



Ohio Market Report: Demographics and Media Habits of Heavy QSR + Sit-Down Restaurant Users

Data provided by:



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Data Source & Methodology

Methodology

This report is based on syndicated consumer data collected through a regional survey of adults across key Ohio markets, including Cincinnati, Dayton, Columbus, Cleveland, and Toledo. Respondents qualified as heavy quick service restaurant (QSR) and sit-down restaurant users by reporting 5 or more visits in the past 30 days. Data reflects behavioral, demographic, and media consumption habits and was analyzed to identify trends and targeting opportunities within this high-frequency dining audience.

Scarborough Research provided by Nielsen

- **Cincinnati**
 - Market/Release: Cincinnati, OH 2025 Release 1 Total (Feb-Aug 2024/Sep 2024-Feb 2025)
 - Base: Total Adults 18+ | Projected 1,923,420 | Respondents: 1,996
- **Dayton**
 - Market/Release: Dayton, OH 2025 Release 1 Total (Mar-Sep 2024/Oct 2024-Apr 2025)
 - Base: Total Adults 18+ | Projected: 954,280 | Respondents: 1,929
- **Columbus**
 - Market/Release: Columbus, OH 2025 Release 1 Total (Mar-Sep 2024/Oct 2024-Apr 2025)
 - Base: Total Adults 18+ | Projected 2,086,369 | Respondents 1,941
- **Cleveland**
 - Market/Release: Cleveland, OH 2025 Release 1 Total (Feb-Aug 2024/Sep 2024-Mar 2025)
 - Base: Total Adults 18+ | Projected 3,044,345 | Respondents: 2,481
- **Toledo**
 - Market/Release: Toledo, OH 2025 Release 1 Total (Apr-Oct 2024/Nov 2024-Apr 2025)
 - Base: Total Adults 18+ | Projected 827,280 | Respondents: 2,026

Why Data Matters at Brandience

- We don't rely on guesswork, our strategies are rooted in real consumer data and regional insights.
- We tailor media strategy across platforms based on usage behavior, from TV to streaming to digital.
- We help brands connect with QSR/Sit-down heavy users where they are—across screens, cities, and moments.

Executive Summary

Who are Heavy Users?

- Defined as those visiting QSR or sit-down restaurants 5+ times in the past 30 days across Cincinnati, Dayton, Columbus, Cleveland, and Toledo.
-

Key Takeaways

- **Audience is Media-Engaged and Mobile**
 - High media consumption: Heavy users are heavy-to-heaviest consumers of radio, TV, digital video, and internet.
 - Highly digital: Average weekly internet use is 20+ hours (34%) and daily social media use is 3+ hours (35%).
 - **These consumers are reachable across multiple media touchpoints—ideal for multi-channel marketing campaigns.**
- **Age and Income Sweet Spot**
 - The majority are young adults 18-34 (29%) or middle-aged adults 35-59 (40%), with strong representation across \$100K-\$250k (38%) and \$50K-\$100K (31%) income brackets.
 - **This audience values convenience and dining out, even if they have the means to choose upscale options—making them strong targets for loyalty programs, family promotions, and premium offerings.**
- **Behavior & Preferences**
 - **High Travel Activity** – Over half are heavy or heaviest travelers by miles in markets like Cincinnati (58%) and Dayton (55%).
 - Prime targets for OOH and transit advertising.
 - **Sports-Centric Media Habits** – NFL and college football dominate viewing, with consistent interest in the Super Bowl, Monday Night Football, and College FB games.
 - Game-day promotions, sports sponsorships, and event tie-ins are high-impact.
 - **Streaming Dominance – Netflix, YouTube, Amazon Prime Video, and Hulu rank as the top-used services across markets.**
 - CTV/OTT ads can extend reach, especially to younger consumers.
 - **Genre Affinities** – Comedies, movies, dramas, documentaries, and sports top TV preferences.
 - Align creative and ad placements with these genres to increase relevance.
- **Brand Affinities**
 - Top QSRs across cities: McDonald's, Wendy's, Chick-fil-A, Taco Bell, Chipotle.
 - Top Sit-Down chains: Buffalo Wild Wings, Olive Garden, Bob Evans, Cracker Barrel
 - Local favorites like Skyline Chili and LaRosa's in Cincinnati
 - **Cross-Dining Behavior – Heavy QSR users also frequent pizza, Mexican, sports bars, coffee shops, and bakeries.**
- **Delivery Trends**
 - While 73% have not used delivery in the past 30 days, half agree it's a convenient alternative.
 - Promotions and incentives could activate this latent demand, especially targeting mid- to high-income consumers.

Case Study

Turning Consumer Insights into Market Share Growth

The Challenge

A national restaurant brand was considering whether to increase its footprint in the Midwest. As part of their analysis, they needed to ensure that their current Midwest marketing investments were reaching the right customers and delivering maximum ROI. They were looking for a way to validate their media investment, identify new trading area partnerships, and connect more effectively with their most frequent diners.

Our Approach

We conducted a deep dive across multiple geographies using syndicated consumer research to better understand this brand's audiences — their demographics, dining motivations, media habits, and lifestyle affinities. Rather than stopping at topline data, we translated the findings into clear, actionable strategies.

This process allowed us to:

- Identify differences between markets/geographies.
- Assess whether media partners and placements were effectively reaching the brand's most valuable customers.
- Identify opportunities to reallocate spend into higher-performing channels.
- Uncover key consumer drivers that could strengthen creative messaging and campaign relevance.
- Provide a framework for tailoring media targeting across both digital and traditional channels.

The Results

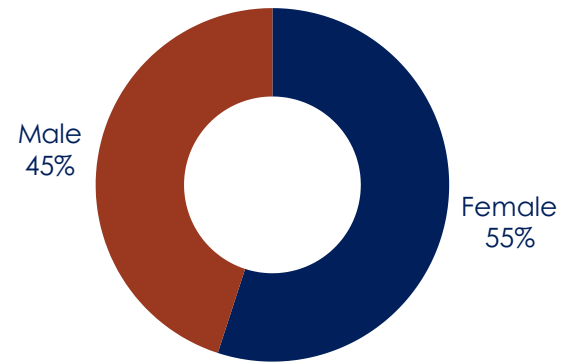
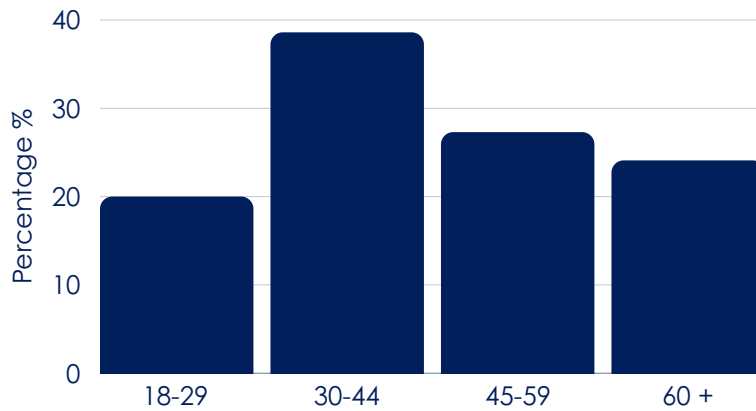
The brand gained confidence that their current marketing investment was effectively delivering but could still be optimized to further amplify the business impact. The brand used this positive marketing investment knowledge to support additional business analysis that led to a recommendation for an increased emphasis on expanding their Midwest footprint.

Brandience Insight: *Data becomes powerful when it leads to action. By blending syndicated research with market-specific strategies, we help brands move beyond "buying media" to building true customer influence.*

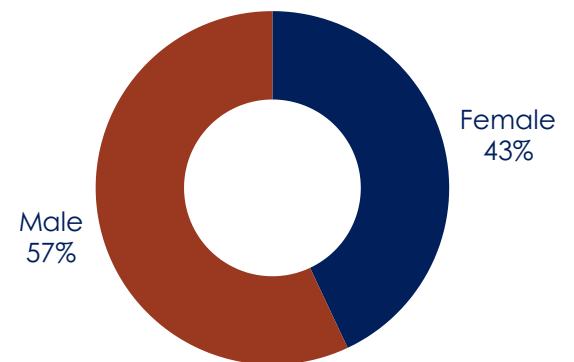
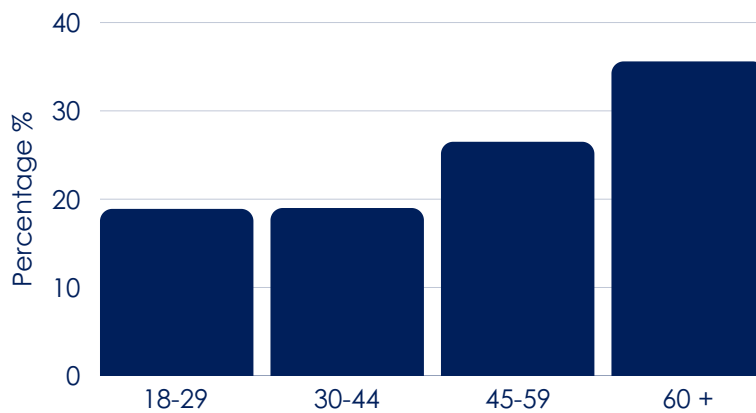
Demographics:

Heavy QSR and Sit-Down Restaurant User, 5+ times past 30 days

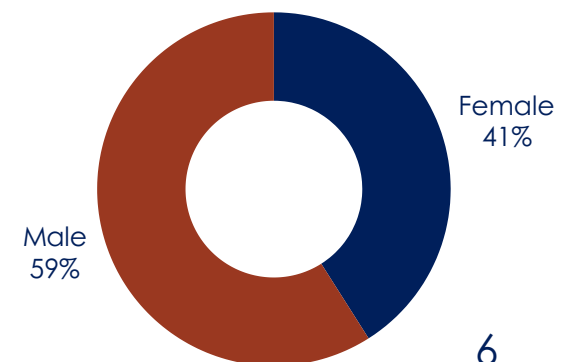
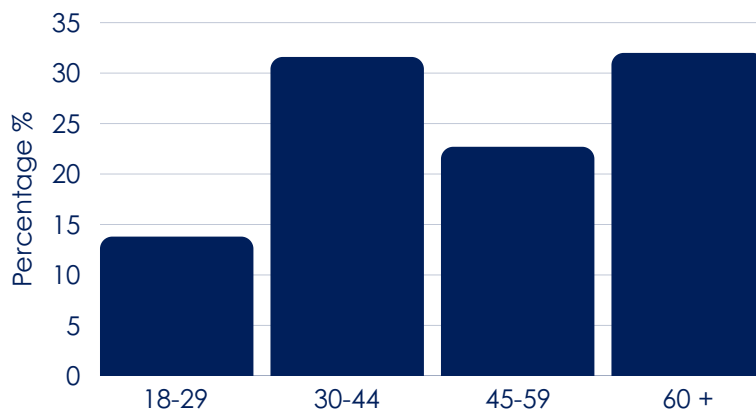
Cincinnati Age:



Dayton Age:



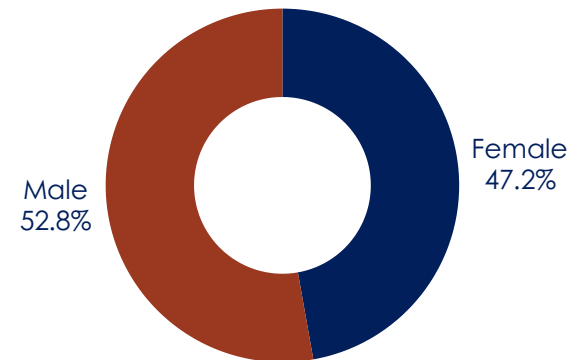
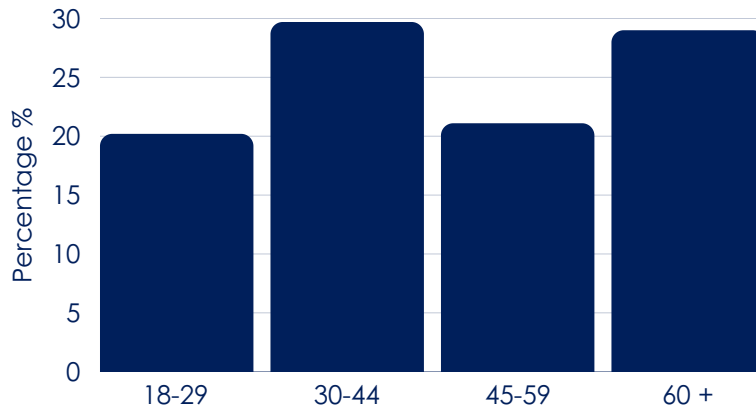
Columbus Age:



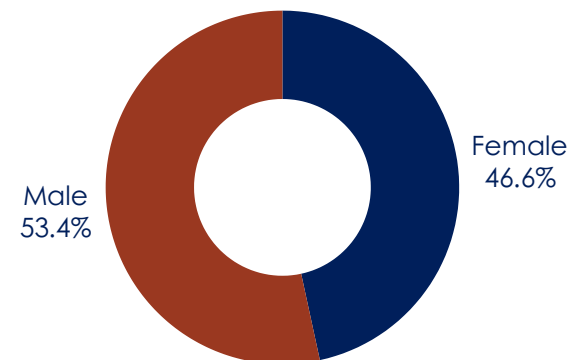
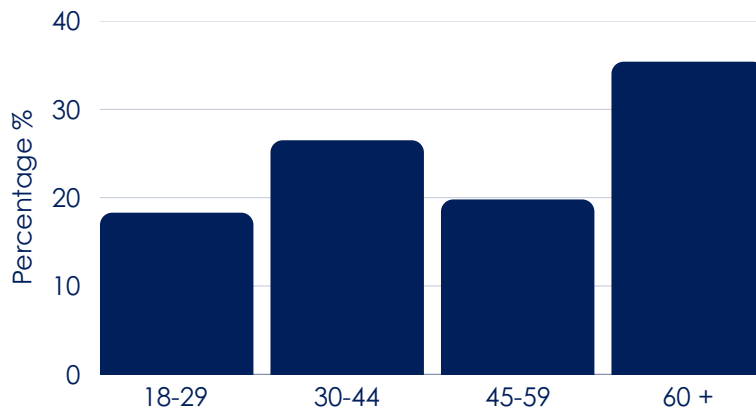
Demographics:

Heavy QSR and Sit-Down Restaurant User, 5+ times past 30 days

Cleveland Age



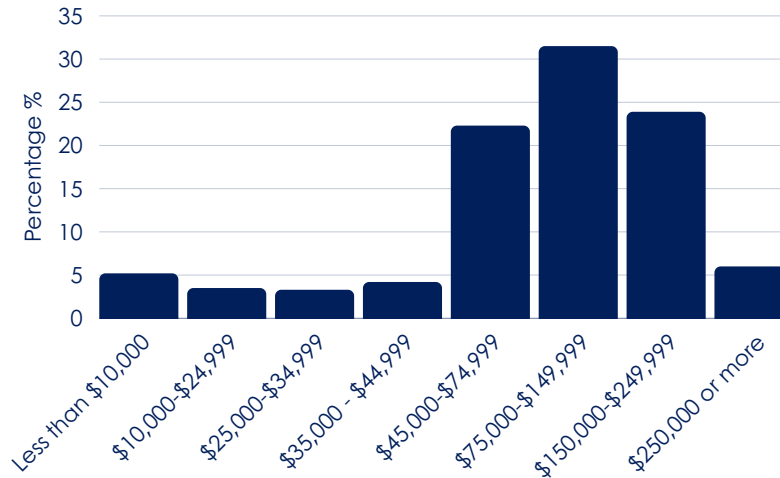
Toledo Age:



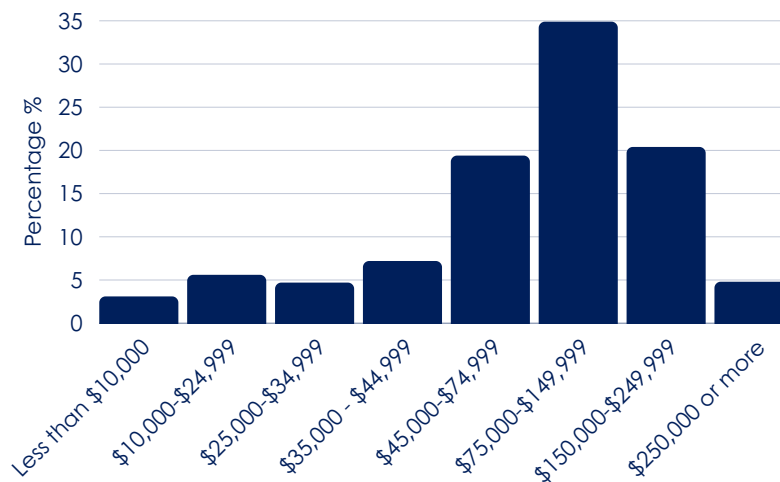
Demographics:

Heavy QSR and Sit-Down Restaurant User, 5+ times past 30 days

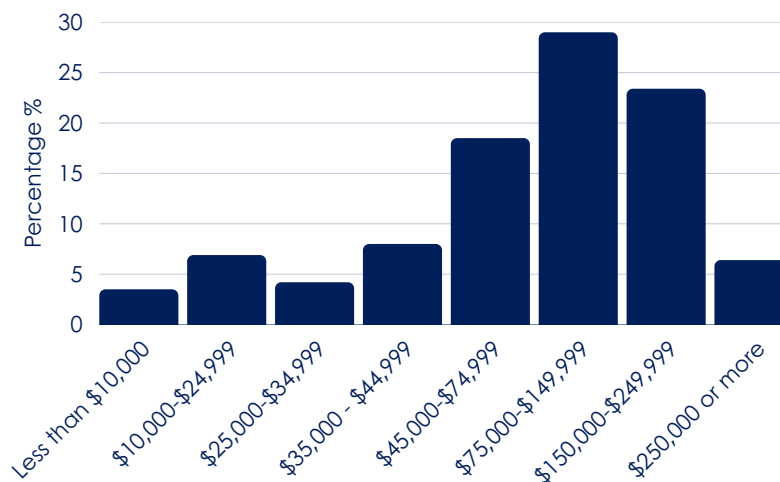
Cincinnati HH Income:



Dayton HH Income:



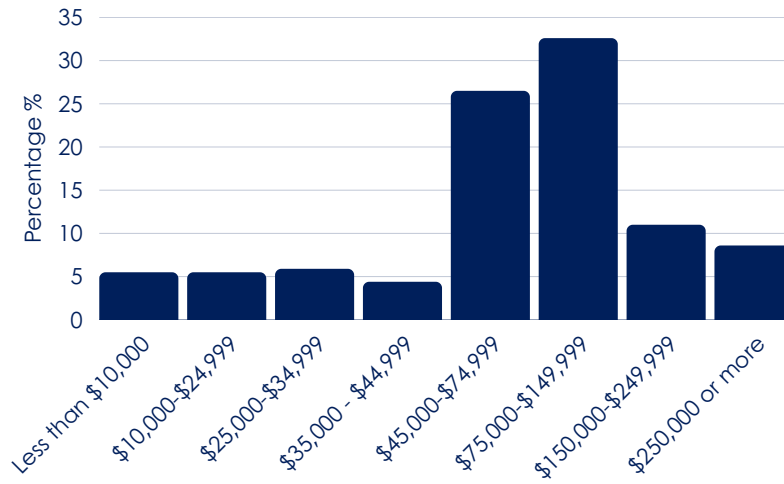
Columbus HH Income:



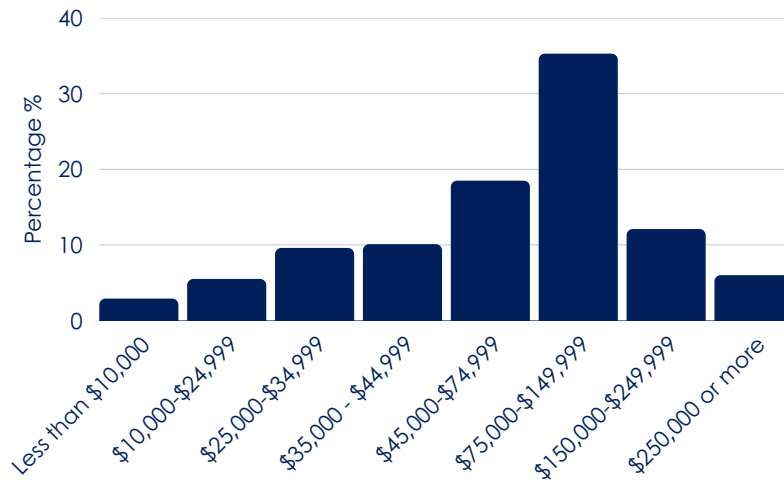
Demographics:

Heavy QSR and Sit-Down Restaurant User, 5+ times past 30 days

Cleveland HH Income:



Toledo HH Income:

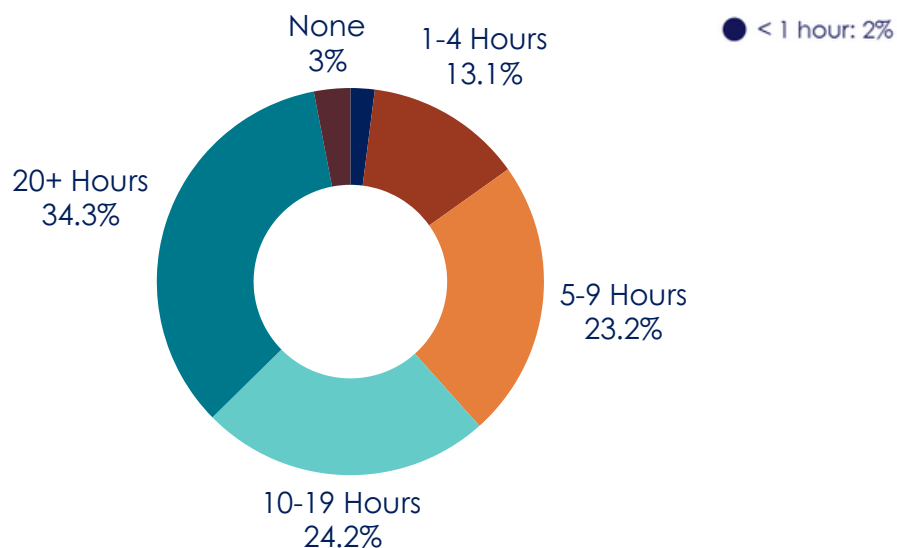


Average Consumer Habits

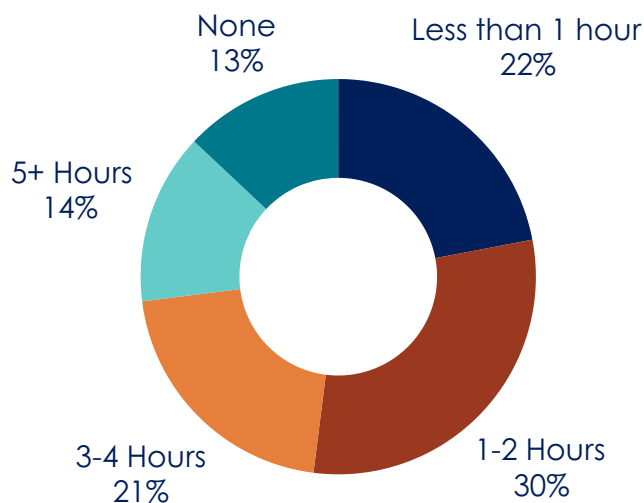
Average Consumer Habits (All Markets)

Heavy QSR & Sit-Down Restaurant Users

Average Time Spent on Internet in One Week:



Social Media Apps/Sites - Hours Spent on an Average Day:

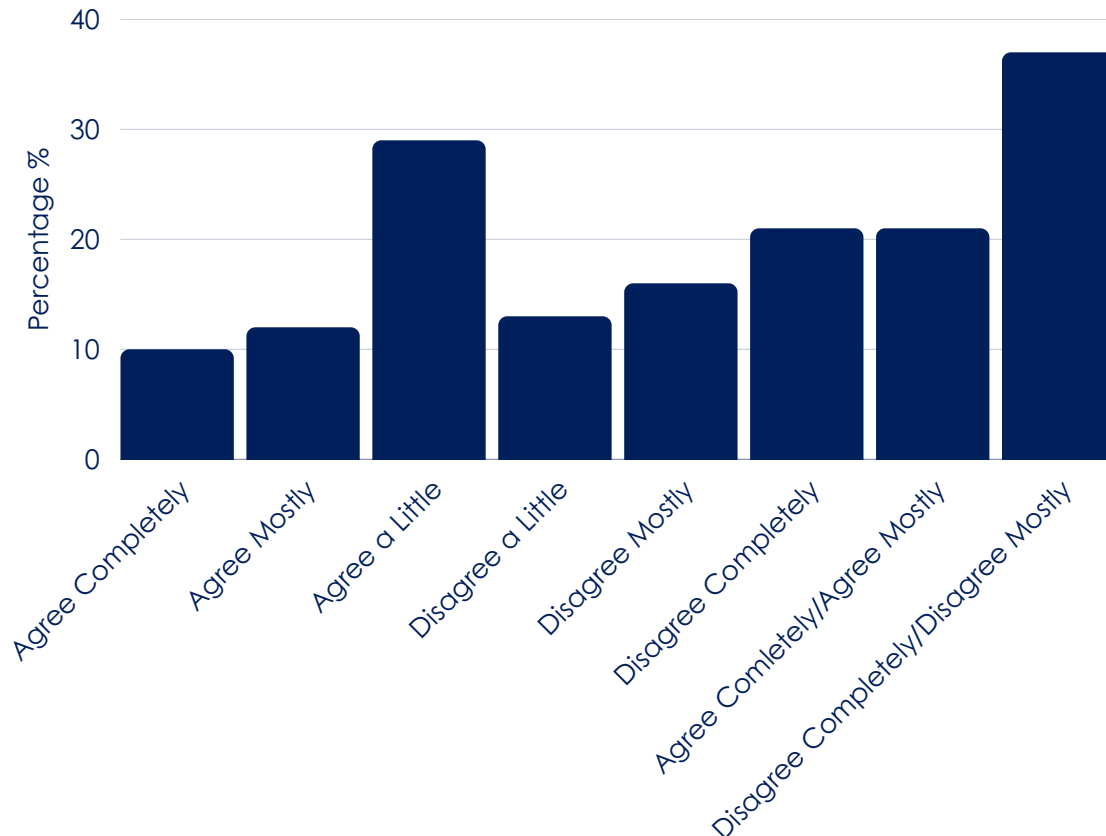


Brandience Insight: Heavy QSR/Sit-down users live online — both in work and leisure time. We recommend balancing awareness media like OTT and broadcast with targeted digital retargeting to stay top-of-mind between dining occasions.

