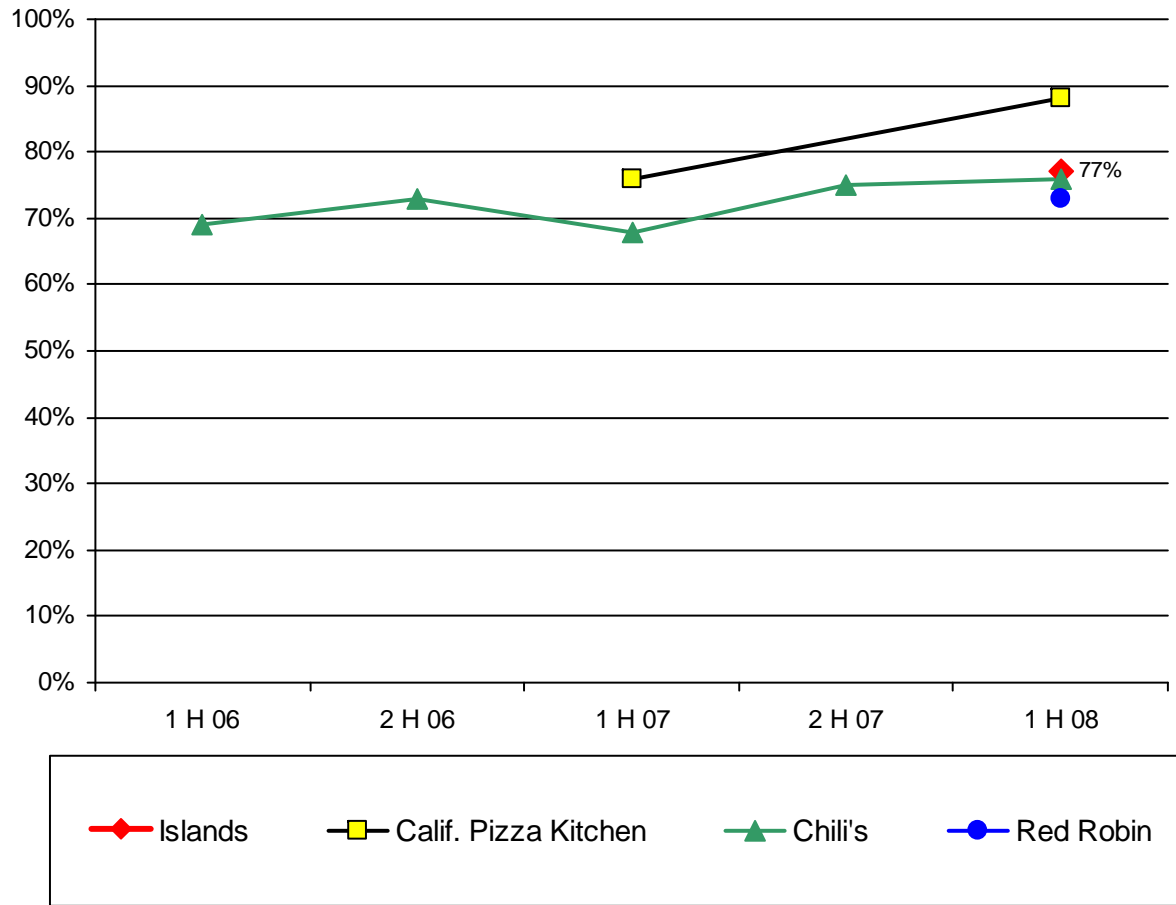
- Attribute ratings are trended over time. Tables and graphs also can show ratings of excellent, very good, good, fair or poor.



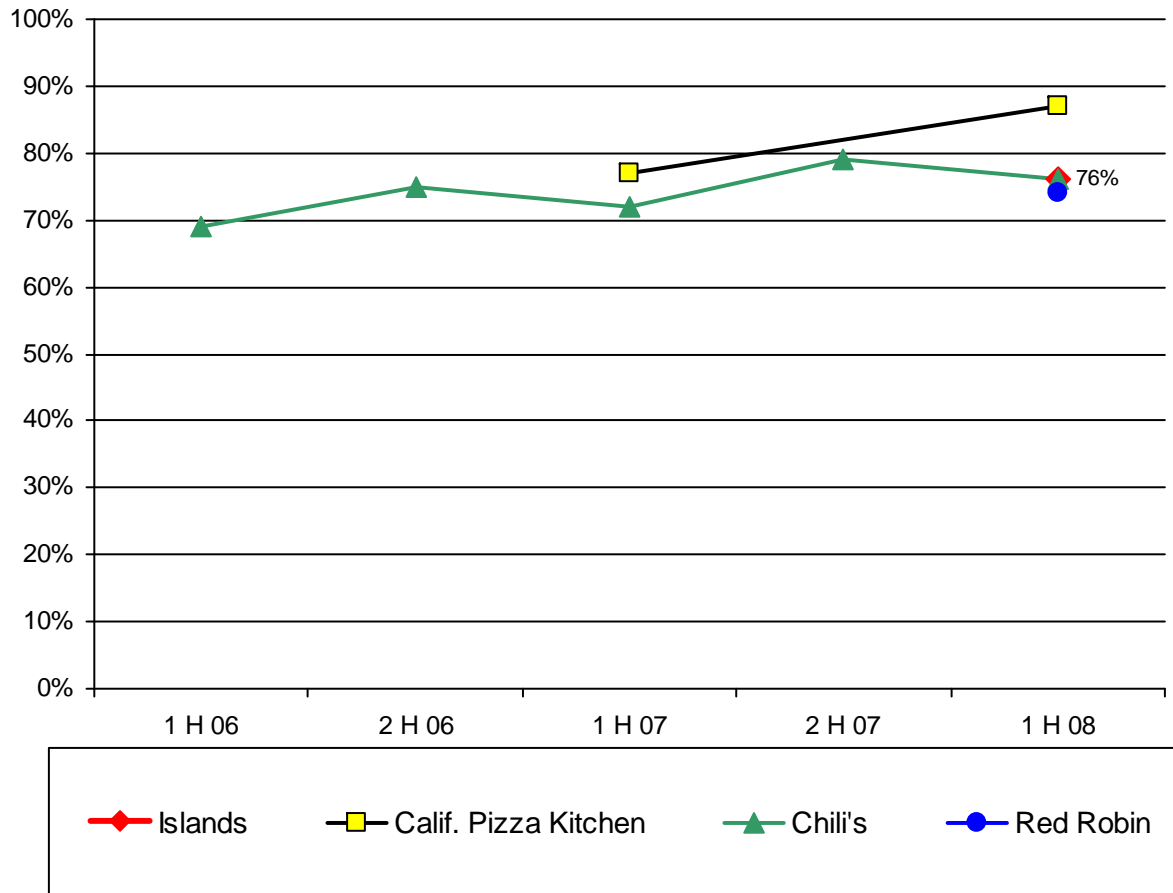
Freshness of Food (Excellent/Very Good-Net)



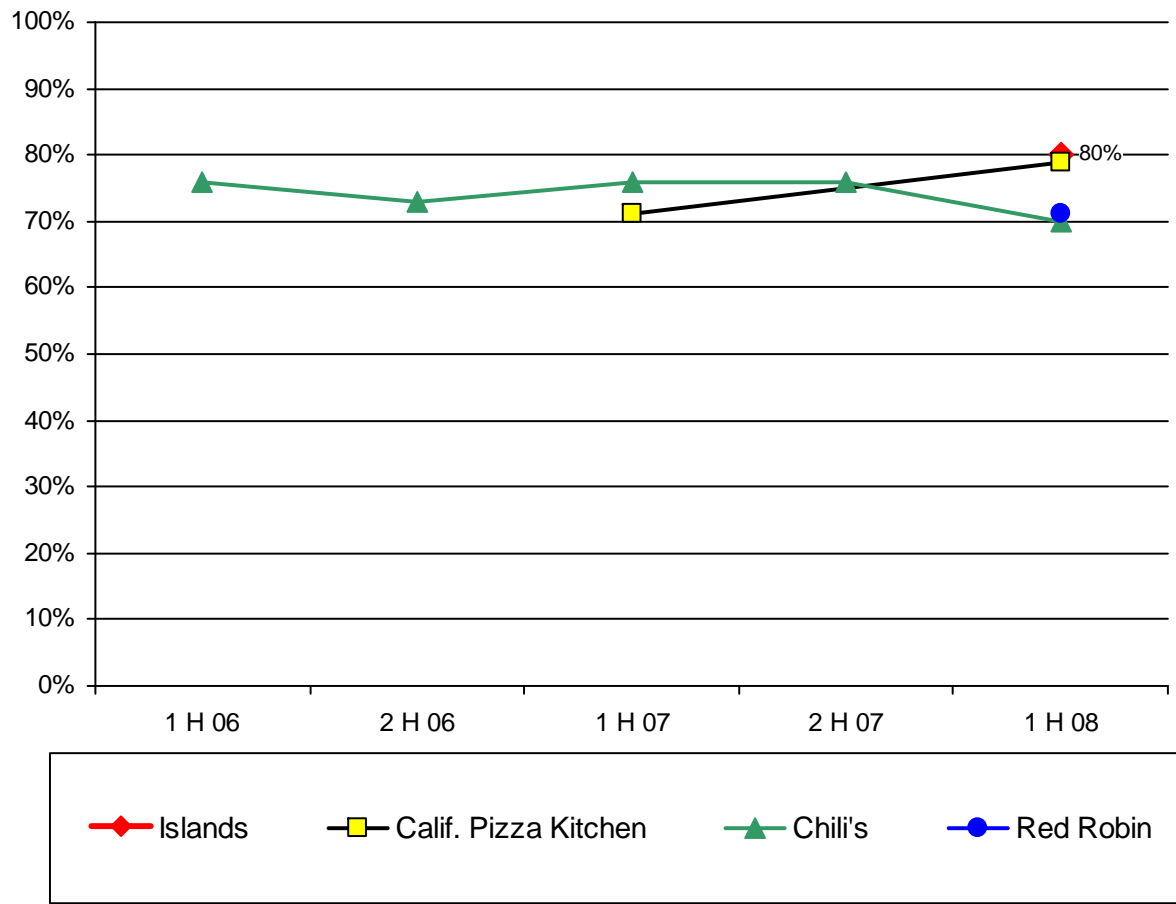
Temperature of Food (Excellent/Very Good-Net)



