

UNITED STATES



State of the plate: US casual dining report 2025

Exploring casual dining preferences in the
US based on YouGov QSR CategoryView.

business.yougov.com





- 01** **Introduction**
- 02** **Casual dining industry trends**
- 03** **Brand rankings by demographics**
- 04** **Brand attribute winners**
- 05** **Methodology**

Foreword



The U.S. casual dining landscape remains highly competitive. In the past 90 days, no chain has served more than 20% of casual diners, though seven have hosted at least 10%.

And while restaurant preferences vary, this report reveals that casual diners prioritize cleanliness, fast service, and consistently look for value options."

Nora Hao

Sales Director at YouGov America

[Get in touch](#)

[Explore our solutions](#)

[Run a survey](#)

Report Methodology

The insights in this report come from [YouGov QSR CategoryView](#).

Throughout the report, we refer to US monthly restaurant visitors. These are the 66% of Americans profiled on Slide 6 who say they purchase food or drinks from casual dining restaurants (either dine-in or take out) at least once per month or more.

A similar methodology is applied on slides 11, 13, and 15, but looking instead at the 23% of Americans who patron a casual dining restaurant at least once per week.

We have also highlighted the top performing casual dining brands across a variety of dining attributes, ranging from food quality to service speed and innovation. Survey respondents answered positive and negative questions about brands for the rankings in this section.

For example, respondents are given a list of casual dining restaurants and asked to select which provides fast service. They are then given a second list and asked to select which brands provide slow service. The rankings methodology in this report determines speed of service by subtracting the negative responses from the positive responses, calculating a net score.

The report concludes with a customer profile for the top performing casual dining brand: Olive Garden. Customers are identified as those having patroned the restaurant at least one time in the previous 90 days. Customer profiles for other tracked brands are available upon request.

[Request your customer profile](#)

[Talk to a researcher](#)



Casual dining demographics

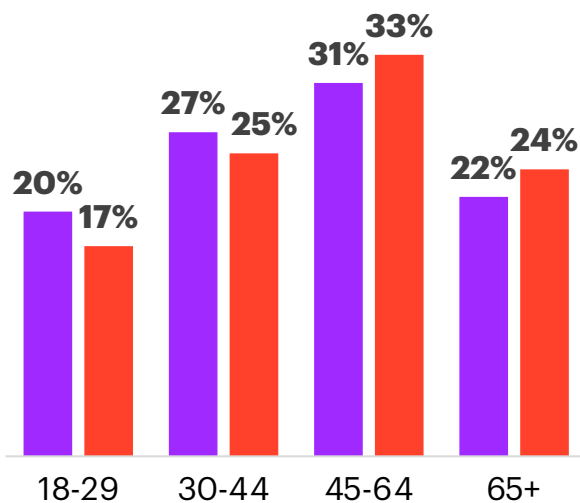
Who are casual restaurant customers in the US?



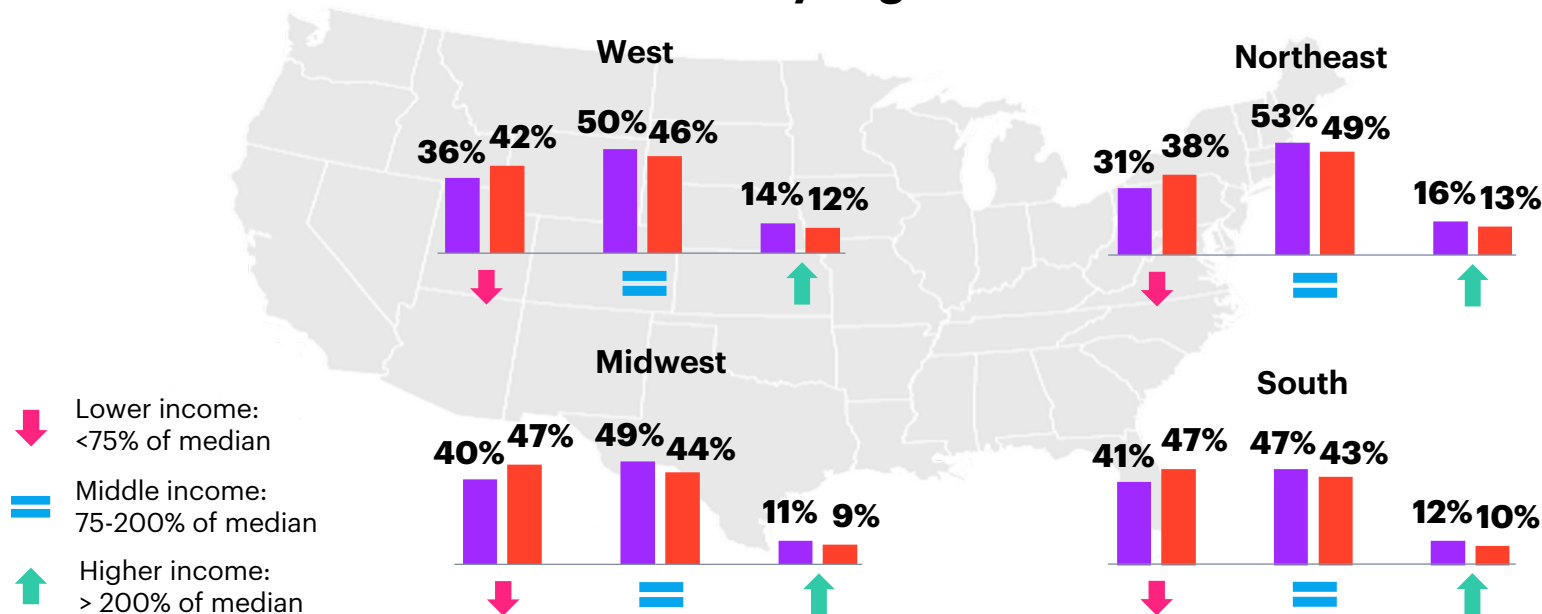
66% of Americans visit a casual dining restaurant at least once per month. Who are they?

■ Monthly restaurant customers ■ Gen pop

Age



Income by Region



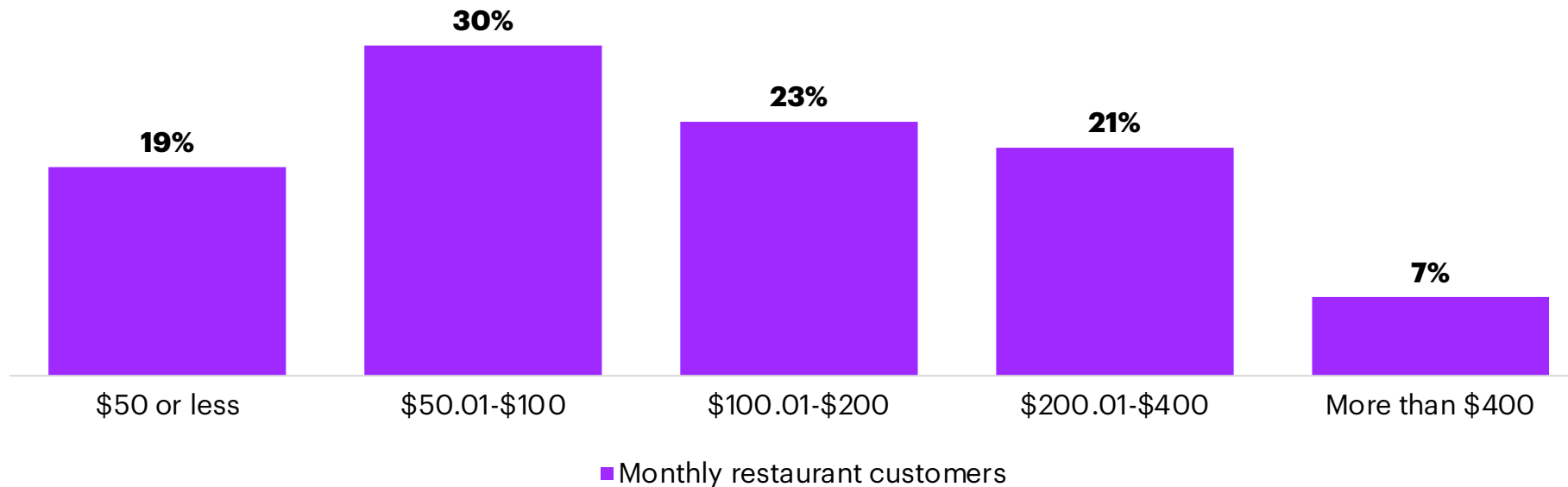
YouGov QSR CategoryView: November 2024 - March 2025. US gen pop: n> 9,400; Monthly restaurant customers: n> 6,000
Income data re-calculated after removing "Prefer not to say / Don't know" responses (Monthly restaurant customers in each region: n> 1,100).