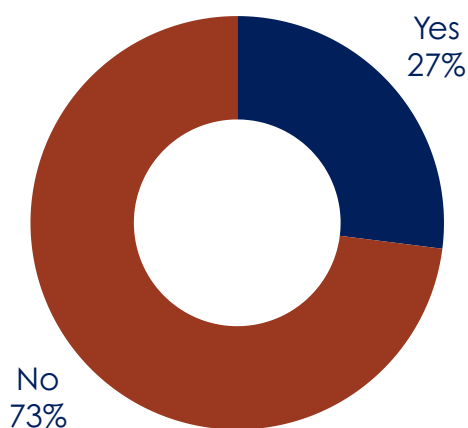
Average Consumer Habits (All Markets)

Heavy QSR & Sit-Down Restaurant Users

Restaurant delivery services (e.g., DoorDash, Grubhub, Uber Eats, etc.) are a great alternative to takeout:



Food Delivery Services used past 30 days:

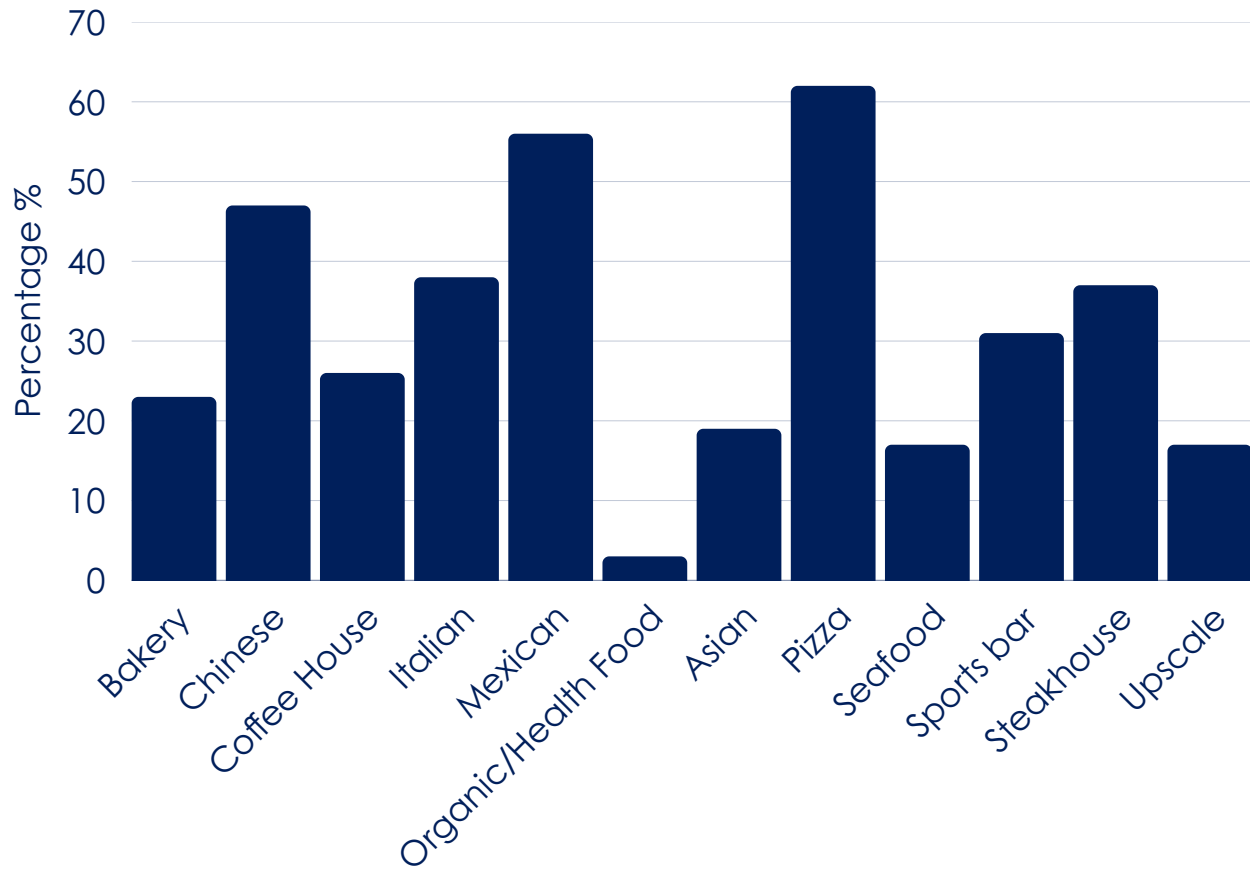


Brandience Insight: This gap signals untapped potential. Brands can capture market share by creating delivery-only specials and using geo-targeted digital to convert convenience-seeking, mid-to-high income customers..

Average Consumer Habits (All Markets)

Heavy QSR & Sit-Down Restaurant Users

Types of restaurants used past 30 days:

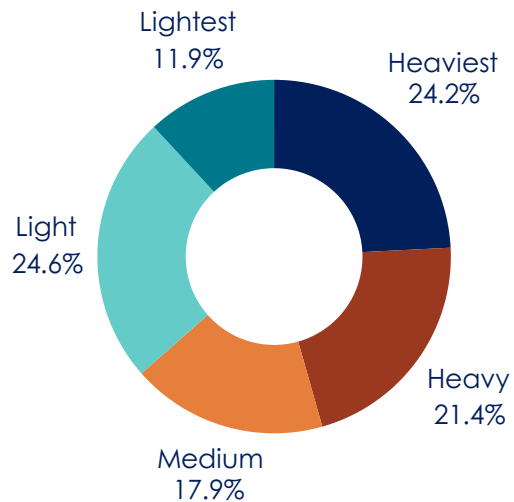


Cincinnati Insights

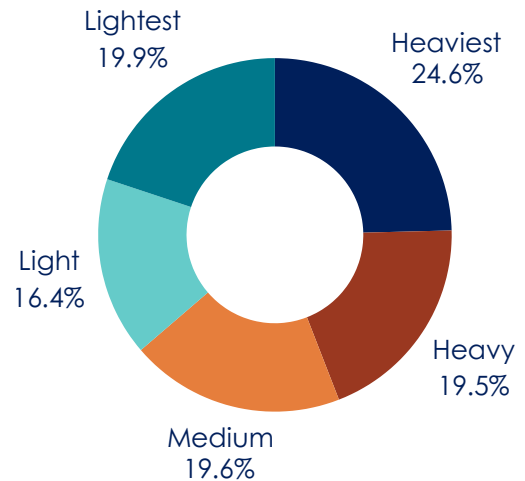
Cincinnati Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

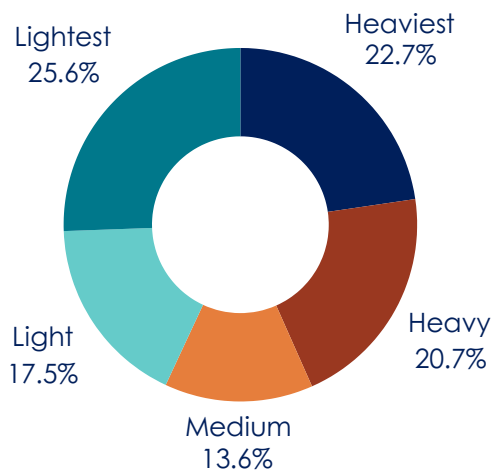
Radio Exposure:



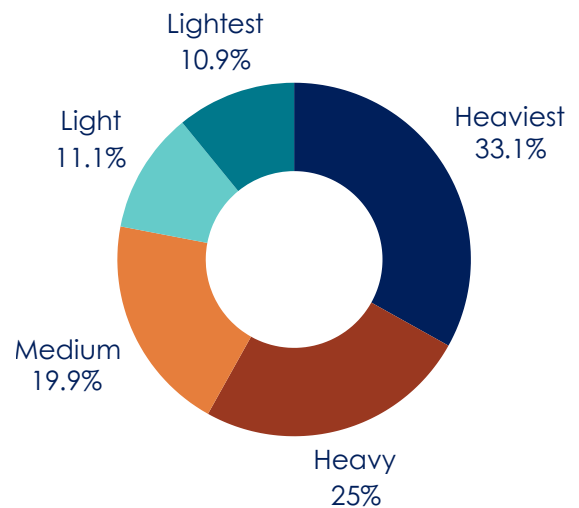
TV Exposure:



Newspaper Exposure:



Miles Traveled:

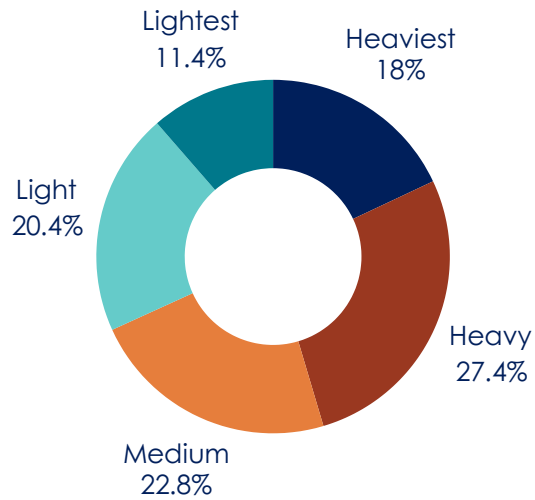


Brandience Insight: Cincinnati's heavy QSR users are on the move and consuming multiple media formats daily. Layering OOH near high-traffic corridors with digital video ads ensures consistent reach throughout their day.

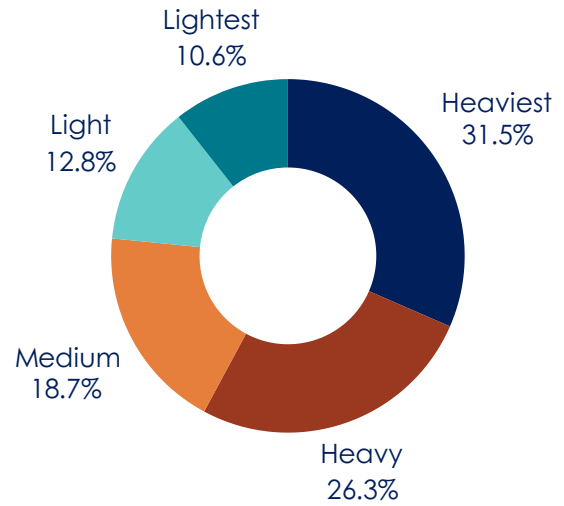
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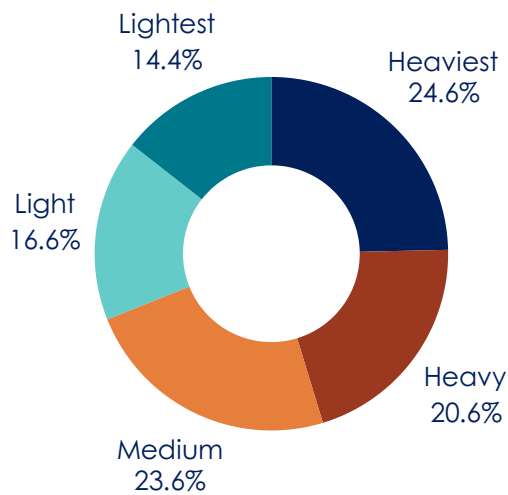
Internet Usage:



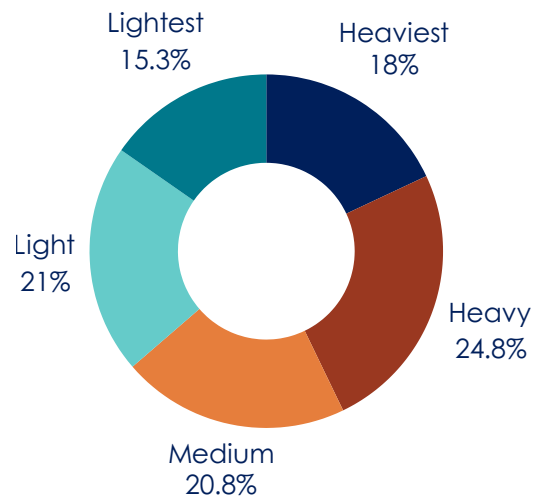
Digital Video Display Usage:



Money Spent on Groceries:



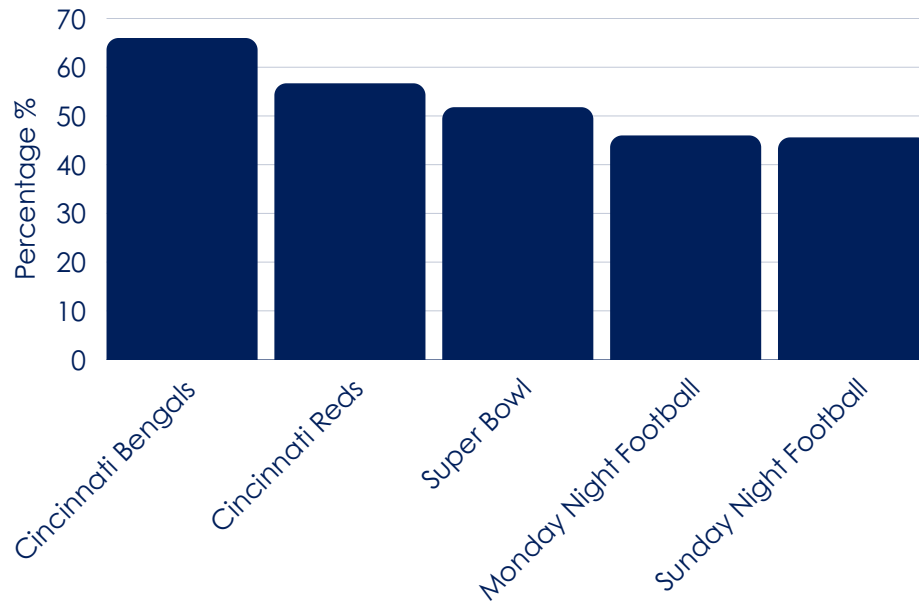
Eco-friendly Activities:



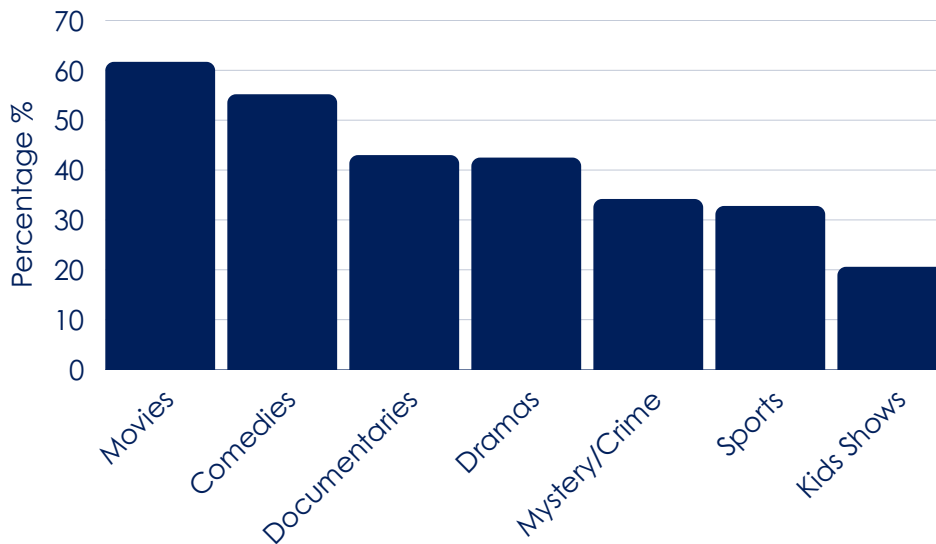
Cincinnati Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Top Sports Watched on TV past 12 months



TV Programs - Typically Stream Online (any device)

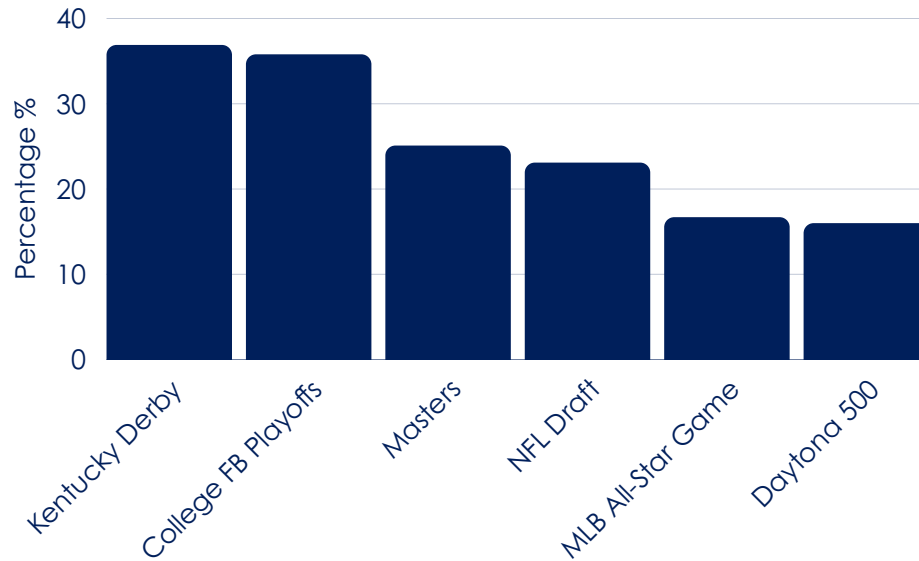


Brandience Insight: Sponsorships or targeted ad buys during Bengals and Reds programming can deliver loyal local audiences at scale. Timing promotions with playoff pushes or key games amplifies urgency.

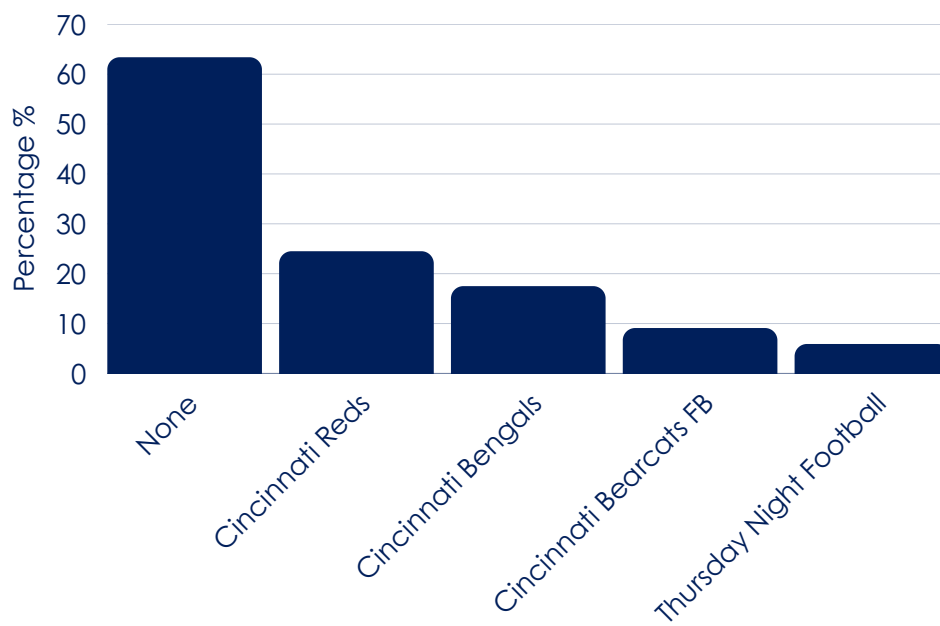
Cincinnati Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Special TV Programs Watched past 12 months



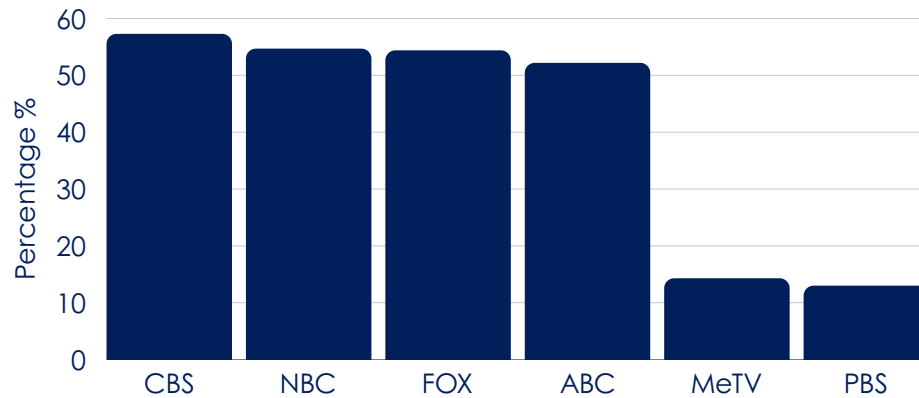
Sports Listened to on Radio past 12 months



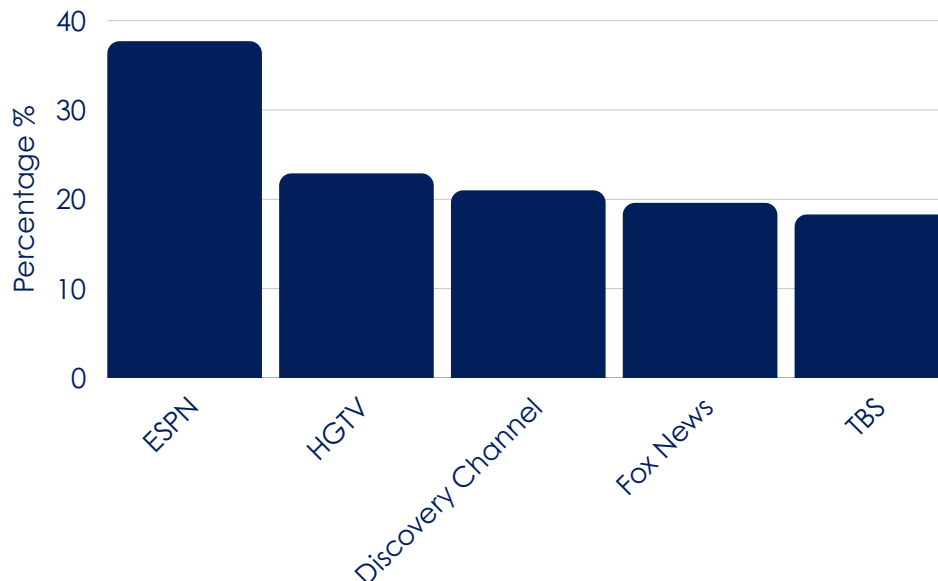
Cincinnati Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Broadcast Stations Watched Past 7 Days



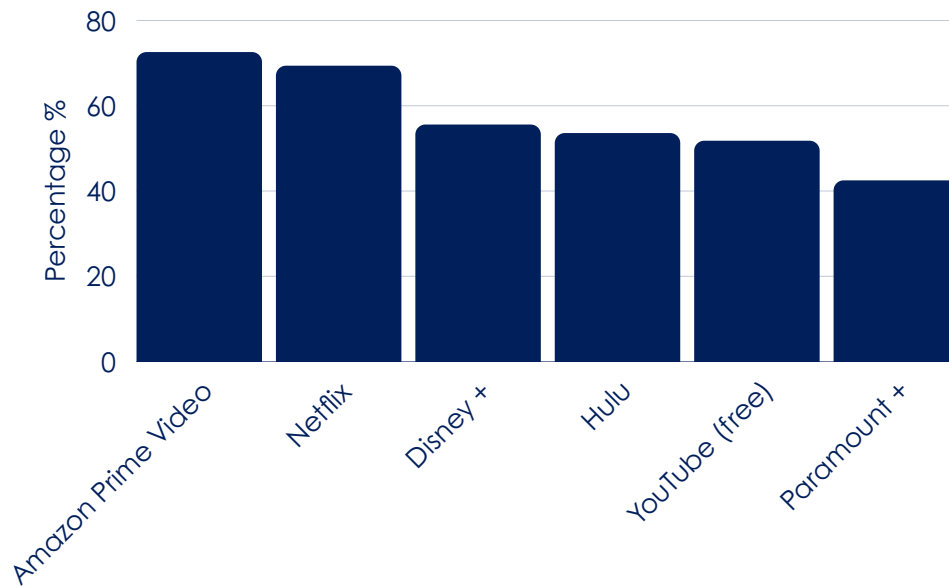
Cable Networks Watched Past 7 Days



Cincinnati Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Video Streaming Services/Apps Used Past 30 Days

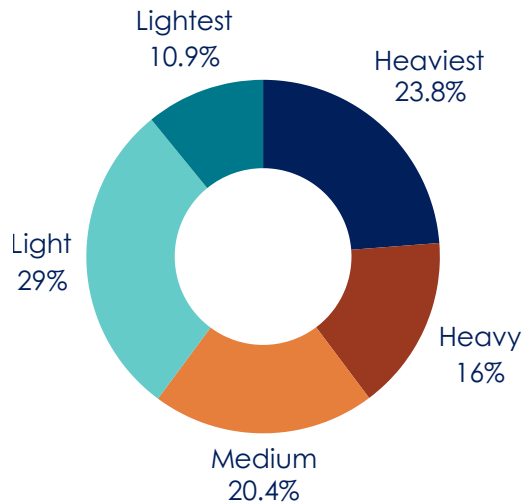


Dayton Insights

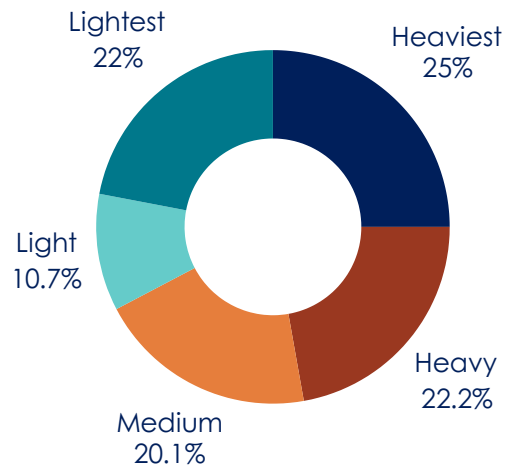
Dayton Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

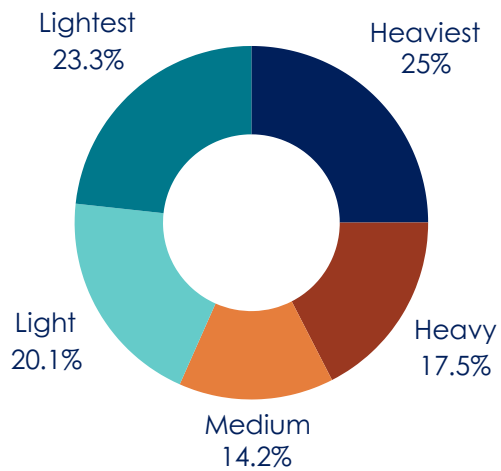
Radio Exposure:



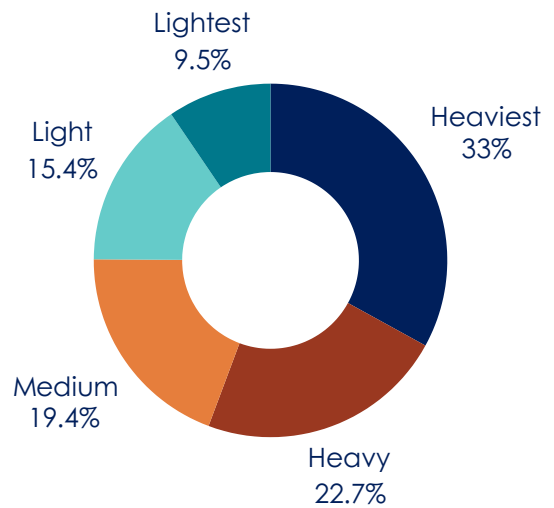
TV Exposure:



Newspaper Exposure:



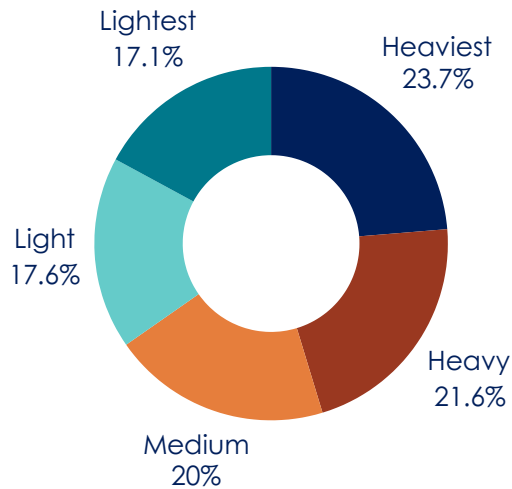
Miles Traveled:



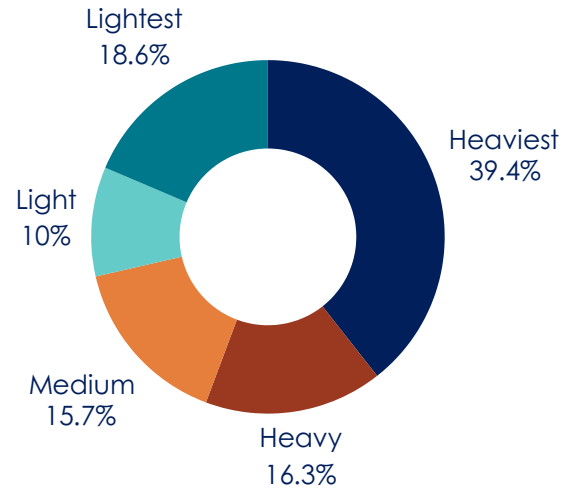
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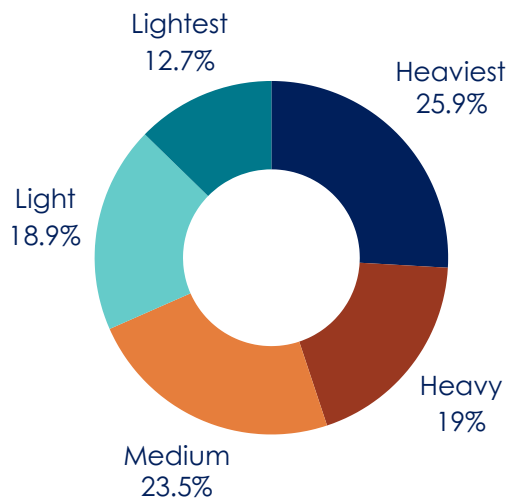
Internet Usage:



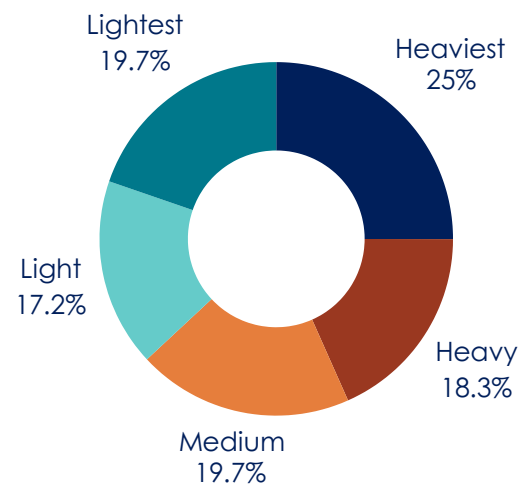
Digital Video Display Usage:



Money Spent on Groceries:



Eco-friendly Activities:

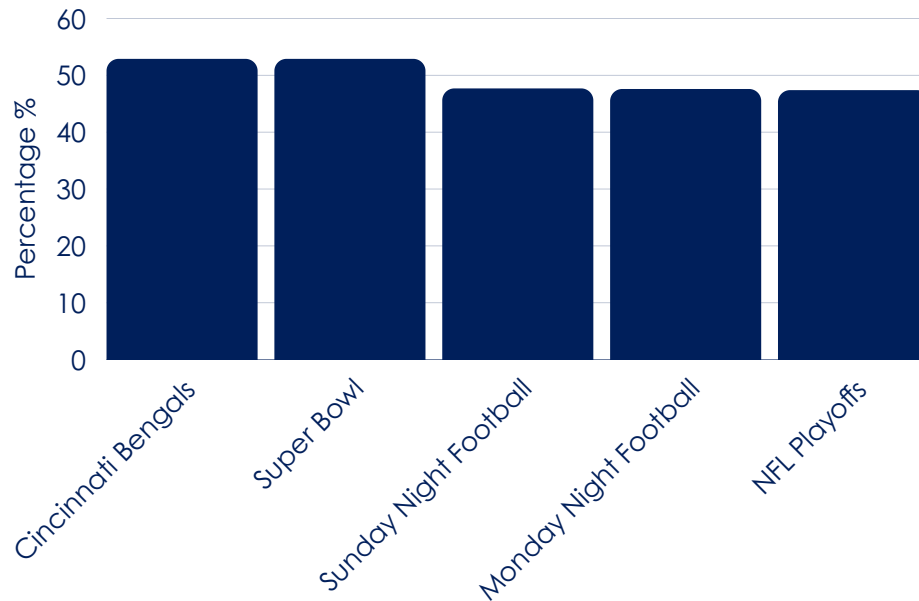


Brandience Insight: Dayton audiences are prime for digital-first campaigns, but still respond well to broadcast. We've seen success pairing digital media with broadcast (TV and radio).

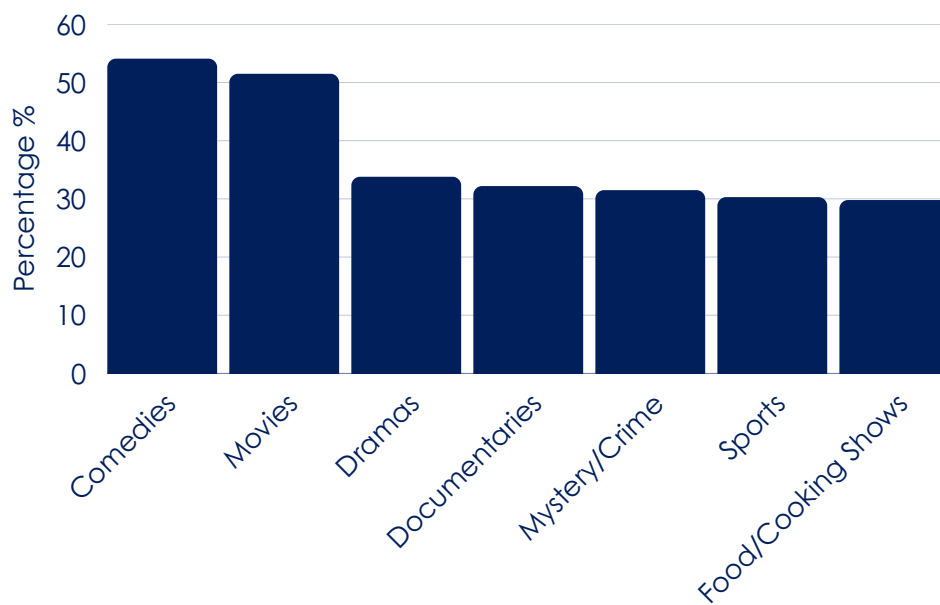
Dayton Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Top Sports Watched on TV past 12 months



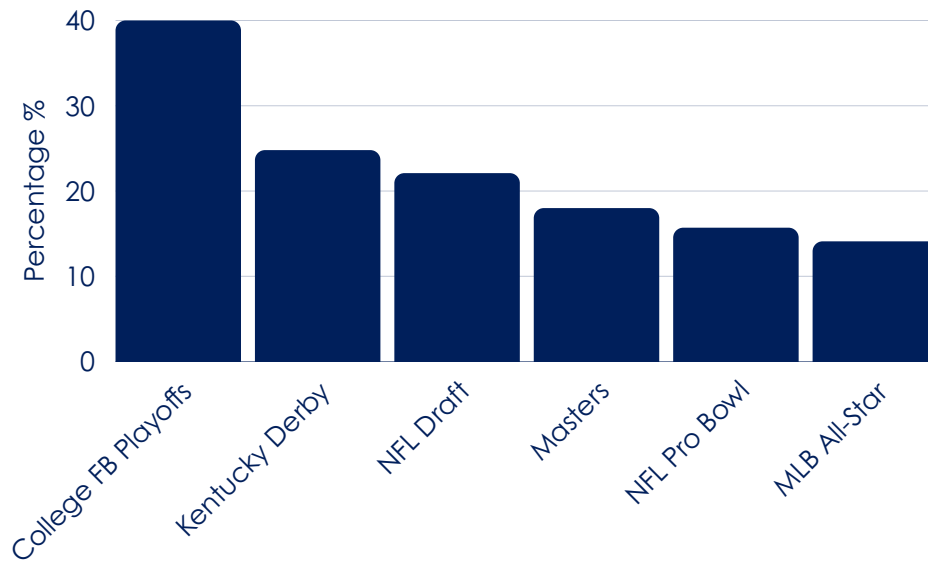
TV Programs - Typically Stream Online (any device)



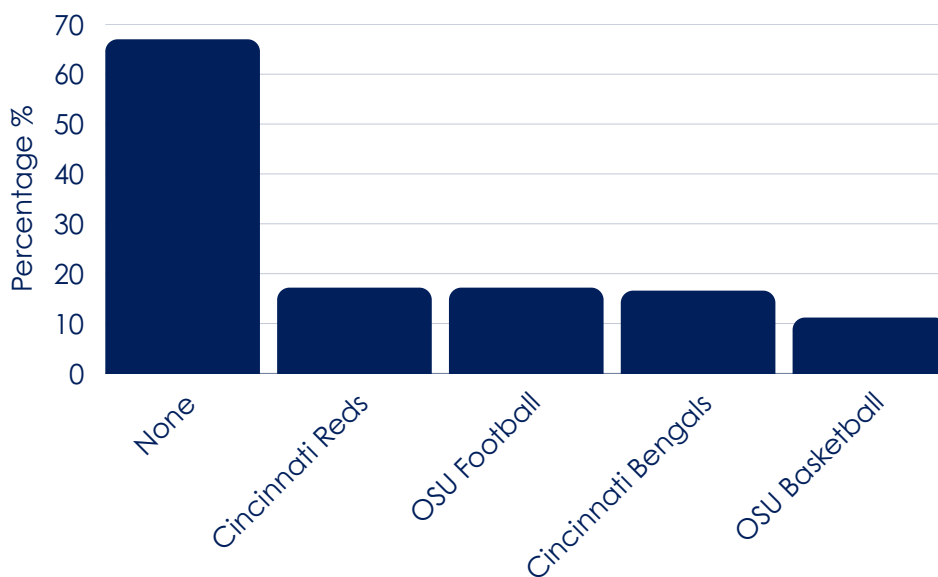
Dayton Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Special TV Programs Watched past 12 months



