



Competitive Analysis

April 2024

April Industry Highlights

Chipotle, Starbucks and more raise prices by as much as 7-8% in California

In light of California's new \$20 minimum wage bill for fast-food workers, which went into effect on April 1, restaurant chains and franchisees are already taking action, in some cases by raising prices by as much as 7-8% for select menu items in the state. Analysts Eric Gonzalez of Keybanc and Mark Kalinowski scraped data and researched pricing trends over the past couple of months at major restaurant chains to determine how much menu prices have been impacted by surge in labor costs in the state. All eyes are on companies like Chipotle and Starbucks, especially, as these brands do not franchise (which is historically an industry anomaly).

California's Wage Hike May Accelerate the Adoption of Restaurant Technology

While customer preference for autonomous ordering, particularly among younger consumers, is driving the adoption of self-service kiosks, the minimum wage increase could accelerate tech adoption in certain areas. Fast food franchisee Harsh Ghai, who owns 180 Burger King, Taco Bell, and Popeyes locations, is one such business owner who plans to install more self-service kiosks in response to the wage increase. Ghai told CNN in an interview that he is also looking to implement AI-powered drive-thru ordering and aims to remove registers completely from his restaurants. He argues that these changes are necessary to offset increased labor costs and maintain profitability.

Why QSR and fast casual visits outpaced full-service in 2023

Potbelly CEO Bob Wright recently called traffic the "heartbeat of long-term health," so when industry-wide traffic started to dip at the end of last year, red lights started to flash. As it turns out, consumers do have a threshold after two-plus years of higher menu prices. A new whitepaper from traffic analytics company Placer.ai finds that the quick-service and fast casual segments have experienced year-over-year increases in visits every quarter since Q1 2023, with signs of slowing. Q1 2023 visits in these segments were up by over 7%, but just 2.1% in Q1 2024. Conversely, full-service chains experienced a 4.9% increase in visits in Q1 2023, but the category declined in Q2 and Q3 2023 before essentially turning flat in Q4 2023 and Q1 2024. Placer.ai suggests that QSRs specifically have benefited from speed of service, pointing to throughput improvements at chains like Taco Bell, Wendy's, and Chick-fil-A as examples. Another factor potentially playing into QSRs' and fast casuals' favor is the heavy presence of chicken concepts. Indeed, chicken has become the most consumed protein throughout the past 30 years, driven largely by younger consumers who prefer its versatility and perceived health halo. Placer.ai also suggests that QSRs and fast casuals have effectively leveraged the marketing calendar and limited-time offerings to drive visits.

April Competitor Synopsis

Value Wars | As labor costs escalate within the food industry, fast food establishments are grappling with the need to raise prices significantly. In a strategic response, casual dining giants such as Applebee's and Chili's are seizing the opportunity by bolstering their burger value meals. Applebee's is aggressively marketing its \$9.99 Whole Lotta Bacon Burger & Fries, while Chili's has introduced the Big Smasher Burger as part of their 3 For Me meal deal, starting at \$10.99. In their email campaigns, Chili's has even taken a direct swipe at fast food competitors, highlighting their offerings as superior to what they describe as "soggy and limp" fare from fast food chains.

Cultural Culinary Moments | As social media continues to reshape the fast casual dining landscape, brands are embracing pop culture trends, seamlessly integrating them into menu items and branding strategies. Whether it's the release of Taylor Swift's highly anticipated album or the once-in-a-lifetime solar eclipse event, restaurant brands are capitalizing on these cultural moments for engaging content opportunities. Lazy Dog, for instance, celebrated Swift's album release with a playful spin, incorporating their Butter Cake dessert. Meanwhile, TGI Friday's put their own twist on the phenomenon, introducing a Mozzarella Department album cover. During the eclipse, Applebee's launched the Patrón Eclipse Margarita, Lucille's offered a tempting \$10 discount on orders of \$30 or more, and Chili's enticed diners with a Free Appetizer deal using the code "Appclipse."

April Antics | Each year, brands ramp up their creativity for April Fools' initiatives, aiming to spark conversations around their products or services. This trend was particularly evident in the restaurant industry this year, with several notable examples. For instance, BJ's delighted guests with a free Pizookie, promoting their quirky pickle flavor, which was fortunately orderable without the pickle! Moe's Southwest Grill teamed up with Sonic to create a cheesy joke with the debut of their Queso Slush. Sweetgreen caught social media users off guard by announcing a Miso Ginger flavored toothpaste. Meanwhile, Urban Plates playfully introduced Chimi-O's cereal featuring chimichurri flavor, and Urbane Cafe joined the fun with a faux announcement of a pet food line tailored to dogs and cats, even going the extra mile to create convincing packaging for a truly immersive prank.



Notable Value Deals

- **Applebee's** | \$9.99 Whole Lotta Bacon Burger & Fries.
- **BJ's** | \$13 Lunch Specials available Monday-Friday 11AM-3PM.
- **Chili's** | 3 For Me - Get a drink, appetizer & entrée starting at \$10.99.
(added their new Big Smasher Burger & Crispy Chicken Sandwich this month)
- **CPK** | Lunch Duos - Served every day from 11AM-4PM. Starting at \$8.99.
- **Denny's** | The Original Grand Slam starting at \$7.99, All Day Diner Deals starting at \$5.99.
- **iHOP** | Daily specials with entrées starting at \$6 beginning at 3PM.
- **Maggiano's** | 3-Course Lunch Menu for \$20.
- **Outback** | Steak & Lobster starting at \$19.99.
- **Panera Bread** | Under \$10 Menu. Duets range from \$6.99 to \$8.99.
- **Rubio's** | 5 Under \$10 Menu Items.
- **TGI Fridays** | 10 for \$10 Lunch Entrées, \$5 Happy Hour, Meal Deals starting at \$9.99.
- **Urban Plates** | Everyday Value Menu - 13 Under \$13.95.

