

Memorandum

TO: Miranda Priestley

FROM: Giovanni Gutierrez

DATE: March 15th, 2021

SUBJECT: Market Analysis of Full-Service Restaurants

EXECUTIVE SUMMARY

This paper focuses on the US full-service restaurant (FSR) industry. Overall, it provides an environmental scan and FSR industry analysis. It gives market value and forecast insight into the overall US food industry. It provides FSR market size, forecast insight then tackles emerging tools to increase market reach, providing statistics and details on how it has benefitted the FSR industry. The paper finds that third party delivery is an enormous tool and shock to the industry, providing opportunities and new competition to arise.

This paper also provides categorical insight for Logan's Roadhouse gathered data from Simmons Insight. It provides market segmentation, targeting, and positioning for Logan's Roadhouse that finds that their target market includes black people between the ages of 25-44 with household income levels of \$75,000-\$99,999 in the South. With that categorical insight, this paper finally concludes with three final recommendations for Logan's Roadhouse to expand their market share: more products, cheaper prices, and additional restaurants within the South, all employed under market penetration strategies that aim to increase their market share and better communicate their services and value.

MARKET SITUATION

**The COVID-19 pandemic was discovered in late 2019; however, it did not start affecting American businesses and lifestyle until the first shutdowns on March 13th, 2020. It especially affected the full-service restaurant (FSR) industry as it required continuous shutdowns and harsh, strict restrictions. Although limited-service restaurants (LSR) have almost recovered to pre-pandemic levels, as of December 2020, only 64% of consumers had ordered from a FSR in the past three months, compared to 80% in February 2020 (Allman 2021).

Food Service Industry Market Value

In 2018, The US food service industry grew by 3.2% and reached 689.8 billion dollars in value (United States - Food Service 2019).

Category Segmentation within the Food Service Industry

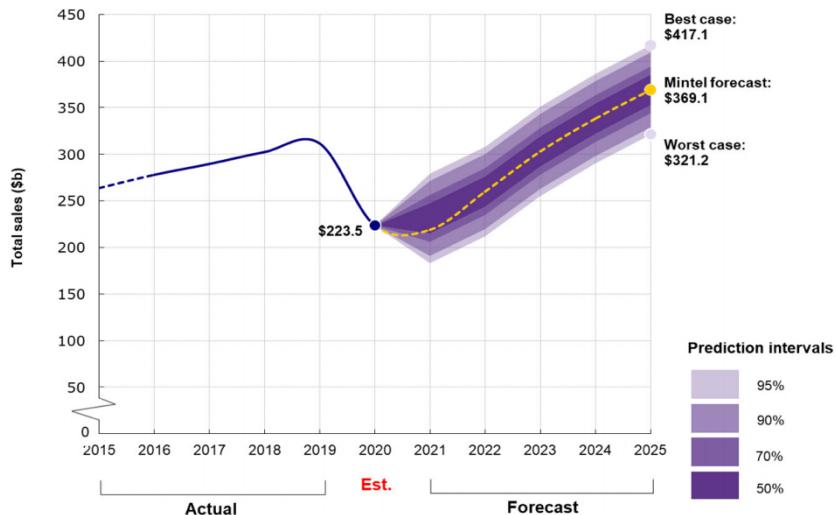
Quick service and fast-food restaurants make up the largest sections in the US food service industry with 40.5% of the whole industry's value (United States - Food Service). On the other hand, The FSR industry makes up 35.6% of the industry. FSRs, specifically, are made up of fine dining restaurants, casual dining restaurants, and family midscale restaurants (Spencer 2020).

FSR Market Size and Forecast

In 2019, total full-service restaurants reached an estimated of \$312 billion in revenues (Spencer). It was forecasted to reach 371 billion in 2024, an estimated 19% sales growth (Spencer). Previously in 2015, sales reached \$249 billion; in 2016, \$264 billion; in 2017, \$290 billion; and in 2018, \$302 billion (Spencer). From 2015 to 2019, we see a 25% sales growth.

However, the pandemic affected FSR sales and they will not recover until 2024. In 2020, FSRs experienced revenues of 223.5 billion, a 28.3% drop in sales and are still expected to drop an additional 2.1% in 2021 (Allman). As seen in Figure 1, FSR sales are now forecasted to reach 338 billion in revenues in 2024 (Allman).

Figure 1: Total US Sales and Fan Chart Forecast of Full-Service Restaurants, at Current Prices, 2015-25



Source: based on US Census Bureau, Annual Retail Trade Survey; US Bureau of Economic Analysis; National Restaurant Association/ Mintel

Market Breakdown and Trends

Fine dining and some casual dining chains are leading the FSR segment growth; however causal and family dining chains are down year over year (YOY) – which calculates the percentage change in the past year – with the top 10 largest casual dining chains reporting slow growth or declining sales (Spencer). Since casual dining chains construct 17% of the top 200 restaurant chains and are the second largest restaurant type in the US, their decline is responsible for the lower FSR segment's overall growth (Spencer).