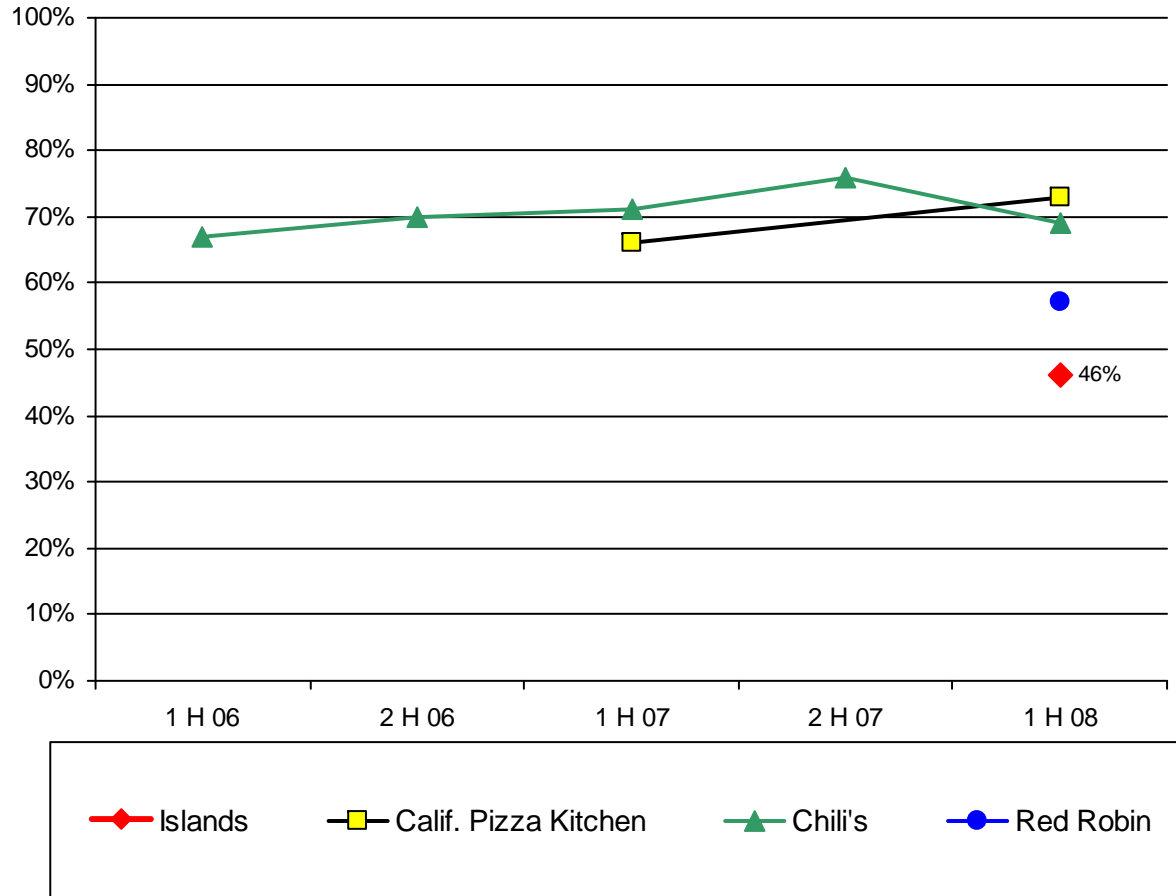
Appearance of Food (Excellent/Very Good-Net)



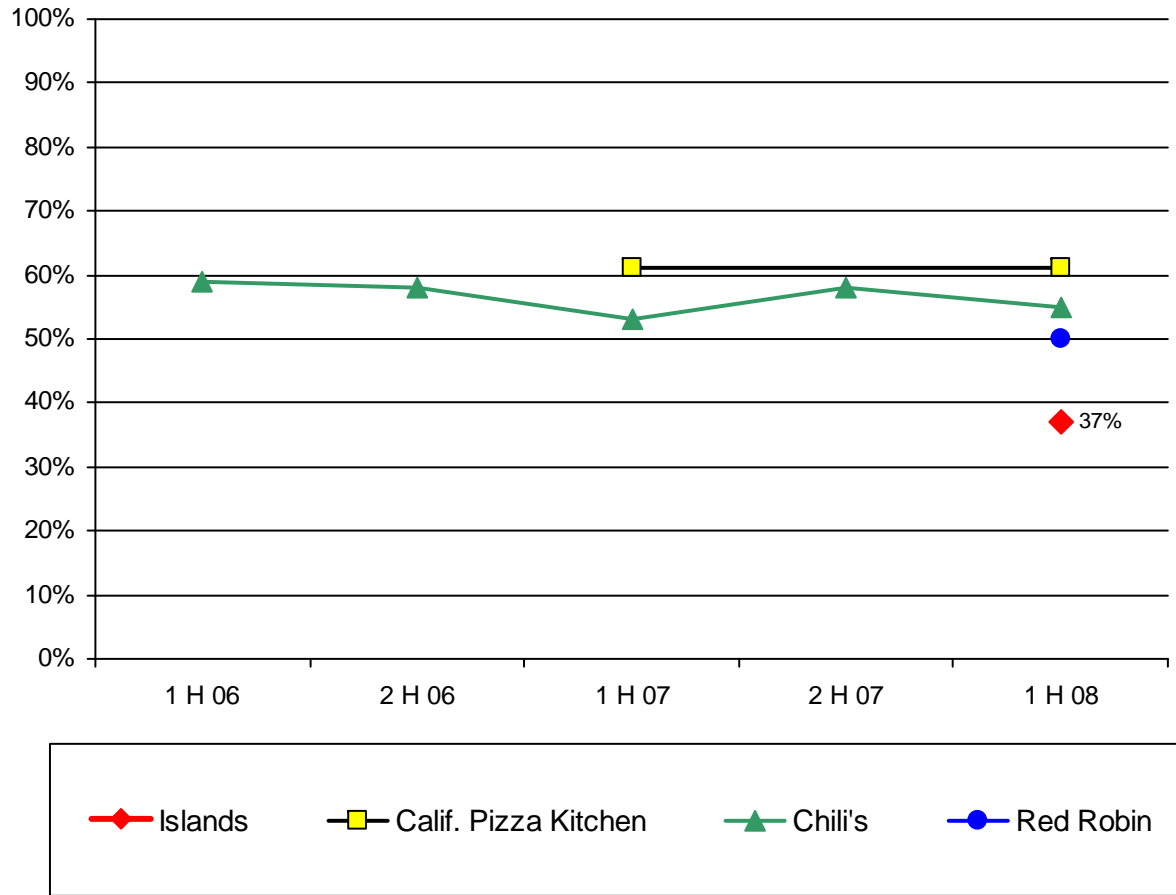
Size of Portions (Excellent/Very Good-Net)



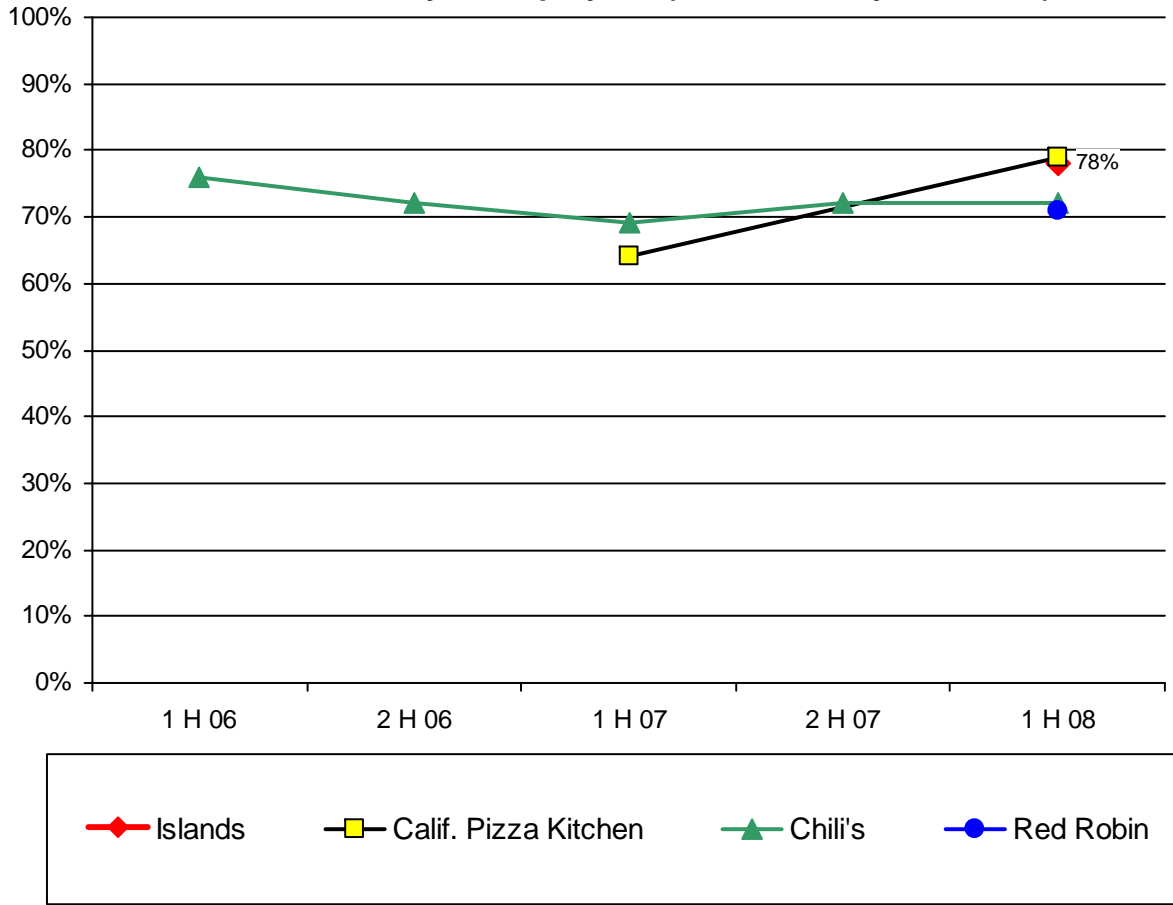
Variety of Menu Items (Excellent/Very Good-Net)