April Holidays & Events

- April Fool's Day (4/1)
- National Burrito Day (4/4)
- National Caramel Day (4/5)
- National Deep Dish Pizza Day (4/5)
- National Beer Day (4/7)
- National Eggs Benedict Day (4/16)
- National Garlic Day (4/19)
- National Cold Brew Day (4/20)
- Earth Day (4/22)
- National Picnic Day (4/23)
- Administrative Professionals Day (4/24)
- National Steak Day (4/25)
- National Pretzel Day (4/26)
- National Shrimp Scampi Day (4/29)

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Applebee's

eClub/Loyalty

- Loyalty Sign-Up Offer
Free Appetizer.
- Fundraising Programs
Promoted two fundraising programs for sports team, school club/activity or other non-profit organizations to raise funds. Dining to Donate and Flapjack Fundraiser.

LTO

- \$0.50 Wings | Winners in National Taste Test
From coast to coast, we had a third party conduct multiple double-blind taste tests between Applebee's, Wingstop, and Buffalo Wild Wings. And the results spoke for themselves.
- LTO | Perfect Patrón Eclipse Margarita
In honor of the Solar Eclipse, this drink featuring Patrón Premium Tequila and Patrón Citrónge with Monin Blue Raspberry, Passion Fruit and lemon and lime. Served in a shaker tin for multiple pours. Available for dine-in only.
- LTO | \$9.99 Whole Lotta Bacon Burger
Loaded with a bacon-seared patty, tangy bacon sauce, and stacked with extra crispy bacon strips and classic fries. Only \$9.99 for a limited time.

Offers/Promotions

- NEW | \$5 Spring Break Sips
New \$5 Adios, special version of a Blue LIT, or a new \$4 Mocktail on the Beach.
- NEW | Bacardi Buckets
Including Rum Breeze, Tropical Mama or Party on the Beach Buckets, all featuring Bacardi Rum.
- Free Delivery | 4/15-4/21
For orders of \$40 or more on their website or app with code: DELIVERY24.
- Gift Card Special | Buy \$50, Get \$10
Moms, Dads and Grads promotion. Available through 6/23/24.
- NFL Draft | 20 Free Boneless Wings
Choose 20 FREE Boneless Wings when you place a \$40 order online using code NFLDRAFT24. Valid 4/25 - 4/27.
- Teachers & Nurses Appreciation | Free Appetizer
Teachers and nurses can receive a free appetizer from 4/29 - 5/11. Valid with adult entrée purchase for a free appetizer up to \$12 value on dine-in orders.

Additional Messages

- N/A



eClub/Loyalty

- BJ's Premier Rewards Plus Member
Free Pizookie upon sign up.

LTO

- LTO | New Food & Drinks
Featuring a new Party Pizookie, Surf & Turf Stack, Brewhouse Sampler, Garlic Shrimp with Parmesan Toast Appetizer, Blue Raspberry Candy Rush, Caribbean Mai Tai, and Sunrise on the Tropics.

Offers/Promotions

- Gift Card Special | Buy \$50, Get \$10
In honor of Mother's Day and Graduation season. Bonus cards valid 6/17 - 7/8.
- \$10 Off \$40 Promo x2
1st: In honor of Tax Day. Available for dine-in, takeout and delivery on 4/15. Use code 10OFF40.
2nd: They brought the offer back for 4/25 - 5/1 for dine-in, takeout and delivery. Use code 10OFF40.
- National Deep Dish Pizza Day | 50% Off Large Pizzas
Only available for takeout and delivery on 4/5. Use code HALFOFF.
- April Fool's Day | Free Pizookie
Minimum order of \$14.95 or more. Use code PIZICKLE.
- Ongoing | Happy Hour
\$5 select BJ's Handcrafted Beer, \$6 Brewhouse Margaritas, & \$7 Mini Deep Dish Pizzas and selec appetizers.
Mon-Fri 3-7PM; Sun-Thurs 9PM-Close.
- Ongoing | Traffic Drivers | Day Parts
Half-Off Large Pizzas Every Monday, \$5 Pizookies Every Tuesday, \$12 Loaded Burgers Every Wednesday, \$19 Slow-Roasted Entrée with Dessert Every Thursday, Prime Rib Special Every Friday-Sunday.
- Ongoing | Beer Club
\$30 every two months for exclusive takeout and dine-in perks. Available for \$11 Lunch Specials.
- Ongoing | \$13 Lunch Specials
7 items for \$13; Monday-Friday 11AM-3PM.

Additional Messages

- Email | Started Promoting Mother's Day Reservations



Cheesecake Factory

eClub/Loyalty

- Cheesecake Rewards
Earn complimentary slices of cheesecake, surprise and delight rewards, and access to reservations.
- Loyalty | Half Off Cheesecake
Join Cheesecake Rewards and get half off any slice of cheesecake. Valid 4/1 only. Offer can be redeemed through 4/16.

LTO

- N/A

Offers/Promotions

- NEW | Cake Merch
Items include tote bags, tumbler cups, mugs, t-shirts, sweatshirts and more.

Additional Messages

- N/A



Chili's

eClub/Loyalty

- My Chili's Rewards Sign-Up Offer
FREE Chips & Salsa or a Non-Alcoholic Beverage.