LSR burger chains which include fast food chains are the largest restaurant type in the US, constructing 28% of the market, while family dining and buffet restaurant chains construct only 5% (Spencer). Therefore, as LSRs displace FSRs, LSRs are mostly responsible for the demise of the Full-Service Restaurant industry.

US Single Location Full-Service Restaurants and Key Players

Within the single location FSR industry, Clyde's Restaurant Group, Joe's Stone Crab, and Tao Las Vegas serve as the key leading players (Le 2021). From 2016 to 2021, revenues grew 2.4% to reach \$192.5 billion in 2020. In 2020, annual growth decreased by 14.5%, but in 2021 revenue is expected to grow by 22.3% (Le). Thus, despite general FSRs' struggles to recover from the pandemic, US single location FSRs are making a quick recovery

Steakhouse Chains

From 2015 to 2020, Premium Steak Restaurants has grown by 3.5% and reached revenue levels of \$5.0 billion (Kennedy 2020). Top steakhouse chains show continuous, slow growth. Despite the rise of plant-based dining, top steakhouse chains Texas Roadhouse and Longhorn Steakhouse reported a 9% and 6% sales gain, demonstrating that meat-heavy dining is still in demand (Spencer). While Texas Roadhouse

(+9%) and Ruth's Chris (+2%) are not forming delivery partnerships, competitors such as Outback Steakhouse (+1%) are making third-party delivery partnerships (Spencer).

ENVIRONMENTAL SCAN

Baby Boomers' Shift in Needs Affecting FSR Sales

Baby boomers make up more than one fifth of the US population, making their evolving needs notable in the US FSR industry (Spencer). They also have more time and money to spend in FSRs compared to younger generations (Allman). Therefore, we must tailor to their changing preferences and needs. Their health and dietary needs are becoming more specific, meaning the industry should consider menu options with low sodium, low calorie, and rich in healthy ingredients that prevent age-related disease (Spencer).

Although this older generation cannot replace their precious dine-in experience with disconnected delivery services, we can still target them by adding personal notes from the restaurant staff in their orders, offer them free services or products with their meals, etc. (Allman).

Emerging Third-Party Delivery and Competition in the Food Service Industry

Food Service companies can now compete among each other due to the introduction of third-party delivery such as GrubHub. They have the ability to turn full-service restaurants into significant competitors to fast food companies (United States - Food Service). These third-party apps show customers a vast range of food service options, all in one place where they can easily compete against each other, demonstrating great use to the full-service industry. Key players can optimize their market reach through partnerships and other small FSRs could also overcome some entry barriers by embracing third-party delivery.

Emerging AI Technology in the Industry

Full-service restaurants are beginning to embrace AI to either create targeted advertisements or to save some money. It is expected that restaurants will keep embracing AI to points where they will use AI for advertisement, delivery platform, and customizing indoor dining experiences (Full-Service Restaurants in the US 2020). TGI Fridays has already begun implementing AI and uses it to make more customized menu suggestions and to save money on waitstaff (Full-Service Restaurants in the US). Additionally, in Shanghai, China, businesses including full restaurant services use AI to record massive amounts of data and analyze it to improve their customer service (Hyatt 2019).

Ghost Kitchens Replacing Traditional Services

Ghost kitchens are becoming more popular in the US. They are successfully growing since they quickly embraced third-party delivery. With their help, they focus on delivery and avoid paying the rent and labor costs associated with physical dining rooms (Spencer). In 2020, 22% of costumers and 31% of millennials ordered from delivery-only restaurants (Spencer). These businesses are expected to grow since they specifically do well with younger generations who are savvy with technology.

SEGMENTATION AND TARGETING

Simmons Insights Data

The following is data collected from the Simmons Insights database. The information includes categorical data (gender, age groups, race, household income, and census regions) and their relationship with Logan's Roadhouse, a causal dining restaurant chain with 194 company operated and twenty-five franchised Logan's Roadhouse locations throughout twenty-three states.