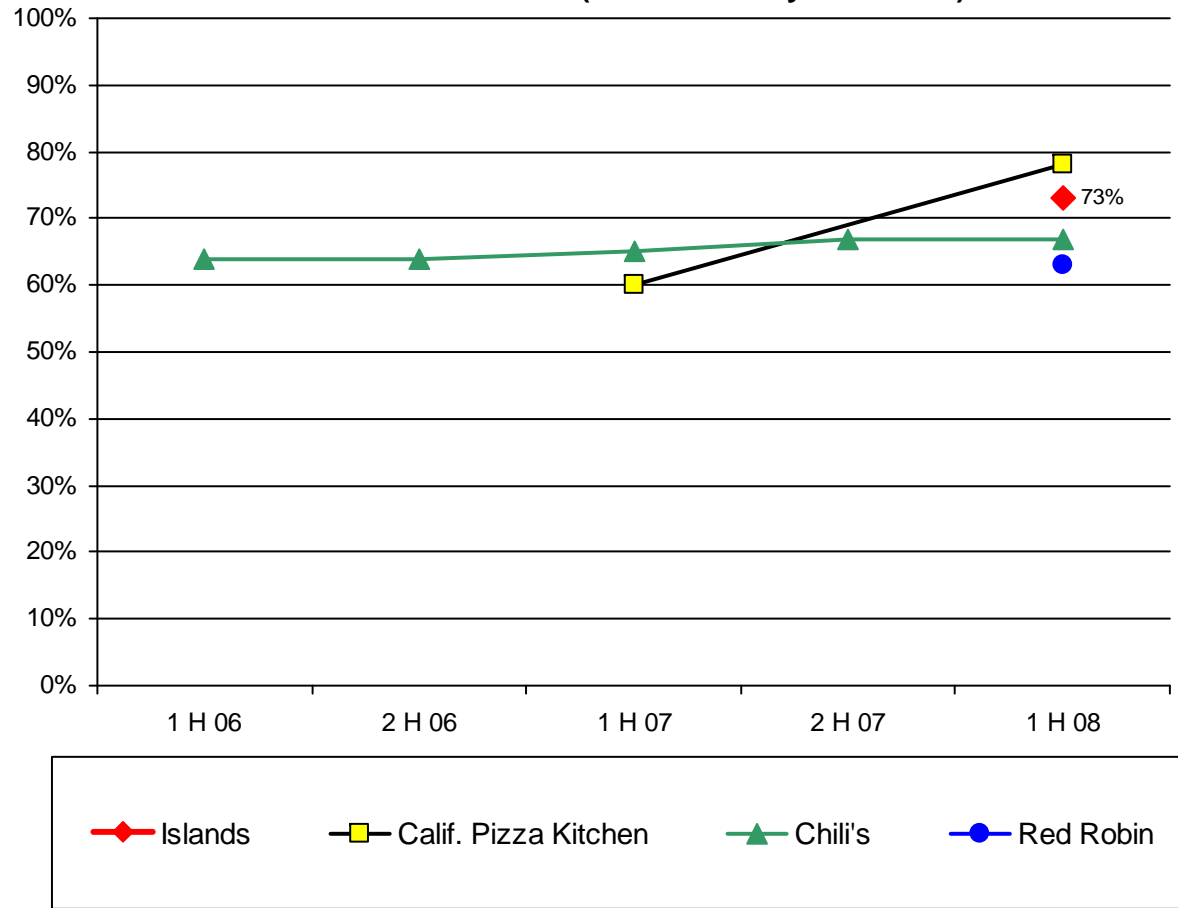
Availability of Healthy/Nutritious Food (Excellent/Very Good-Net)



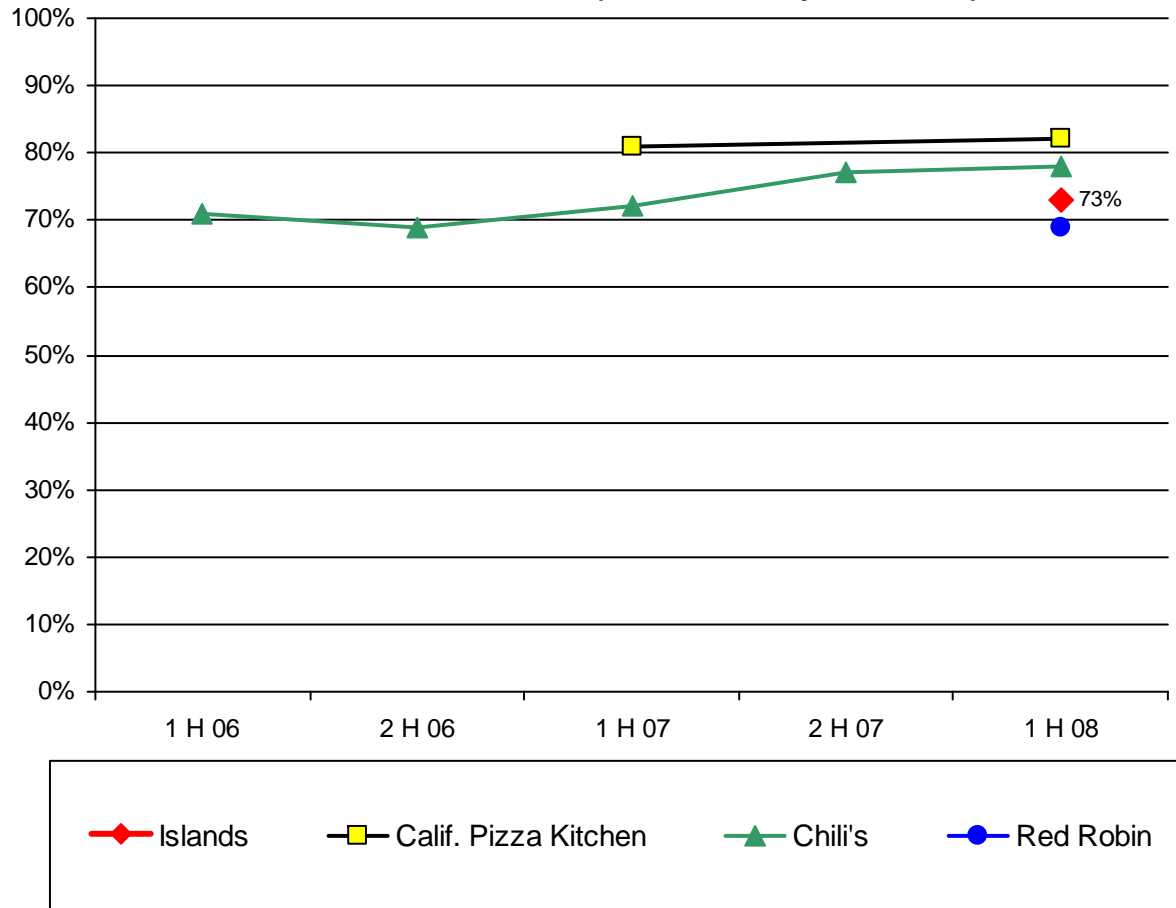
Friendliness/Courtesy of Employees (Excellent/Very Good-Net)