LTO

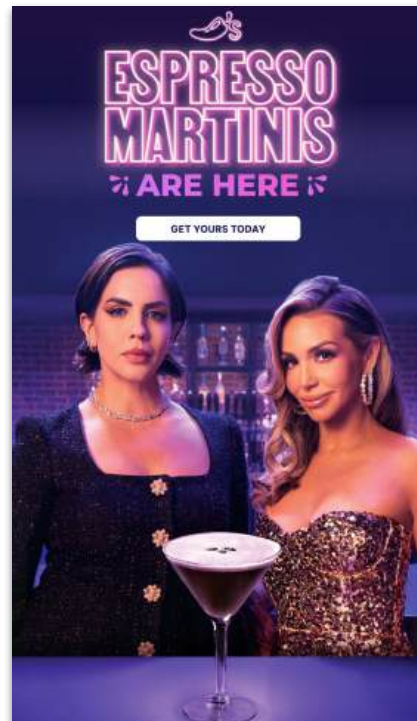
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Offers/Promotions

- **NEW | Espresso Martinis**
Made with tequila, spiced rum, agave, espresso and coffee beans for garnish. Partnered with reality stars Scheana Shay and Katie Maloney (Vanderpump Rules) for the menu launch.
- **Solar Eclipse | Free Appetizer**
Free appetizer with purchase of an entrée. Valid 4/7 - 4/8, with code: APPCLIPSE.
- **Gift Card Special | Buy \$50, Get Two \$10**
Double bonus card offer only available 4/15. Bonus cards can be redeemed 4/19 - 7/31.
- **Ongoing | 3 for Me Value Menu for \$10.99**
Beverage, Appetizer and Entrée starting at \$10.99. Added their NEW Big Smasher Burger & Crispy Chicken Sandwich, positioned to target fast food consumers.
- **Ongoing | Lunch Specials**
Starting at \$10. Salad or soup and an entrée. Available Mon-Fri, 11AM-4PM.

Additional Messages

- **Social | Free Appetizer**
In honor of the Solar Eclipse, guests can get a free appetizer with purchase of an entrée. Valid 4/7 - 4/8 in-restaurant or online.
- **Social | Hoodie Giveaway**
Hosted a giveaway on social for a custom menu-branded hoodie, using the hashtag #ChilisMenuTruck.



Chipotle

eClub/Loyalty

- Chipotle Rewards
10 points for every \$1 spent in restaurant, online or on the app. Free Guac upon sign up.

LTO

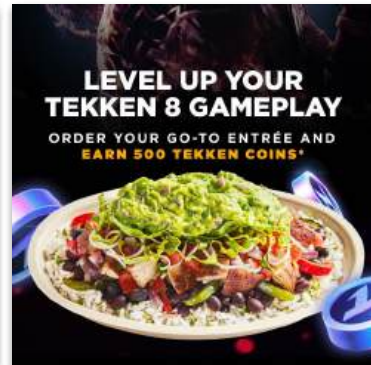
- LTO | Chicken Al Pastor is Back
Choose your entrée and try the bold flavors of morita peppers, balanced with a splash of pineapple, and finished with fresh lime and cilantro.

Offers/Promotions

- National Burrito Day | Free Delivery
Only valid 4/4 with code: DELIVER.

Additional Messages

- Collaboration | Tekken 8
Order your go-to entrée and earn 500 Tekken coins, with code: EWGF623. Only the first 20,000 to redeem will score.



California Pizza Kitchen

eClub/Loyalty

- CPK Rewards
FREE Starter when you register, free dessert for your birthday, earn 1 point for every \$1 you spend (including catering orders), 75 points = \$5 reward, and special offers throughout the year.*
- Tax Day | \$10 Off \$40
Offer valid on 4/15 with any purchase of food and non-alcoholic beverages.
- \$5 CPKids Meal
Enjoy a CPKids meal for \$5 with a purchase of an entrée every Monday & Tuesday. Valid for dine-in and takeout 4/22 - 5/28.

LTO

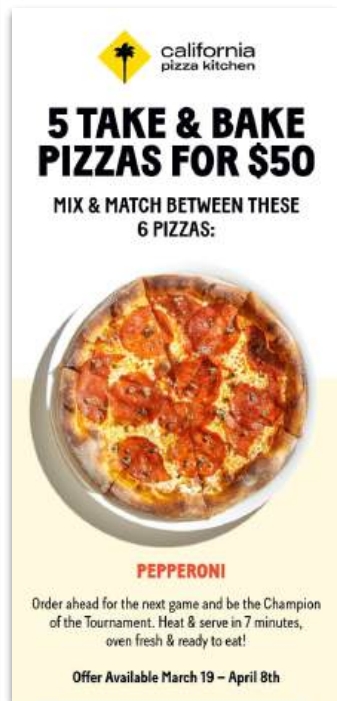
- LTO | Fresh & Festive Flavors
Featuring Green Chili Enchilada Pizza, Tostada Pizza and Casa Paloma.

Offers/Promotions

- NEW | 5 Take & Bake Pizzas for \$50
Mix and match between 6 pizza options. Available 3/19 - 4/18.
- NEW | 10% Off Catering
Valid through 6/30 with code: CATER10.
- Ongoing | \$8 Take And Bake Pizzas
Available with a dine-in entrée.
- Ongoing | Lunch Duos
Served every day, 11AM-4PM. Starting at \$8.99.

Additional Messages.

- N/A



eClub/Loyalty

- Ongoing | 20% Off New App Members

Valid dine-in or online. Minimum \$8 purchase required, taxes and gratuity not included. Maximum \$10 discount. Offer excludes Everyday Value Slam and Original Grand Slam. Additional restrictions may apply.

- Loyalty | Grand Slam Giveaway Sweepstakes

Rewards members get the chance to win a free Original Grand Slam every week from April 17 through the end of the professional baseball regular season. Four lucky Denny's Rewards Members will be picked. Members must enter each week for a chance to win.

LTO

- LTO | Original Grand Slam \$7.99

Fluffy buttermilk pancakes, crispy bacon, sausage, and your choice of eggs. Back for a limited time.

- LTO | Berry Waffle Slam

Featuring new liège-style waffles made with pearl sugar for an extra delicious bite, then topped with seasonal berries and caramel sauce.

Offers/Promotions

- Offer | 10% Off

Minimum \$8 purchase required. Valid 4/8 - 4/30.

- National Cold Brew Day | 20% Off

20% off one Sweet Cream Cold Brew. Valid 4/20 only.