Gender and Logan's Roadhouse

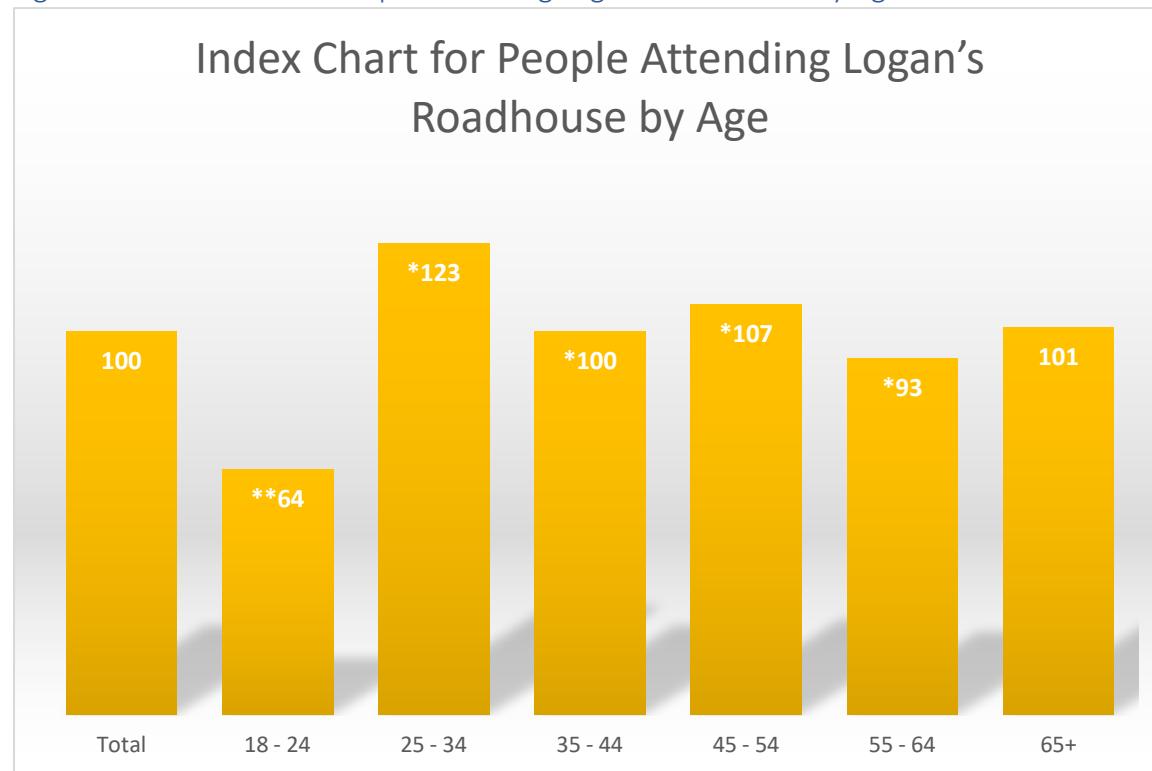
There is not a significant statistical difference between genders attending Logan's Roadhouse. Nevertheless, on average, men are 8% more likely to visit the roadhouse than women.

Age and Logan's Roadhouse

Figure 2 shows the differences in age groups eating from Logan's Roadhouse. Ages 18-24 are 34% less likely to eat from Logan's Roadhouse than the national average; ages 25-34 are 23% more likely; ages 35-44 is neither higher or lower than expected; ages 45-54 are 7% more likely; ages 55-64 are 7% less likely; and ages 65 and up are 1% more likely to visit.

The steakhouse performs particularly well among people of ages 24-34. As expected, younger generations (18-24) are not as attracted to the steakhouse.

Figure 2: Index Chart for People Attending Logan's Roadhouse by Age



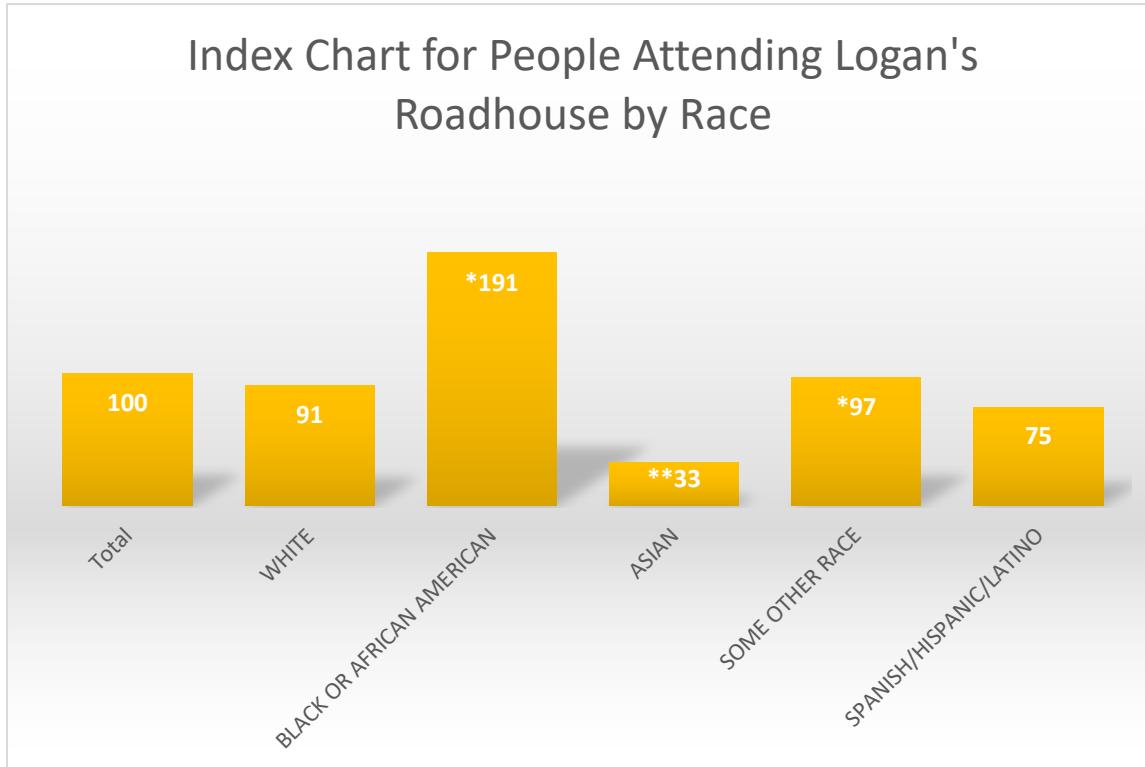
Source: Data Collected from Simmons Insights

Race and Logan's Roadhouse

As shown in Figure 3, white people are 9% less likely to eat from Logan's Roadhouse than the national average; black people are 91% more likely; Asian people are 67% less likely; other races are 3% less likely; and Hispanic people are 25% less likely to visit.

