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Asociación de Restaurantes de Puerto Rico

ANIVERSARIO
The Research Office

Presentation
October 9, 2025


"CONSUMERS ARE DRIVEN TO RESTAURANTS BY MORE THAN JUST FOOD. THE OPPORTUNITY TO SOCIALIZE IS A POWERFUL & UNIQUE ADVANTAGE"

Study Background Overview

Design

Personal, face-to-face, house-to-house interviews

Sampling error

±3.1% for Total sample. Greater for subgroups

Design & Sample

Sample

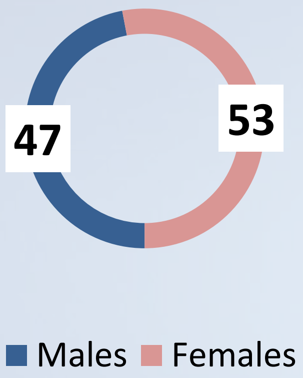
1,000 adults 18-69 in all of PR, all SEL. Past 3 Months users of Limited-Service Restaurants or Past 6 Months users of Full-Service Restaurants

Timing

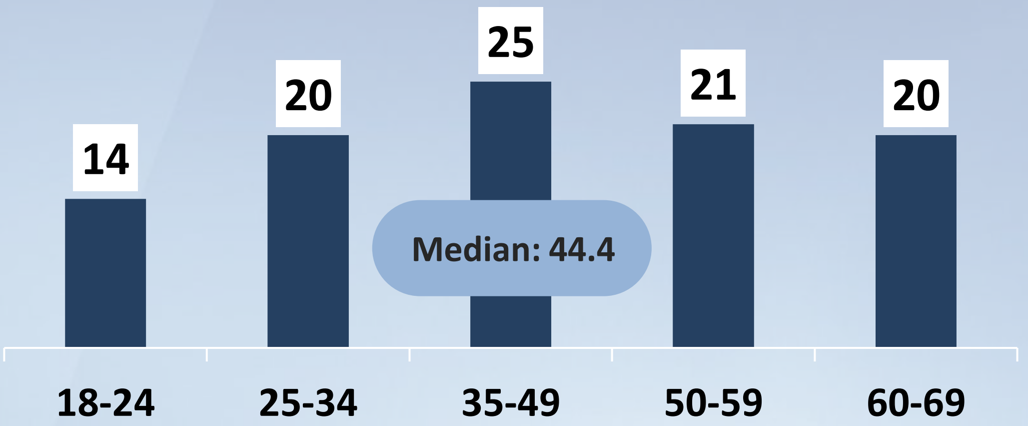
August 30 – September 24, 2025

Sample Composition Overview

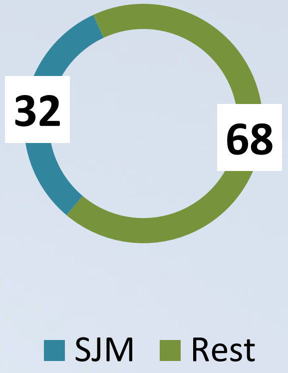
Gender (%)



Age groups (%)



Area (%)

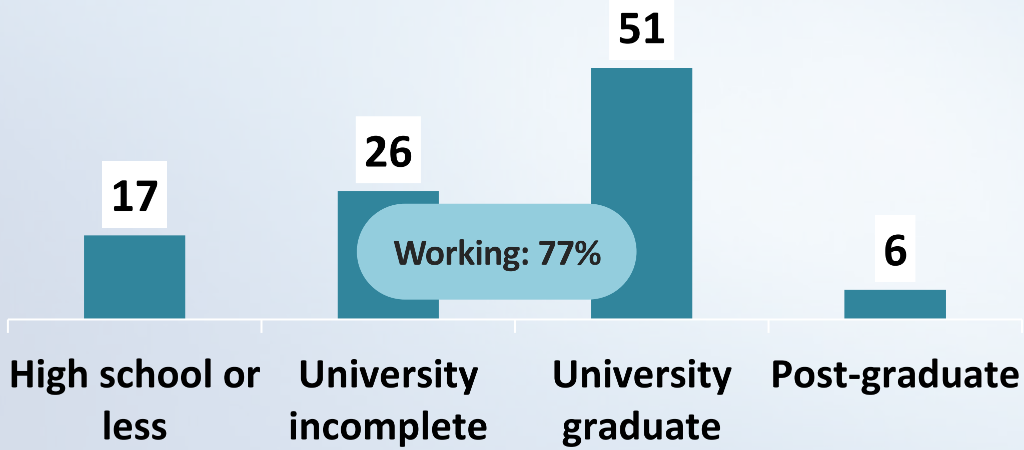


Married or Living together

70%

36% With kids

Level of Education (%)



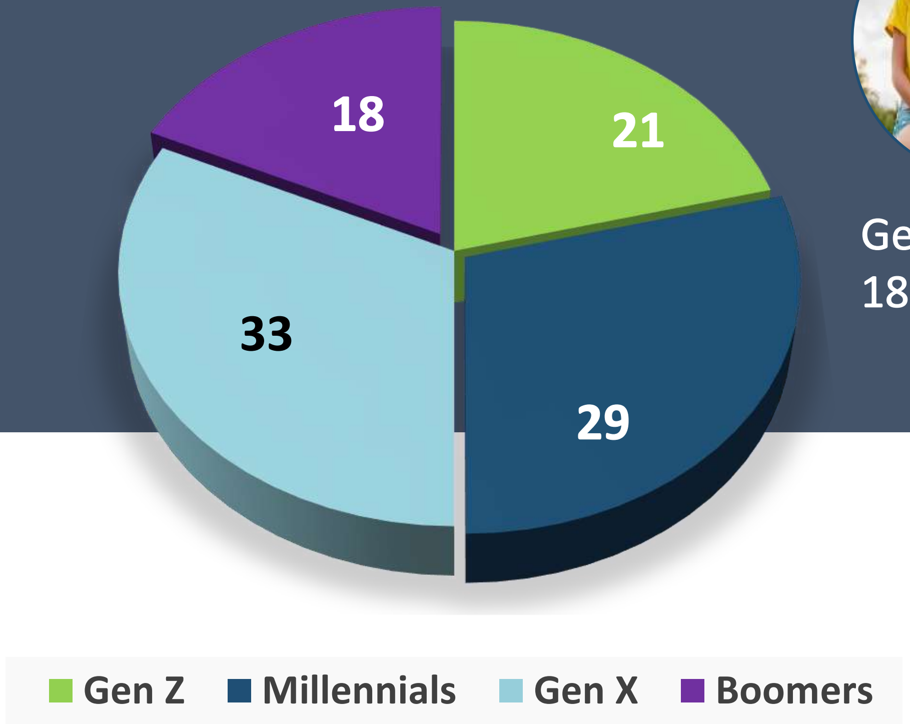
NAP Beneficiaries

33%

100% in D-/E SEL
53% in C-/D+ SEL
43% in Non-working
30% in Working

Results by Generations

Throughout this report, there are multiple tables showing results by Generation, specifically Generation Z Adults, Millennials, Generation X and Baby Boomers. Below are the weights of each Generational segment and their age definitions.



Gen Z Adults:
18 to 28 years old

Millennials:
29 to 44 years old

Generation X:
45 to 60 years old

Baby Boomers:
61 to 69 years old

The age range for each Generation has been updated to be aligned with the definition used by the National Restaurant Association

Results By Socio-Economic Level (SEL)

There are also multiple tables showing results by Socio-Economic Level (SEL), divided between Upper, Middle, Middle-Lower and Lower. Below are the weights of each SEL and the variables used to compute SEL.

	Upper	Middle	Middle-Lower	Lower
	16%	34%	37%	13%
2024	15%	32%	37%	16%
	A & B SEL	C+ & C SEL	C- & D+ SEL	D- & E SEL
	Upper + Middle-Upper	Middle-ascendant + Middle	Middle-descendant + Middle-Lower ascendant	Middle-Lower descendant + Lower

The Research Office uses an **11-variable equation to determine SEL** rather than relying solely on reported annual household income. This equation includes:
1) Work status; 2) Occupation; 3) Level of education; 4) Annual household income; 5) Number of persons contributing to income; 6) Welfare assistance (NAP, WIC); 7) Commodity ownership; 9) Ownership of financial products; 9) Area of residence; 10) Approximate value of residence; and 11) Type of dwelling

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Contents

The Full Report of this study includes 10 key sections with detailed results, with additional complementary information on Values, Attitudes & Lifestyles, Preference with Distilled Spirits and Alcohol Beverages, and Profiles

Main Lessons Learned

Socializing with friends and family is the leading reason why consumers enjoy using restaurants. Desire for food and convenience also drive preference over cooking at home

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Value offerings are critical for consumers and will continue to be an important driver of traffic. Financially-stressed users want specials and more for their dollar

Consumers appreciate more than good value in restaurants. They also want a clean, friendly and welcoming experience, with attentive service and short wait times

Unfulfilled demand is at its highest, overall, and for many types of restaurants. But consumers must be properly stimulated to use these more frequently and spend more. Value and a promise of quality experience are motivators

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Main Lessons Learned

How Puerto Rican consumers are behaving and perceiving the Restaurant Industry in 2025

1

Use with restaurants is in line with 2024

Most types of restaurant show fully stable results across all KPIs. QSR continue to widely lead in Use. Bakeries have the strongest Loyalty and highest monthly frequency of use

2

Consumers are being more careful about their overall spending

Four adults in every 5 claim that the economic uncertainty is affecting their spending habits. Yet, expenditure in restaurants has remained stable and seems likely to remain unchanged

3

Consumers prioritize cleanliness and staff-related aspects in restaurants

As essential factors to improve the experience across all types of restaurants. Diners want to interact with staff that is knowledgeable about the food and beverages, and that is friendly and welcoming

Main Lessons Learned

How Puerto Rican consumers are behaving and perceiving the Restaurant Industry in 2025

4

Three in five consumers would like to use restaurants more frequently

If they had the money available to pay for it, which underscores the importance of a solid offer of value and a promise of an enjoyable experience

5

Value continues to be top of mind for consumers

With an overwhelming majority of users of most types of venues expecting specials, discounts and attractive promotions

6

Multiple triggers have comparable weight for choosing one restaurant over another

Led by value propositions, loyalty programs, healthier options and locally-sourced food. For QSRs, high quality, good service, innovation and products that are part of our diet are also critical

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Key Performance Indicators by Venues

Quick Service Restaurants

QSRs continue to have the highest Year-To-Date use, at 93%, and above 2024. QSR users show the highest importance of having daily specials. These restaurants command the highest Share of Wallet, at 26%

Used in 2025

93% ↑

Highest

91% in 2024

Last-time used: Past 7 Days

65%

63% in 2024

Recent Retention Past Month:Past Week

70%

# of times used/month

7.6

7.4 in 2024

Main days used

77%

Both weekdays & weekends

Importance of daily specials, offers

90%

Highest

Not as often as liked

28%

24% in 2024

Avg. expenditure/use

$23

$24 in 2024

Share of Wallet

26%

Highest

26% in 2024

Casual Diners

Casual Dining Restaurants (CDRs) show full stability vs. 2024 across all metrics. CDRs have the lowest loyalty of all restaurants, as measured by its Past Month users that have used again in Past Week, at 28%

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Used in 2025

46%

47% in 2024

Last-time used: Past 7 Days

21%

21% in 2024

Recent Retention Past Month:Past Week

28%

# of times used/month

3.5

3.7 in 2024

Main days used

51%

Weekends only

Importance of daily specials, offers

82%

Not as often as liked

55%

56% in 2024

Avg. expenditure/use

$49

$52 in 2024

Share of Wallet

12%

14% in 2024

Bakeries

Bakeries hold various record-high scores, including the highest proportion –among all restaurant users– of Past 7 Days use, highest Recent Retention (Past Month-to-Past Week), and highest number of uses per month (9.9)

Used in 2025

45%

43% in 2024

Last-time used: Past 7 Days

71%

Highest

73% in 2024

Recent Retention Past Month:Past Week

79%

Highest

# of times used/month

9.9

Highest

9.3 in 2024

Main days used

54%

Both weekdays & weekends

Importance of daily specials, offers

77%

Not as often as liked

28% ↑

23% in 2024

Avg. expenditure/use

$13

$11 in 2024

Share of Wallet

9% ↑

7% in 2024

Cafeterias

Cafeterias are only one of three venues that shows growth in Year-To-Date use vs. 2024, now at 35%. Fully two-thirds (68%) of its Past Month patrons have used again in Past Week. The importance of daily specials is at a peak

Used in 2025	Last-time used: Past 7 Days	Recent Retention Past Month:Past Week
35% ↑	**60%**	**68%**
30% in 2024	59% in 2024	

# of times used/month	Main days used	Importance of daily specials, offers
8.4	**67%**	**86%**
8.2 in 2024	Weekdays only	Highest

Not as often as liked	Avg. expenditure/use	Share of Wallet
33%	**$12**	**5%**
36% in 2024	$10 in 2024	4% in 2024

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Family Restaurants

Family Restaurants also have stable results vs. 2024, but have the second lowest Recent Retention rate (proportion of Past Month-to-Past Week users), at 2 in 5. These command a 10% Share of Wallet, the fourth highest