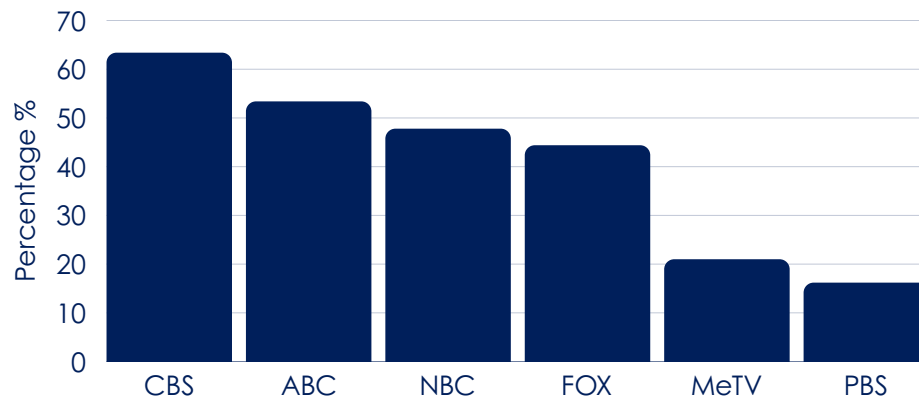
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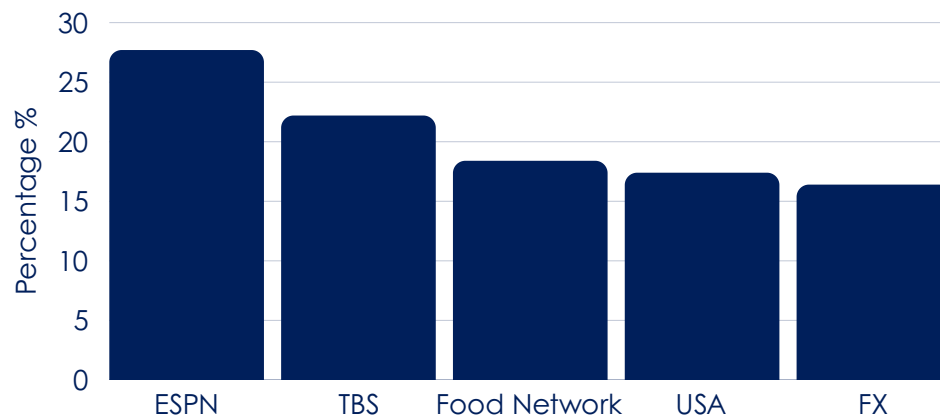
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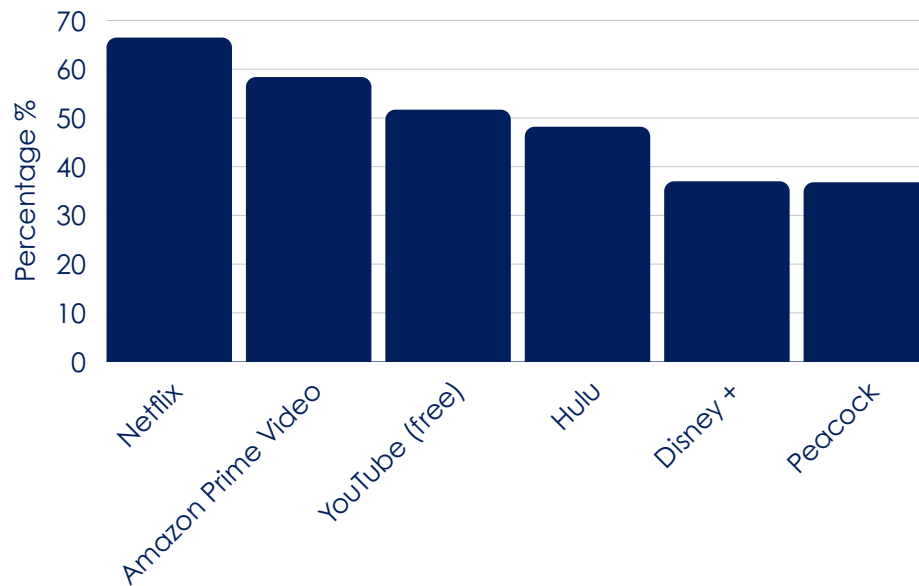
Cable Networks Watched Past 7 Days



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Video Streaming Services/Apps Used Past 30 Days

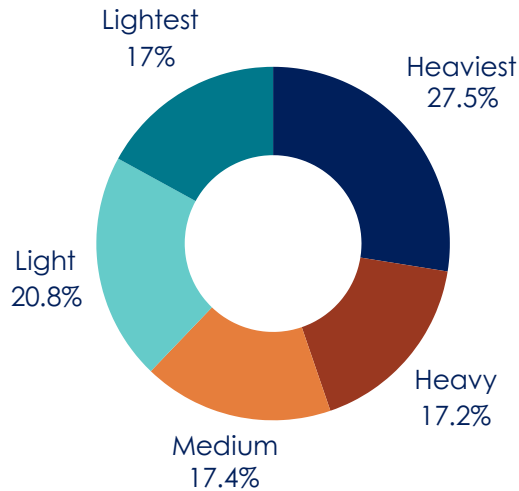


Columbus Insights

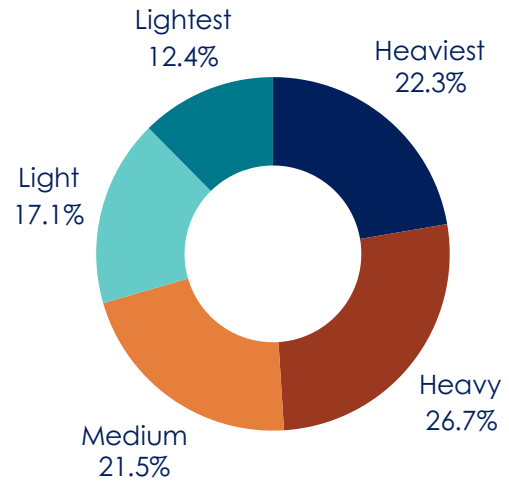
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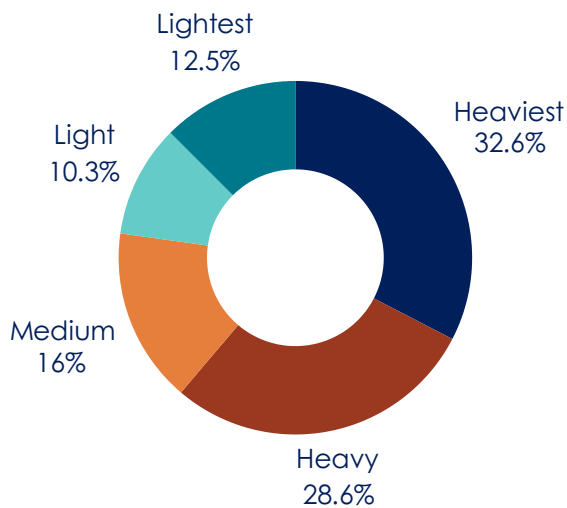
Radio Exposure:



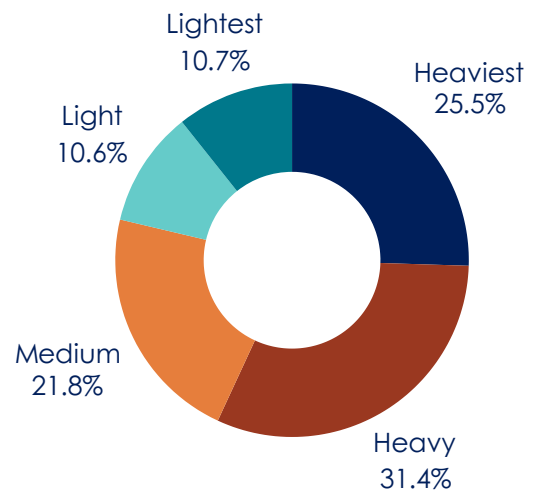
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Newspaper Exposure:



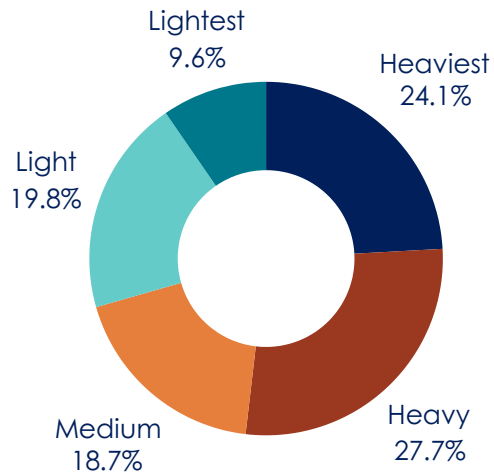
Miles Traveled:



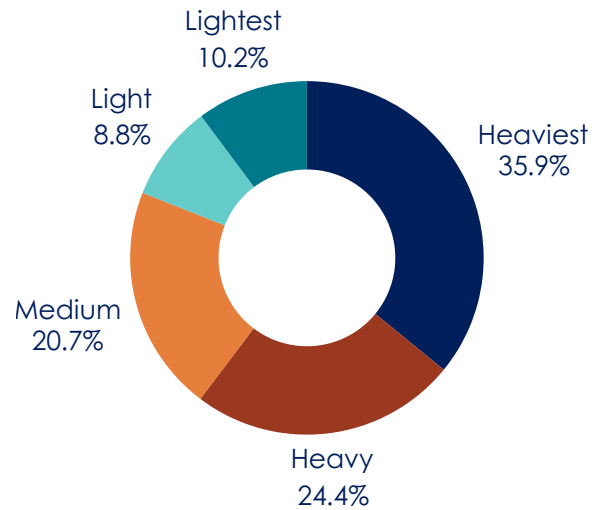
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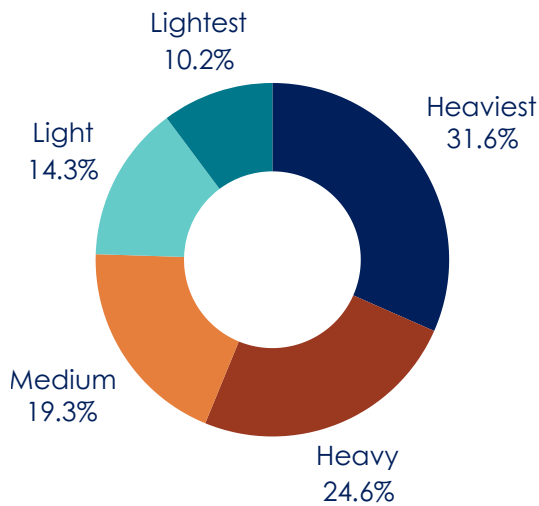
Internet Usage:



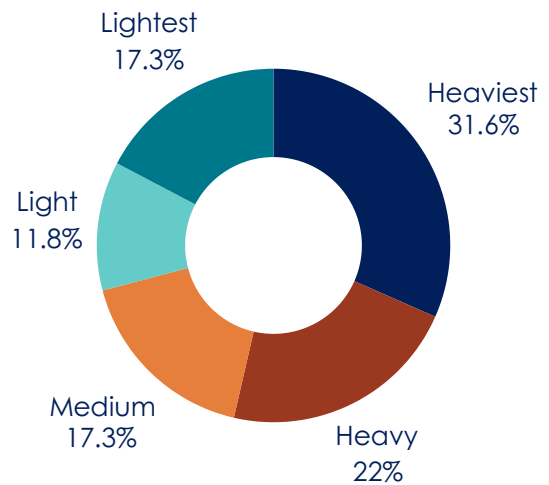
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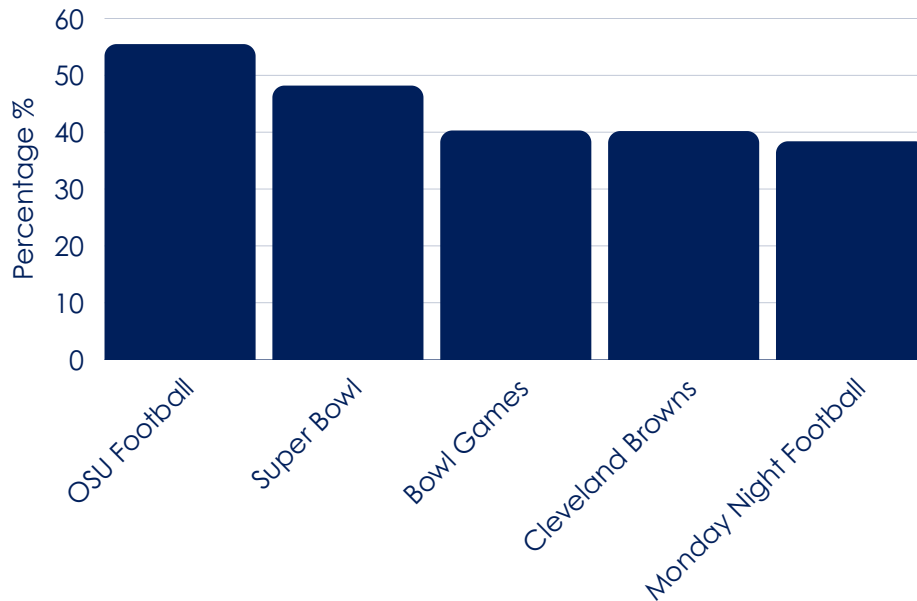
Eco-friendly Activities:



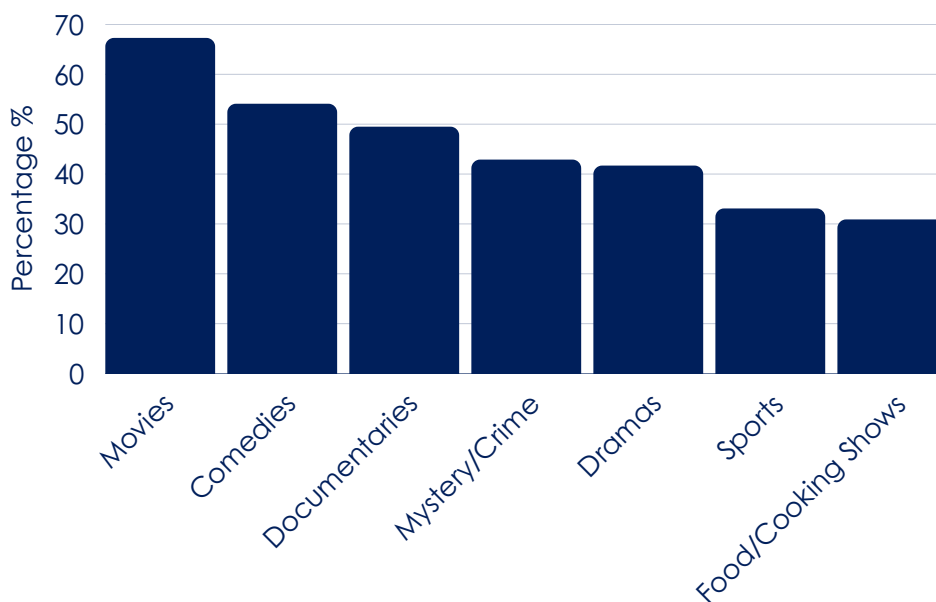
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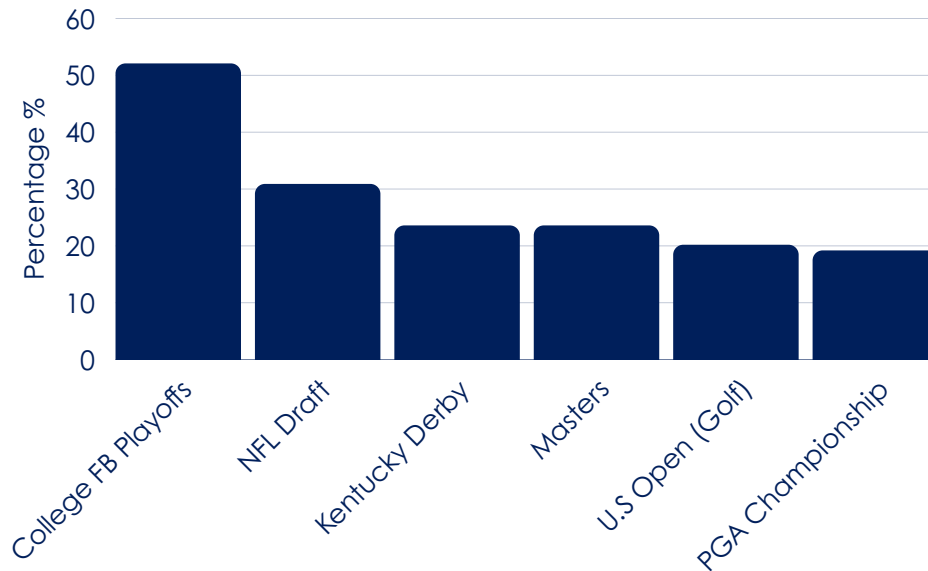


Brandience Insight: Aligning promotions with OSU football season — in-store, online, and at stadium tailgates — taps into a deeply loyal fan base that's already engaged with casual dining.