The steakhouse performs overwhelmingly well among black people and performs poorly attracting the Asian community. Black people are 158% more likely to attend than Asian people.

Figure 3: Index Chart for People Attending Logan's Roadhouse by Race



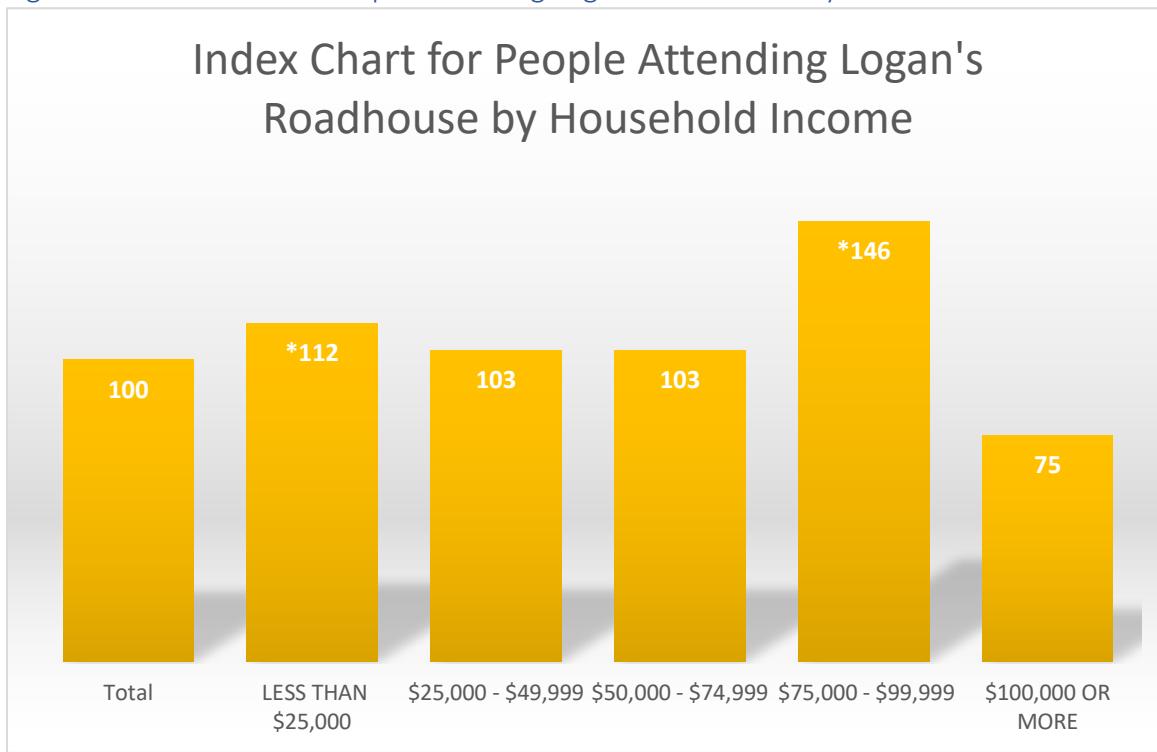
Source: Data Collected from Simmons Insights

Household Income and Logan's Roadhouse

As presented in Figure 4, households making less than \$25,000 a year are 12% more likely to attend Logan's Roadhouse than the national average; households between \$25,000-\$49,999 are 3% more likely; households between \$50,000-\$74,999 are 3% more likely; households between \$75,000-\$99,999 are 46% more likely; and households between \$100,000 and more are 25% less likely to eat from Logan's Roadhouse.

The steakhouse performs well with household incomes between \$75,000-\$99,999. Although they attract incomes on the higher end, they still struggle to attract household incomes of \$100,000 and more.