- Ongoing | All Day Diner Deals

Menu items starting at \$5.99, featuring Everyday Value Slam, All You Can Eat Pancakes, and more.

Additional Messages

- N/A



First Watch

eClub/Loyalty

- N/A

LTO

- New | Spring Menu
Featuring Shrimp & Grits, Hawaiian French Toast, Hacienda Hash, Tropical Sunrise Juice, and Holey Donuts.

Offers/Promotions

- N/A

Additional Messages

- Social | Collab with @simjiofficial
Simji creates custom rugs and designed on based on First Watch's Million Dollar Bacon. She was invited to headquarters to meet the Head Chef and hosted a giveaway on her social channels.



Fleming's

eClub/Loyalty

- Loyalty Sign-Up Offer
\$10 reward on next dining visit.

LTO

- 2-Course Spring Prix Fixe Menu | \$71
Featuring Baby Kale & Beet Salad and choice of the following: Tarragon-Mustard Petite Filet, Carrot Ginger Halibut or New Zealand Rack of Lamb.

Offers/Promotions

- Gift Card Special | Buy \$100, Get \$20
Receive a \$20 e-bonus card for every \$100 in gift cards purchased. Valid through 6/23.
- Ongoing | Social Hour
Sunday-Thursday 4PM-6PM with shareable bar bites and \$9 hand-crafted cocktails.
- Ongoing | Sunday Surf & Turf
Filet Mignon & North Atlantic Lobster Tail with their new Sunday 3-course meal for \$85 per guest.
- Ongoing | Tomahawk Twosday
Tuesday 3-course dinner for two for \$150. Features 35oz Prime Tomahawk, two salads, two sides, and two desserts.

Additional Messages

- Email | Started Promoting Mother's Day Reservations
- Email | Pushed Event Packages for Wedding Season



eClub/Loyalty

- To-Go | 20% Off First Online Order
With code: IHOP20.

LTO

- Partnership | Sonic The Hedgehog Menu
Menu items include Knuckles' Chicken Sandwich, Sonic's Blue Blur Special, Tails' 2x2x2, Dr. Eggman's Benedict, Amy's Sweet Strawberry Delight, and Shadow's Chaos Chocolate Pancakes.
- NEW | Spring Menu
Featuring a Classic Chicken Sandwich, Cinn-A-Stack Milkshake, Kids French Toast Sticks, and more.
- NEW | Pancake of the Month - Cinnamon Apple Pecan
4 buttermilk pancakes topped with cinnamon apples, dulce de leche sauce, pecans, and whipped topping.
- NEW | Pepsi Maple Syrup Cola or Float

Offers/Promotions

- Gift Card Special | Buy a \$25 Gift Card, Get a \$5 Bonus Card
Offer available through 6/30. Bonus cards expire 8/25.
- Ongoing | iHOPPY Hour
Daily specials with entrées starting at \$6. Available starting at 3PM.
- Ongoing | Kids Eat Free
One Free Kids entrée with each full-priced adult entrée everyday from 4-10PM.
- Ongoing | Family Feasts To-Go
iHOP 'N Go only. Choose from 2 feasts, both \$39.99.

Additional Messages

- Social | Promoted Plant-Based Items for Earth Day
- Social | Sonic the Hedgehog Giveaway
Guests had the chance to win a bundle of Sonic the Hedgehog figurines and limited-edition gift cards.



Lazy Dog

eClub/Loyalty

- Loyalty Sign-Up Offer
Free appetizer or dessert on next dining visit.

LTO

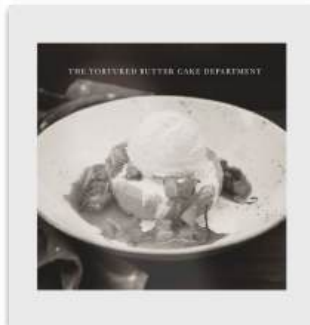
- NEW | Spring Seasonal Menu
Featuring Bacon Cheddar Biscuits, Pretzel-crusted Chicken Schnitzel, Cuban Sandwich, Shrimp Yakisoba Noodles Roadtrip Bowl, Pumpkin Cheesecake, S'more Brownie Sundae, Mountain Berry Pancakes, Blood Orange Margarita, Citrus Lime Drop, Spiced Apple Smash and Mocha Martini.
- \$5 16oz. House Beer Pours
Choose from Huckleberry Haze IPA, Lighting Jack Light Lager, Ankle Buster Blonde, Liquid Blanket IPA, and more.

Offers/Promotions

- TV Dinners | Buy 5, Get 1 Free
Available in-restaurant and online.
- House Beer | 2 for \$25 4-Packs
- Lazy Dog Beer Club Membership
Join and get \$39 off your next visit, plus 10% off takeout and free beer upgrades.
- Ongoing | Free Delivery
On orders over \$25 only through their website.
- Ongoing | Family Meals Starting at \$5 per person
Starting at \$25.
- Ongoing | Happy Hour
Mon-Fri 3PM-6PM and Sun-Thurs 9PM-close.

Additional Messages

- Pushed Mother's Day Reservations
Cross promoting with Jolene's to offer \$1 wings.



Lucille's Barbeque

eClub/Loyalty

- Loyalty Sign-Up Offer
Receive a \$10 off \$30 coupon after sign up.

LTO

- 3-Course Dino Beef Rib Dinner 4/22 | \$195
Serves 4-6. An 18% service charge will also be applied.
- Pitmaster's BBQ Tour Platters
Combos include two slow-smoked bar-b-que meat selections and three sides, freshly baked biscuits and apple butter. Starting at \$27.99.

Offers/Promotions

- National Burrito Day | Cheese-Crusted Brisket Burrito
Only available 4/4 for dine-in.
- Solar Eclipse | \$10 Off \$30
Enjoy \$10 off your order of \$30 or more. Available 4/8 only.
- Free Banana Pudding with Brisket Entrée Purchase
Available 4/22 - 5/1.
- Limited-Edition Spring Merch
Items include hats, beanies, tote bags, coffee mugs, and more.
- Ongoing | Happy Hour
Specials starting at \$. Monday-Friday 3-7PM and Every Day 9PM - Close.