Used in 2025

31%

33% in 2024

Last-time used: Past 7 Days

30%

33% in 2024

Recent Retention Past Month:Past Week

39%

# of times used/month

3.8

3.9 in 2024

Main days used

56%

Weekends only

Importance of daily specials, offers

71%

Not as often as liked

38%

42% in 2024

Avg. expenditure/use

$54

$56 in 2024

Share of Wallet

10%

12% in 2024

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Pizza Restaurants

While overall Year-To-Date use is on parity vs. 2024, the average number of monthly uses shows a significant increase, from 4.1 to 5.0 times. Its pent-up demand (not used as often as liked), also shows an increase vs. 2024

Used in 2025	Last-time used: Past 7 Days	Recent Retention Past Month:Past Week
26%	**35%**	**47%**
27% in 2024	36% in 2024	

# of times used/month	Main days used	Importance of daily specials, offers
5.0 ↑	**50%** Weekends only	**84%**
4.1 in 2024		

Not as often as liked	Avg. expenditure/use	Share of Wallet
53% ↑	**$31**	**6%**
46% in 2024	$30 in 2024	5% in 2024

Chinchorros

Chinchorros are one of three venues that show Year-To-Date growth vs. 2024, up from 18% to 21%. These are used, on average, 5.1 times per month. Seven in 10 place higher importance on specials, meaning happy hours

Used in 2025

21% ↑

18% in 2024

Last-time used: Past 7 Days

58%

55% in 2024

Recent Retention Past Month:Past Week

67%

# of times used/month

5.1

5.5 in 2024

Main days used

67%

Weekends only

Importance of daily specials, offers

72%

Not as often as liked

45%

44% in 2024

Avg. expenditure/use

$28

$30 in 2024

Share of Wallet

N/A

N/A in 2024

Fine Dining Restaurants

Fine Dining Restaurants show full stability in the broad use metrics. These continue to show the highest pent-up demand, with 65% of its patrons stating that these are not used as often as desired. Its expenditure is the highest

Used in 2025	Last-time used: Past 7 Days	Recent Retention Past Month:Past Week
16%	26%	40%
17% in 2024	27% in 2024	

# of times used/month	Main days used	Importance of daily specials, offers
4.4	48% Weekends only	66%
4.5 in 2024		

Not as often as liked	Avg. expenditure/use	Share of Wallet
65% Highest	$111 Highest	12%
65% in 2024	$102 in 2024	12% in 2024

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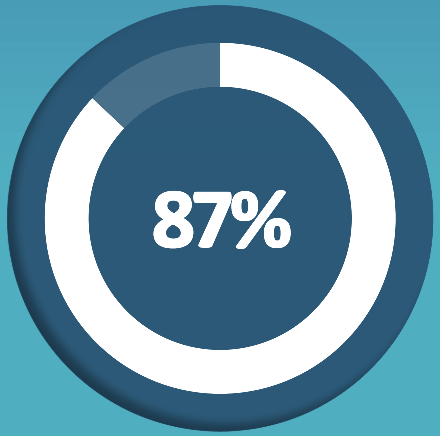
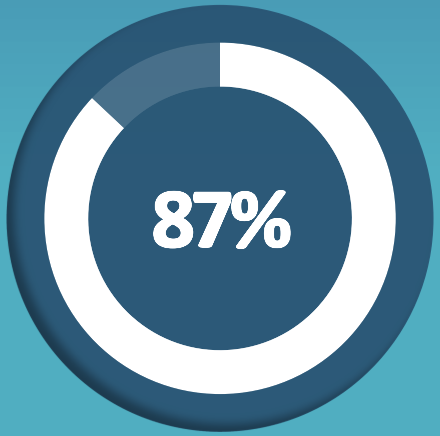
Satisfaction with Key Attributes of Restaurants

Percent of adults who say they are satisfied with the following attributes of restaurants

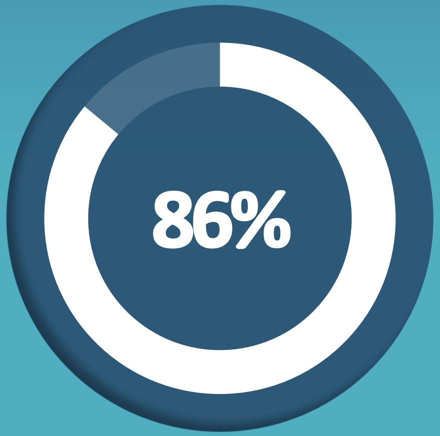
Consumers continue to be widely satisfied with different aspects of their restaurant experiences



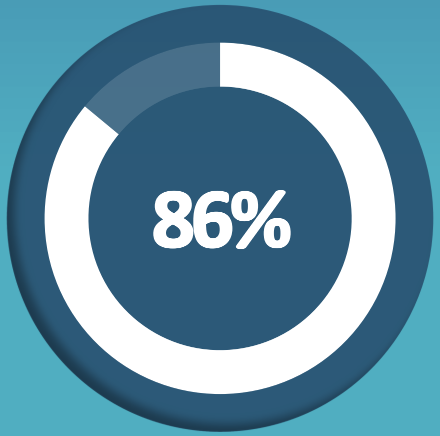
Food ready in reasonable time



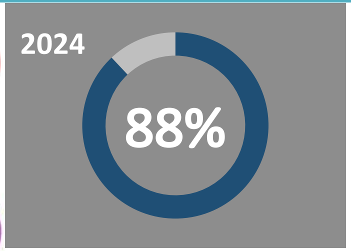
Cleanliness

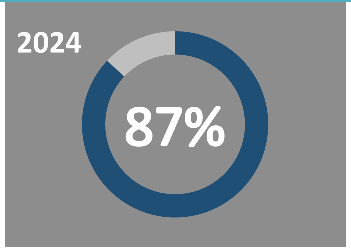


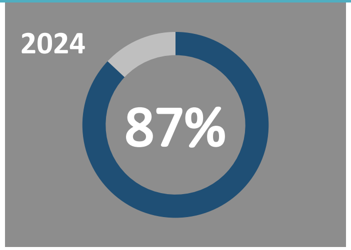
Service in general

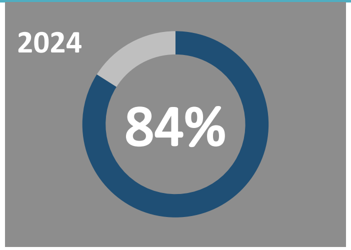


Value received for price paid









Statistically significant decreases or increases (at the 90% confidence level) vs. 2024 results

Satisfaction with Key Attributes of Restaurants

Percent of adults who say they are satisfied with the following attributes of restaurants

Most attributes show parity in their Satisfaction scores vs. 2024. 'Food quality' is up

85%
Food quality

85%
Carryout & Delivery service

82%
Courteousness of staff

80%
Quickness of service

2024
81%

2024
83%

2024
87%

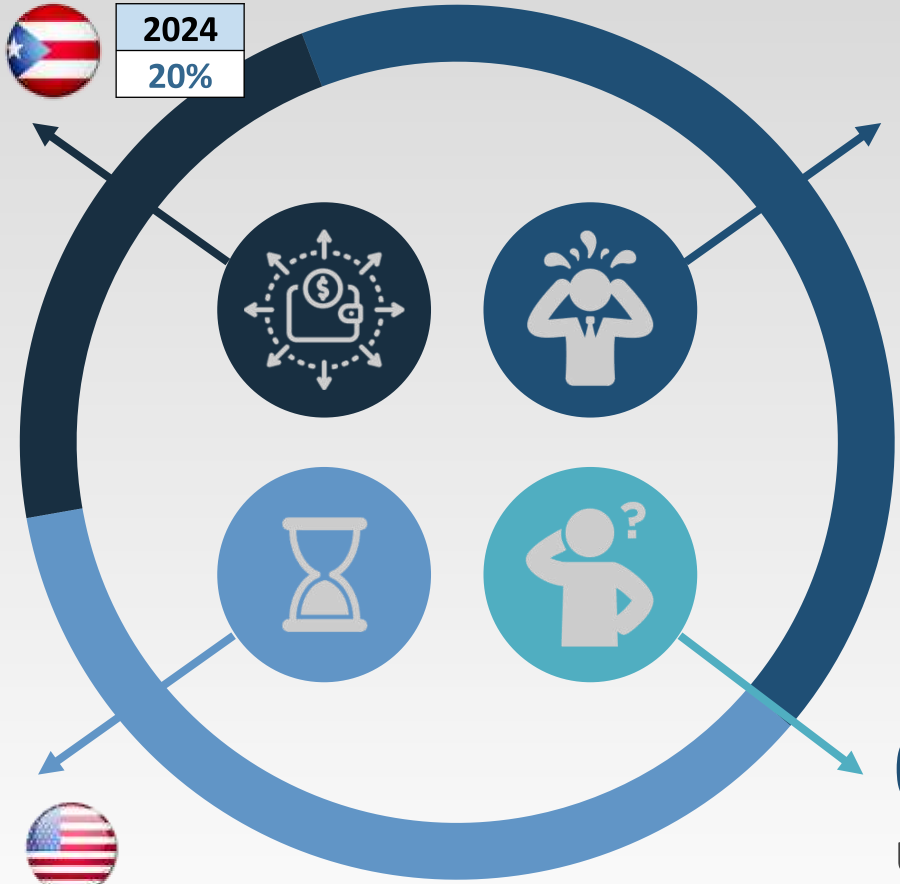
2024
80%

Statistically significant decreases or increases (at the 90% confidence level) vs. 2024 results

The Mood Of Consumers

Current Behavior With Personal Expenditures

The leading behavior, with 42%, continues to be the 'wait-and-see' attitude that limits spending



22%

2024
20%

Confident in personal finances and not holding back on spending

Higher: Upper SEL

2025
19%

36%

2024
32%

Very concerned about personal finances and holding back significantly on spending

Higher: Boomers, Lower SEL, EBT beneficiaries

2025
40%

42%

2024
41%

Taking a wait-and-see approach, and holding back somewhat on spending

Higher: SJM, Upper SEL

2025
41%

0%

Unsure

2024
7%

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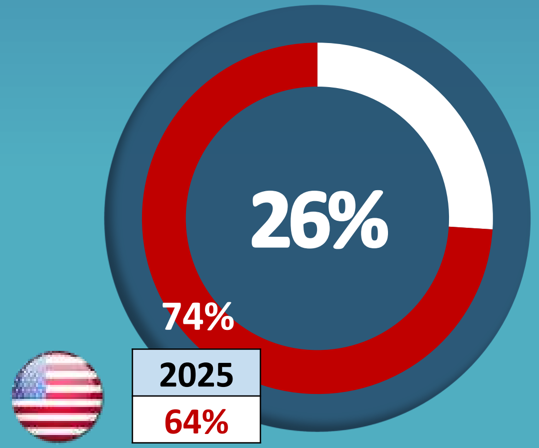
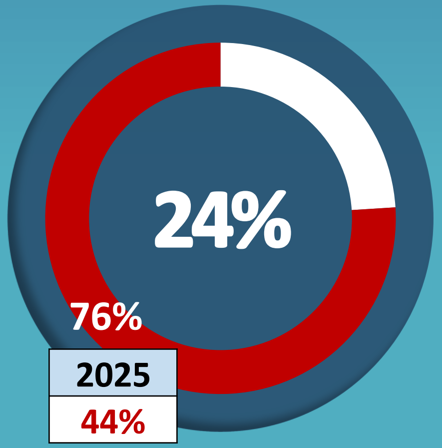
Ease or Difficulty of Financial-related behaviors

Ranked by percent of adults who say it is ‘easy’ for them

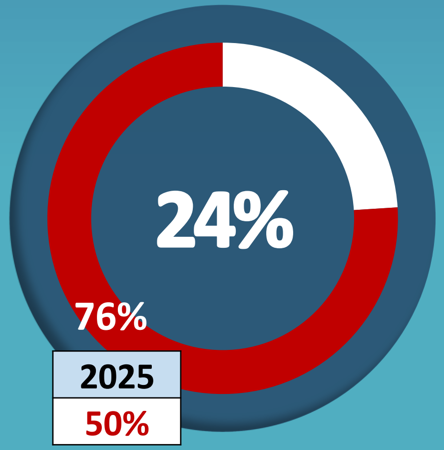
On average, 1 in 4 consumers find it ‘easy’ to do meet these financial goals and responsibilities



Save for things like a vacation or car



Keep up with monthly housing costs, whether you rent or own



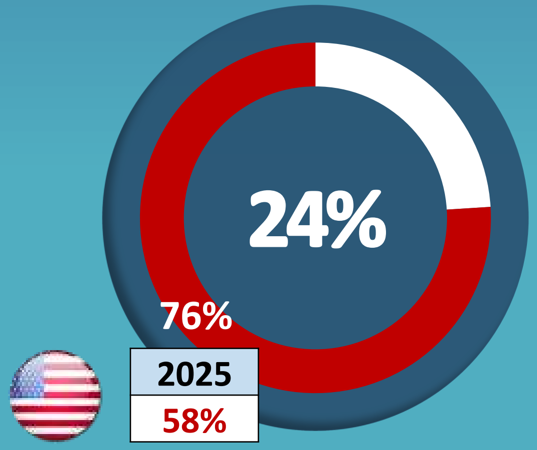
Keep up with basic expenses and the cost of living