Figure 4: Index Chart for People Attending Logan's Roadhouse by Household Income



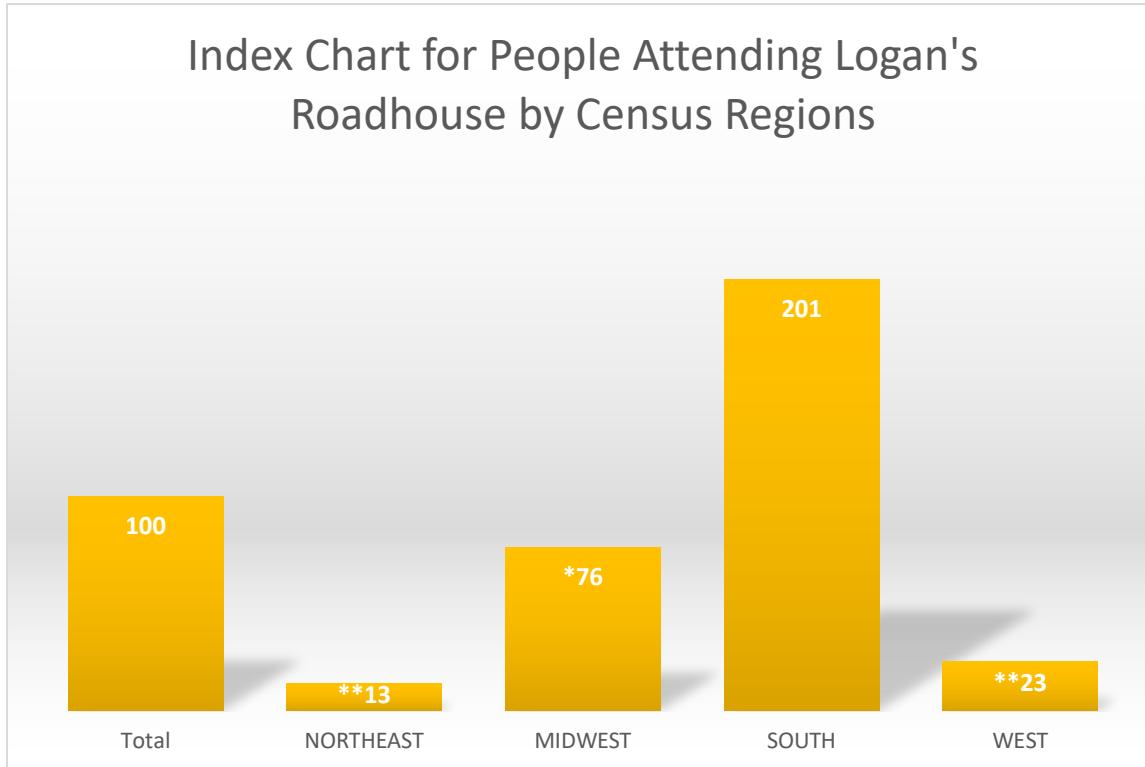
Source: Data Collected from Simmons Insights

Census Regions

Figure 5 shows the differences in census regions eating from Logan's Roadhouse. The Northeast is 87% less likely to consume from Logan's Roadhouse than the national average; the Midwest is 24% less likely; the South 101% more likely; and the West is 77% less likely to attend the steakhouse.

The steakhouse performs extremely well in the South while very poorly in the Northeast. A person in the South is more 88% more likely to go to Logan's Roadhouse than a person in the Northeast.