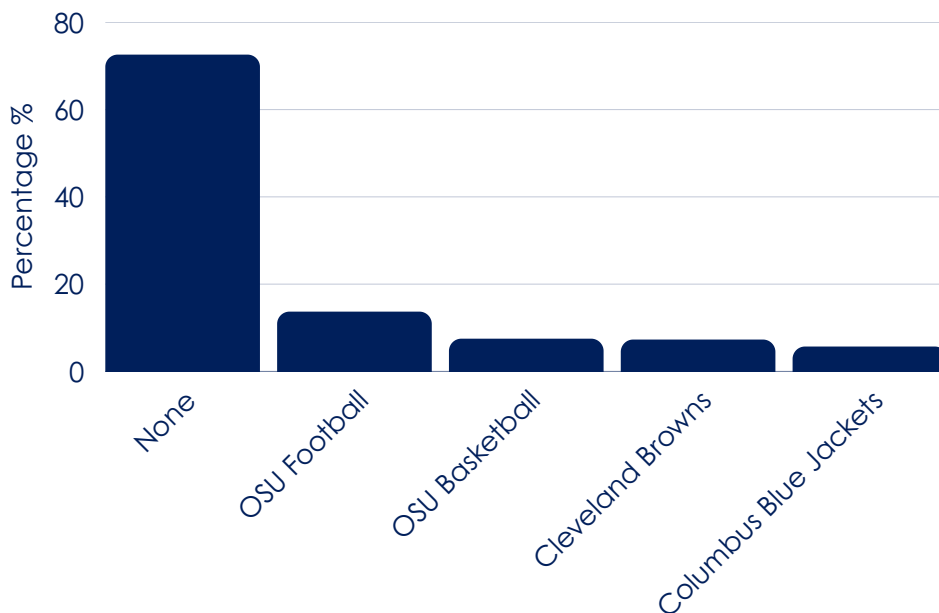
Columbus Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Special TV Programs Watched past 12 months



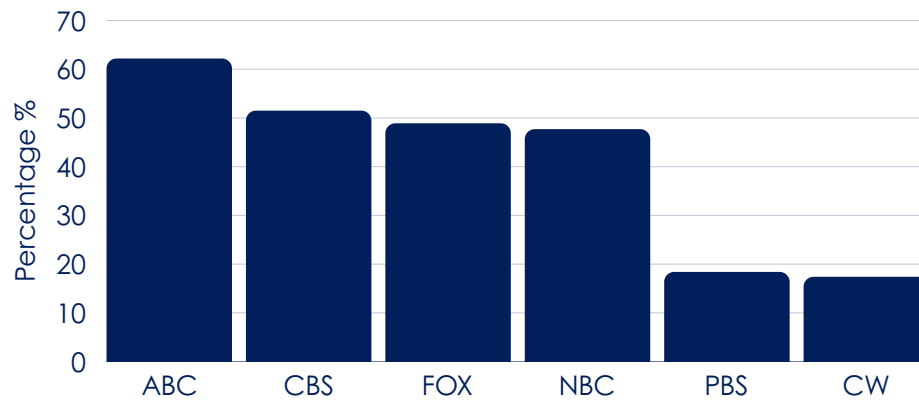
Sports Listened to on Radio past 12 months



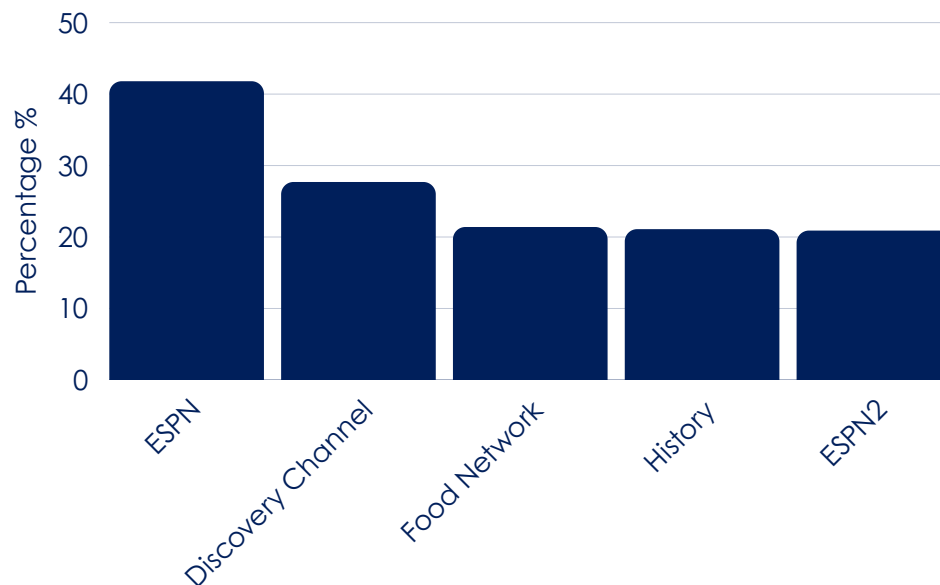
Columbus Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Broadcast Stations Watched Past 7 Days



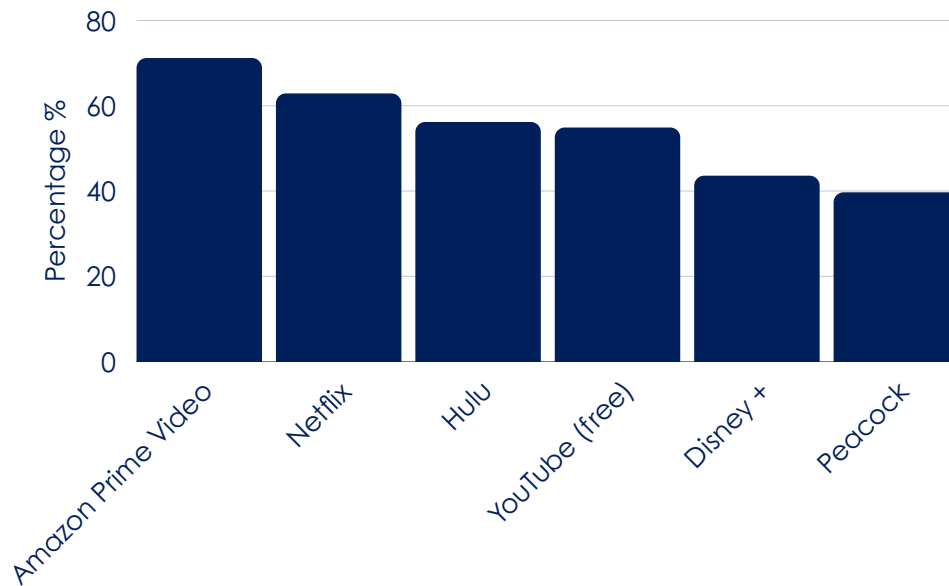
Cable Networks Watched Past 7 Days



Columbus Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Video Streaming Services/Apps Used Past 30 Days

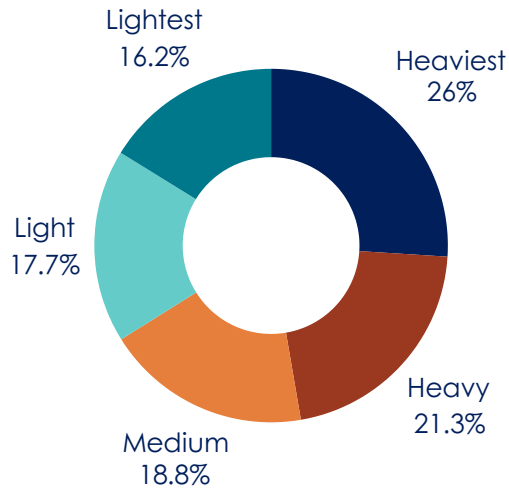


Cleveland Insights

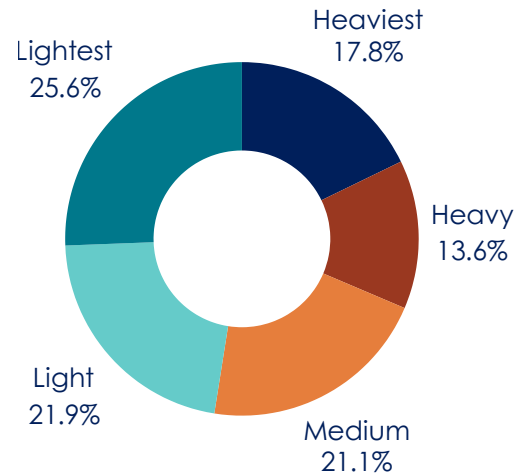
Cleveland Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

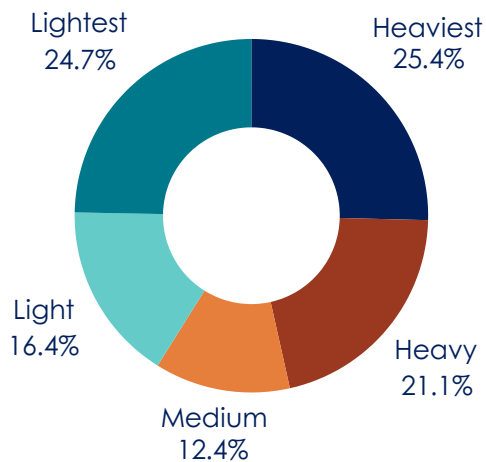
Radio Exposure:



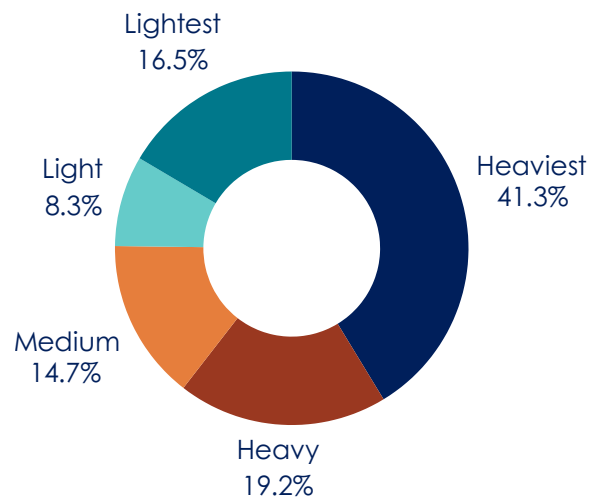
TV Exposure:



Newspaper Exposure:



Miles Traveled:

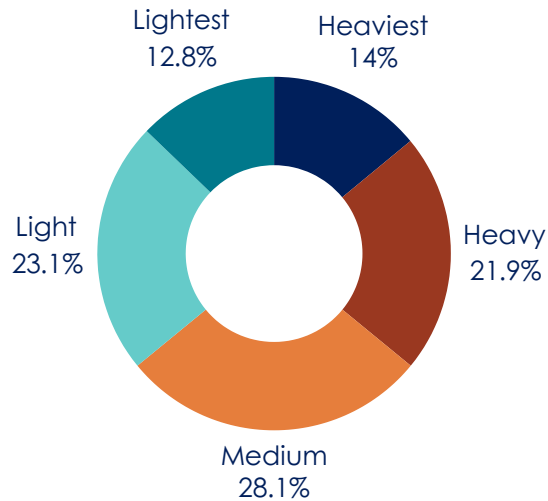


Brandience Insight: Cleveland's audience skews more traditional in some habits, with higher print and cable news consumption. A blended approach using community newspaper ads + lifestyle sponsorships can build trust and awareness, especially for family-focused dining promotions.