[Explore more data](#)

Of the 66% of monthly restaurant customers, 51% spend at least \$100 eating out each month

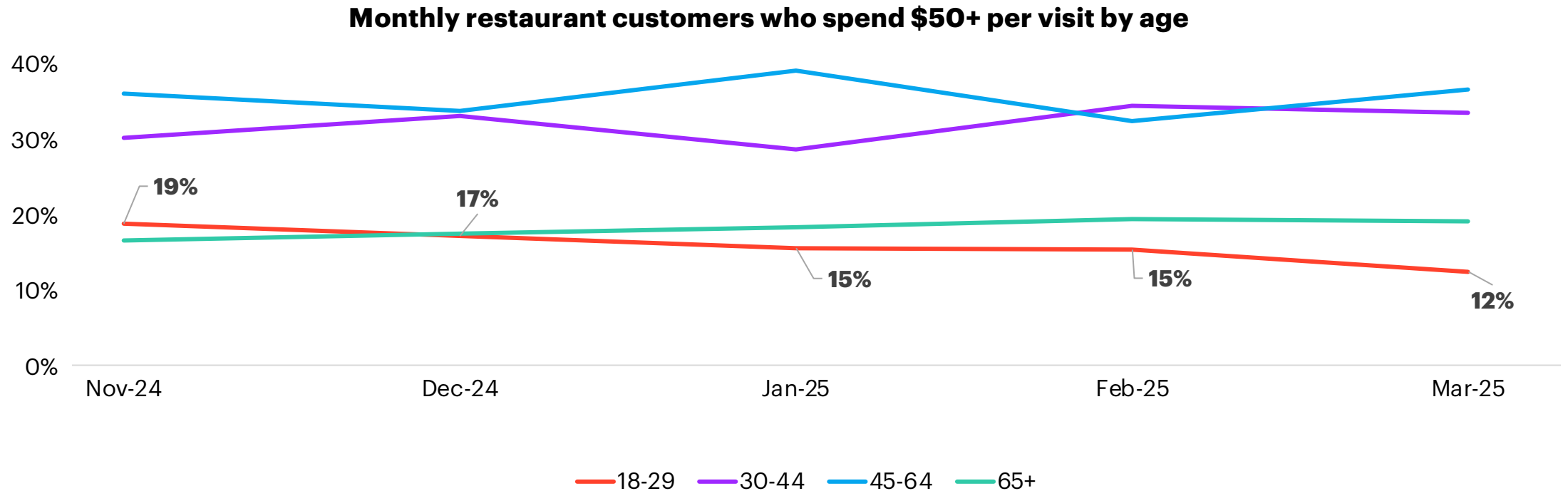
More than a quarter spend \$200+ monthly (28%).

Casual dining - average monthly spend eating out



The proportion of monthly restaurant customers aged 18-29 spending \$50+ per visit has decreased in 2025

Only 12% of those who spend \$50+ per restaurant visit in March 2025 were aged 18-29, down from 19% in November 2024.



YouGov QSR CategoryView: November 2024* - March 2025 (Filter: US monthly restaurant customers who spent \$50+ per visit. Each month: n > 400)

*YouGov QSR CategoryView launched.

What matters to casual dining restaurant customers?

Clean dining areas, quality food, and fair value lead among those who patron casual dining restaurants at least once per month.

What features would make you more likely to visit a casual dining restaurant?

Rank	Restaurant feature	% considering
1	Clean dining area	65%
2	Short wait for table	55%
3	Value / discount menu	44%
4	Daily specials / promotions	41%
5	Ability to easily customize menu items	33%
6	Healthy menu options	31%
7	Ability to make a reservation	25%
8	Open 24 hours	22%
9	All-day breakfast	21%
10	Alcohol / bar	19%

What do you look for when purchasing food or drinks from casual dining restaurants?

Rank	Reason to visit	% important to
1	Quality of food	78%
2	Good service	62%
3	Value	51%
4	Convenient location	49%
5	Good atmosphere	45%
6	It is comforting / familiar	36%
7	To fulfill a craving	34%
8	Family / friends like to eat there	32%
9	Special deals	31%
10	Speed of service	30%

What would deter you from purchasing food or drinks from casual dining restaurants?

Rank	Reason not to visit	% deterred
1	Bad value for the money	58%
2	High prices	63%
3	Slow service	54%
4	Long wait times / too crowded	60%
5	Don't like the food	56%
6	Inconvenient location	46%
7	Unhealthy food	29%
8	Friends / family do not want to eat there	27%
9	Prefer to eat at a different type of restaurant	19%
10	Prefer to eat at home	16%

What features different ages look for in casual dining restaurants

Clean dining areas are important to consumers across all ages, but customers aged 65+ place much more importance on cleanliness.

18-29			30-44			45-64			65+		
Rank	Restaurant feature	% considering	Rank	Restaurant feature	% considering	Rank	Restaurant feature	% considering	Rank	Restaurant feature	% considering
1	Clean dining area	53% ▼	1	Clean dining area	58% ▼	1	Clean dining area	68%	1	Clean dining area	79% ▲
2	Value / discount menu	45%	2	Short wait for table	47% ▼	2	Short wait for table	61% ▲	2	Short wait for table	66% ▲
3	Short wait for table	44% ▼	3	Value / discount menu	41%	3	Daily specials / promotions	46% ▲	3	Daily specials / promotions	45%
4	Open 24 hours	38% ▲	4	Daily specials / promotions	37% ▼	4	Value / discount menu	46%	4	Value / discount menu	44%
5	Healthy menu options	35% ▲	5	Healthy menu options	33%	5	Ability to easily customize menu items	35%	5	Ability to easily customize menu items	32%
6	Daily specials / promotions	35% ▼	6	Ability to easily customize menu items	31%	6	Healthy menu options	27% ▼	6	Healthy menu options	31%
7	Ability to easily customize menu items	33%	7	Ability to make a reservation	27%	7	All-day breakfast	24% ▲	7	All-day breakfast	25% ▲
8	Ability to make a reservation	31% ▲	8	Open 24 hours	27% ▲	8	Ability to make a reservation	23% ▼	8	Ability to make a reservation	22% ▼
9	Mobile ordering	28% ▲	9	Mobile ordering	24% ▲	9	Alcohol / bar	19%	9	Alcohol / bar	16% ▼
10	Alcohol / bar	19%	10	Kids menu	23% ▲	10	Open 24 hours	18% ▼	10	More options that meet my dietary restrictions	12% ▼

YouGov QSR CategoryView: November 2024 - March 2025 (US monthly restaurant customers. Each age group: n> 625)

▲/▼ arrows signify 10% relative difference for an age group from all US monthly restaurant customers.

Features more important to regulars

Weekly restaurant customers are more likely to want televisions and alcohol than those who patron restaurants less frequently.