Figure 5: Index Chart for People Attending Logan's Roadhouse by Census Regions

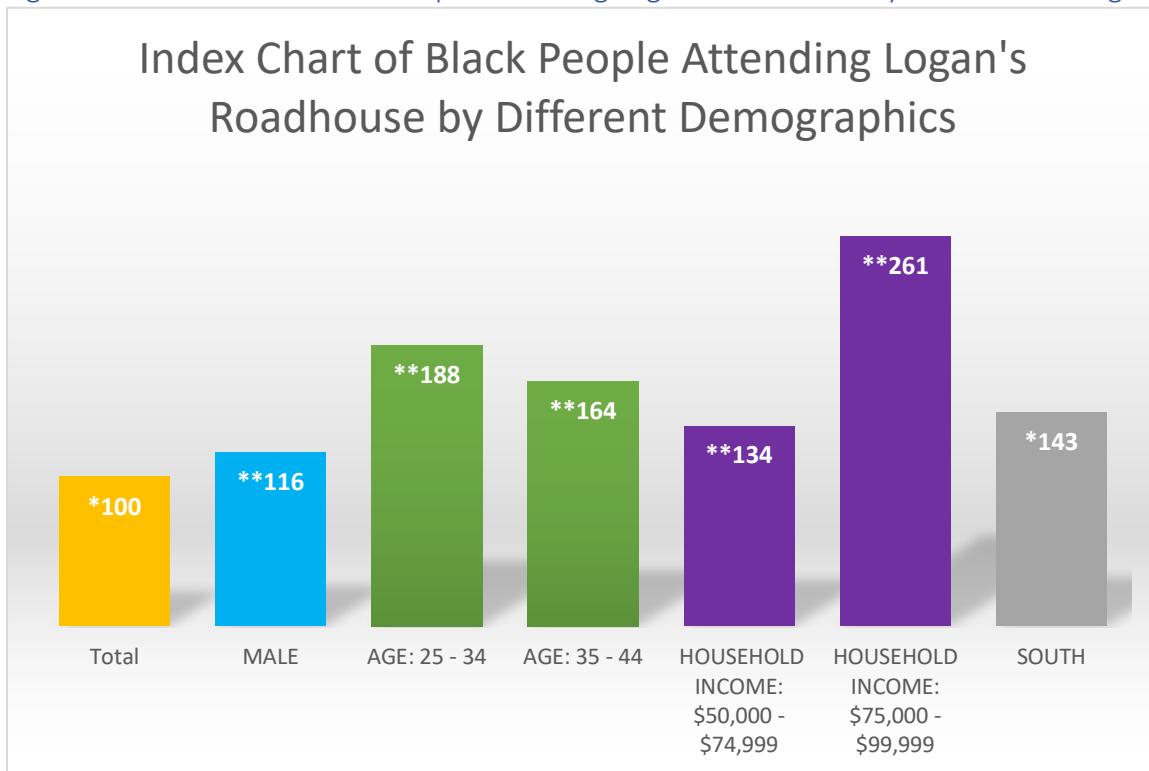


Source: Data Collected from Simmons Insights

Black People at Logan's Roadhouse

Figure 6 shows the relationship between black people and Logan's Roadhouse through gender, age, household income, and census regions. On average, black men are 16% more likely to visit the roadhouse than the national average. Among black people, Ages 25-34 are 88% more likely to eat from Logan's Roadhouse than the national average, and 35-44 are 64% more likely. Black households making between \$50,000-\$74,999 are 34% more likely to attend Logan's Roadhouse than the national average and black households between \$75,000-\$99,999 are *astonishingly* 161% more likely. Finally, black people from the South are 43% more likely to consume from Logan's Roadhouse than the national average.

Figure 6: Index Chart of Black People Attending Logan's Roadhouse by Different Demographics



Source: Data Collected from Simmons Insights

LOGAN'S ROADHOUSE POSITIONING

To black men, 25-44, with household income levels of \$75,000-\$99,999, who live in the South and wish to eat a delicious, juicy medium-rare steak after a long, hot day at work, Logan's Roadhouse is the casual dining restaurant that is heaven-sent with quality meals at lesser rates. The reason is Logan's Roadhouse relaxed environment where the atmosphere is lively, and beer is served cold for one to sit down and enjoy quality meat. The brand character is friendly, genuine, and accommodating.

BRAND ANALYSIS

Controllable Marketing Mix Factors

This section analyzes how Logan's Roadhouse is using their **marketing mix** elements. These consist of the **Four Ps: product, price, promotion, and place** and how they employ these to reach their **target market**. Logan's uses these **controllable factors** – as opposed to **uncontrollable, environmental forces** – to add benefits that will satisfy their customers' needs. Logan's Roadhouse general branding speaks to their American, affordable, friendly dining experience with steakhouse-quality entrees and cold alcoholic beverages to eat and drink with friends and family.

Product

Logan's Roadhouse's red and yellow logo is distinctive and enhances their message. The red and yellow theme reflects the smokey fire used to cook their fresh steak entrees. The logo has an LED outline in their respective colors that connects back to the general fun, bar-like **physical environment**. Together, they enhance the brand's main attractions: steak and cold beers for young adults.

The steakhouse offers multiple **product lines** at high quality, freshness, and value. These lines include appetizers, crisp salads, burgers, sandwiches, chicken entrees, seafood entrees, rib entrees, pork entrees, steak entrees, soups, deserts, and more. Their **services** focus on providing American-inspired **consumer products** such as premium steak cuts, including ribeye, prime rib, filet, T-bone and porterhouse. More than 40% of their entrees are steak and most dinner entrées include two side items. They also provide all-you-can-eat supply of freshly prepared yeast rolls and peanuts with every table. Logan's also has a huge emphasis on freshness. They only serve fresh – never frozen – chicken, salmon, salads, soups, yeast rolls, and chili and salad dressings.

Logan's has a full bar that offers a selection of draft and bottled beer and also serves a selection of major brands of liquor and wine, as well as frozen margaritas and specialty drinks. Within the last five years, they have updated their liquor, beer, and wine offerings and have improved their bar operations. However, Logan's falls short when competing with Texas Roadhouse's products. Texas Roadhouse has much more variety in products. Whereas Logan's offers a 6 oz. Top Sirloin, Texas Roadhouse offers four different portions of their choice Sirloin (6 oz., 8 oz., 11 oz., 16 oz.). This is typical across most of these companies' **product mixes**. Texas Roadhouse offers a variety of size portions that threaten Logan's Roadhouse.

Essential to pandemic times, they also provide hot-and-ready and ready-to-bake meals which makes them stand out from their competitors. Customers can pick up meals that include meat entrees such as Prime Rib, Fall-Off-The-Bone Ribs, BBQ Pork Chops, Meatloaf, BBQ Pulled Pork or Roasted Turkey and come with two sides, a choice of rolls, a house salad, and dessert. They have a choice to either buy it ready to eat or to back it back home.

Price

Logan's employs a pricing strategy that looks at competitor's prices and attempts to maintain their prices at similar ranges as they have an emphasis on providing an affordable dining experience. They use **bundle pricing** all throughout their menu, giving their customers the option to choose between two or three meat choices with two sides for a reduced price. They also provide **optional product pricing** through their premium sides (sweet potato fries, Caesar salad, grilled mushroom skewer, etc.) for only an

extra .99 cents and loaded sides (loaded baked potato, loaded mac & cheese, loaded mashed potatoes) for \$1.99.