Easy Difficult

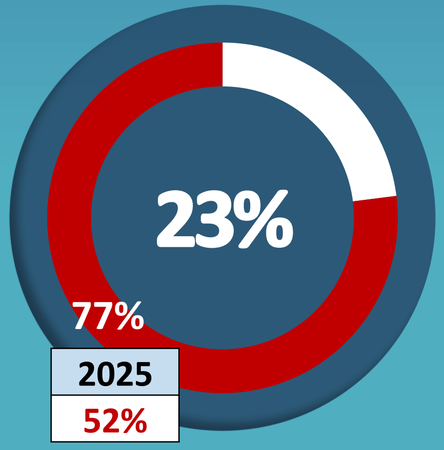
Ease or Difficulty of Financial-related behaviors

Ranked by percent of adults who say it is 'easy' for them

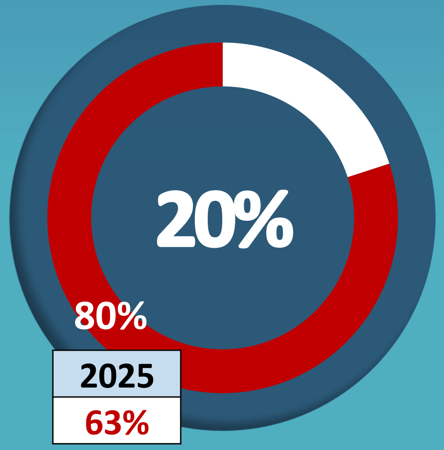
Conversely, 3 in 4 find it consistently 'difficult' to comply with these financial responsibilities



Have enough money to live comfortably and maintain lifestyle



Pay off debt like loans and credit cards



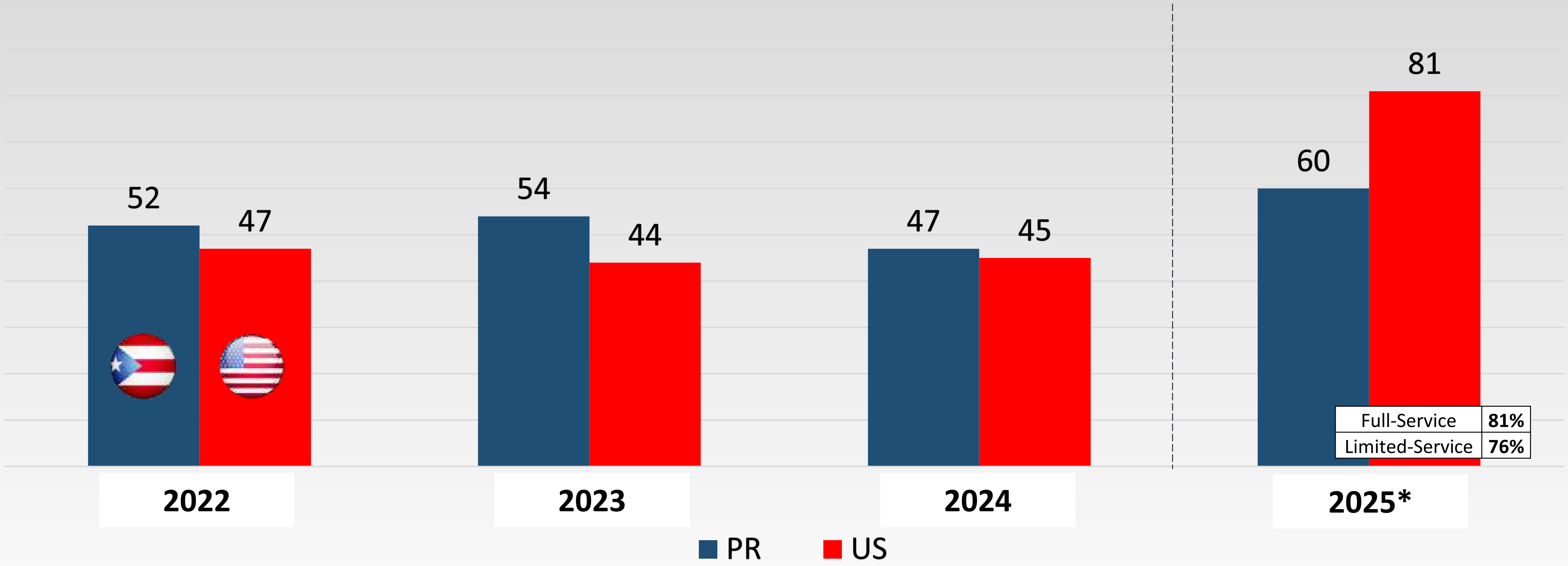
Save for retirement

Easy Difficult

Pent-up Demand[1] For On-Premise In PR vs. US (%)

Percent of adults who say they are not eating at restaurants as often as they would like, if they had the money available to pay for it

Fully 3 in 5 (60%) consumers say they would like to eat at restaurants more often, higher than 2024



[1]**Pent up demand** refers to a situation when **demand** for a service or product is unusually strong. Economists generally use the term to describe the general public's return to consumerism following a period of decreased spending.

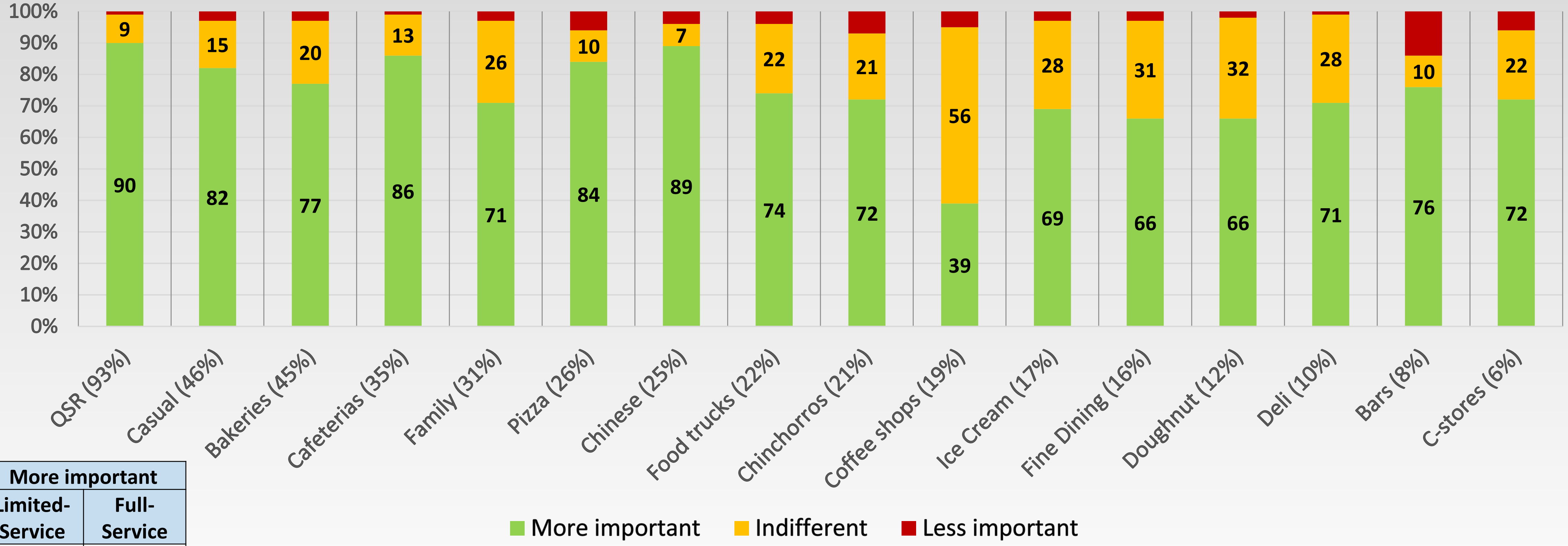
US Source: National Restaurant Association, *National Household Surveys, 2022 – 2025* / ***Wording changed in 2025 in PR & US**

Usage Trends

Importance of having a Daily Special, Discount or Promotion (%)

Over base that has used each during 2025

This new metric confirms the widespread relevance of specials and temporary price reductions



More important	
Limited-Service	Full-Service
75%	62%

Triggers to choose one QSR brand over another

Percent of adults who say each factor has 'much influence' in this decision

'High quality meals and ingredients' and 'good service' are the main triggers in the decision tree

59%
High-quality meals and ingredients

58%
Good service, in-store and drive-thru

57%
Innovative products that are not more of the same

57%
Products identified with PR, part of our diet

Triggers to choose one QSR brand over another

Percent of adults who say each factor has 'much influence' in this decision

Yet, eight other factors have comparable weight as triggers to choose one QSR brand over another

56%
Its offers and specials, including combos

55%
Convenient locations

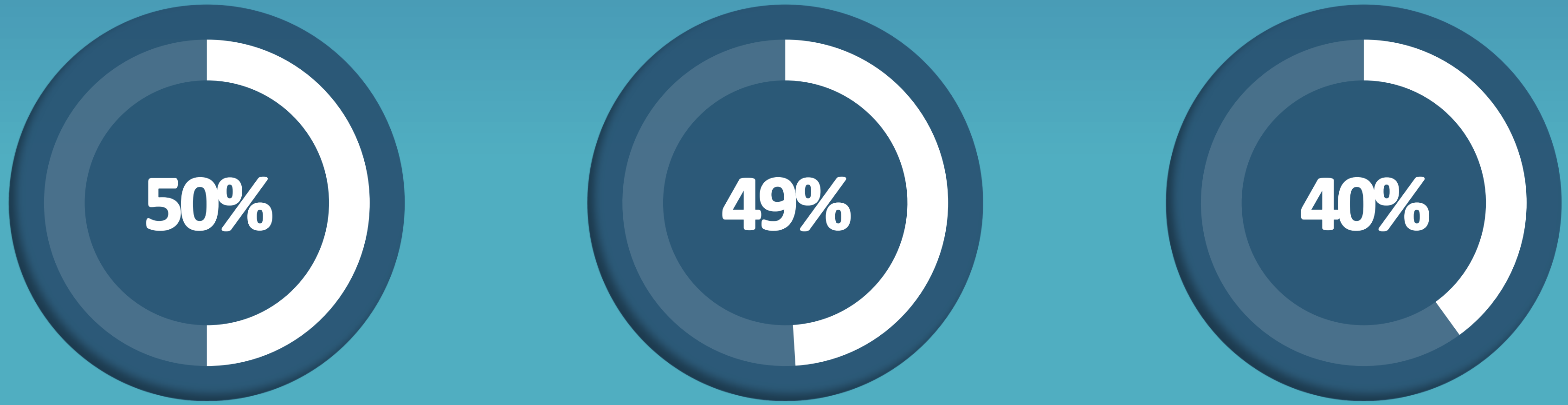
54%
Products I can relate to, with the taste I like

52%
Its regular prices

Triggers to choose one QSR brand over another

Percent of adults who say each factor has ‘much influence’ in this decision

The least salient trigger in the decision-making process is ‘catchy advertising I can identify with’



Uses locally-sourced products from PR

Daily specials at a lower price

Catchy advertising I can identify with

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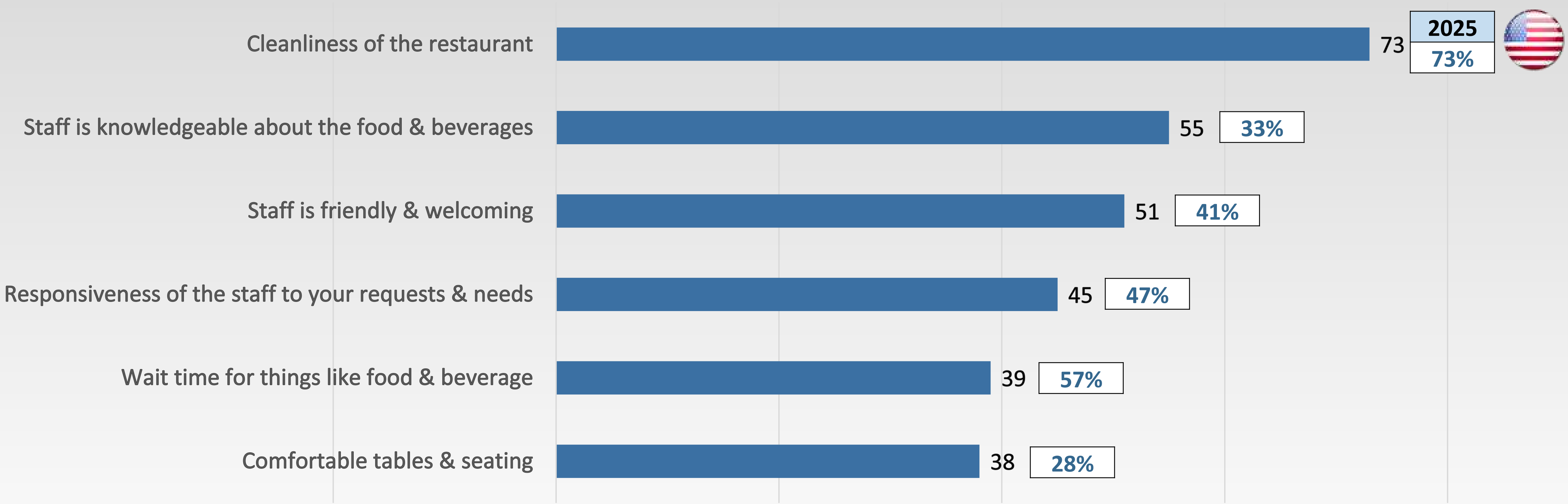
3 most important factors to improve the experience in Limited-Service Restaurants