YouGov QSR CategoryView: Nov 2024 - March 2025.
US weekly restaurant customers: n > 2,000;
Less frequent customers (A few times a month, once a month, or less than once a month): n > 6,900.

What features would make you more likely to visit a casual dining restaurant?

■ Weekly restaurant customers ■ Less frequent customers



Televisions

64% more important



9%



Alcohol / bar

27% more important



16%



Mobile ordering

36% more important



14%



Ability to make a reservation

26% more important



22%

What different age groups look for when choosing a restaurant

18-29s are more likely to indulge in a craving or treat, while Americans aged 65+ are more likely to seek out good service.

18-29			30-44			45-64			65+		
Rank	Reason to visit	% important to	Rank	Reason to visit	% important to	Rank	Reason to visit	% important to	Rank	Reason to visit	% important to
1	Quality of food	71%	1	Quality of food	74%	1	Quality of food	80%	1	Quality of food	85%
2	Good service	59%	2	Good service ▼	56%	2	Good service	65%	2	Good service ▲	71%
3	Value	51%	3	Value	49%	3	Value	52%	3	Convenient location ▲	56%
4	Convenient location	45%	4	Convenient location	47%	4	Convenient location	49%	4	Good atmosphere ▲	51%
5	To fulfill a craving ▲	42%	5	Good atmosphere ▼	40%	5	Good atmosphere	49%	5	Value	49%
6	Good atmosphere ▼	40%	6	To fulfill a craving	36%	6	It is comforting / familiar	40%	6	It is comforting / familiar	39%
7	Speed of service ▲	37%	7	Family / friends like to eat there	34%	7	To fulfill a craving	34%	7	Family / friends like to eat there	32%
8	It is comforting / familiar ▼	33%	8	Speed of service ▲	34%	8	Family / friends like to eat there	31%	8	Special deals ▼	26%
9	To have a treat ▲	33%	9	Special deals	34%	9	Special deals	31%	9	Speed of service ▼	24%
10	Special deals	31%	10	It is comforting / familiar ▼	33%	10	Speed of service ▼	27%	10	To fulfill a craving ▼	24%

YouGov QSR CategoryView: November 2024 - March 2025 (US monthly restaurant customers. Each age group: n> 625)

▲/▼ arrows signify 10% relative difference for an age group from all US monthly restaurant customers.

Reasons to visit: More important to regulars

Weekly restaurant customers are much more concerned about delivery options and speed of service than less frequent customers.

YouGov QSR CategoryView: Nov 2024 - March 2025.
US weekly restaurant customers:: n> 2,000;
Less frequent customers (A few times a month, once a month, or less than once a month): n > 6,900.

What do you look for when purchasing food or drinks from casual dining restaurants?

■ Weekly restaurant customers

■ Less frequent customers



Delivery options

47% more important



Want to try new menu items

34% more important



Speed of service

41% more important



Kid friendly dining options

30% more important



What's stopping different age groups from dining out?

From prices and wait times to the food itself, Americans aged 65+ are more likely to have reasons not to visit a restaurant.

18-29			30-44			45-64			65+		
Rank	Reason not to visit	% deterred	Rank	Reason not to visit	% deterred	Rank	Reason not to visit	% deterred	Rank	Reason not to visit	% deterred
1	Bad value for the money ▼	52%	1	High prices ▼	56%	1	High prices ▲	70%	1	High prices ▲	73%
2	High prices ▼	52%	2	Long wait times / too crowded ▼	53%	2	Long wait times / too crowded ▲	67%	2	Long wait times / too crowded ▲	71%
3	Slow service	50%	3	Bad value for the money ▼	51%	3	Bad value for the money	63%	3	Don't like the food ▲	67%
4	Long wait times / too crowded ▼	49%	4	Slow service ▼	48%	4	Don't like the food ▲	61%	4	Bad value for the money ▲	67%
5	Don't like the food ▼	45%	5	Don't like the food ▼	47%	5	Slow service	57%	5	Slow service ▲	60%
6	Inconvenient location	44%	6	Inconvenient location	42%	6	Inconvenient location	46%	6	Inconvenient location ▲	53%
7	Unhealthy food ▲	33%	7	Unhealthy food	28%	7	Friends / family do not want to eat there	26%	7	Unhealthy food ▲	35%
8	Friends / family do not want to eat there ▼	24%	8	Friends / family do not want to eat there	26%	8	Unhealthy food ▼	24%	8	Friends / family do not want to eat there ▲	32%
9	Prefer to eat at a different type of restaurant ▲	21%	9	Not kid friendly ▲	20%	9	Prefer to eat at a different type of restaurant	19%	9	Prefer to eat at a different type of restaurant ▲	19%
10	Prefer to eat at home ▲	19%	10	Menu does not meet my dietary restrictions ▲	18%	10	Prefer to eat at home	15%	10	Menu does not meet my dietary restrictions ▼	13%

YouGov QSR CategoryView: November 2024 - March 2025 (US monthly restaurant customers. Each age group: n> 625)

▲/▼ arrows signify 10% relative difference for an age group from all US monthly restaurant customers.

Reasons to avoid: Deterrents for regulars

Weekly restaurant customers be more likely to avoid a casual dining restaurant because of food options than less frequent visitors.

YouGov QSR CategoryView: Nov 2024 - March 2025.
US weekly restaurant customers:: n> 2,000;
Less frequent customers (A few times a month, once a month, or less than once a month): n > 6,900.

What would deter you from purchasing food or drinks from casual dining restaurants?

Weekly restaurant customers

Less frequent customers



Prefer to eat at a different type of restaurant

15% more important



18%



Friends / family do not want to eat there

13% more important



26%



Unhealthy food

13% more important



28%



Menu does not meet dietary restrictions

10% more important



14%

Casual dining brand rankings

Top ranked brands by age, region, income.



Casual dining brand rankings: Top 10 by age group

Olive Garden is winning with monthly restaurant customers aged 30+, while Chili’s has been most likely to be visited by 18-29s.

18-29			30-44			45-64			65+		
Rank	Brands visited (1+ visit in last 90 days)	% visited	Rank	Brands visited (1+ visit in last 90 days)	% visited	Rank	Brands visited (1+ visit in last 90 days)	% visited	Rank	Brands visited (1+ visit in last 90 days)	% visited
1	Chili’s ▲	23%	1	Olive Garden	20%	1	Olive Garden	20%	1	Olive Garden	19%
2	Applebee's	18%	2	Chili’s ▲	19%	2	Applebee's	17%	2	Cracker Barrel ▲	19%
3	Olive Garden ▼	18%	3	Applebee's	19%	3	Texas Roadhouse	16%	3	Applebee's	17%
4	Buffalo Wild Wings ▲	17%	4	Texas Roadhouse	17%	4	Cracker Barrel ▲	16%	4	Texas Roadhouse	16%
5	The Cheesecake Factory ▲	16%	5	Buffalo Wild Wings ▲	15%	5	Chili's	15%	5	Chili’s ▼	10%
6	Texas Roadhouse ▼	15%	6	The Cheesecake Factory ▲	15%	6	Buffalo Wild Wings ▼	10%	6	Outback Steakhouse ▲	9%
7	Red Lobster ▲	13%	7	California Pizza Kitchen ▲	10%	7	Golden Corral ▲	10%	7	LongHorn Steakhouse ▲	8%
8	California Pizza Kitchen ▲	11%	8	Red Lobster	8%	8	Red Robin ▲	8%	8	Golden Corral	8%
9	BJ’s ▲	10%	9	Red Robin	8%	9	Outback Steakhouse ▲	8%	9	Red Lobster ▼	6%
10	Red Robin	7%	10	Cracker Barrel ▼	8%	10	LongHorn ▲	8%	10	Red Robin ▼	6%

YouGov QSR CategoryView: November 2024 - March 2025 (US monthly restaurant customers. Each age group: n> 600). “None of these” option for restaurants visited not displayed.
▲/▼ arrows signify 10% relative difference for an age group from all US monthly restaurant customers.