The steakhouse is also successfully attracting customers through their **off-peak pricing** methods by hosting happy hour deals from 3 pm- 6 pm every day that offers a selection of \$8.99 Roadhouse meals that include one entrée, two sides, and yeast rolls, and discounted drink prices. Customers can choose from Steak Tips, 6 oz. Choice Sirloin Steak, BBQ Grilled Pork Chop, Chopped Steak, Chicken Tenders, Bayou Popcorn Shrimp, and Grilled Meatloaf, as well as \$3 margaritas, \$3-\$5 beers, and \$3-\$6 well drinks. All tables include unlimited free yeast rolls and peanuts which is essential to entertain the customer all throughout their experience.

However, Logan's "affordable" prices cannot compete with Texas Roadhouse prices and deals. Logan's Roadhouse faces **pure competition** in the restaurant field. There are also multiple steakhouses and roadhouses in their target market such as Texas Roadhouse that provides happy hour menus until 5pm every day. These happy hour menus also provide more options than Logan's. Even without these deals, Texas Roadhouse offers quality meals at cheaper rates. For example, whereas the 12 oz. New York Strip at Logan's cost \$23.99, the 8 oz. and the 12 oz. New York Strip at Texas Roadhouse costs \$15.99 and \$19.99 respectively. It is highly concerning that most entrees are cheaper at Texas Roadhouse. It is also crucial to note that Texas Roadhouse successfully uses **quantity discounting**. Although these might be due to Logan suffering large losses during the pandemic, it still largely comes into conflict with their "affordable brand".

Place

Logan's employs varied purchasing and pricing strategies and techniques to secure supply contracts and minimize costs in a high-fluctuating market. Logan's Roadhouse negotiates directly with food suppliers to ensure consistent quality, freshness, and cost. They aim to sign fixed price and supply contracts to minimize the high volatility in **supply chains**. They purchase the majority of their food products and restaurant supplies through a contracted national foodservice distributor while some perishable products are purchased through local distribution channels. The distributor is responsible for both warehousing and delivering **business products** to their restaurants.

Logan's has also partnered with third-party delivery services such as Grubhub, Postmates, Doordash, and Uber Eats to deliver their **consumer products**. These partnerships are essential during the pandemic and in general times to ensure convenience and offset location hardships.

However, Logan's Roadhouse suffered tremendous location losses during the pandemic. Logan's closed 261 restaurants during the pandemic (Gore, 2020). Although they had to close the vast majority of their locations, they were able reopen many of these and now have a total of 230 locations. Nevertheless, most of their locations remain in their target market in the South.

Promotion

Logan's Roadhouse uses a variety of brand promotions to share their message of providing exceptional, authentic steakhouse quality meat in an environment with loud music, cold beers, family and friends in the comfort of your jeans and a regular t-shirt. Their brand also consists of calling themselves the "real American roadhouse."

The roadhouse does a careful job to ensure their **physical environment** complements their message. It provides a full-service bar that attracts regular customers to sit down with their friends and chat while enjoying cold beer and a variety of liquor. This guides customers to sit down at the bar and order drinks and meals with their friends and family. The steak and pork entrees are also grilled under real mesquite wood for the audience to see and enjoy, demonstrating genuineness, authenticity, and transparency with their customers. The stores are decorated with LED red and yellow strips throughout the corners, both inside and out, which supplement their LED red and yellow logo and adds a sense of liveliness and joy to the general environment. This environment goes well with their intent to have customers come back to drink with friends and enjoy their meals.

Logan's uses a series of advertising methods to attract their **target market**. They use local **broadcast advertising** to advertise new product offerings and promotions and increase their brand identity and awareness. They selectively focus on more highly **penetrated markets** to more effectively reach their target market. They use **digital advertising** channels to expand their marketing reach and build customer relationships as they showcase new product offerings, promotions, and value through electronic devices across various interactive channels. Logan's also uses **print advertising** by sending newspaper inserts and inserts in coupon mailings to communicate new products, promotions and value and is an efficient method to target their price-sensitive customers. Finally, they use **in-restaurant marketing** to announce special events and to promote brand building initiatives such as happy hours, gift cards, and loyalty clubs, driving **word of mouth advertising**.

SWOT Analysis

STRENGTH	OPPORTUNITY
Diverse advertising methods	Expanding into unserved markets
Fixed price and supply chain markets	Offering additional products
Complementary physical environment	Extend off-peak pricing hours
WEAKNESS	THREAT
Price not matching affordable expectations	Many competitors within target market
Loss of multiple locations during COVID-19	Market volatility further increasing product prices
Not having as many product options as competition	Competitors further expanding market share as Logan loses locations

BRAND RECOMMENDATIONS

Market Penetration at Logan's Roadhouse

Logan's Roadhouse should attempt to employ a **market penetration** strategy that aims to (1) introduce additional products, (2) reduce product pricing, and (3) operate additional restaurants within their target market.

Recommendation 1: Introduce Additional Products

Due to competing restaurants providing more products within Logan's Roadhouse target market, there appears to be an opportunity to move into new products that are closely related with Logan's already established product lines that will allow them to offset the competition's effect on sales. Many full-service restaurants aim for quality, affordability, and convenience as Logan's does. Specifically, Texas Roadhouse, also a steakhouse, offers more products than Logan's Roadhouse.