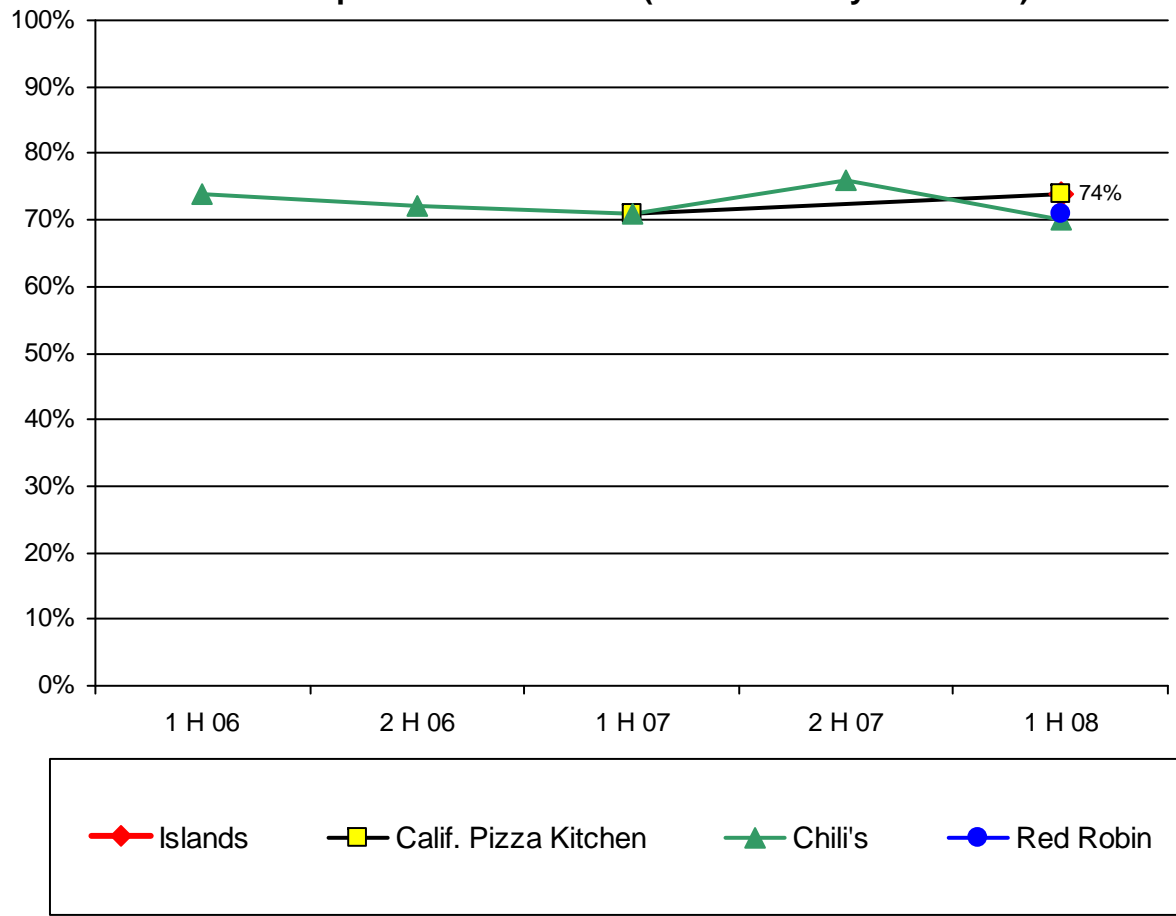
Attentiveness of Service (Excellent/Very Good-Net)



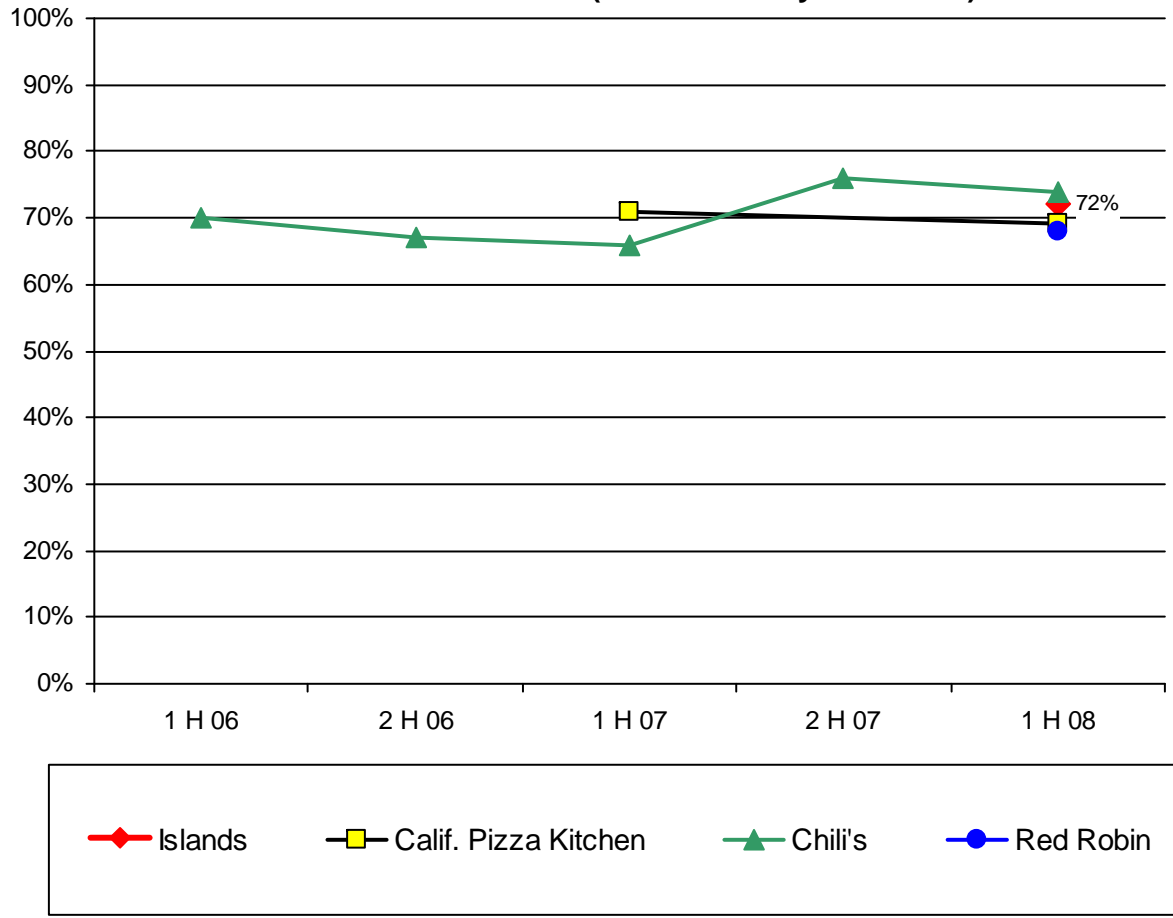
Cleanliness of Restaurant (Excellent/Very Good-Net)



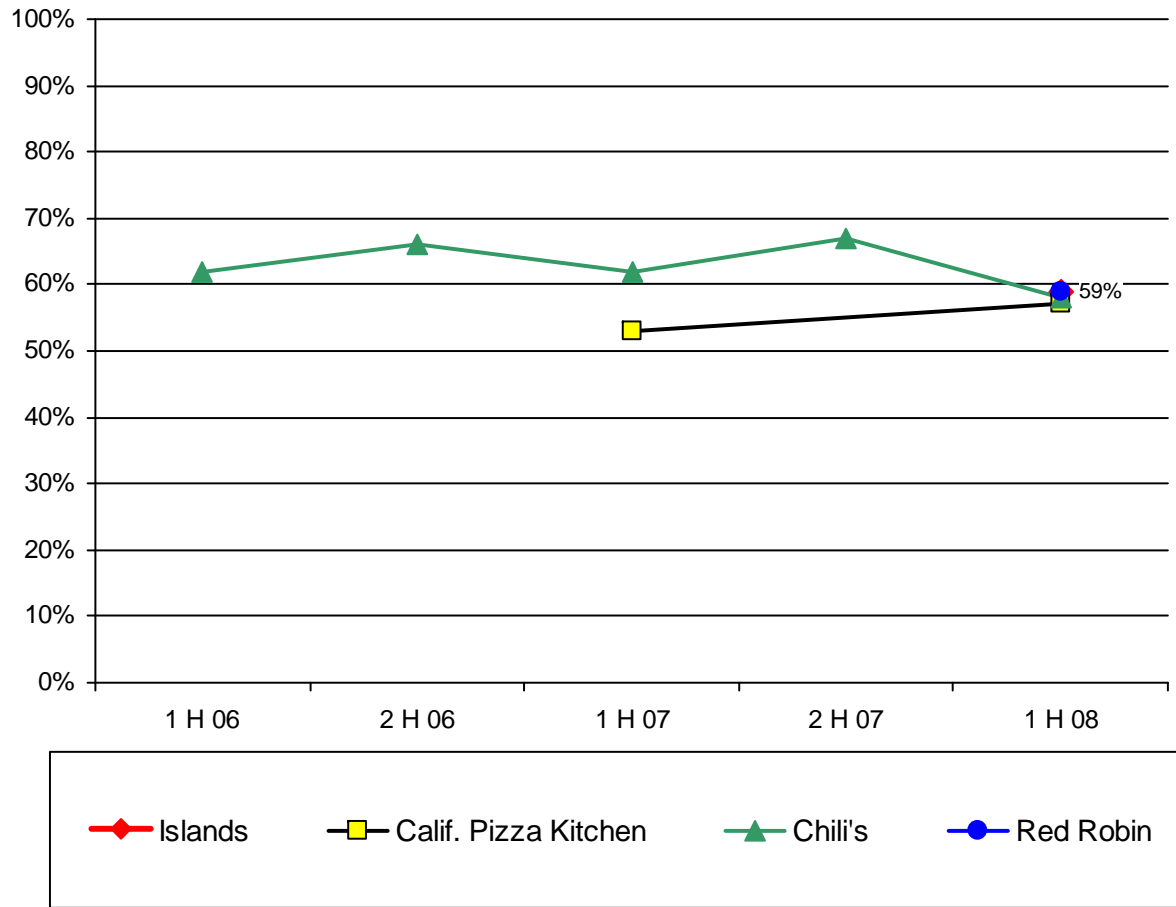
Décor/Atmosphere of Restaurant (Excellent/Very Good-Net)