Casual dining brand rankings: Top 10 by region

While Applebee’s, Olive Garden, and Chili’s are most visited, none have been visited by more than 20% of a region’s monthly diners.

Northeast			Midwest			South			West		
Rank	Brands visited (1+ visit in last 90 days)	% visited	Rank	Brands visited (1+ visit in last 90 days)	% visited	Rank	Brands visited (1+ visit in last 90 days)	% visited	Rank	Brands visited (1+ visit in last 90 days)	% visited
1	Applebee's ▲	20%	1	Applebee's ▲	20%	1	Olive Garden	20%	1	Chili's ▲	19%
2	Olive Garden ▼	17%	2	Olive Garden	20%	2	Chili's ▲	18%	2	Olive Garden	19%
3	Chili's ▼	12%	3	Texas Roadhouse ▲	19%	3	Texas Roadhouse ▲	18%	3	Applebee's	17%
4	Buffalo Wild Wings	11%	4	Buffalo Wild Wings	13%	4	Cracker Barrel ▲	17%	4	Buffalo Wild Wings	12%
5	The Cheesecake Factory ▲	11%	5	Cracker Barrel	13%	5	Applebee's ▼	16%	5	The Cheesecake Factory ▲	12%
6	Texas Roadhouse ▼	11%	6	Chili's ▼	12%	6	Buffalo Wild Wings	11%	6	Texas Roadhouse ▼	12%
7	Red Lobster ▲	9%	7	Red Lobster	8%	7	Golden Corral ▲	9%	7	California Pizza Kitchen ▲	11%
8	Cracker Barrel ▼	8%	8	Golden Corral ▲	8%	8	Outback Steakhouse ▲	9%	8	Red Robin ▲	11%
9	Red Robin	8%	9	Red Robin	8%	9	The Cheesecake Factory ▼	8%	9	Red Lobster ▲	8%
10	Outback Steakhouse	7%	10	LongHorn ▲	8%	10	LongHorn ▲	8%	10	BJ's ▲	8%

YouGov QSR CategoryView: November 2024 - March 2025 (US monthly restaurant customers. Each region: n> 1,000). “None of these” option for restaurants visited not displayed.
▲/▼ arrows signify 10% relative difference for a region from all US monthly restaurant customers.

Casual dining brand rankings: Top 10 by income

High-income Americans are most likely to have visited Olive Garden or Texas Roadhouse in the last 90 days.

Low income

Rank	Brands visited (1+ visit in last 90 days)	% visited
1	Olive Garden ▼	19%
2	Applebee's ▼	19%
3	Texas Roadhouse ▼	15%
4	Chili's ▼	15%
5	Cracker Barrel	14%
6	Buffalo Wild Wings ▼	10%
7	Golden Corral	10%
8	Red Lobster	8%
9	The Cheesecake Factory	8%
10	Outback Steakhouse	6%

Middle income

Rank	Brands visited (1+ visit in last 90 days)	% visited
1	Olive Garden ▲	26%
2	Applebee's	23%
3	Chili's ▲	21%
4	Texas Roadhouse	19%
5	Buffalo Wild Wings	15%
6	Cracker Barrel	14%
7	The Cheesecake Factory	11%
8	Red Lobster	10%
9	Outback Steakhouse	9%
10	Red Robin	8%

High income

Rank	Brands visited (1+ visit in last 90 days)	% visited
1	Olive Garden	22%
2	Texas Roadhouse	21%
3	Chili's	21%
4	Applebee's	20%
5	Buffalo Wild Wings ▲	16%
6	The Cheesecake Factory ▲	13%
7	Cracker Barrel	12%
8	Red Robin	11%
9	Outback Steakhouse ▲	9%
10	Red Robin ▲	9%

YouGov QSR CategoryView: November 2024 - March 2025. Low income: <75% of the median / Middle income: 75-200% of the median / High income: >200% of the median. Data re-weighted after removing Prefer not to say/Don't know responses.

"None of these" option for restaurants visited not displayed. Filter: US monthly restaurant customers. Each income group: n> 675.

▲/▼ arrows signify 10% relative difference for an income group from all US monthly restaurant customers.

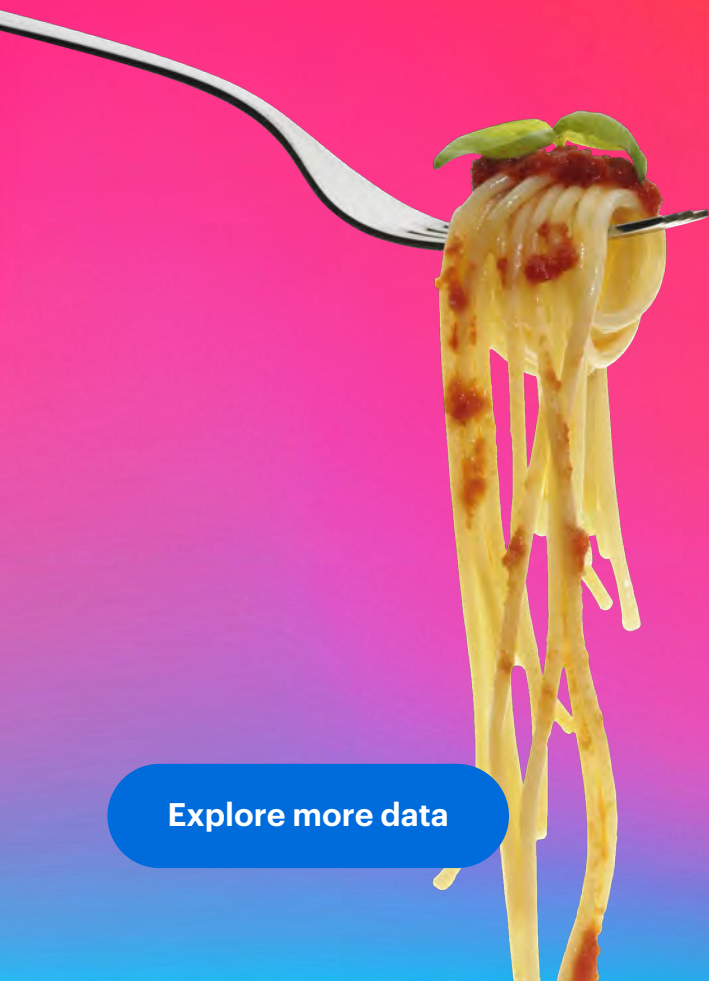


Casual dining brand rankings

Top ranked brands by: Order accuracy, Customizable options,
Fast service, Fresh food, Great tasting, Innovative.