Additional Messages

- Email | Pushed Mother's Day Pre-Orders



Maggiano's Little Italy

eClub/Loyalty

- Loyalty Sign-Up Offer
Receive a \$10 off coupon after sign up.

LTO

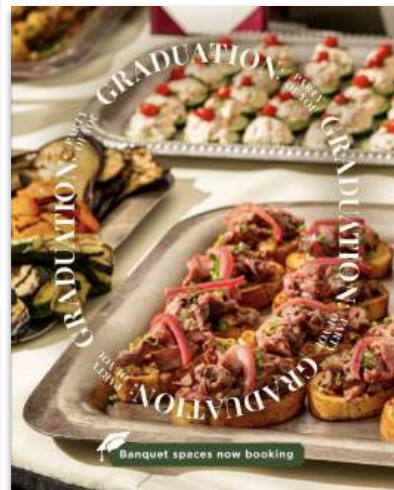
- Make-A-Wish Wine Dinner 4/25 | \$90 Per Person
4-course dinner featuring J Lohr Wines. \$10 from each ticket will be donated to the Make-A-Wish Foundation.

Offers/Promotions

- 3-Course Lunch | \$20
Choose a salad, entrée, and a drink or dessert. Available for carryout or delivery only Monday-Friday, open-3PM.
- Gift Card Flash Sale | Buy \$75, Get \$20
Offer available 4/18 only. Normal offer is spend \$100, get a \$20 bonus card.
- Ongoing | Happy Hour Mon - Fri from 3PM - 6PM

Additional Messages

- Email | Pushed Mother's Day Reservations
- Email | Promoted Event Hosting for Rehearsal Dinners
- Email | Admin Professionals Catering Push
- Local Events
Featuring wine dinners, murder mystery dinners, and kids cooking classes.



Mendocino Farms

eClub/Loyalty

- Loyalty | \$5 Off \$15 Offer

LTO

- NEW | Farmer's Market Pesto Salad

Featuring fresh mozzarella, marinated peppers, Kumato tomatoes, carrots, red onions, honey roasted almonds, chopped romaine, mixed greens with basil pesto vinaigrette.

Offers/Promotions

- N/A

Additional Messages

- Email | Pushed Catering for Graduation Season & Teacher Appreciation
- Opening | Newport Beach

Located at Fashion Island Shopping Center. Guests who signed up for rewards could receive a free entrée to redeem during the grand opening.



Moe's Southwest Grill

eClub/Loyalty

- Loyalty Sign-Up Offer
Sign up and receive a free cup of Moe's Famous queso.
- Loyalty | Moe Monday
Members receive an exclusive Moe Monday offer every week.

LTO

- N/A

Offers/Promotions

- National Burrito Day | BOGO Burritos & Bowls
Buy one burrito or bowl and receive a second for free. Only available 4/4 at participating locations,
- Moe's x Cinnabon | 20% Off
Join or sign into your Cinnabon Rewards account and receive 20% off your order. Expires 14 days after linking account.

Additional Messages

- April Fool's Day Collab | Sonic
Fooled guests by announcing a new SONIC Queso Slush featuring Moe's famous queso.



North Italia

eClub/Loyalty

- Loyalty Sign-Up Offer
\$10 off \$20 online purchase when subscribed to email club.

LTO

- Pi Day | 14 New Pizzas
This Pi Day through 4/10, enjoy our two new handcrafted pies that are the perfect ratio of Italian heritage and local flavor! (Hot Honey & Smoked Prosciutto, Truffle Hunter, Shrimp Fra Diavola, Piemonte Veggie, The Morty, The Cure, Pampanella, Winter In Puglia, The Siclian, Sunday Gravy, Fried Green Tomato Parmesan, Italian Supreme, The Heatwave, Not Your Neighbor's Cheesesteak).

Offers/Promotions

- Ongoing | Happy Hour
Mon-Thurs 3PM - 6PM.
- Ongoing | Beer, Wine & Cocktails To Go
Sangria, Sicilian Margarita, Ginger Margarita, Milano Mulle Kit, Aperol Spritz Kit.

Additional Messages

- Sweepstakes | Win a Trip To Rome
Order any Pi Day Pizza through 4/10 for a chance to win a 6-day trip to Rome for 2!
- Pop-up | Miami's Racing Fan Fest
Pop-up activation where they served food and beverages. Also, promoted a DoorDash partnership for every \$50 spent on North Italia through DoorDash, guests would receive \$10 off.



Olive Garden

eClub/Loyalty

- N/A

LTO

- NEW | Cocktails
Italian inspired cocktails including Sicilian Sunset and Strawberry Limoncello Margarita.
- NEW | Chocolate Lasagna
Layers of chocolate cake, mousse, and crushed wafers.

Offers/Promotions

- Ongoing | Create Your Own Pasta
Starting at \$13.49. Pick your pasta, sauce, and add a topping.
- Ongoing | \$6 Take Home Entrée
Get your favorite entrée while dining in at the restaurant and add a \$6 Take Home Entrée to go.

Additional Messages

- N/A



Outback

eClub/Loyalty

- Loyalty Sign-Up Offer
Receive a free Bloomin' Onion upon signing up for Dine Rewards.
- Gift Card Special | Buy \$50, Get \$20
Exclusive to Dine Reward members, receive double bonus cards from 4/22 - 4/24.

LTO

- NEW | Steak & Lobster \$19.99
- NEW | Koala Punch
Crafted with Bacardi®, Malibu® Pineapple, lemonade, mango and watermelon flavors, plus a koala chillin' on top.