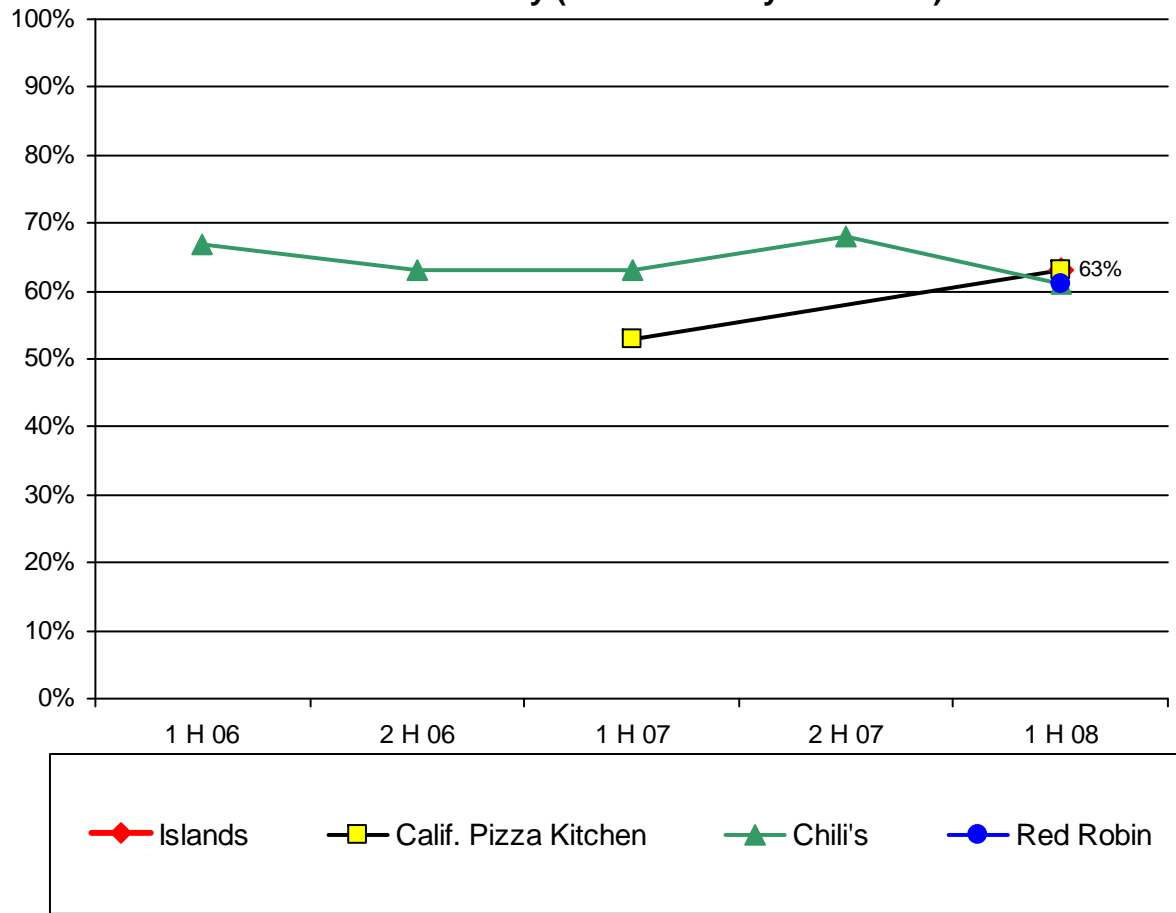
Convenience of Locations (Excellent/Very Good-Net)



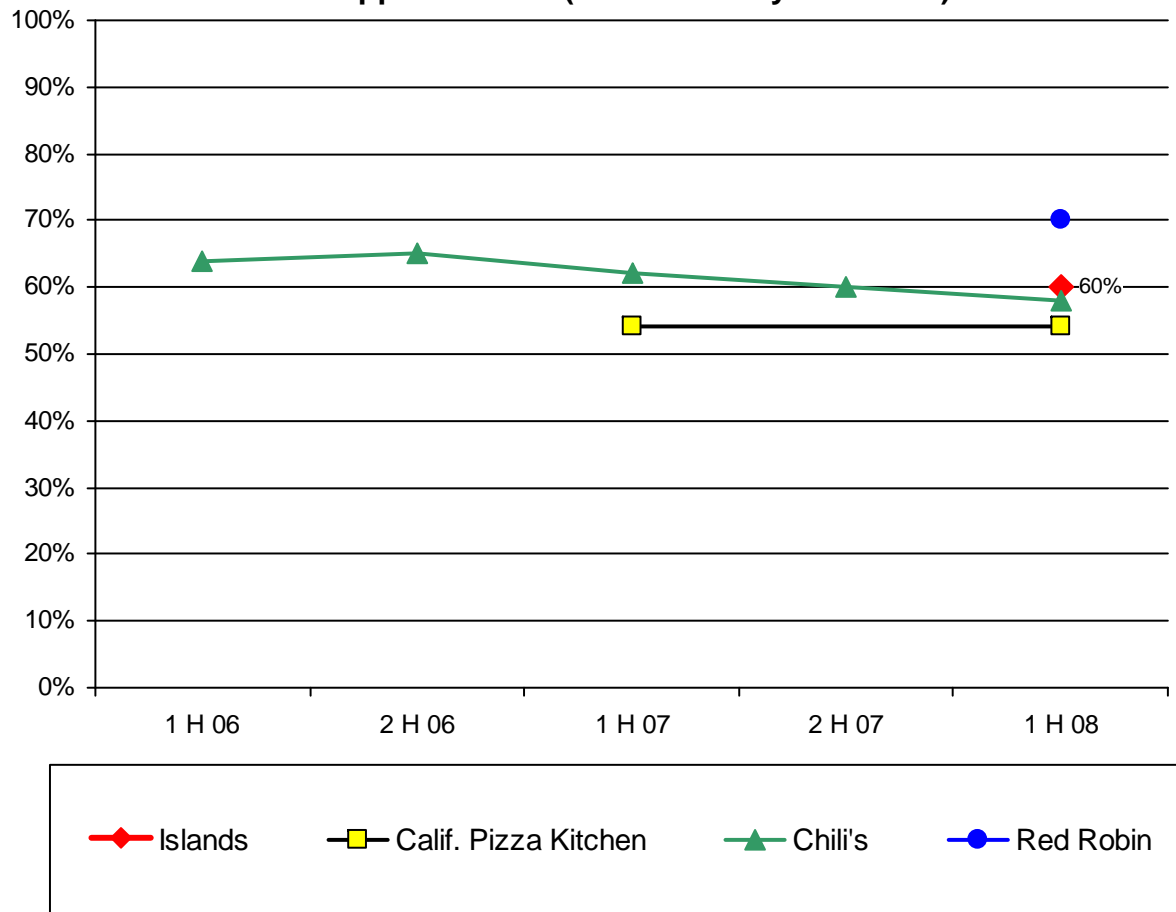
Reasonable Prices (Excellent/Very Good-Net)



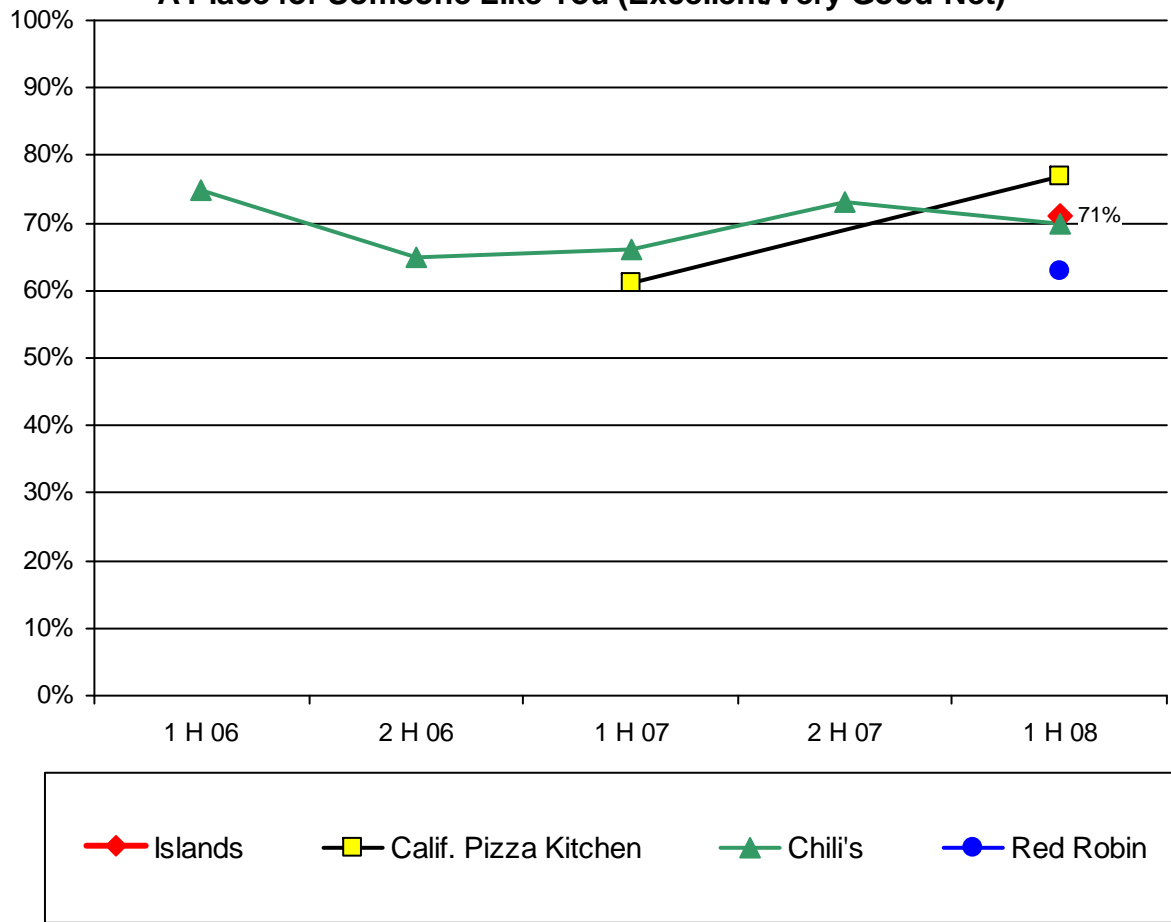
Value For The Money (Excellent/Very Good-Net)



