



Fast Casual Restaurants - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Trended foodservice and fast casual ordering
- Types of fast casual operators visited and interest in trial
- Changes in and reasons for fast casual visitation
- Restaurant perceptions, traffic drivers and new concepts

Convenience and technology helped fast casual operators to navigate the past 2+ years, but it may be time (again) to cultivate the notion that fast casual operations can be value-focused destination dining, too. Among those diners increasing fast casual visitation, there were more occasions stolen from full-service dining than QSRs, indicating that it's not just convenience, but also enjoyment, that's driving traffic.

Still, even with recovery in the fast casual segment progressing, engagement is less robust relative to other segments like QSRs and casual dining. To narrow these gaps, fast casual operators need to steal occasions from competitors in both directions by doubling down on convenience, yet keeping elevated experience in the marketing mix too.

Naturally, these competitors have clear advantages: in number of locations, convenience services, awareness and even delivering on experience. One way fast casual operators can enter the consideration set more often is to communicate messages that drive home versatility; to be an option for any time, any occasion.

Timing is perhaps ideal for fast casual operators to lean into and even enhance outreach with loyalty programs and price promotions. With escalated prices across most goods and services, coupled with diners still eager to get back out and enjoy themselves while establishing new daily routines, accessible value, quality and versatility prove to be strong assets for fast casuals.



“Fast casual operators should seize the opportunity to capture new and existing diners to combat competition in other segments and become the go-to destination for all meal occasions. With the right marketing tactics and promotions, operators in this segment can continue to accelerate their growth and win with new and existing customers.”

– Pooja Lal, US Foodservice and Mintel Menu Insights

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **This Report looks at the following areas**
- **Definition**
- **Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Total US sales and fan chart forecast of limited-service restaurants, at current prices, 2017-27
Figure 2: Category outlook, 2022-27
- **Challenges and opportunities**
- **Fast casual recovery lags behind other segments**
Figure 3: Restaurant ordering 2022-22
- **Parents are especially ripe for the picking**
Figure 4: Reasons for increased fast casual visitation, by parental status, 2022
- **Contemporary values go beyond price point**
Figure 5: Fast casual visitation motivators, by generation, 2022
- **Versatility, convenience can help cast a wider audience net**
Figure 6: Interest in Fast casual concepts, by generation, 2022
- **Keep connections and communications strong with younger adults**
Figure 7: Marketing-related behaviors, 2022

MARKET SIZE AND FORECAST

- **Innovation in the foodservice market pushes industry growth**
Figure 8: Total US retail sales and fan chart forecast of limited-service eating places*, at current prices, 2017-27
Figure 9: Total US retail sales and forecast of limited service eating places*, at current prices, 2017-27

MARKET BREAKDOWN

- **Full-service recovery picked up steam in 2021**
Figure 10: Total US revenues and forecast of full service restaurants and limited service eating places*, at inflation-adjusted prices, 2017-27

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Market share of total us sales and forecast of full service restaurants and limited service eating places, by segment, 2020-27

MARKET FACTORS

- Elevated food costs may chip into out-of-home occasions**

Figure 12: Changes in Consumer Price Indexes for food

- Labor crisis continues to pose difficulties for operators**

Figure 13: Quit levels, accommodation and foodservices, April 2021-22

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- Fast casual operators expand plant-based options**

Figure 14: Portillo's vegan hot dog, May 2022

Figure 15: Pure Grit BBQ launches first NYC location, May 2022

- Fast casuals remodel for a new outlook post-pandemic**

Figure 16: Panera Bread NextGen Store design, April 2022

Figure 17: Sweetgreen Instagram – launch of new digital pickup location

- Subscription services boost visitation frequency and convenience**

Figure 18: Unlimited Sip Club – Panera Bread Facebook Post, April 2022

- Munchies spark interest on brand menus on 4/20**

Figure 19: Wingstop Instagram Post, April 2022

Figure 20: Del Taco Instagram Post – 4/20 theme

THE FAST CASUAL CONSUMER – FAST FACTS

RESTAURANT ORDERING

- Fast casuals to take inspiration from other restaurant segments**

Figure 21: Restaurant ordering 2020-22

- Go all in on value, benefits to reach Gen Z**

Figure 22: Restaurant ordering by generation, 2022

- Price, value and loyalty for all**

Figure 23: Restaurant ordering by household income, 2022

FAST CASUAL VISITATION AND INTEREST

Figure 24: Fast casual visitation and interest, 2022

- Expand Gen Z palates with small doses of flavor, authenticity**

Figure 25: Fast casual visitation and interest by generation, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

CHANGE IN FAST CASUAL VISITATION AND INTEREST

- **Strive for destination status, yet maintain convenience**
Figure 26: Change in Fast Casual Visitation and Interest, 2022
- **Parents driving increased visitation**
Figure 27: Change in fast casual visitation and interest by parental status, 2022
- **Build casual, not necessarily quick occasions**
Figure 28: Reasons for increased fast casual visitation, 2022
- **Feed the need for value with unique, affordable experiences**
Figure 29: Reasons for reduced fast casual visitation, 2022
- **Drive fast casual appeal to workers on the go and at home**
Figure 30: Change in fast casual visitation and interest by work from home status, 2022

RESTAURANT TYPE ASSOCIATIONS

- **Health is a hallmark of fast casuals**
Figure 31: Restaurant type associations, 2022
- **Double down on convenience and value for parents**
Figure 32: Fast casual associations by parental status, 2022
- **Gen Z attitudes point to potential**
Figure 33: Fast casual associations by generation, 2022

FAST CASUAL VISITATION MOTIVATORS

- **Convenience is non-negotiable**
Figure 34: Fast casual visitation motivators, 2022
- **Focus healthy for women, hearty for men**
Figure 35: Fast casual visitation motivators, by gender, 2022
- **Fast and healthy will drive traffic**
Figure 36: TURF Analysis – Fast casual visitation motivators, 2022

INTEREST IN FAST CASUAL CONCEPTS

- **New channels help FC operators meet consumers where they are**
Figure 37: Interest in Fast casual concepts, 2022
Figure 38: Farmer’s Fridge Instagram Post
Figure 39: Fast casual feature interest by parental status, 2022
- **Hybrid workers seek workday balance**
Figure 40: Fast casual feature interest by work from home status, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Fast Casual Restaurants - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

APPENDIX – THE MARKET

Figure 41: Total US revenues and forecast of full-service restaurants and limited-service eating places*, at inflation-adjusted prices, 2017-27

Figure 42: Total US retail sales and forecast of at inflation-adjusted prices, 2017-27"

Figure 43: Total US retail sales and forecast of limited-service eating places*, at inflation-adjusted prices, 2017-27

APPENDIX – CORRESPONDENCE ANALYSIS

Figure 44: Restaurant type associations, 2022

- **Methodology**

APPENDIX – TURF ANALYSIS

Figure 45: Table – TURF Analysis – Fast casual restaurant concept interest, 2022

- **Methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.