Offers/Promotions

- Admin Professionals Day/Championship Game | \$50 Off Catering
\$50 off any \$250+ catering order with code: WORKHERO or STEAKPLEASE.
- Ongoing | Walk-a-Bout Wednesday
Choose a 6 oz Center-Cut Sirloin or Grilled Chicken on the Barbie, plus Aussie Fries and a 16 oz domestic draft beer or an ice-cold Coca-Cola starting at just \$13.99.
- Ongoing | Tuesday Tails
Sirloin & lobster, starting at \$24.99 every Tuesday.
- Ongoing | Happy Hour \$7 Cocktails
Every day.

Additional Messages

- N/A



Pacific Catch

eClub/Loyalty

- Ongoing | \$5 Off your next online order of \$20+
When you sign up for SMS texts.
- eClub Survey | \$5 Off Coupon
Survey respondents received a \$5 off coupon for their next online order and were entered for a chance to win one of 4 \$250 gift cards.

LTO

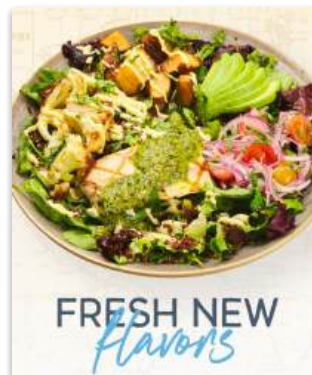
- NEW | Latin Flavors
Items include a Latin Chimichurri Bowl, Peruvian Aji Amarillo Fresh Catch, and Peruvian Patatas Bravas.
- NEW | Desserts
Pineapple "Right Side Up" Cake and Chocolate Lava Cake.

Offers/Promotions

- Ongoing | 5 for \$15 Lunch Menu
Lunch bowls and sandwiches for \$15 each. Available every weekday from 11am - 3pm.
- Ongoing | Happy Hour
Available Monday-Friday from 3-6PM. New additions to Happy Hour offerings.

Additional Messages

- Earth Day Partnership | Beach Clean Up with Surfrider
4/21 from 9-11AM in Half Moon Bay, in honor of Earth Day. Attendees received a bounceback card for a free shareable.



Panera Bread

eClub/Loyalty

- MyPanera Benefits
Monthly member exclusives, two MyPanera weeks, and members-only challenges and rewards. Free Treat & Free Delivery For 30 Days.
- Ongoing | 2 Free Months of Unlimited Sips Club
When you join, get 2 free months of Unlimited Sips Club. Includes unlimited coffee, teas, charged lemonades and fountain drinks.

LTO

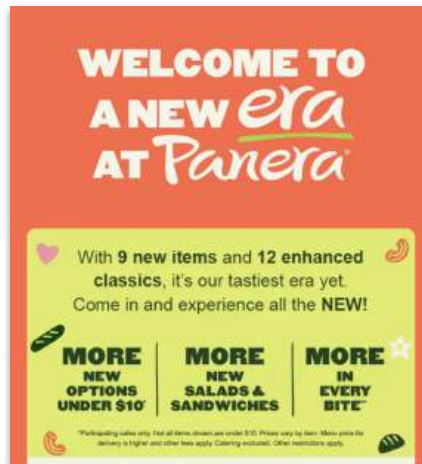
- Strawberry Poppyseed Salad is Back
Now including a larger portion of chicken.

Offers/Promotions

- New Menu Launch
9 new items added to the menu, along with 12 enhanced classics. They referred to this launch as a "New Era at Panera."
- NEW | Under \$10 Menu
Added 5 new menu options under \$10.
- e-Gift Card Special | 20% Off
20% off iMessage and online gift card purchases. Available through 4/30.
- \$30 Off Catering Order
Enjoy \$30 off your next catering order of \$150 or more. Use code EVENTERA.

Additional Messages

- N/A



Red Lobster

eClub/Loyalty

- Ongoing | Free Dozen Cheddar Bay Biscuits
Download the app and create a My Red Lobster Reward account to receive 12 Free Cheddar Bay Biscuits on your to go order of \$15 or more.
- Ongoing | 10% Off
When you sign up for My Red Lobster Rewards.

LTO

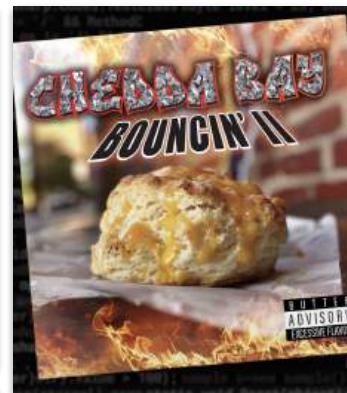
- NEW | Lobsterfest Entrées
Available through 4/14. 10 crowd-pleasing lobster creations. Newly added creations include the Dueling Southern Tails and the Crispy Lobster & Shrimp Stack served with hush puppies.
- NEW | Shrimp Your Way \$20
Choose 3 shrimp options for only \$20.

Offers/Promotions

- April Fool's Day | Cheddar Bay Breadsticks
Only available at the NYC Times Square location on 4/1 from 12-7PM.
- Gift Card Special | Buy \$50, Get \$20
Offer available 4/30 - 7/1.
- Ongoing | Daily Deals
Monday: Lobster & Shrimp Scampi, Tuesday: Crab Your Way, Wednesday: Steak & Lobster, Thursday: Sea Scallops & Shrimp and Friday: Fish & Chips.

Additional Messages

- AI-Generated Cheddar Bay Playlist
Used AI to generate love songs about the famous Cheddar Bay Biscuits.



Rubio's

eClub/Loyalty

- Ongoing | \$5 Off for Joining Rubio's Rewards
- Cinco de Mayo Catering | \$20-\$40 Off
\$20 off orders of \$100+ or \$40 off orders of \$200+. Only available for rewards members.

LTO

- NEW | Guajillo Lime Shrimp
Sweet, tangy, sustainably sourced. Salsa Guajillo is made from scratch every day.