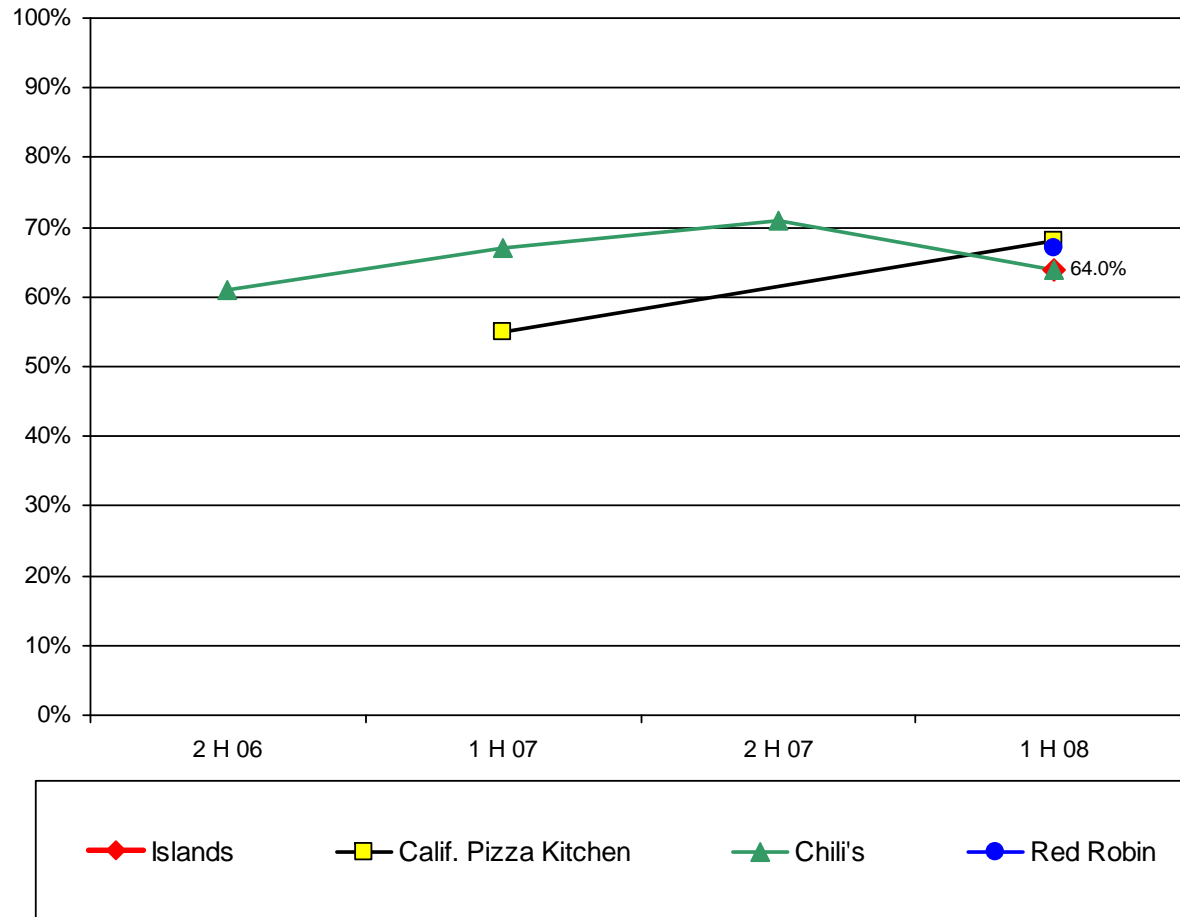
Overall Appeal to Kids (Excellent/Very Good-Net)



A Place for Someone Like You (Excellent/Very Good-Net)

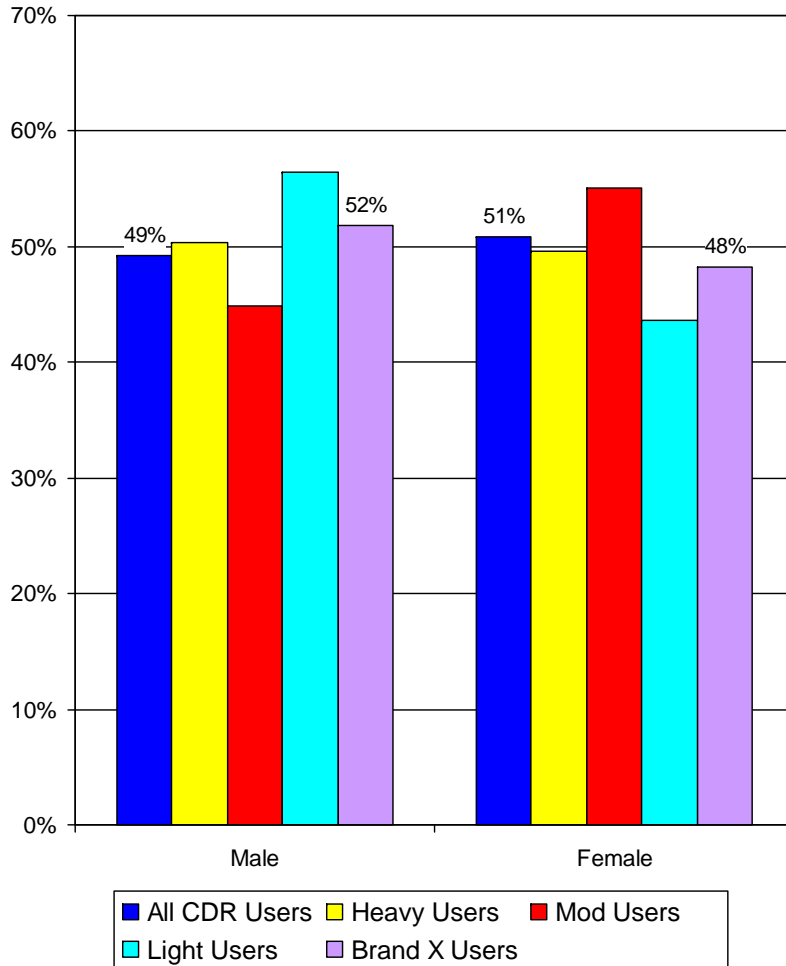


A Fun Place to Go (Excellent/Very Good-Net)