In the sum of the top 3 factors, ‘cleanliness’ continues to be most relevant, with staff-related behind

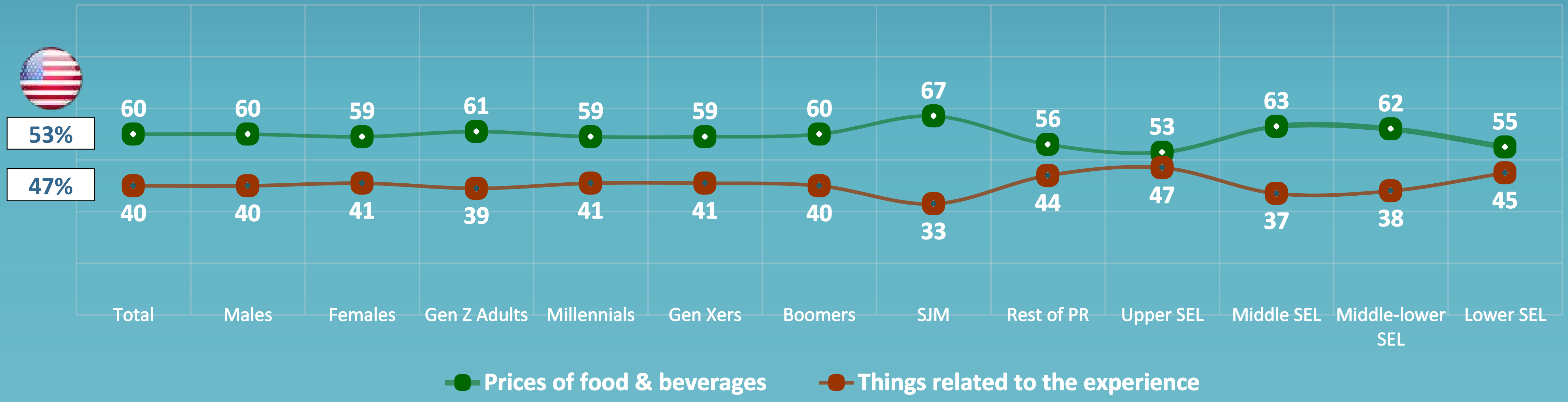


Base: 99% that uses Limited-Service Restaurants

Most important factor in Limited-Service Restaurants (%)

Prices of food & beverages vs. Things related to the experience

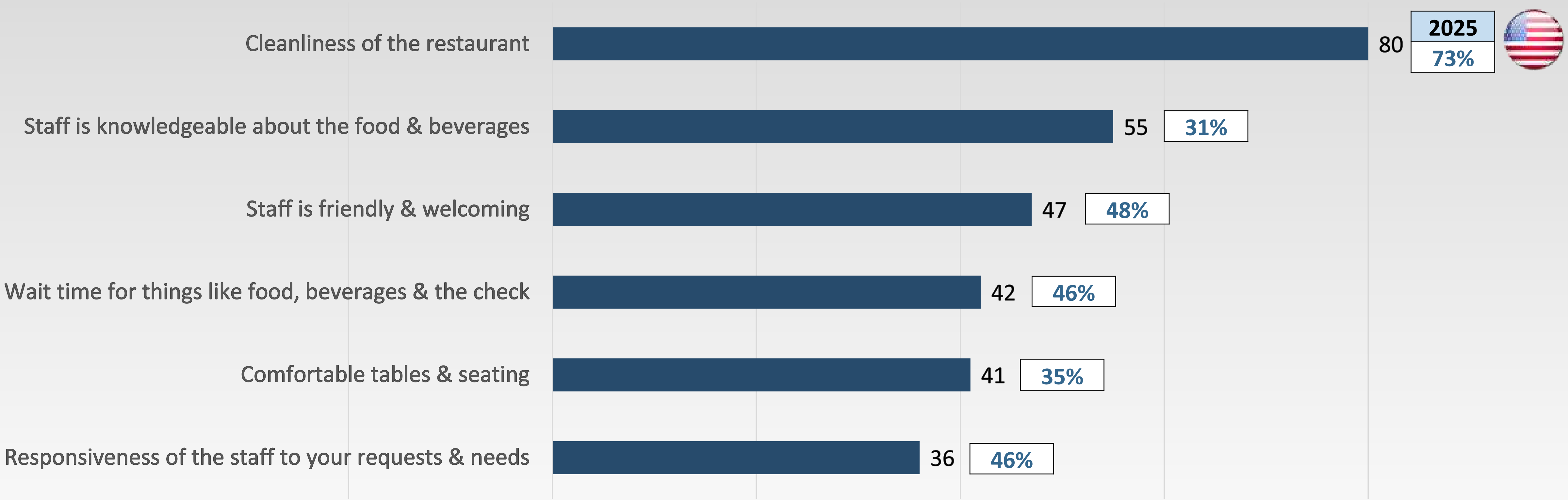
'Prices of food & beverages' show a 20-point advantage gap over 'experience aspects' as most relevant



Base: 99% that uses Limited-Service Restaurants

3 most important factors to improve the experience in Full-Service Restaurants

On a top 3 basis, 'cleanliness', 'knowledgeable staff' and 'friendly staff' lead in these venues

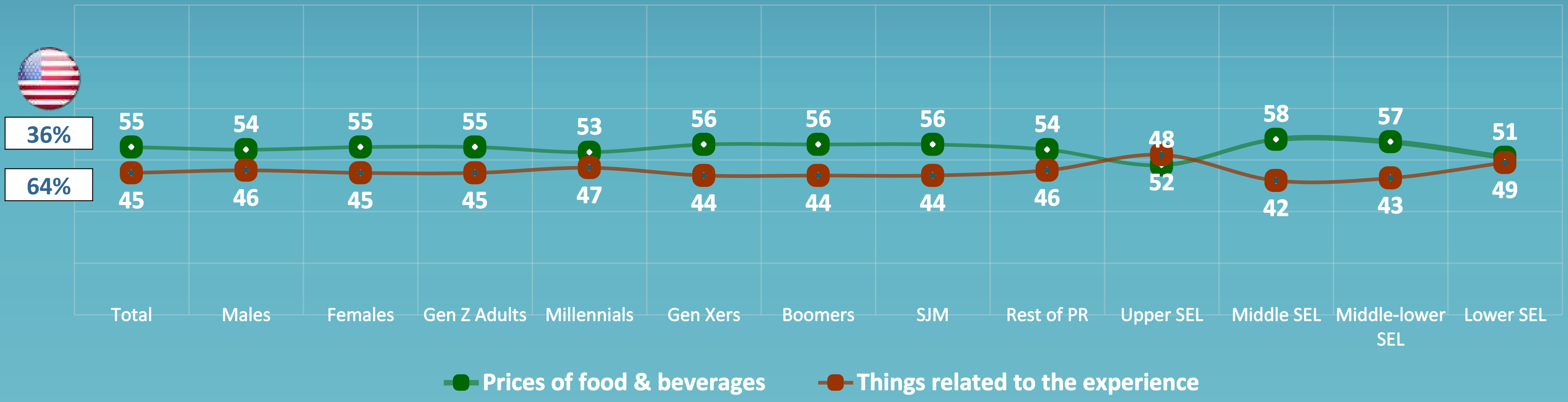


Base: 77% that uses Full-Service Restaurants

Most important factor in Full-Service Restaurants (%)

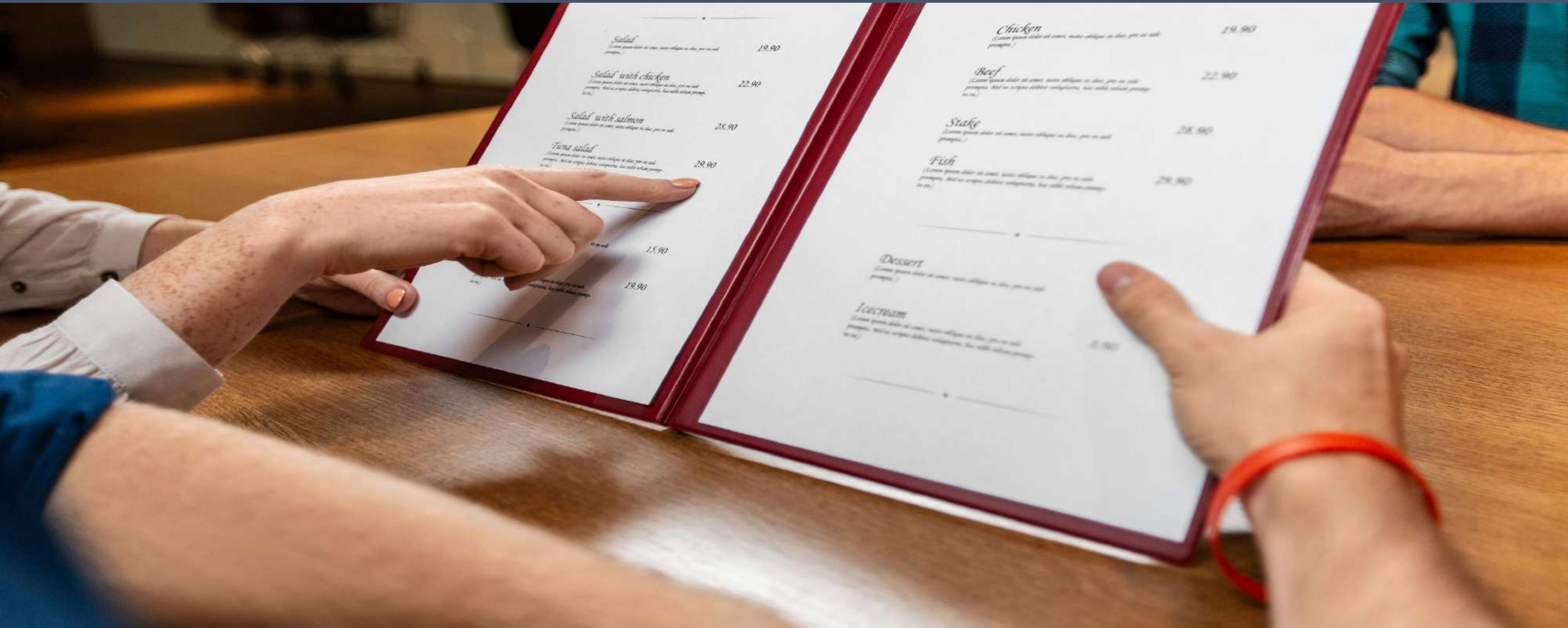
Prices of food & beverages vs. Things related to the experience

The advantage gap of ‘prices’ over ‘experience-related aspects’ is narrowed down to 10 points



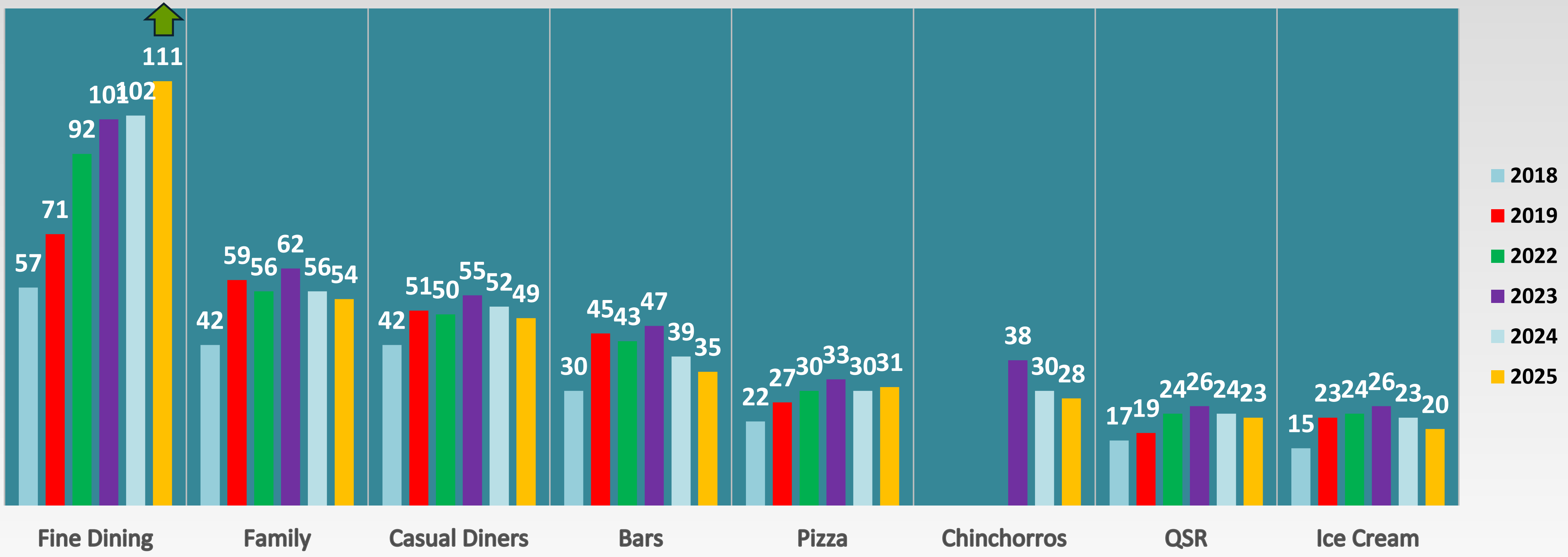
Base: 77% that uses Full-Service Restaurants