Offers/Promotions

- National Burrito Day | \$8.99 Burritos
Valid 4/4 only with code: BURRITO.
- Free Delivery 4/4 - 4/8
- Gift Card Special | Buy \$25, Get \$5
Offer valid 4/26 - 6/30.
- Ongoing | Taco Tuesday Specials
Classic Chicken or Original Fish Taco (\$2.50), Fish Taco Especial or Steak Taco (\$3.00), and Shrimp Trio (\$10.99).
- Ongoing | 5 Under \$10 Menu Items
Baja-inspired menu items: Classic Trio, Chicken Chilaquiles Bowl, Chopped Chicken Salad, Baja Grilled Chicken Burrito, and Baja Beer-Battered Shrimp 2 Taco Plate.

Additional Messages

- Padres Partnership | Steal a Base, Score a Taco.
Every time the Padres steal a base at a home game, you score a free taco with any purchase the next day! Choose from our Original Fish Taco®, Salsa Verde Shrimp Taco, Classic Chicken Taco and more.



Ruth's Chris Steakhouse

eClub/Loyalty

- N/A

LTO

- NEW | Filet & Rosé
6 oz. filet, topped with 3 grilled shrimp, paired with a glass of Whispering Angel Rosé. Available starting at \$42 in the bar area only.

Offers/Promotions

- NEW | Rombauer TasteMaker Dinner
4-course dinner featuring Rombauer Vineyards wines during the month of April.
- Ongoing | Happy Hour
Full-size appetizers starting at \$11 as well as hand-crafted cocktails and wine starting at \$9.

Additional Messages

- Email | Pushed Mother's Day Reservations



Shake Shack

eClub/Loyalty

- **Loyalty Sign-Up Offer**
Get \$5 off when you sign up. Offer valid for 30 days from date of email receipt for orders placed on the Shake Shack Mobile App or via shakeshack.com at participating Shake Shack locations.

LTO

- **LTO | Korean BBQ Menu**
Includes Korean BBQ Burger, Korean Style Fried Chicken, Spicy Korean BBQ Cheese Fries, Spicy Korean BBQ Fries.
- **LTO | Summer Shakes**
Includes Peaches and Cream Shake, Chocolate Salted Caramel Shake, and Strawberry Frosted Donut Shake.

Offers/Promotions

- **Free Chicken Sandwich on Sundays**
Aimed as a dig to Chick-Fil-A, Shake Shack offered free Chicken Sandwiches on Sundays with any \$10 purchase. Available every Sunday in April.
- **Free Avocado Upgrade**
Free avocado added to any sandwich or burger 4/25 - 4/28 with code: FREEAVO.
- **Gift Card Special | Buy \$25, Get \$5**
Offer available 4/29 - 6/16.

Additional Messages

- **Giveaway | Win a Trip to NYC**
In partnership with Avocados from Mexico, they are giving away a trip to NYC for an exclusive visit to the Shake Shack Innovation Kitchen to get a look at a special avocado menu.



Sweetgreen

eClub/Loyalty

- Sweetpass
Free Birthday Gift, Rewards and Challenges, Bowl Drops, and Merch Drops.

LTO

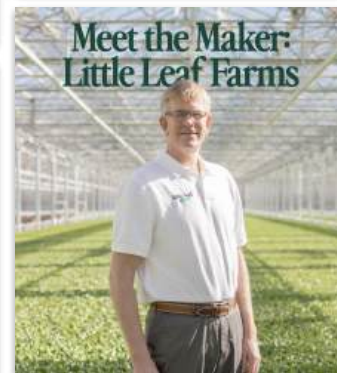
- LTO | Protein Plates
Choose from BBQ Salmon, Southwest Chicken Fajita, Miso Glazed Salmon and Hot Honey Chicken.

Offers/Promotions

- N/A

Additional Messages

- April Fool's Day | Miso Ginger Toothpaste
Fooled guests on social by announcing Miso Ginger flavored toothpaste on social channels.
- Email | Highlighted Farm Vendors for Earth Month



TGI Fridays

eClub/Loyalty

- Loyalty Sign-Up Offer
Free appetizer with your next entrée purchase.
- FREE Birthday Dessert

LTO

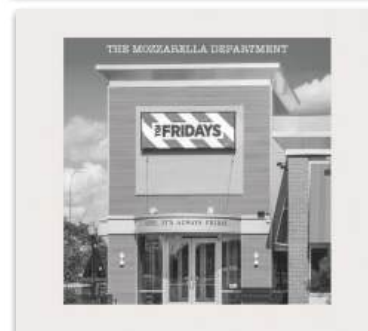
- NEW | Fridays Feast Pick 3
Featuring Whiskey-Glazed Pork Big Ribs, Crispy Shrimp & NEW Whiskey-Glazed Crispy Chicken Tenders.
- LTO | Tax Break Cocktail
Featuring 1800 Silver Tequila, strawberry, passionfruit, fresh citrus and agave. Served with a hitchhiker of Hennessy V.S.

Offers/Promotions

- National Beer Day | \$3 Beer All Day
Includes all drafts, bottles, and cans.
- Admin Professionals Day | Free App or Dessert
Valid with entrée purchase on 4/24. Dine-in only.
- NEW | BOGO Entrées
Buy one entrée and get a free entrée of an equal or lesser value. Dine-in only.
- NEW | Meal Deals Starting at \$9.99
Choose an entrée, side and drink.
- Ongoing | \$5 Happy Hour
Premium cocktails, beers and bites, all for \$5. Available every day from 3-6PM and 9PM-close.
- Ongoing | Wing Mondays
\$0.50 wings + \$2 beer every Monday 5PM - close.
- Ongoing | 10 for \$10 Lunch Entrées
For a limited time, available Monday - Friday until 3PM.

Additional Messages

- N/A



Torchy's Tacos

eClub/Loyalty

- Loyalty Sign-Up Offer
Free Queso & Chips for signing up.