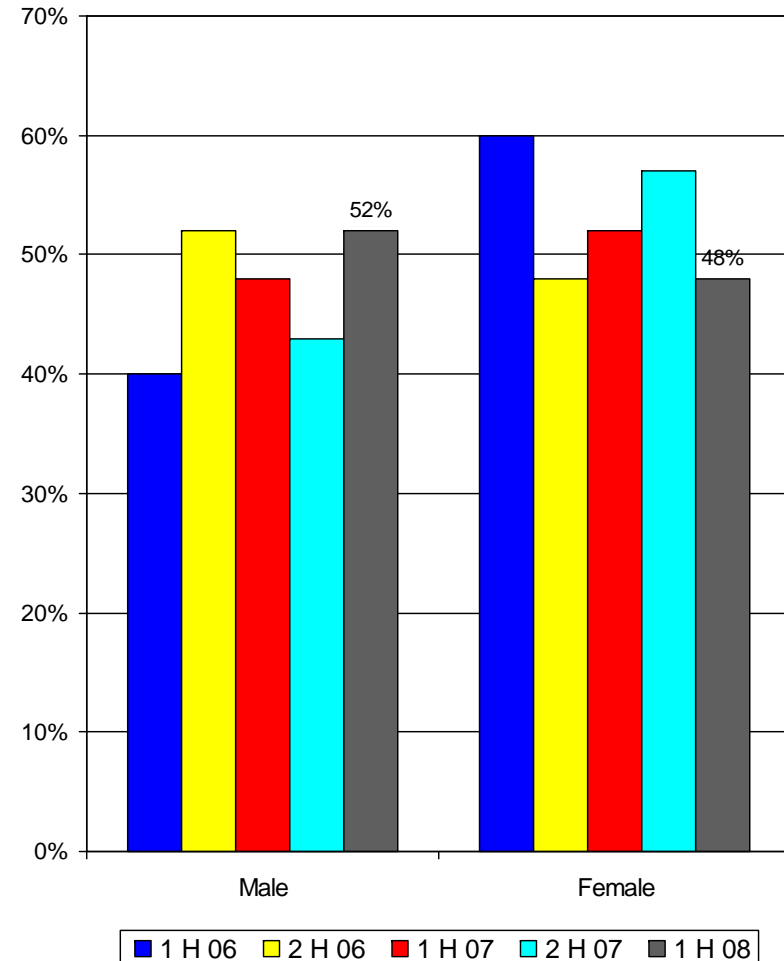


Gender

By CDR Usage & Brand X Users - Current Period

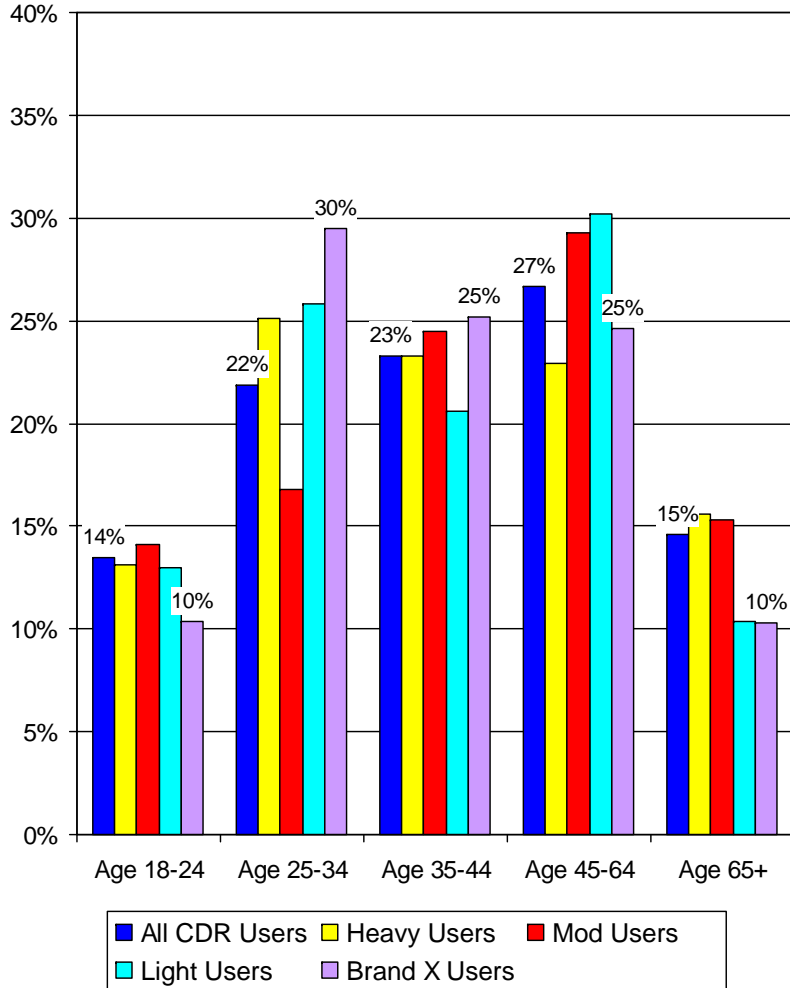


Brand X - Trends

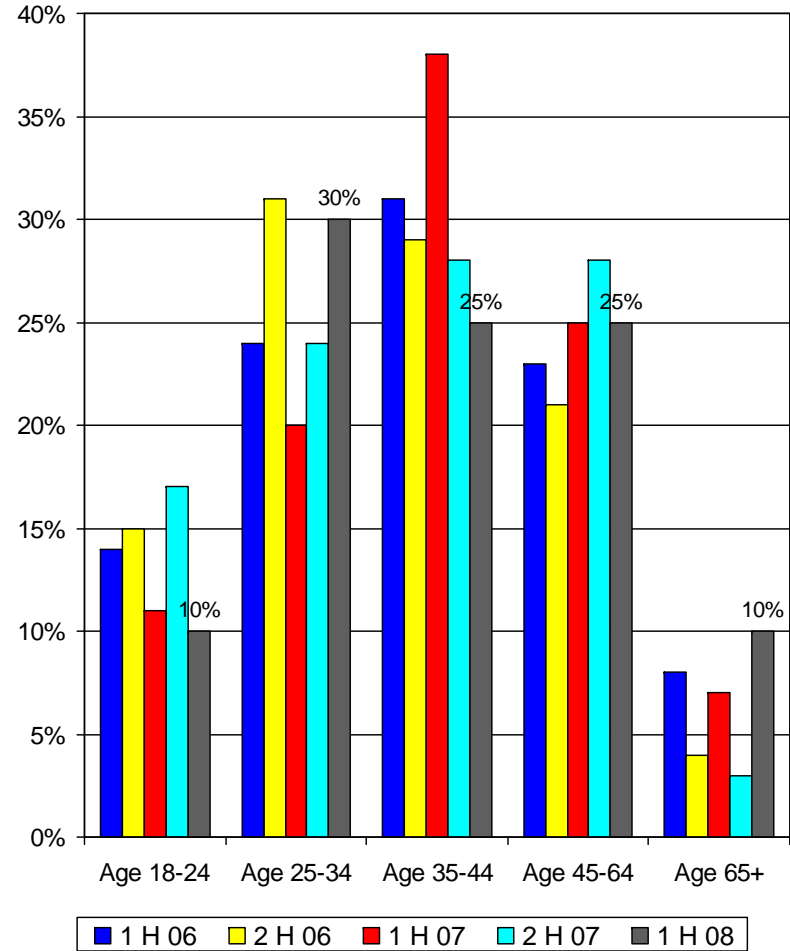


Age

By CDR Usage & Brand X Users - Current Period

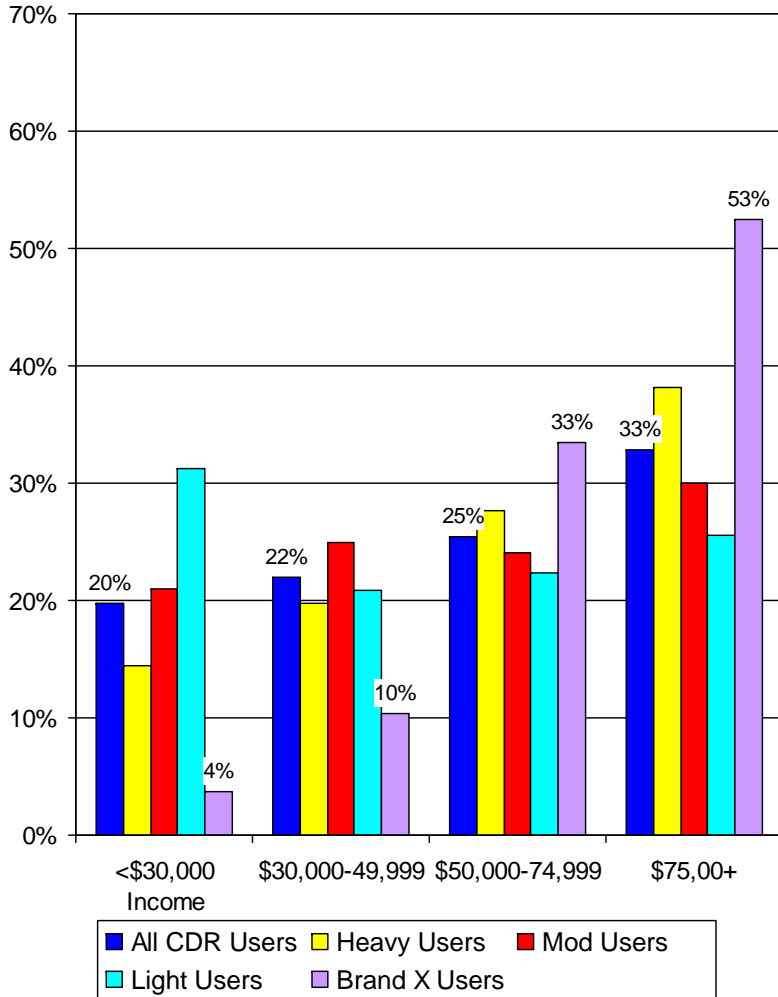


Brand X - Trends

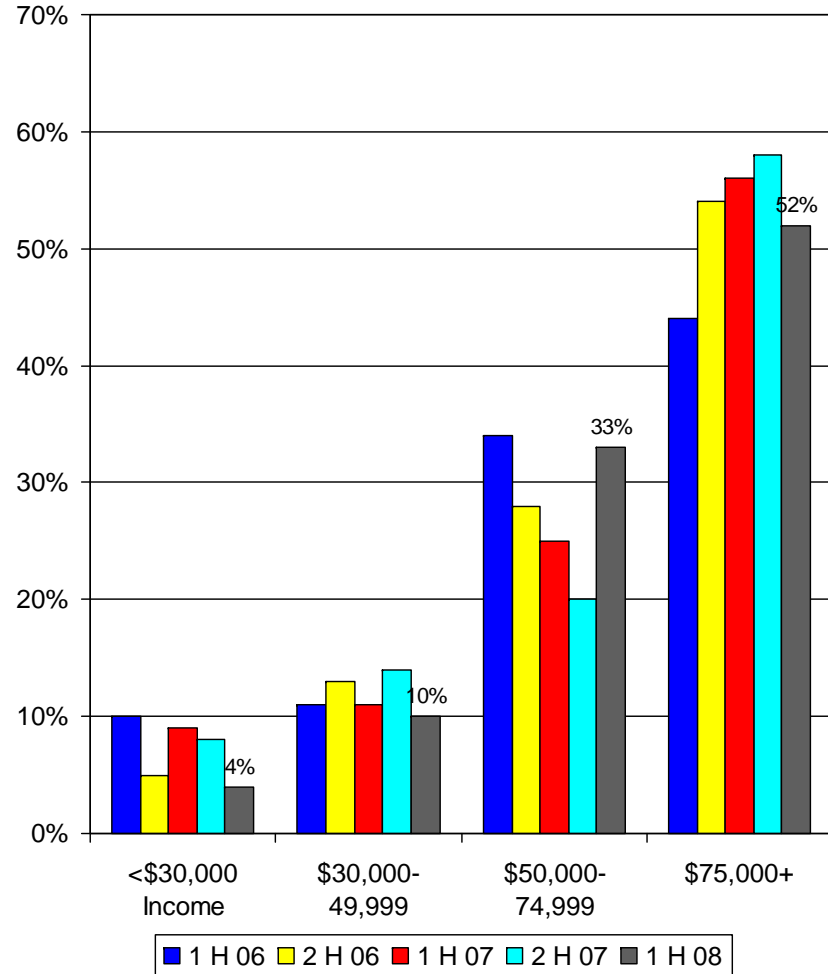


Household Income

By CDR Usage & Brand X Users - Current Period

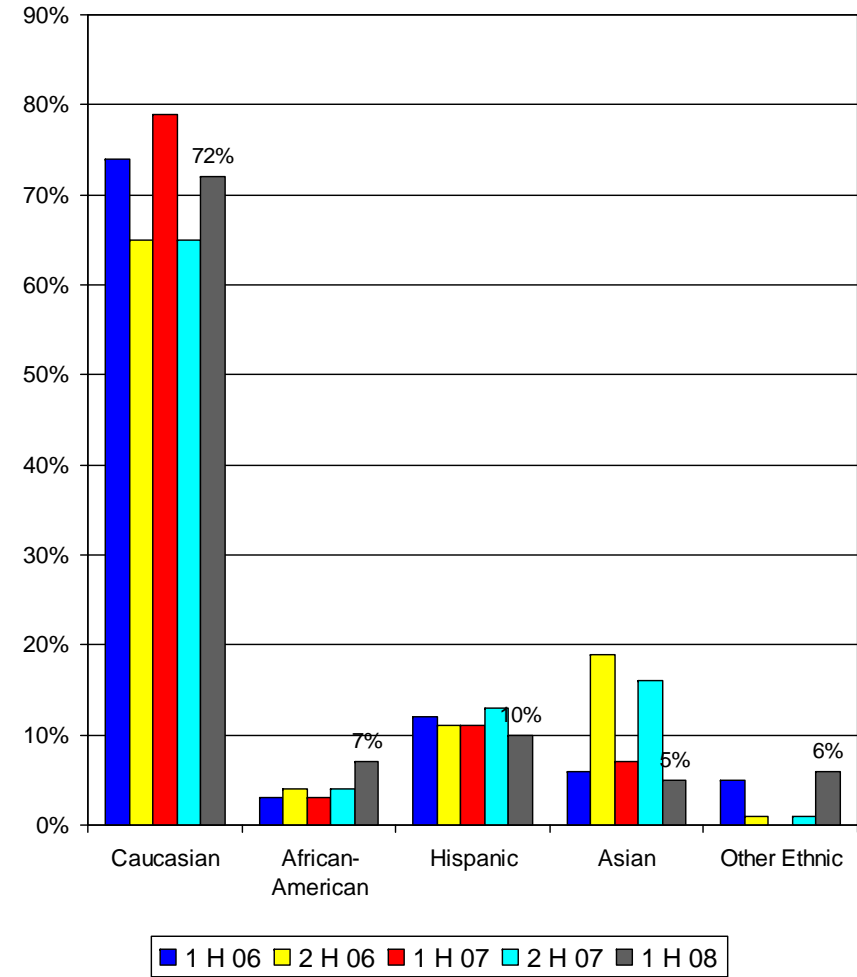