Expenditure & Price Perceptions



Average Expenditure Per Use – Trends ($)

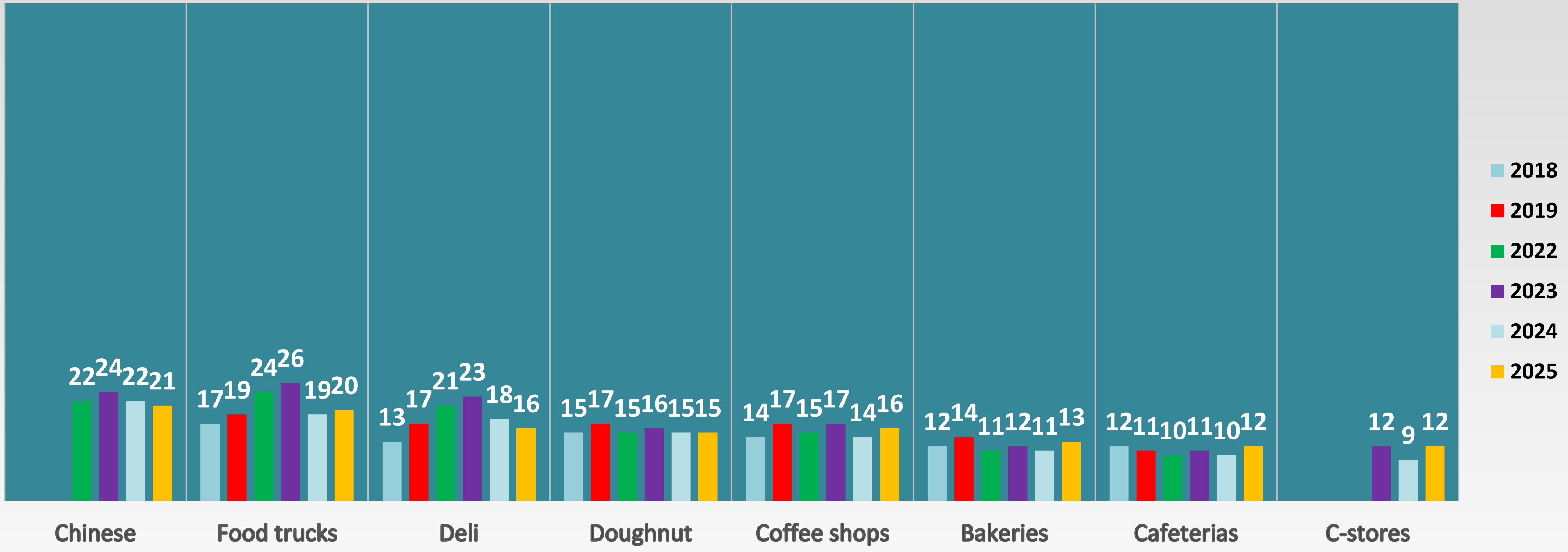
The average expenditure per use is fully stable vs. 2024 for most restaurants, except Fine Dining (up)



Statistically significant decreases or increases (at the 90% confidence level) vs. 2024 results

Average Expenditure Per Use – Trends ($)

No restaurant experienced a statistically significant decline vs. 2024 in the spending metric



Statistically significant decreases or increases (at the 90% confidence level) vs. 2024 results

Weighted Expenditure Per Month

The weighted monthly expenditure stands at $633, or $11 above 2024

Eating & Drinking Places
Incidence of uses

×

Monthly number of uses
Average

×

Expenditure per use
Average

=

Weighted Expenditure
Per month

$633
$661 with Chinchorros & C-stores

$445 in 2019

$493 in 2022

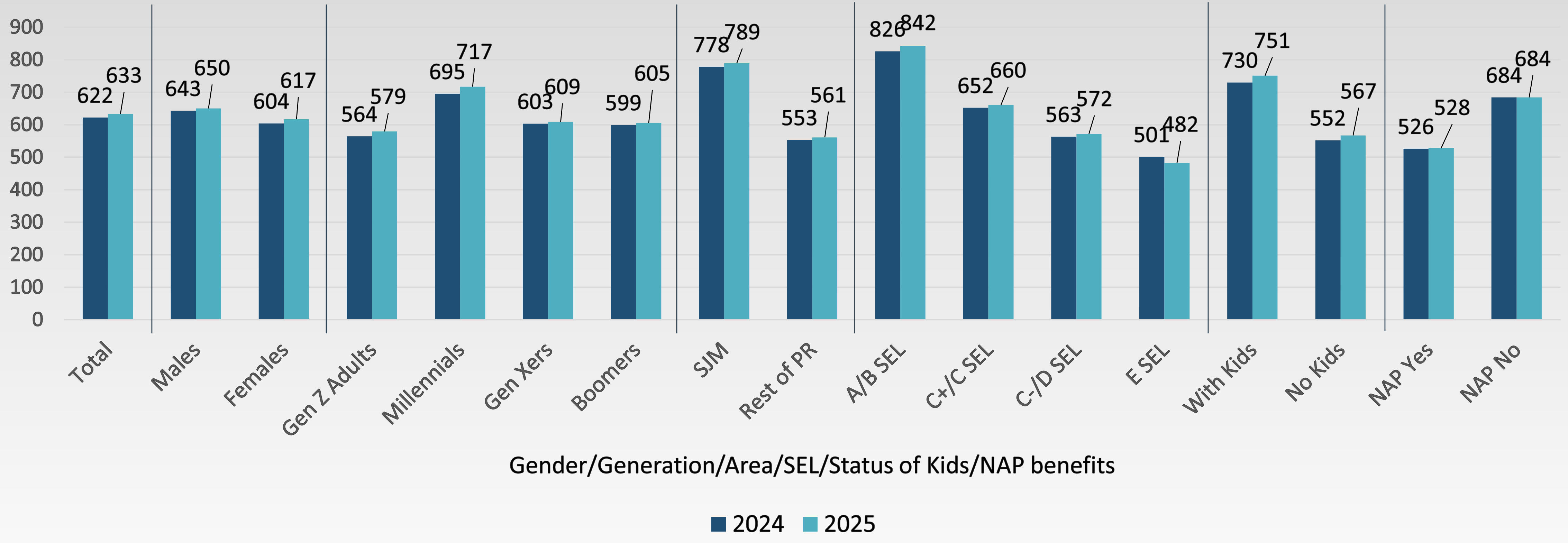
$595 in 2023

$622 in 2024
$656 with Chinchorros & C-stores

Weighted Expenditure Per Month ($)

Comparative – 2024 vs. 2025

All groups are slightly up vs. 2024 in the weighted monthly expenditure, with none falling behind

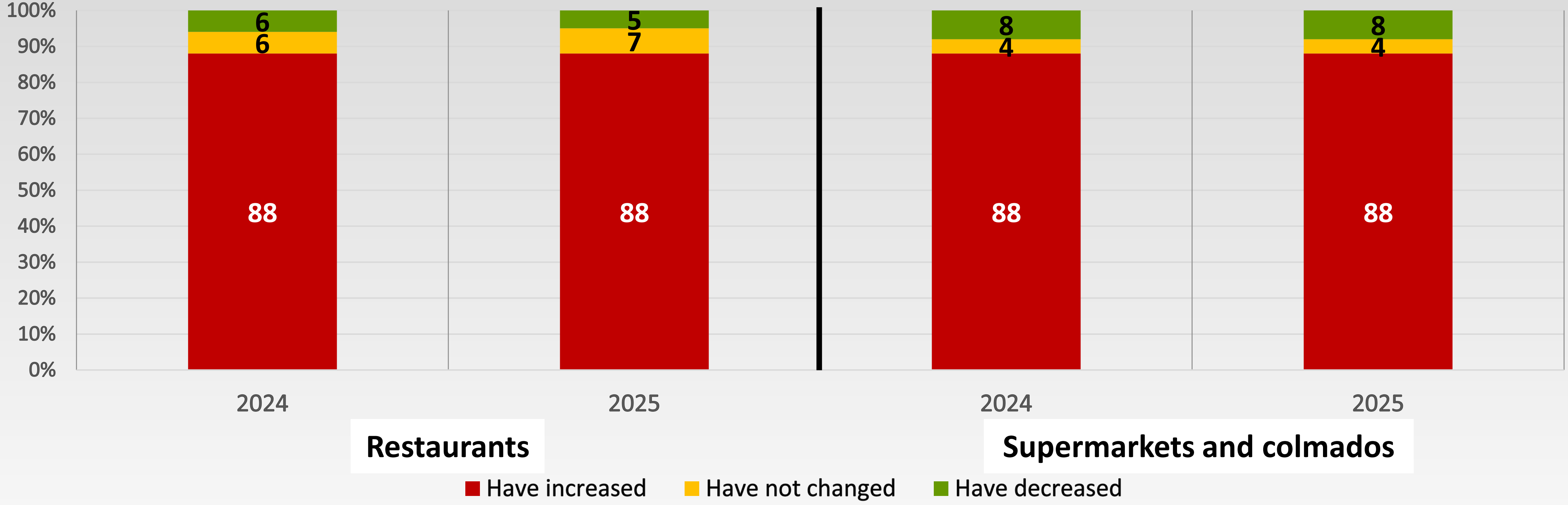


Excludes Chinchorros & C-stores / Only groups with the widest dispersion are shown

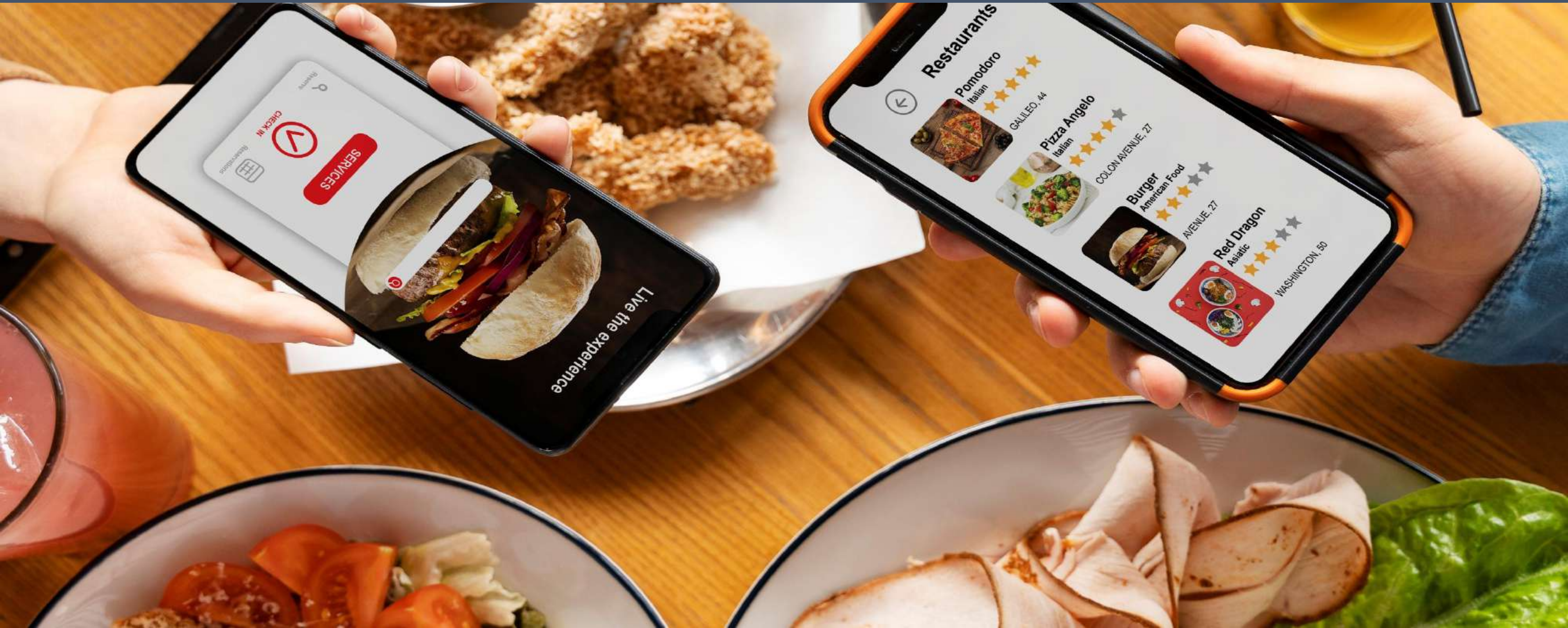
Perception of changes in prices vs. past 2-3 years (%)

In Restaurants & Supermarkets and colmados

Consumers perceive that prices at both restaurants and supermarkets have increased comparably