LTO

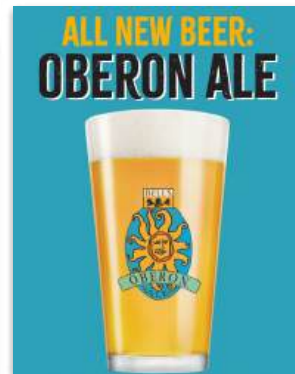
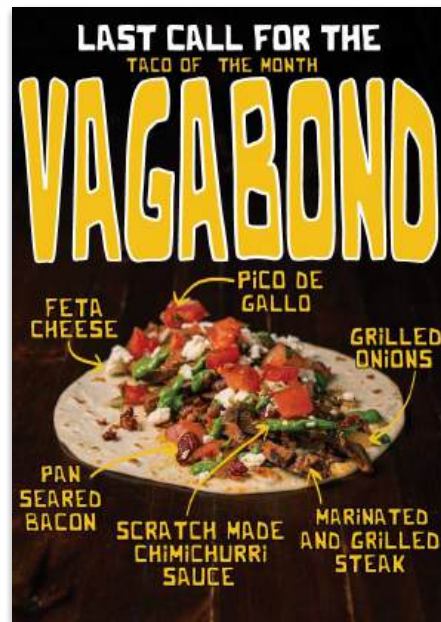
- LTO | Taco of the Month - "Vagabond"
Marinated grilled steak, bacon, grilled fajita onions, Chimichurri sauce, feta cheese, and pico de gallo, all served on a flour tortilla.
- NEW | Oberon Ale
Brewed by Bell's Brewery, this ale is a citrusy, easy drinking and refreshing beer.
- NEW | Mexican Candy Margarita
Featuring Don Julio Blanco Tequila, Grand Marnier, watermelon purée, house margarita mix, and a dash of Tabasco with a Tajín rim.

Offers/Promotions

- 4/20 | 4 Tacos for \$20
In-store only.
- Ongoing | Happy Hour
\$2 off margaritas and signature sips & \$1.50 off beers. Available Monday-Friday from 3-6PM.

Additional Messages

- Social | Early Cinco de Mayo Giveaways
Each week guests have a chance to win a variety of prizes, including a Torchy's Tacos custom decanter and 2 glasses, custom Torchy's cooler, and more.



Urban Plates

eClub/Loyalty

- Ongoing | Plate Plus Membership
Subscription service where members can save 20% on all main menu food and beverage purchases made at the restaurant, on the website, or app. Fee is \$5 per month.

LTO

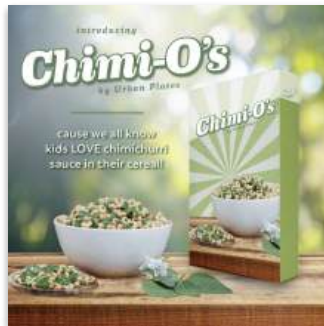
- LTO | Spring Menu
Featuring Roasted Barramundi Sea Bass, Roasted Sweet Potatoes, Balsamic Brussels Sprouts, Garlic Parmesan Mushrooms, Green Lentil Soup, Blueberry Ginger Limeade, Peanut Butter Chocolate Cream Pie.

Offers/Promotions

- Ongoing | 13 Under \$13.95
Pushing everyday value by offering 13 meals under \$13.95. Items include Nashville Hot Tender Sandwich, Chicken 2 Tender Plate, Moroccan Chicken Braise, a variety of salads and more.

Additional Messages

- April Fool's Day | Chimi-O's
Fooled guests on social by announcing Chimi-O's cereal featuring chimichurri.



actual image of the inside of my brain



Urbane Cafe

eClub/Loyalty

- Order Grilled Cheese & Get 100 Points
Order the Gourmet Grilled Cheese or the Kids Grilled Cheese online and get 100 bonus points. Only available 4/12.

LTO

- NEW | Lemon Parmesan Caesar Salad
Chopped salad mix, marinated kale, pickled onions, grape tomatoes, shaved parmesan, housemade focaccia croutons. Served with Lemon Parmesan Dressing.
- NEW | Mango Lemonade
They brought back their Mango Lemonade for the Spring season. Promoted mixing it with their agua fresca and soda for unique drink hacks.

Offers/Promotions

- Admin Professionals Day | Free Delivery
Minimum order of \$25+/- Available 4/25 only..

Additional Messages

- Now Offering Snickerdoodle Cookies
- Social | Announced Reduction in Plastic Use on Earth Day
They will now offer plant starch-based utensils, paper-based cups, and fully compostable paper bottoms for salad, sandwich, and bowl containers.
- April Fool's Day | OC Pets
Fooled guests online by announcing a pet food line, tailored to dogs and cats.
- Partnership | Serving Our Kids Foundation
Those who dine in from 10:30AM-1:30PM on 4/12 & 4/13 will have the opportunity to donate to the cause.



Yard House

eClub/Loyalty

- Loyalty Sign-Up Offer
Free Appetizer for signing up.

LTO

- NEW | House Hazy IPA
Collab with @newbelgium with fruity and tropical hops and is dry-hopped with IPA hits like Citra and Cascade.

Offers/Promotions

- National Beer Day | \$10 Half Yards
\$10 Half Yards of select House Beers available all day 4/7.
- IPA Madness | \$15 IPA Flight + Pint
*Available through 4/8. Four new IPA brews are battling for bragging rights for this year's IPA Madness. Featuring Voodoo 1985 Mango IPA, House Hazy IPA, Stone Delicious Hazy IPA, and Sweetwater Half-a-Gummie Fruit Punch IPA.
WINNER: Voodoo 1985 Mango IPA.*
- Ongoing | Happy Hour
*\$2 off local draft beer & all drinks; 1/2 off selected appetizers & all pizzas.
Monday-Friday, 3-6PM.*

Additional Messages

- N/A