Order accuracy: casual dining brand rankings



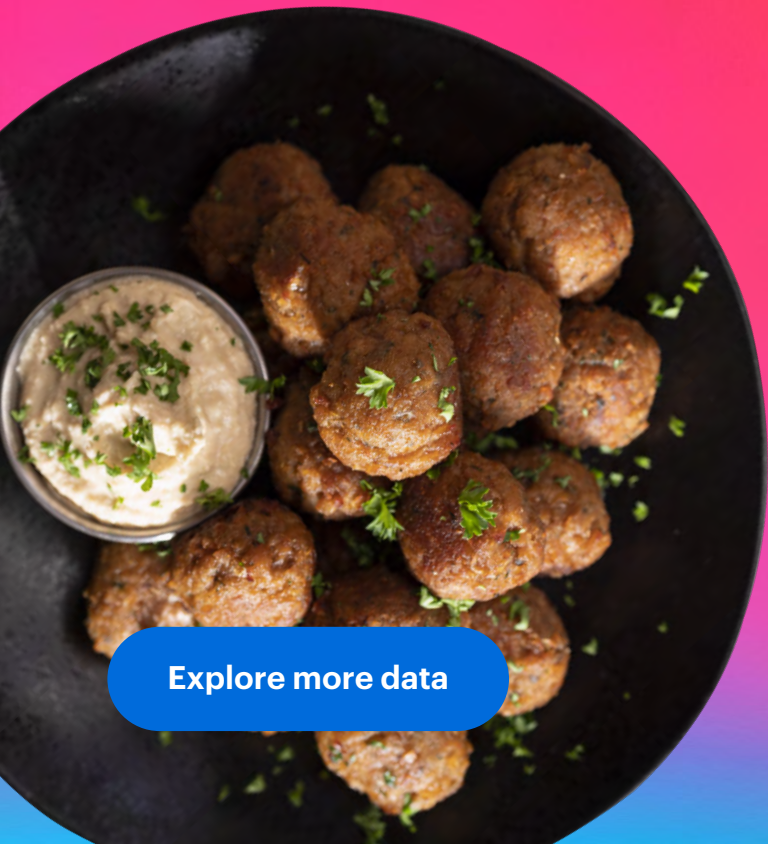
Explore more data

Which of the following brands produces accurate orders?
(% of US monthly restaurant customers)

Rank	Casual dining brand	Accurate	Inaccurate	Net total
1	Olive Garden	38.0%	3.8%	34.2%
2	Texas Roadhouse	30.7%	2.1%	28.6%
3	Applebee's	31.4%	6.3%	25.1%
4	Chili's	27.6%	3.8%	23.8%
5	Cracker Barrel	25.6%	3.2%	22.4%
6	Outback Steakhouse	24.9%	2.6%	22.3%
7	The Cheesecake Factory	24.0%	2.1%	21.9%
8	Red Lobster	24.3%	3.9%	20.4%
9	Red Robin	19.0%	2.0%	17.0%
10	Buffalo Wild Wings	19.6%	4.4%	15.2%

YouGov QSR CategoryView: November 2024 - March 2025. Ranked by percentage-point difference between “Accurate” and “Inaccurate” orders (Net total). US monthly restaurant customers: n> 6,000.

Menu flexibility: casual dining brand rankings



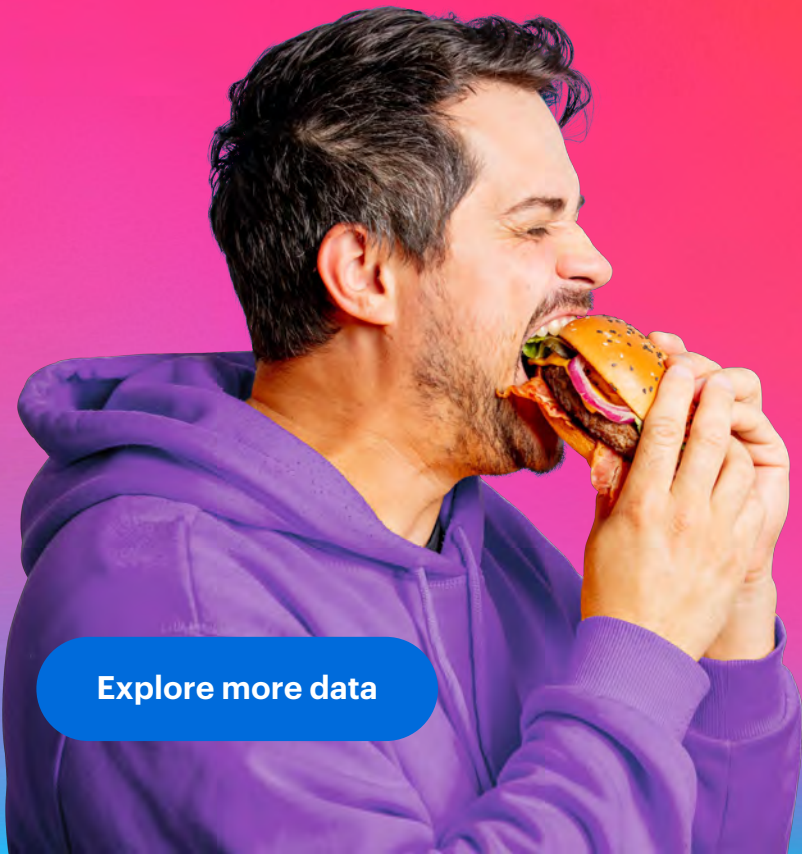
Explore more data

Which of the following brands has customizable menu options?
(% of US monthly restaurant customers)

Rank	Brand	Customizable	Not customizable	Net total
1	Olive Garden	24.3%	6.5%	17.8%
2	Applebee's	22.9%	5.9%	17.0%
3	Texas Roadhouse	19.5%	3.4%	16.1%
4	Chili's	19.7%	4.6%	15.1%
5	Cracker Barrel	15.7%	4.3%	11.4%
6	The Cheesecake Factory	15.2%	4.2%	11.0%
7	Outback Steakhouse	15.5%	4.6%	10.9%
8	Red Robin	13.6%	2.9%	10.7%
9	Buffalo Wild Wings	14.3%	4.1%	10.2%
10	Red Lobster	14.8%	6.2%	8.6%

YouGov QSR CategoryView: November 2024 - March 2025. Ranked by percentage-point difference between “Customizable” and “Not customizable” menu options (Net total). US monthly restaurant customers: n> 6,000.

Speed of service: casual dining brand rankings



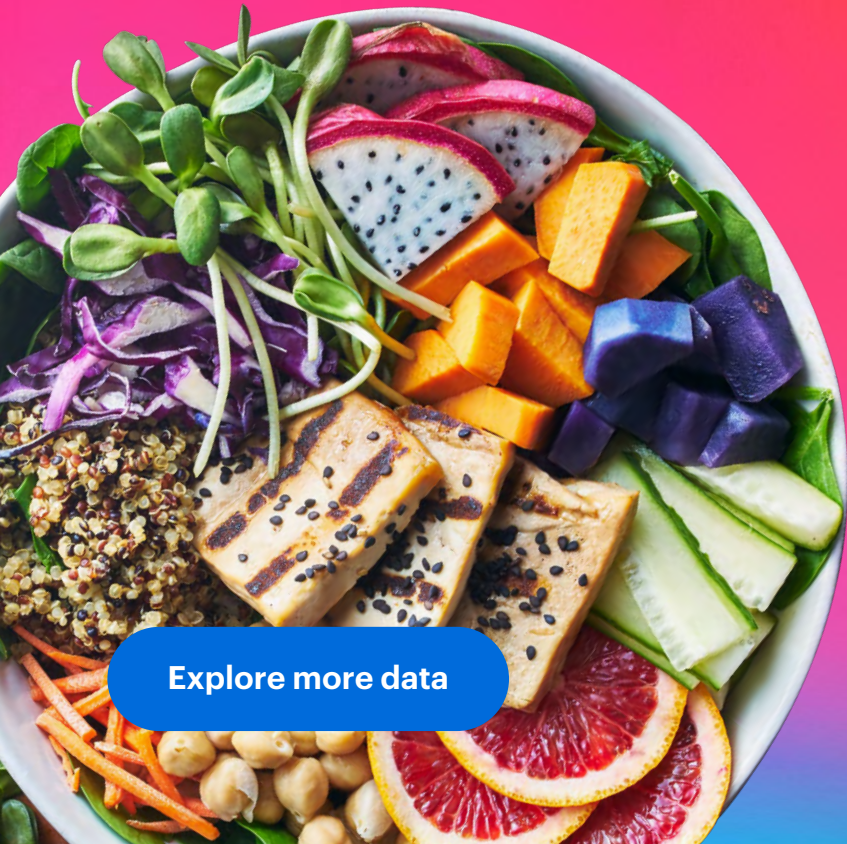
Explore more data

Which of the following brands provides fast service?
(% of US monthly restaurant customers)

Rank	Brand	Fast service	Slow service	Net total
1	Olive Garden	23.8%	7.0%	16.8%
2	Chili's	19.4%	4.9%	14.5%
3	Applebee's	20.6%	6.8%	13.8%
4	Texas Roadhouse	18.2%	5.0%	13.2%
5	Golden Corral	15.0%	2.5%	12.5%
6	Cracker Barrel	15.9%	5.2%	10.7%
7	Red Robin	11.9%	3.2%	8.7%
8	Buffalo Wild Wings	13.1%	5.4%	7.7%
9	Outback Steakhouse	10.7%	6.2%	4.5%
10	California Pizza Kitchen	6.2%	2.1%	4.1%

YouGov QSR CategoryView: November 2024 - March 2025. Ranked by percentage-point difference between “Fast” and “Slow” service (Net total). US monthly restaurant customers: n> 6,000.