Off-Premise Consumption

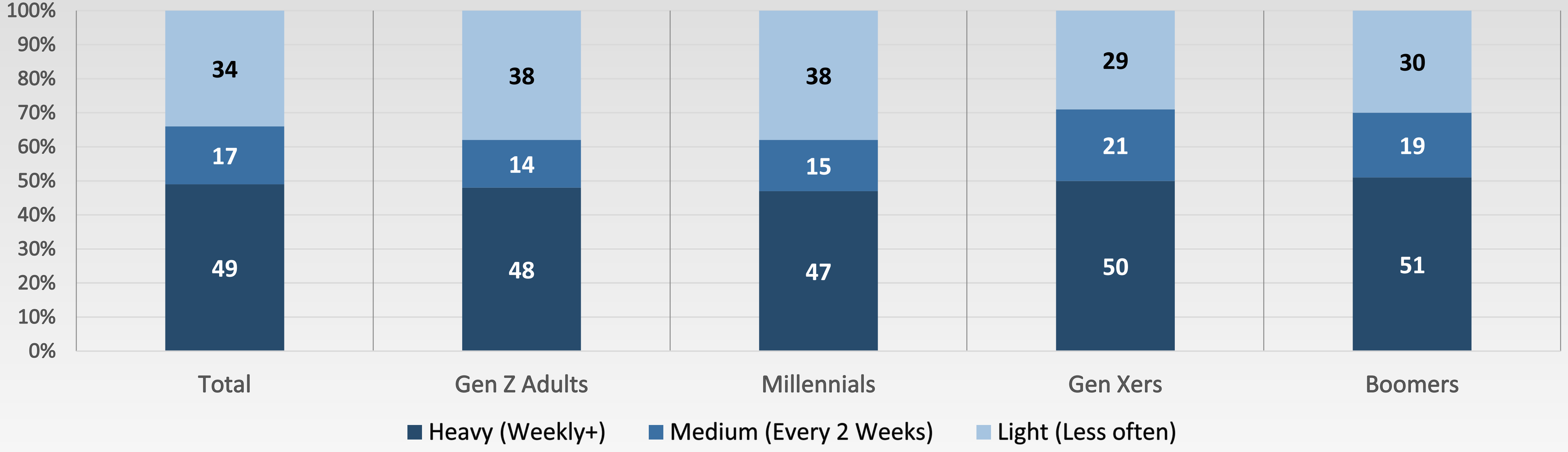


Frequency of using delivery services (%)

Base: 47% that has ordered for Delivery / By generation

Past 3 Months use of Delivery services is up by 7 points vs. 2024. Heavy users (Weekly+) continue to lead

Total 2024 | **Heavy: Weekly+ (45%)** | **Medium: Every 2 Weeks (20%)** | **Light: Less often (35%)**

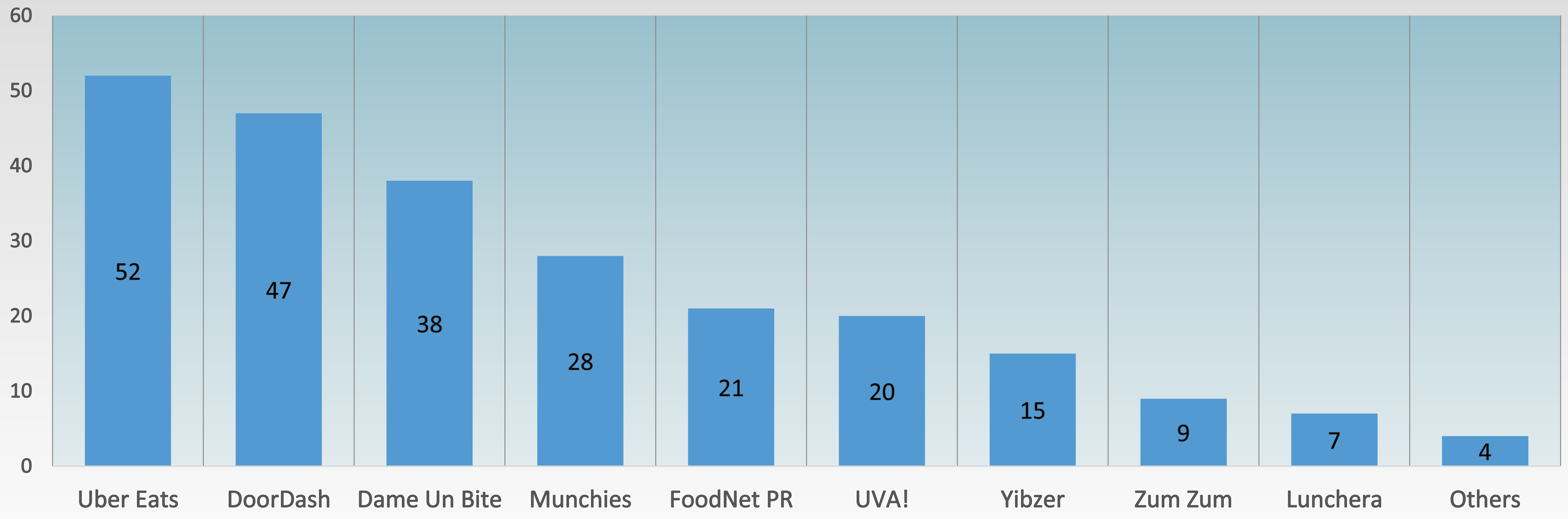


Base: 47% that has ordered for Delivery in Past 3 Months (vs. 40% in 2024)

Past 3 Months Use (%)

All brands of third-party delivery services used in Past 3 Months

Uber Eats and DoorDash have the lead in Past 3 Months use of third-party delivery services

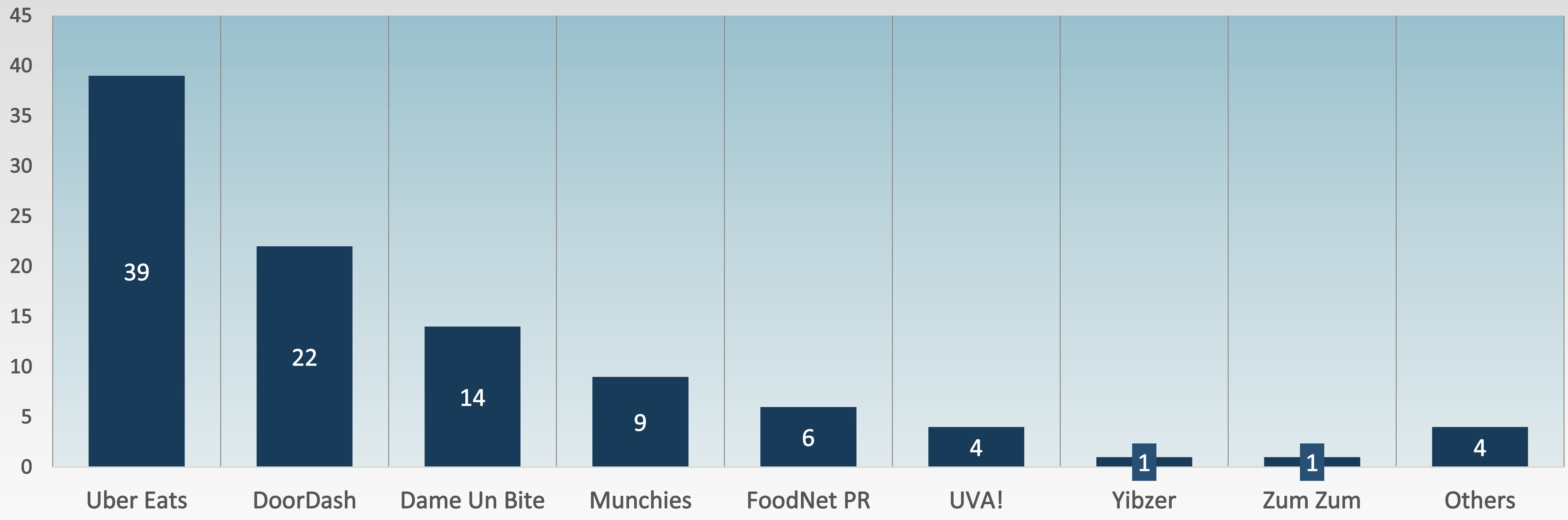


Base: 47% that has ordered for Delivery in Past 3 Months

Favorite third-party delivery service (%)

Preferred brand of third-party delivery services among all

As Favorite third-party delivery service, Uber Eats leads, with 39%, among Past 3 Months users



Base: 47% that has ordered for Delivery in Past 3 Months

Satisfaction with Key Attributes of Favorite third-party delivery

Percent of adults who say they are satisfied with the following attributes of third-party delivery services

Satisfaction exceeds the 80% threshold for all attributes surveyed regarding Favorite delivery service

Base: 47% that has ordered for Delivery in Past 3 Months

Satisfaction with Key Attributes of Favorite third-party delivery

Percent of adults who say they are satisfied with the following attributes of third-party delivery services

There are differences across specific Favorite third-party delivery suppliers vs. Total results

Service in general | **Care in handling food so it arrives in good condition** | **Ease of use of mobile app** | **Variety of restaurants available on the platform**

Base: 47% that has ordered for Delivery in Past 3 Months

Satisfaction with Key Attributes of Favorite third-party delivery

Percent of adults who say they are satisfied with the following attributes of third-party delivery services

The take-away is that users of third-party delivery services are generally satisfied with all aspects

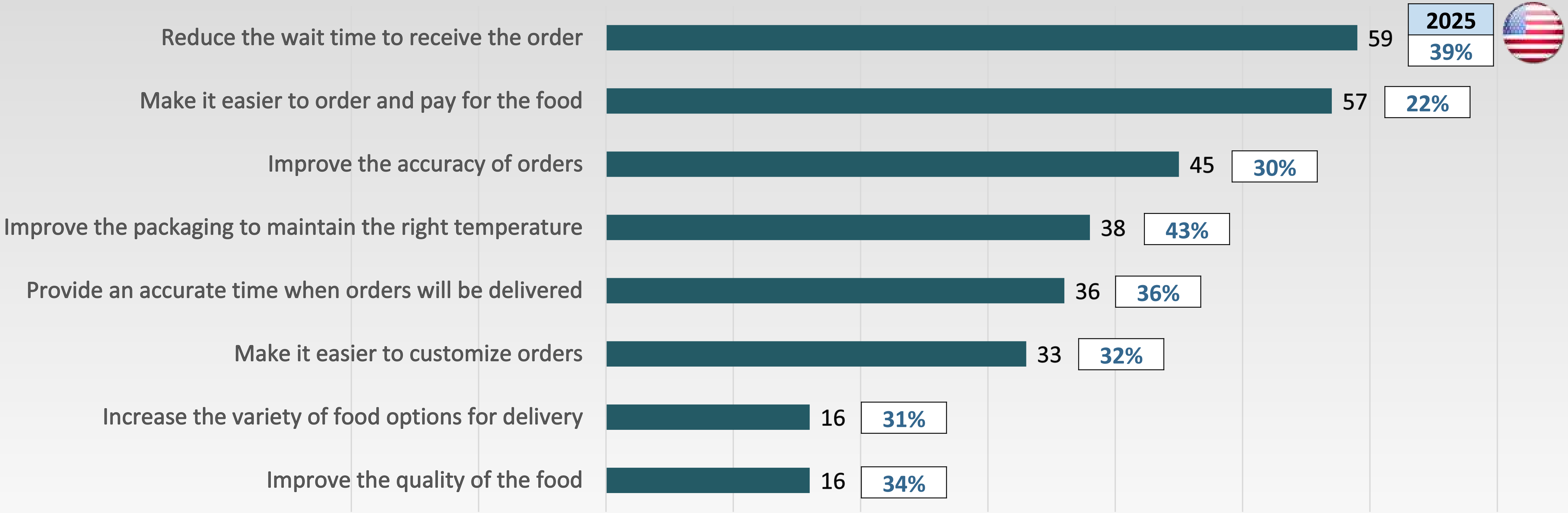
Cost of service

Availability of offers and promotions

Base: 47% that has ordered for Delivery in Past 3 Months

3 most important factors to improve the experience in use of delivery & third-party delivery services

On a top 3 basis, reducing the wait time, making the process easier and improving accuracy are on top



Base: 47% that has ordered for Delivery in Past 3 Months

Deciding Factors

Deciding factors: Puerto Rican consumers expect more

Percent of adults who say these factors would make them more likely to choose one restaurant over another

All of these factors have gained relevance vs. 2023 as deciding factors between two restaurants

1 — **85%** (72% in 2023)
Discounts for dining at off-peak times of the day

2 — **85%** (62% in 2023)
Customer loyalty and reward program

3 — **84%** (75% in 2023)
Offers 3-course meals for carryout and delivery

4 — **84%** (77% in 2023)
Offers healthy menu options

81%

US Source: National Restaurant Association, *National Household Survey, 2025*

Deciding factors: Puerto Rican consumers expect more

Percent of adults who say these factors would make them more likely to choose one restaurant over another

The offer of locally-sourced food is equally prominent as in 2023, but no longer ranks #1