By adding more entrée, drink, and happy hour options, the roadhouse would be able to provide equally as many or more options as their main competitor. This would drive consumers to their locations. Logan's Roadhouse should analyze their target market's preferences and specifically provide more of those options. Since over 37% of their sales rely on steak entrees and since they are steakhouse, they should especially add more variety of steak entrees.

A possible risk is that even if Logan's introduces similar products to competitors' products, the other restaurant may be able to keep their customers due to higher quality or because the customer is used to this. Logan's could use their digital and print advertising to effectively communicate their new products and value to their target market. They could also use their broadcast advertising methods that already target their penetrated markets to further entertain their current market share with the hopes that they will bring their friends and family to a joyful, alive environment with additional products.

Recommendation 2: Reduce Product Prices

Due to competing restaurants providing cheaper products within Logan's Roadhouse target market, there appears to be an opportunity to reduce product prices to appeal more to customers. The roadhouse should try to reduce their prices to attract more customers. Since their branding and their competitors' branding relies on affordability, reducing prices and keeping prices at the lower ranges in comparison to their competitors' price ranges could attract those unserved customers.

Most urgently, is highly inconvenient that many of Logan's products are more expensive than those of Texas Roadhouse. Texas Roadhouse has vast name recognition for their quality steak entrees at great value and most reviews rank them a couple places higher than Logan's Roadhouse. When a customer faces eating a higher quality meal for a cheaper price at Texas Roadhouse, they will easily choose Texas Roadhouse over Logan's. With lower prices, customers can also expect lower quality. However, if Logan's Roadhouse sells more expensive services than the reputable, well-known Texas Roadhouse, Logan's will continue losing their market share in the full-service restaurant industry.

This will essentially further attract their target market of household income levels of \$75,000-\$99,999, that are already 46% more likely to visit their restaurant, and give the opportunity to attract households making less than \$25,000 a year, that are 12% more likely to visit and come next to their target one. These cheaper prices would keep attracting people making less than 25,000 a year, giving Logan's an increased market share. In addition, lower prices empower this firm to easily penetrate markets.

However, if Logan's is unable to attract more customers given these reduced prices, their revenue would decrease and they would not be able to generate sufficient funds, further impeding their growth. If their growth were to be further impeded on top of the COVID-19 pandemic effects, Logan's Roadhouse could go out of business. Any increase in food prices, especially beef, chicken, produce, and seafood could also gravely affect their operations. The roadhouse should continue using their strong, diversified advertising techniques to appeal to their penetrated markets and additional markets. Nevertheless, if advertising is done well and Logan's is able to beat Texas Roadhouse, that should provide a shock to the steakhouse market. With new products at cheaper prices, Logan's is likely to grow their market share.

Recommendation 3: Operate Additional Restaurants in the South

Due to other restaurants having the same target market and Logan's Roadhouse losing so many locations, there appears to be an opportunity to move into these markets in the South that still have room for Logan's to come back and expand. Logan's had to close many restaurants during the pandemic and was not able to recover many of them. Although this resulted in less of a market share, this could be used as an advantage. Most restaurants closed were in places other than the South which makes sense given people in the South are 101% more likely to visit Logan's Roadhouse.

Specifically, Logan's Roadhouse should open more locations in predominantly black areas in the South. Black people are 91% more likely to visit the roadhouse and Logan's Roadhouse could concentrate their efforts in these areas given that they closed down many locations, allowing them to focus and specialize in these areas with the hopes of gaining a higher market share. Moreover, black people with household income levels between \$75,000-\$99,999 are 161% more likely to visit the roadhouse, so it would be smart and effective to also concentrate on black areas with high incomes in the South.

It is important to note that there could be less interest than predicted in the areas. Nevertheless, Logan's Roadhouse has an essential opportunity to open more restaurants in their target market areas with their ideal consumers. Besides, it will be easier for Logan's to penetrate these markets as they already have a focus in it and lower prices make it easier to further penetrate these markets. This, topped off with new products at cheaper prices will create a huge shock to the full-service industry that will directly elevate sales, revenues, attraction, and more at Logan's Roadhouse.

Conclusion

The FSR industry will not recover until 2024 due to the pandemic's impact. It was expected to keep steadily growing in the next years, but the pandemic and the growth of LSRs will be a hard shock to recover from. The introduction of third-party delivery companies has also shocked the FSR industry and created new competition. FSR companies should focus on making these partnerships and consider a transition to using technology and third-party delivery to appeal to new crowds and emerging technologies, thereby expanding their market size and reach. This will be extremely helpful to deal with pandemic losses and impacts and attempt to recover FSR sales.

Logan's Roadhouse, a relaxed, casual dining steakhouse, performs particularly well among Black people, household income levels of \$75,000-\$99,999, the south, and interesting enough, does well among people of ages 25-34. Therefore, due to their lack of market share in the FSR industry, they should use market penetration techniques that add new products to their product mix, reduce their prices overall to better compete with similar restaurants, and establish additional restaurants within the South to increase their market share.

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