Food freshness: casual dining brand rankings



Explore more data

Which of the following brands has fresh food? (% of US monthly restaurant customers)

Rank	Brand	Fresh	Not fresh	Net total
1	Olive Garden	29.5%	8.1%	21.4%
2	Texas Roadhouse	24.2%	4.0%	20.2%
3	Outback Steakhouse	18.4%	4.1%	14.3%
4	The Cheesecake Factory	18.5%	4.7%	13.8%
5	Red Lobster	18.6%	6.8%	11.8%
6	Cracker Barrel	17.1%	5.9%	11.2%
7	Chili's	18.3%	7.5%	10.8%
8	Applebee's	21.1%	10.6%	10.5%
9	LongHorn	11.8%	2.2%	9.6%
10	Red Robin	12.4%	4.2%	8.2%

YouGov QSR CategoryView: November 2024 - March 2025. Ranked by percentage-point difference between “Fresh” and “Not fresh” food (Net total). US monthly restaurant customers: n> 6,000.

Great tasting: casual dining brand rankings



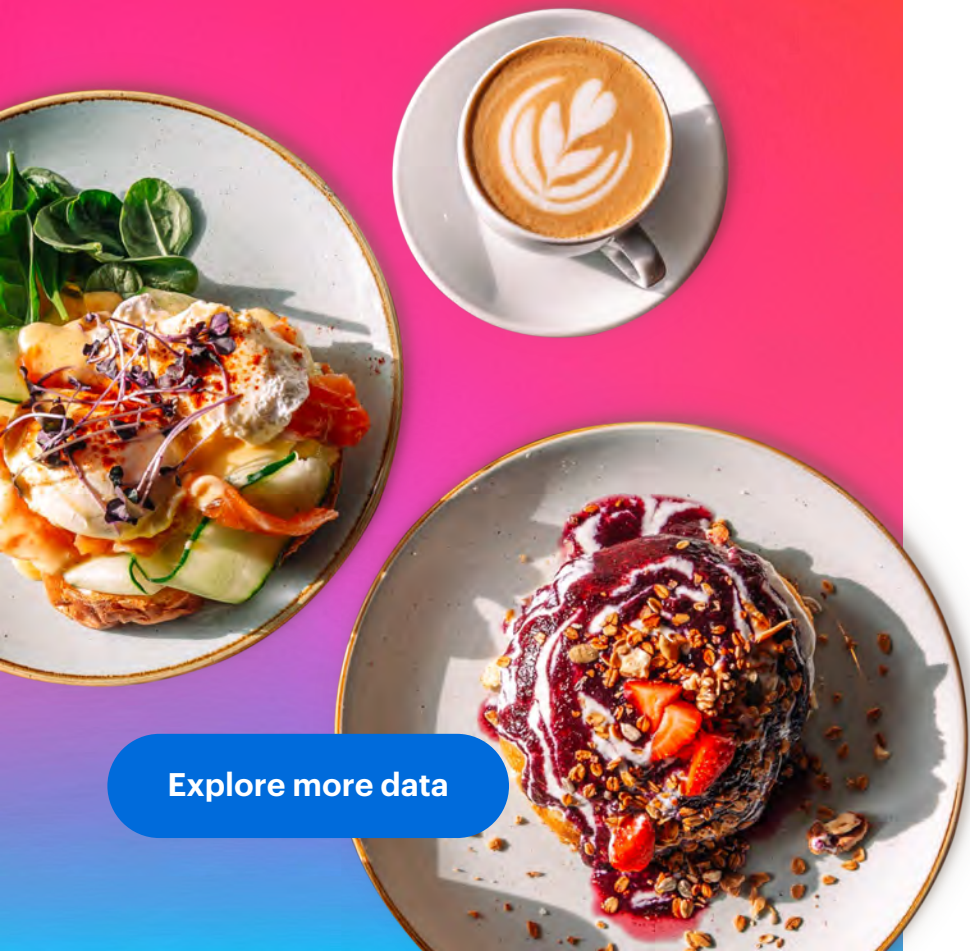
Explore more data

Which of the following brands has great tasting food?
(% of US monthly restaurant customers)

Rank	Brand	Great tasting	Bad tasting	Net total
1	Texas Roadhouse	33.3%	2.3%	31.0%
2	Olive Garden	36.1%	5.8%	30.3%
3	The Cheesecake Factory	26.9%	2.4%	24.5%
4	Outback Steakhouse	26.4%	3.2%	23.2%
5	Chili's	25.1%	5.1%	20.0%
6	Cracker Barrel	24.1%	4.8%	19.3%
7	Applebee's	27.0%	9.3%	17.7%
8	Red Lobster	23.5%	6.6%	16.9%
9	Red Robin	18.8%	3.0%	15.8%
10	LongHorn	16.6%	1.4%	15.2%

YouGov QSR CategoryView: November 2024 - March 2025. Ranked by percentage-point difference between “Fast” and “Slow” service (Net total). US monthly restaurant customers: n> 6,000.

Innovation: casual dining brand rankings



Explore more data

Which of the following brands is innovative?
(% of US monthly restaurant customers)

Rank	Brand	Innovative	Not innovative	Net total
1	The Cheesecake Factory	12.7%	4.9%	7.8%
2	Texas Roadhouse	12.0%	5.4%	6.6%
3	Chili's	11.8%	7.8%	4.0%
4	California Pizza Kitchen	6.6%	2.8%	3.8%
5	Olive Garden	13.6%	9.9%	3.7%
6	Applebee's	13.7%	10.7%	3.0%
7	Buffalo Wild Wings	8.8%	6.1%	2.7%
8	First Watch	3.7%	1.4%	2.3%
9	BJ's	4.2%	2.2%	2.0%
10	P.F. Chang's	5.5%	3.8%	1.7%

YouGov QSR CategoryView: November 2024 - March 2025. Ranked by percentage-point difference between “Innovative” and “Not innovative” (Net total). US monthly restaurant customers: n> 6,000.