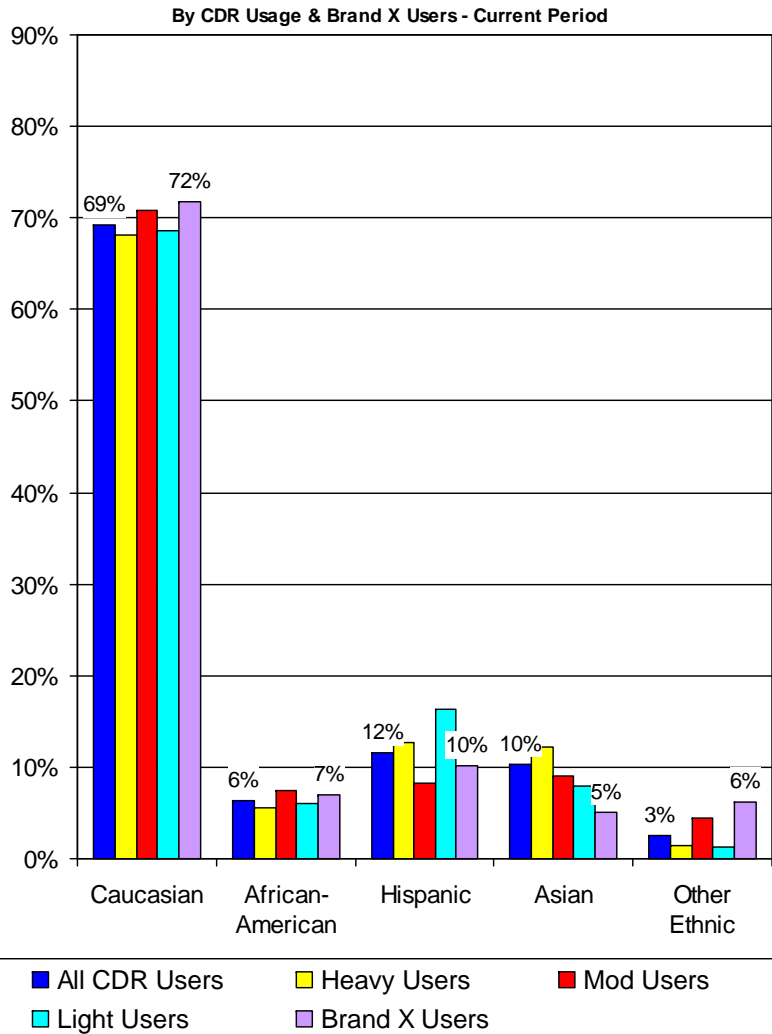


Brand X - Trends



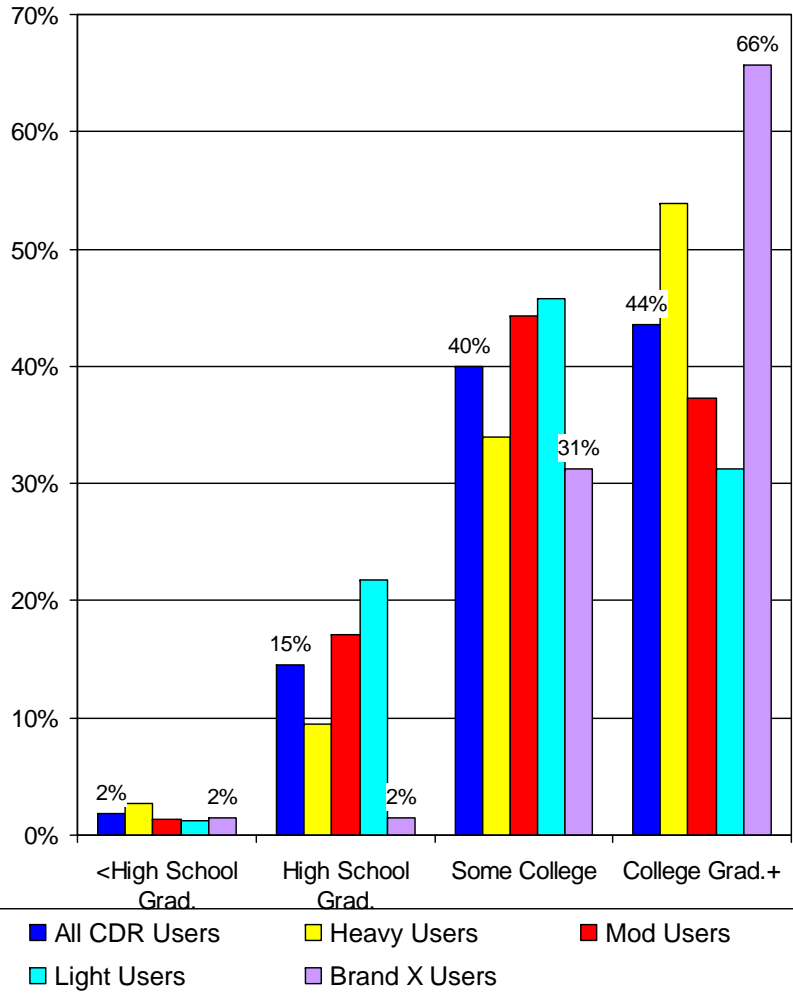
Ethnicity

Brand X - Trends

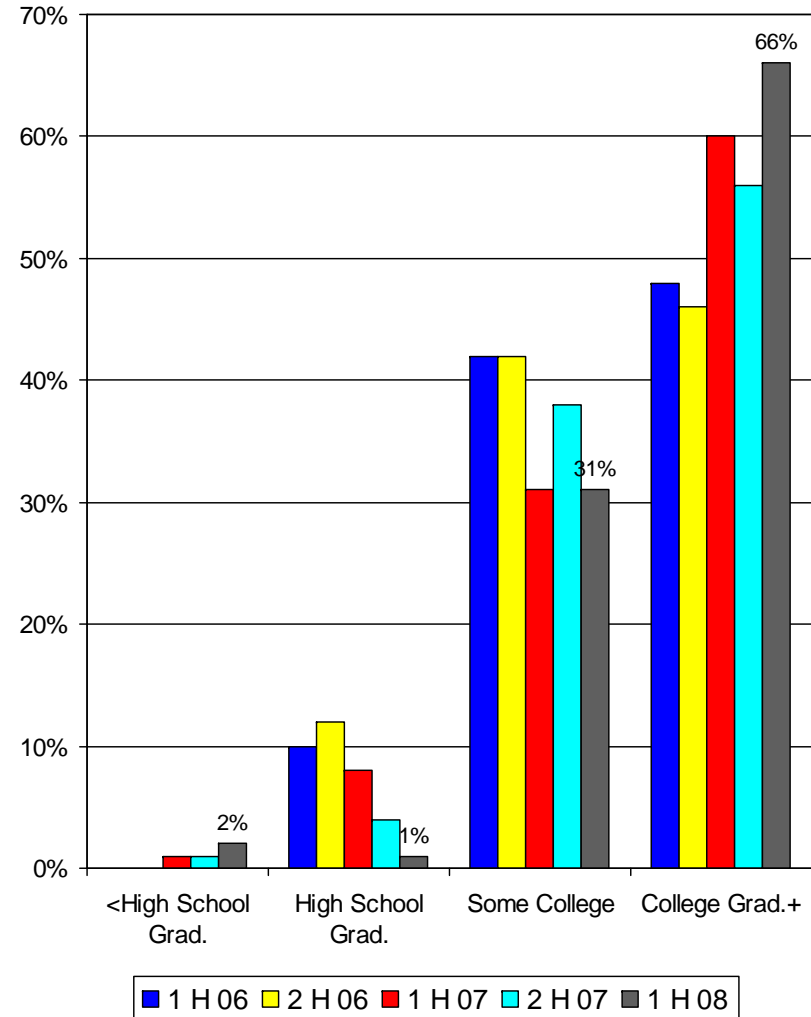


Education

By CDR Usage & Brand X Users - Current Period



Brand X - Trends



Contact information:

- Sales and Marketing
 - Paul Clarke
 - (847) 277-7603
 - paul@sandelman.com
- SandelmanEdge.com help line
 - Jennifer Park & Carole Lockwood
 - (714) 993-0147
 - service@sandelman.com