5

82%

77% in 2023

Has pop-up specials available via app or social media

6

81%

81% in 2023

Offers locally-sourced food

US: **64%**

7

80%

73% in 2023

Discounts for dining on less busy days of the week

US: **82%**

8

79%

69% in 2023

Offers environmentally friendly food

US Source: National Restaurant Association, *National Household Survey, 2025*

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Deciding factors: Puerto Rican consumers expect more

Percent of adults who say these factors would make them more likely to choose one restaurant over another

A new factor, having dishes that can be shared, represent a deciding factor for 77% of consumers

8
77%
Has dishes that can be shared with other persons at the table

10
77%
64% in 2023
Offers diet-specific food like vegetarian or gluten-free options

11
76%
67% in 2023
Smaller-sized portions for a lower price

73%

12
70%
61% in 2023
Offers locally-sourced alcoholic beverages like rum and beer

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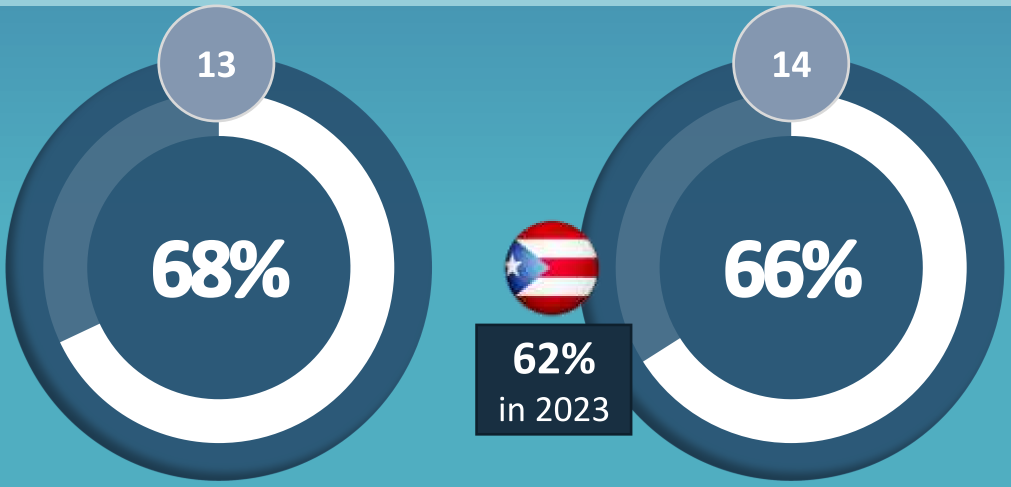
US Source: National Restaurant Association, *National Household Survey, 2025*

Deciding factors: Puerto Rican consumers expect more

Percent of adults who say these factors would make them more likely to choose one restaurant over another

One of the least relevant deciding factors is offering food options, as only 1 in 3 have children at home



Has food options for children

Offers possibility to order alcoholic beverages for carryout and delivery

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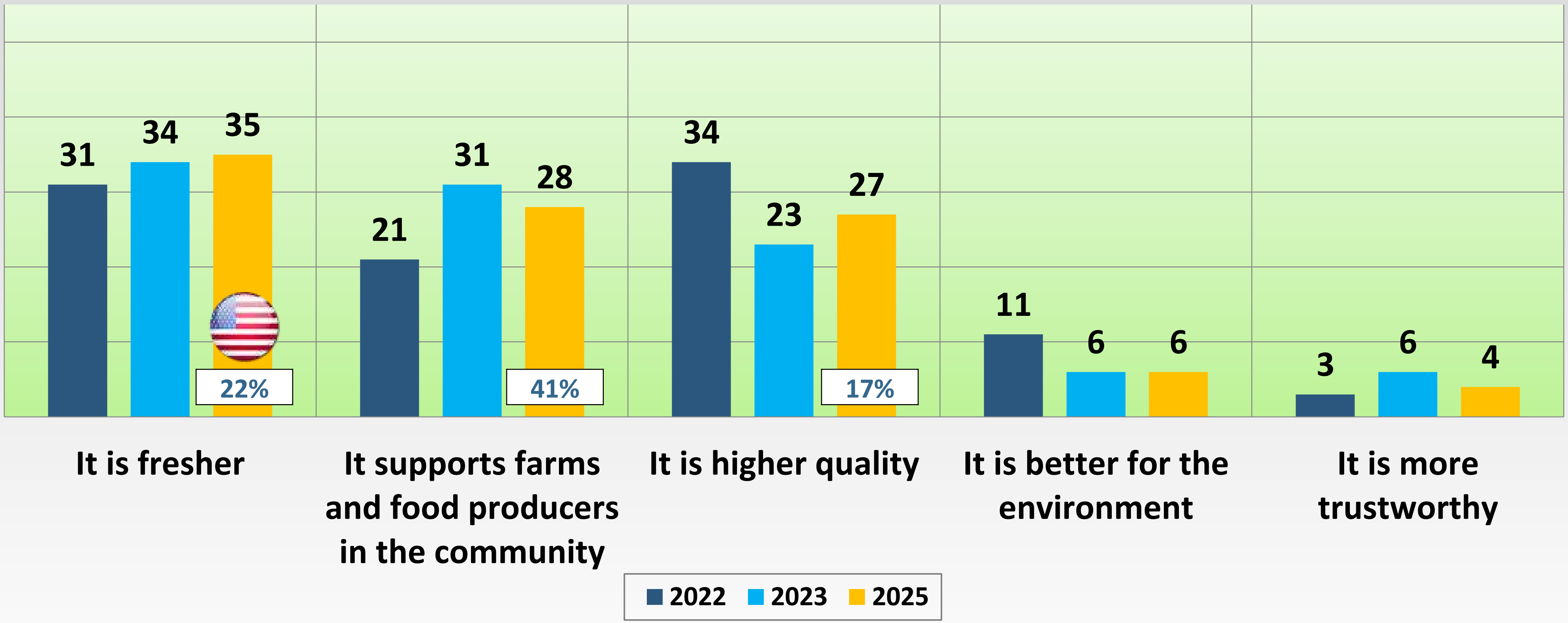
Top reason why consumers like locally-sourced food in restaurants* (%)

The most important reason why consumers like locally-sourced food relates to its superior freshness

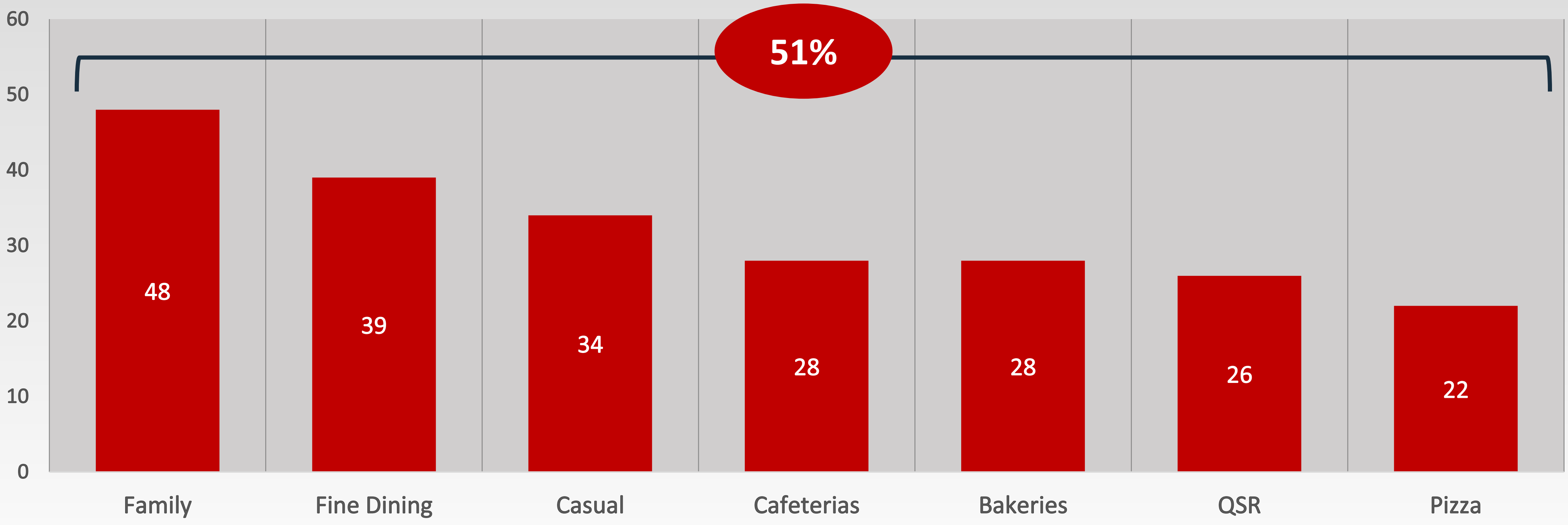


*Base: Respondents who say the availability of locally-sourced food would make them more likely to choose one restaurant over another (81% in 2024; 81% in 2023; 80% in 2022)

Lapsing with Restaurants

Incidence of having restaurants that consumers decided not to visit or use again (%)

Sizeable portions of consumers from different types of restaurants acknowledge to have lapsed



Base: 2025 Users of each type of restaurant

Reasons for having stopped visiting/using restaurants (%)

Percent of adults who say that each reason had 'much or some influence' in their decision of having stopped visiting or using restaurants

'Not having met expectations' is the most salient reason behind lapsing in terms of its high influence

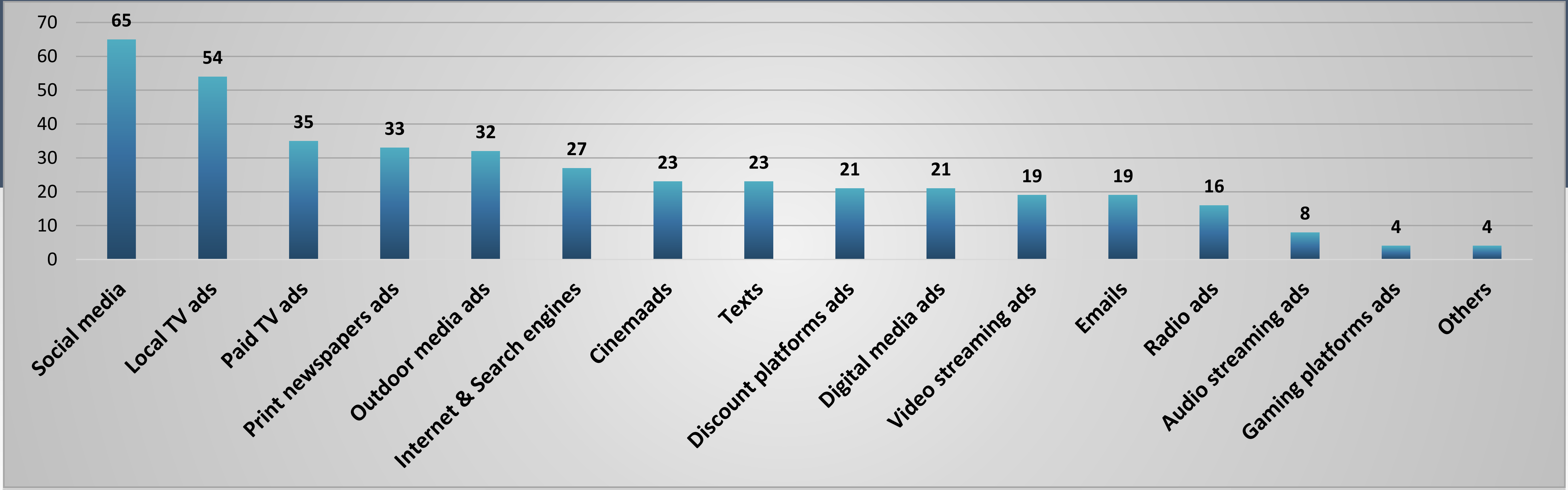
Base: 51% that stopped visiting or using restaurants

Role of Media

All Media Used To Get Informed (%)

On where to eat, menu items, offers, locations and other details / Total

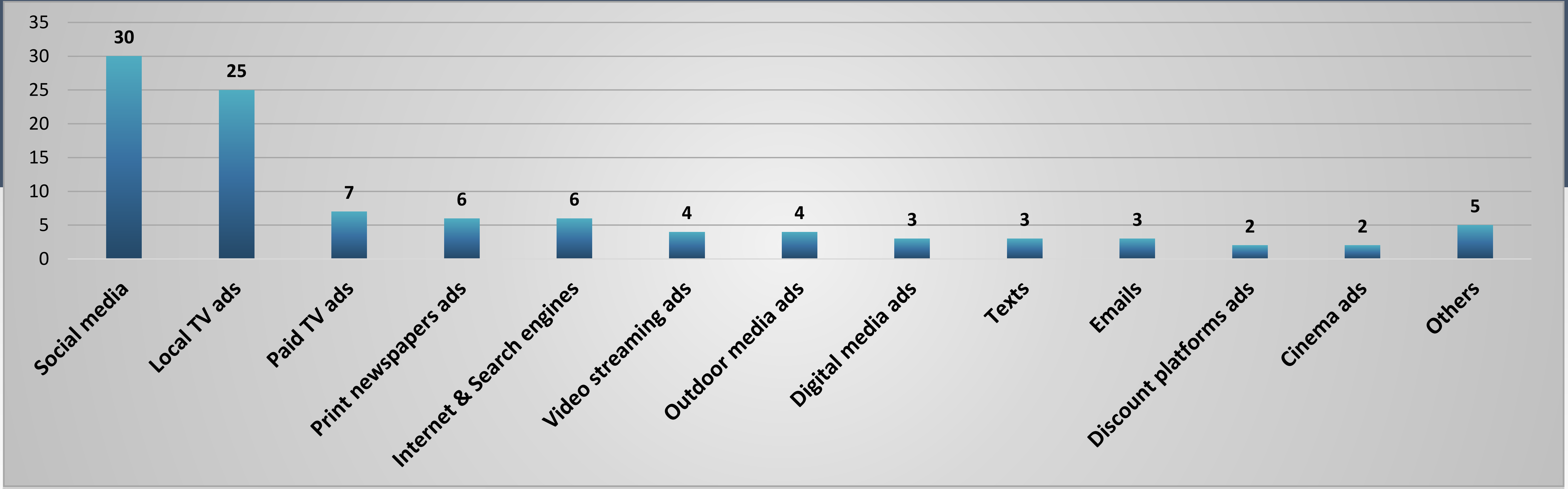
In the Total base, Social media leads among all media used to get informed about restaurant aspects