Overall Casual dining brand rankings



Explore more data

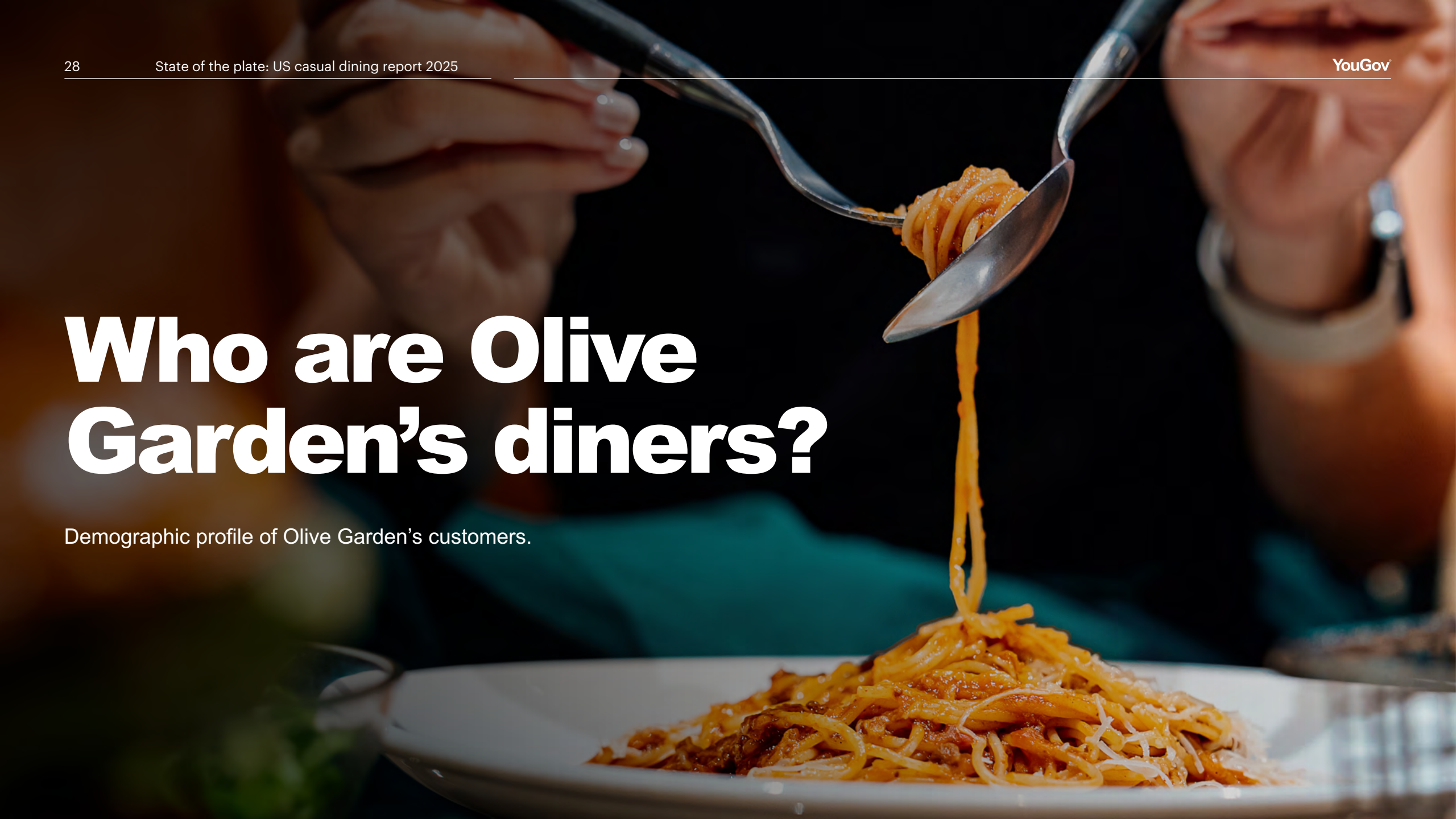
Average score across all attributes
(% of US monthly restaurant customers)

Rank	Brand	Positive average	Negative average	Net Average
1	Olive Garden	27.6%	6.9%	20.7%
2	Texas Roadhouse	23.0%	3.7%	19.3%
3	Chili's	20.3%	5.6%	14.7%
4	Applebee's	22.8%	8.3%	14.5%
5	The Cheesecake Factory	18.0%	4.2%	13.8%
6	Outback Steakhouse	17.2%	4.6%	12.6%
7	Cracker Barrel	17.7%	5.3%	12.4%
8	Red Robin	13.8%	3.5%	10.3%
9	Red Lobster	16.7%	6.6%	10.2%
10	Buffalo Wild Wings	14.6%	5.2%	9.4%

YouGov QSR CategoryView: November 2024 - March 2025. Ranked by percentage-point difference between positive and negative averages (Net average). US monthly restaurant customers: n> 6,000.

Who are Olive Garden's diners?

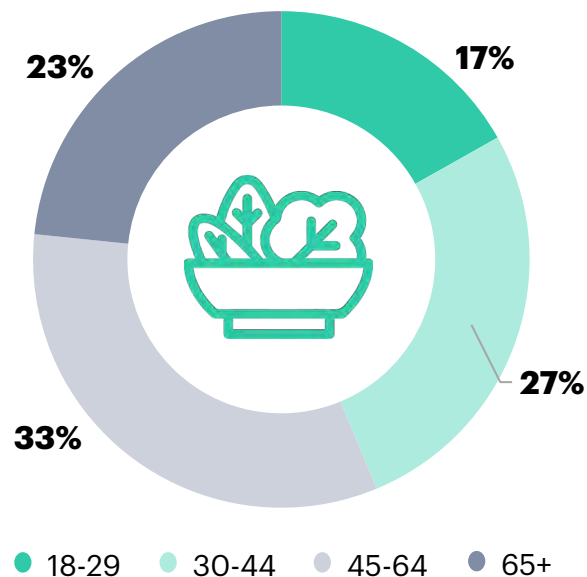
Demographic profile of Olive Garden's customers.



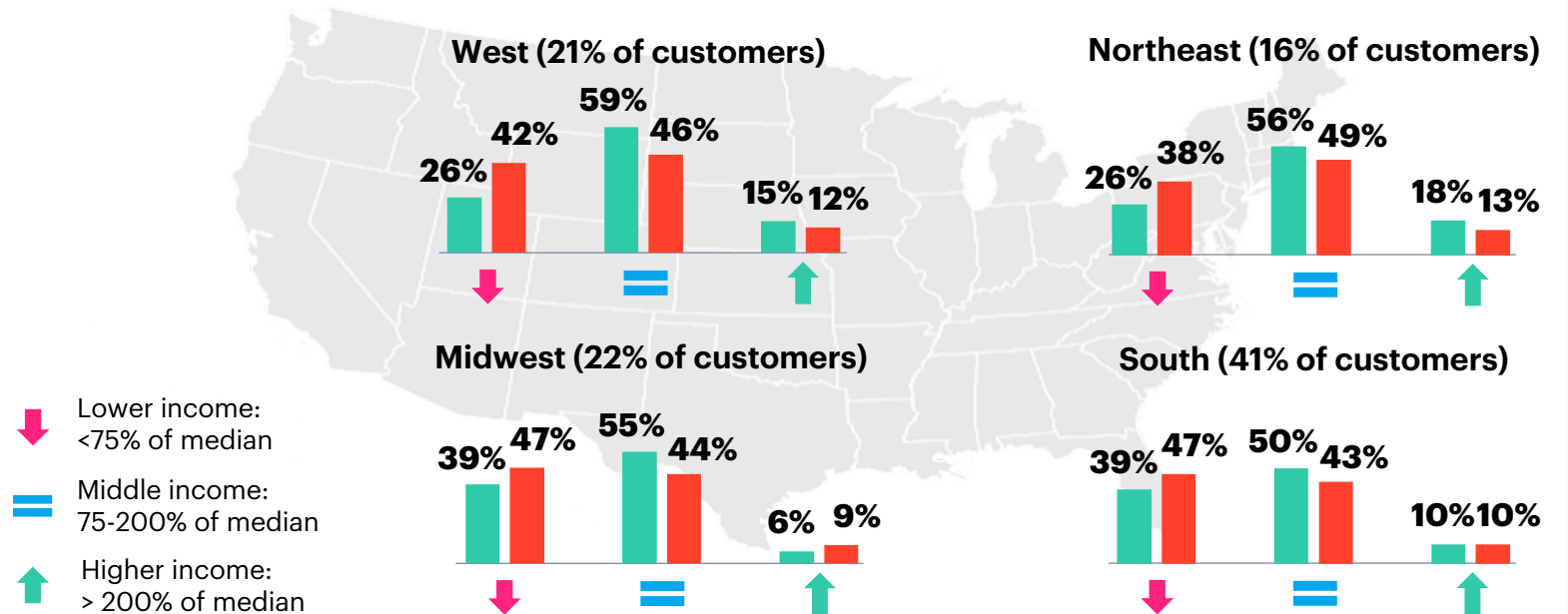
19% of Americans patroned Olive Garden in the last 90 days. Who are they?

■ Olive Garden customers ■ Gen pop

Olive Garden customers by age



Olive Garden customer income by region



YouGov QSR CategoryView: November 2024 - March 2025. US gen pop: n> 9,400; Olive Garden customers (1+ visit last 90 days): n> 1,300. Income data re-calculated after removing "Prefer not to say / Don't know" responses. Olive Garden customers in each region: n> 225.

[Explore more data](#)

If they're not going to Olive Garden, which restaurants do they visit?

Rank	Casual dining restaurant	% of Olive Garden customers also visited (last 90 days)
1	Applebee's	29.5%
2	Texas Roadhouse	26.4%
3	Chili's	25.1%
4	Cracker Barrel	20.7%
5	Buffalo Wild Wings	17.6%
6	The Cheesecake Factory	14.8%
7	Red Lobster	13.9%
8	Red Robin	12.5%
9	Outback Steakhouse	12.4%
10	LongHorn	10.6%

YouGov QSR CategoryView: Nov 2024 - March 2025
Olive Garden customers: Visited Olive Garden 1+ time in last 90 days (n> 1,300).

Olive Garden customers are 31% more likely than other restaurant customers to want a kids menu



What do you look for when purchasing food or drinks from casual dining restaurants?

■ Olive Garden customers

■ Monthly restaurant customers



Kids menu

31% more important



12%



Ability to easily customize menu items

9% more important



33%



Televisions

16% more important

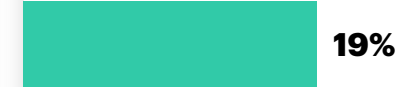


12%



Mobile ordering

8% more important



17%

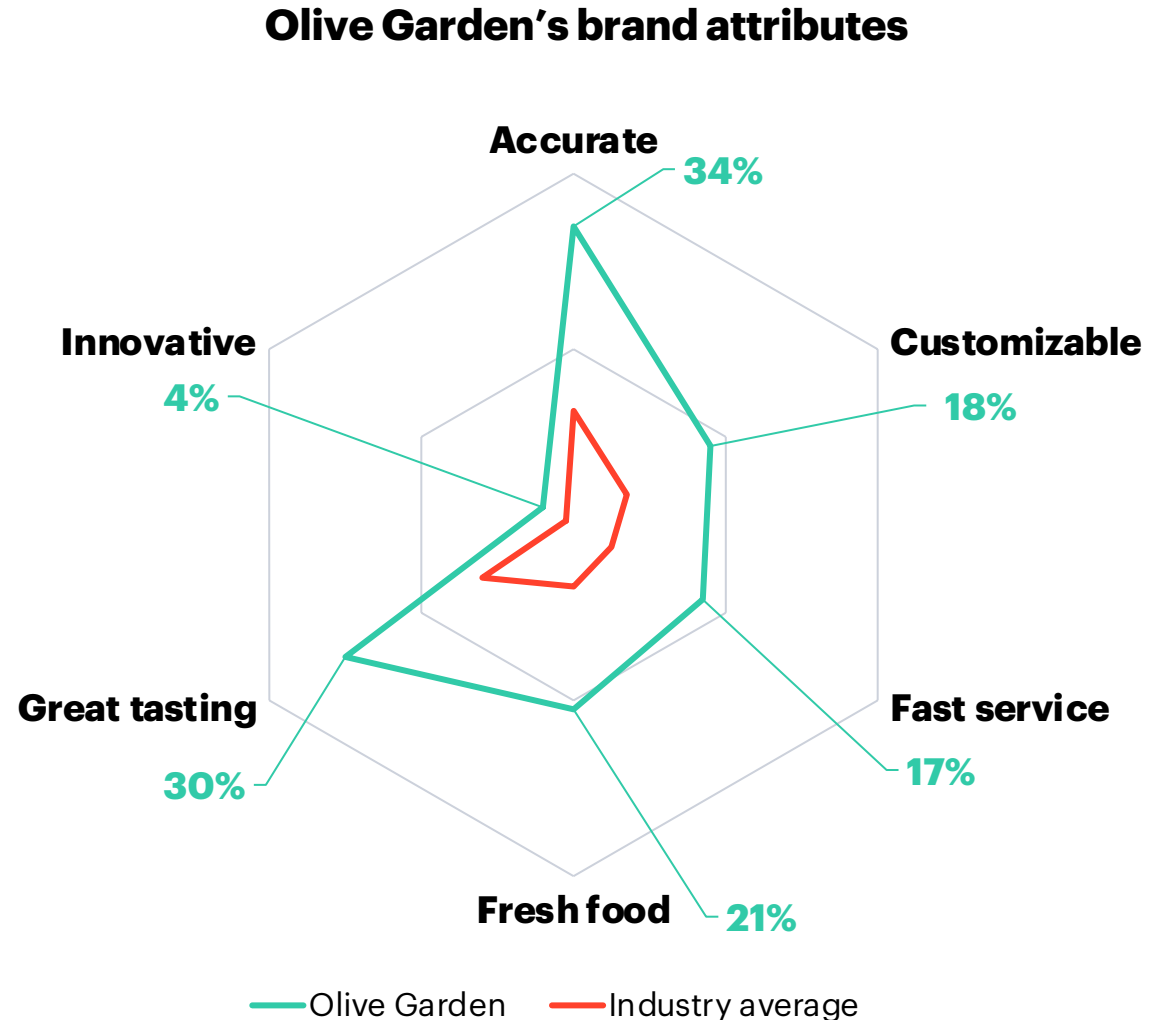
YouGov QSR CategoryView: November 2024 - March 2025

Olive Garden customers (Visited Olive Garden 1+ time in last 90 days): n> 1,300

Monthly restaurant customers (Visit any casual dining restaurant at least once per month): n> 6,000.

What brand attributes led to Olive Garden ranking number 1?

YouGov QSR CategoryView: November 2024 - March 2025
Brand attributes asked as two-part question, identifying positive and negative attributes. Net totals displayed.
(US Olive Garden diners in last 90 days: n> 1,300).



Introducing: YouGov QSR CategoryView

Explore detailed insights from the dining category with our new tool.

- **Delivery services:** Uncover which delivery services consumers prefer, their reasons for choosing them, and the barriers that may prevent usage.
- **Mobile apps and loyalty programs:** Understand what drives consumers to use (or avoid) mobile apps and loyalty programs, and what features they value most.
- **Dining experiences:** Discover how consumers interact with QSRs and what they prioritize in their dining experience, from food quality to service expectations.
- **Comprehensive brand analysis:** Connect sector-specific insights with key metrics such as media & communication, purchase funnel, and brand perception to effectively measure your brand's equity against competitors.

[Request demo](#)



Thank you

yougov.com/business

YouGov, 2025, all rights reserved. All materials contained herein are protected by copyright laws. Any storage, reproduction or distribution of such materials, in whole or in part, in any form without the prior written permission of YouGov is prohibited. This information (including any enclosures and attachments) is propriety and confidential and has been prepared for the exclusive use and benefit of the addressee(s) and solely for the purpose for which it is provided. We make no representations, warranties or guarantees, whether express or implied, that the information is accurate, complete or up to date. We exclude all implied conditions, warranties, representations or other terms that may apply and we will not be liable to you for any loss or damage, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, even if foreseeable, arising under or in connection with use of or reliance on the information. We do not exclude or limit in any way our liability to you where it would be unlawful to do so.