Main Medium Used To Get Informed (%)

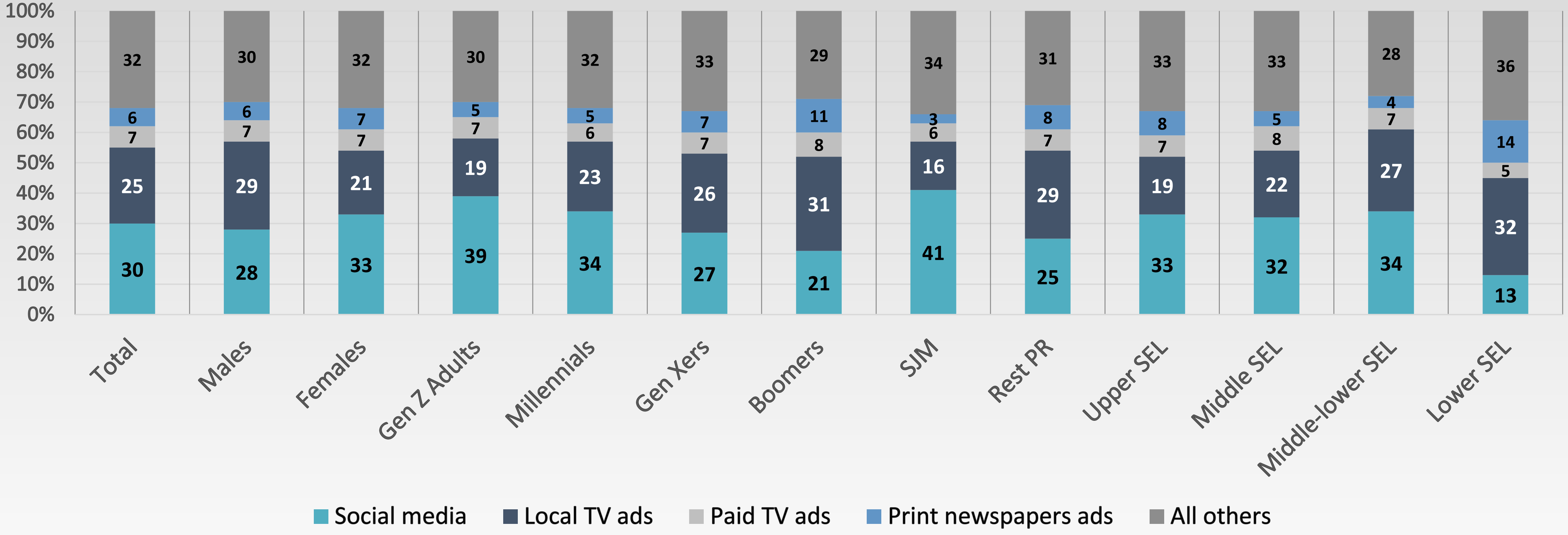
On where to eat, menu items, offers, locations and other details / Total

When narrowed down to one medium, the main one used to get informed, Social media leads with 30%



Main Medium Used To Get Informed (%)

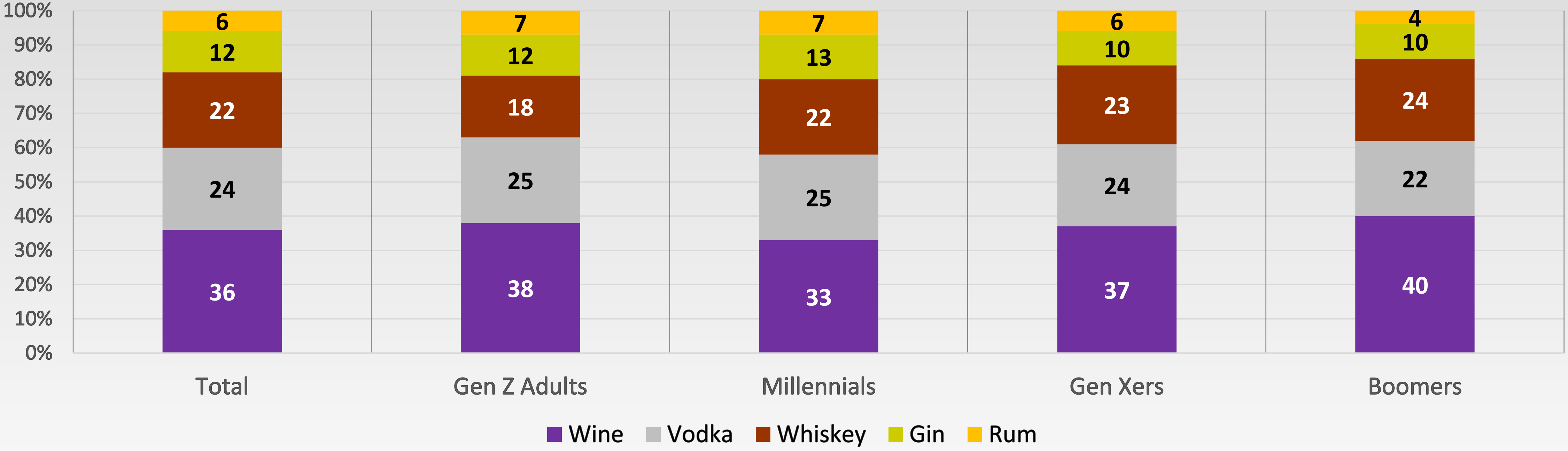
Social media is preferred as main medium, by a wider margin, in SJM and Gen Z Adults vs. Total



Preference with Distilled Spirits & Alcohol Beverages

Preference with Distilled Spirits (%)
#1 Rank

Among consumers of Distilled Spirits, Wine ranks #1 in Preference, with 36%

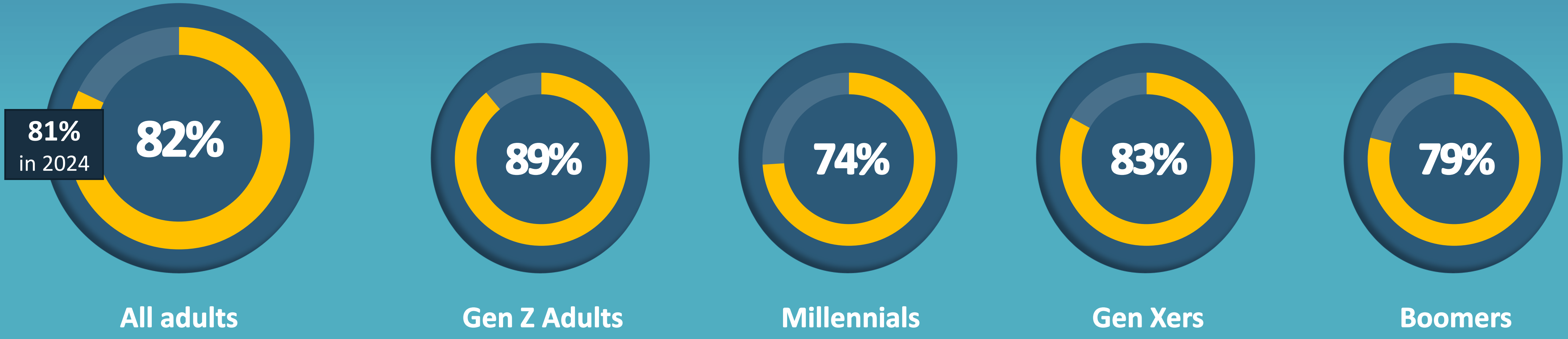


Base: 59% that consumes Distilled Spirits

Importance of consuming Rum made in Puerto Rico

Percent of adults who consume Rum and say this is very + somewhat important

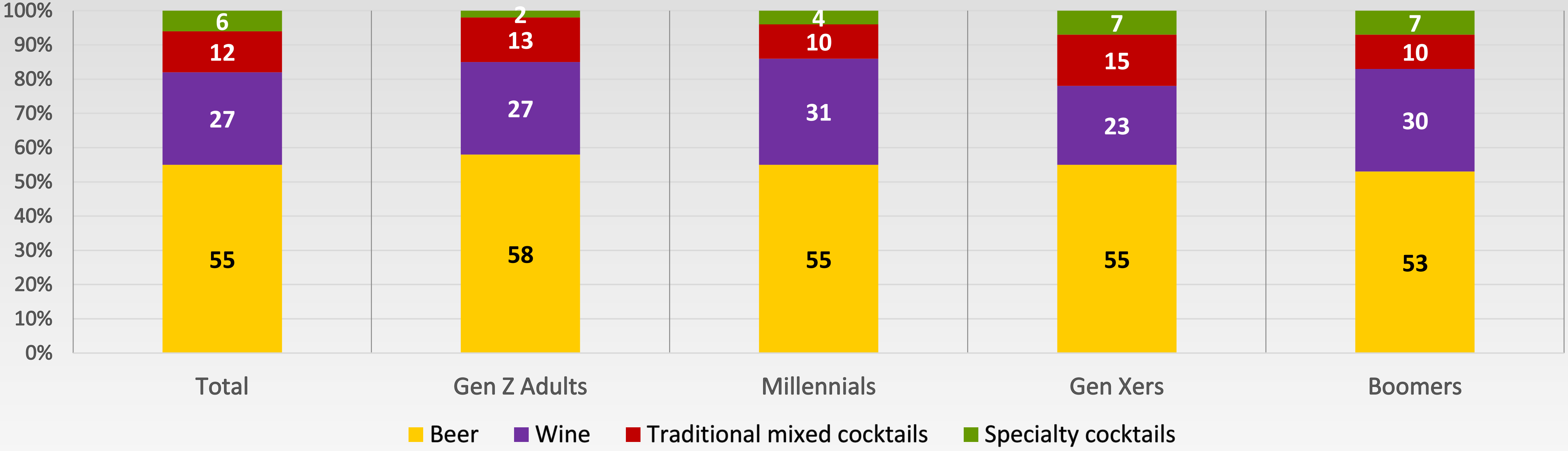
Among Rum consumers, 4 in 5 (82%) believe that consuming brands made in PR is 'important'



Base: 23% that consumes Rum (and prefers in 1st, 2nd or 3rd instance among all Distilled Spirits)

Preference with Alcohol Beverages (%)
#1 Rank

Among drinkers of Alcohol Beverages, Beer widely leads as the #1 in Preference, with 55%



Base: 71% that consumes Alcohol Beverages

Closing Thoughts

In Summary....

Customer Loyalty

Leverage consumer reliance on restaurants despite the financial situation

Effectively capture the unfulfilled desire that consumers have

Invest in vigorous loyalty programs and social media

Experience

Ensure impeccable cleanliness. Properly train staff to always deliver beyond expectations

Build on deciding factors and triggers to give consumers more reasons-why

Avoid, at all costs, offending behaviors that drive consumers away

Value

Recognize that it will remain an important driver and a critical part of the equation

An essential proposition to neutralize the higher price perceptions

Adequately steer consumers from price to experience as the most relevant consideration

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There are clear growth opportunities despite the challenges

Customers must be attracted by offering the right value proposition and providing experiences that meet expectations.

The ultimate goal should be to *create enjoyable experiences that keep customers coming back*.

Operators must match their offers with consumer wants and needs

Currently, more than one-half of consumers of all types of restaurants are motivated by price and value.

All others place more weight on the quality experience and superior service from staff.

To be successful, *operators should focus on strategies to meet these different wants and needs*.

Mainstream venues need to delight value-seeking consumers

Clearly enough, a majority of consumers are prioritizing their use of restaurants despite their financial limitations.

Value will continue to remain very prominent in the decision of which restaurants to use.

Operators must think out-of-the-box with other value enhancers beyond the usual specials.

The role of delicious food and beverages cannot be underestimated

While most consider restaurants to be an essential part of their lifestyles, the food and beverages offer must always take center stage.

Locally-sourced products have a positive halo effect, as do *familiar dishes* that are part of PR's gastronomy.

Customers are also willing to try new flavors and dishes.

Thank you for your interest

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Call us
787-783-9640

Visit us
asorepr.com

Mail us
gadlebron@asorepr.net