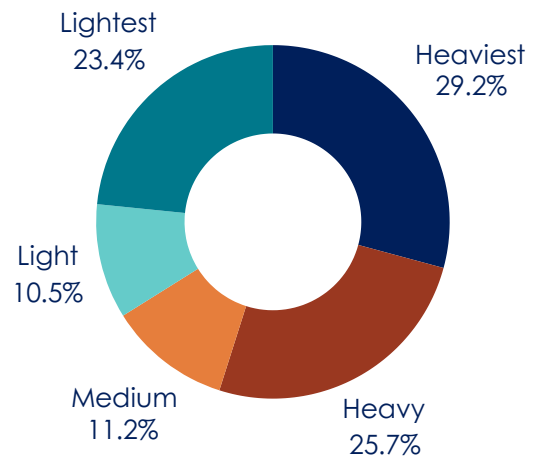
Cleveland Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

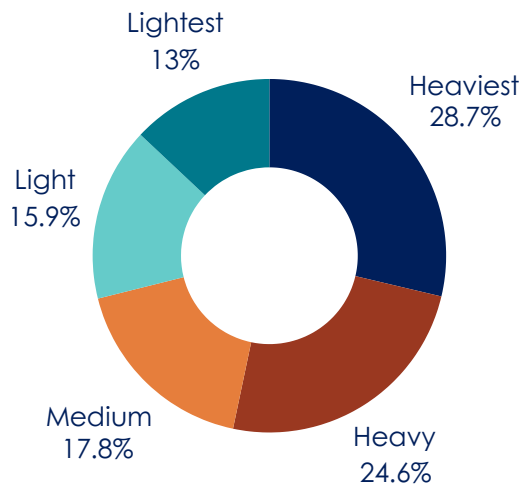
Internet Usage:



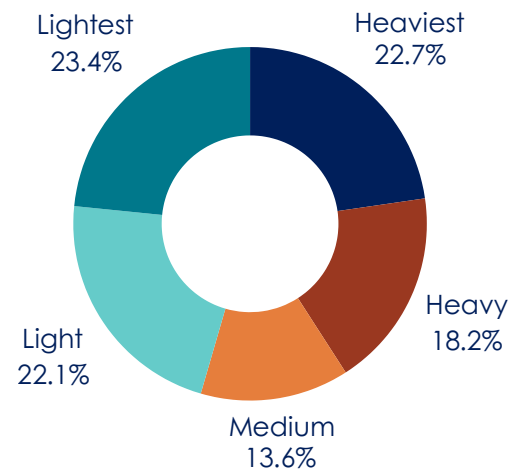
Digital Video Display Usage:



Money Spent on Groceries:



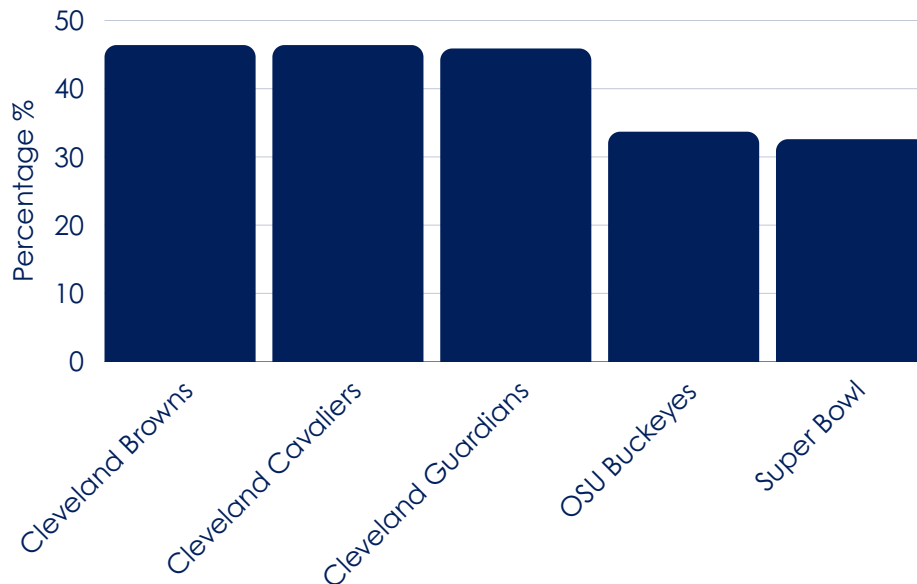
Eco-friendly Activities:



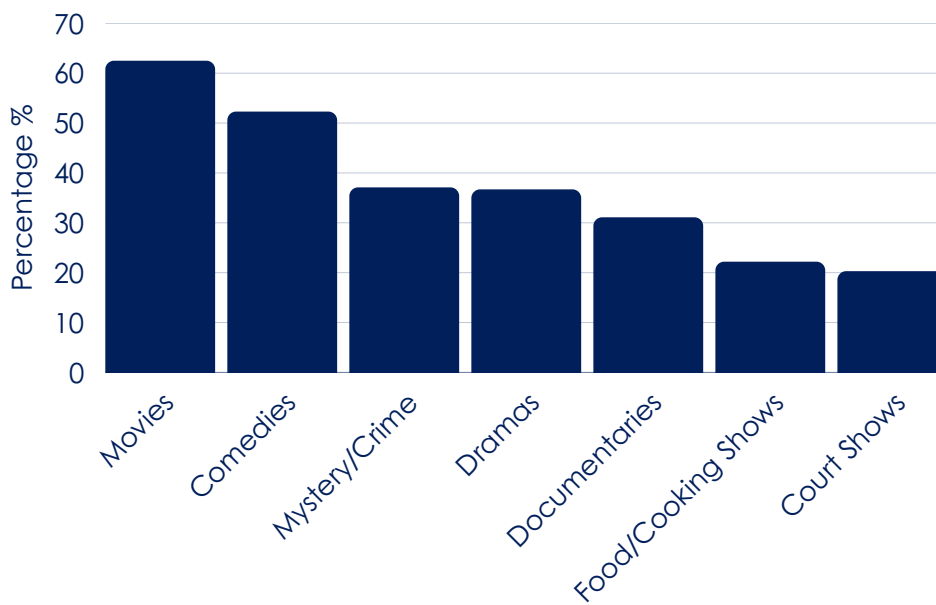
Cleveland Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Top Sports Watched on TV past 12 months



TV Programs - Typically Stream Online (any device)

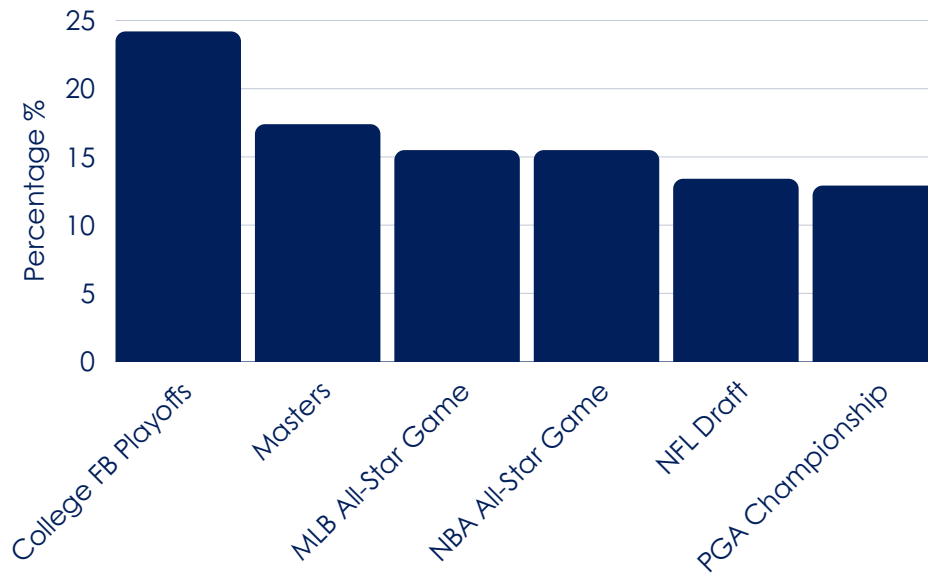


Brandience Insight: Leveraging Cleveland's deep loyalty to its pro sports teams through themed menu items, limited-time offers, or in-game promotions can create cultural relevance and drive both dine-in and takeout orders.

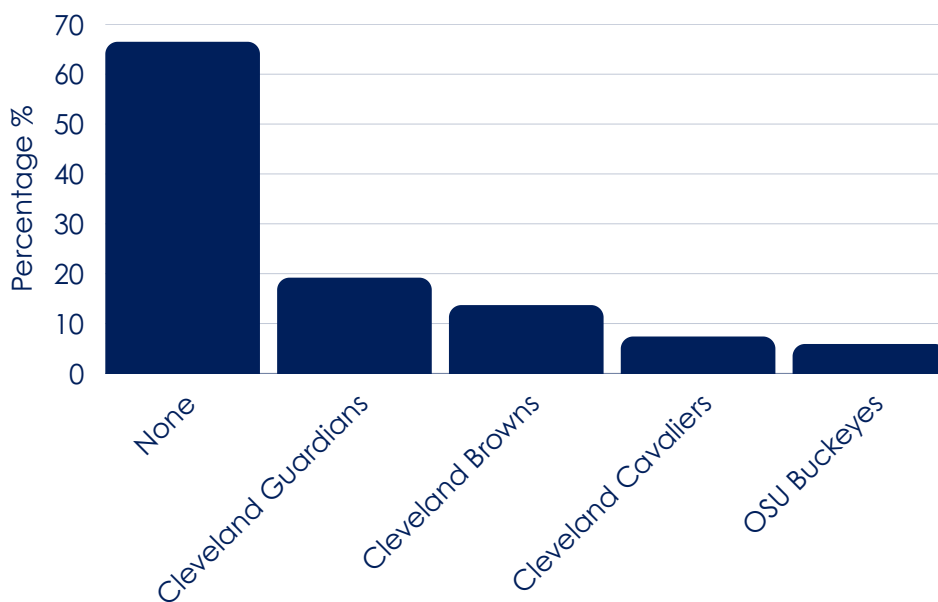
Cleveland Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Special TV Programs Watched past 12 months



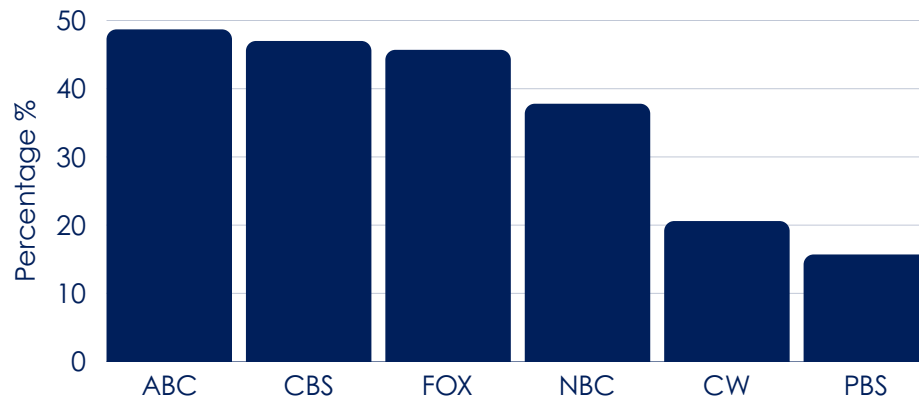
Sports Listened to on Radio past 12 months



Cleveland Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Broadcast Stations Watched Past 7 Days



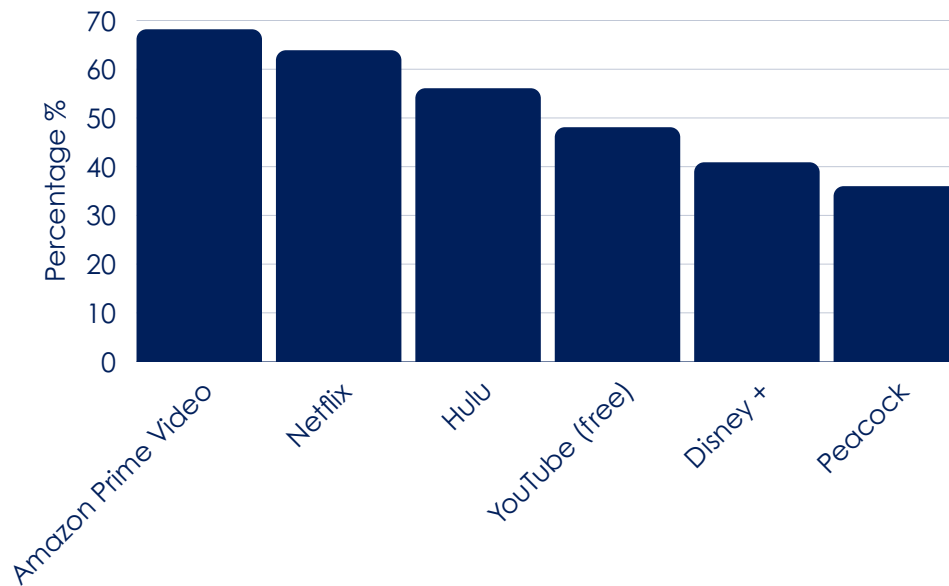
Cable Networks Watched Past 7 Days



Cleveland Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Video Streaming Services/Apps Used Past 30 Days

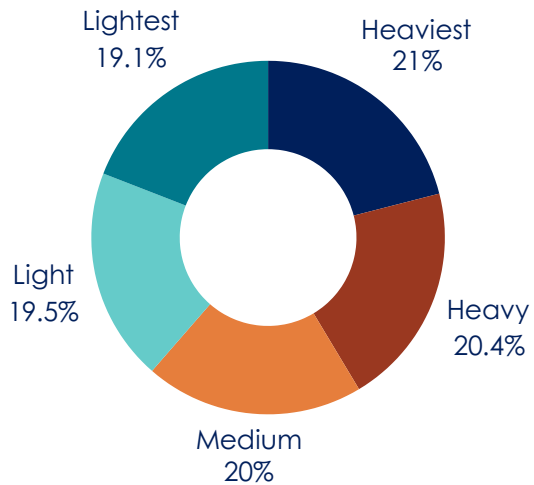


Toledo Insights

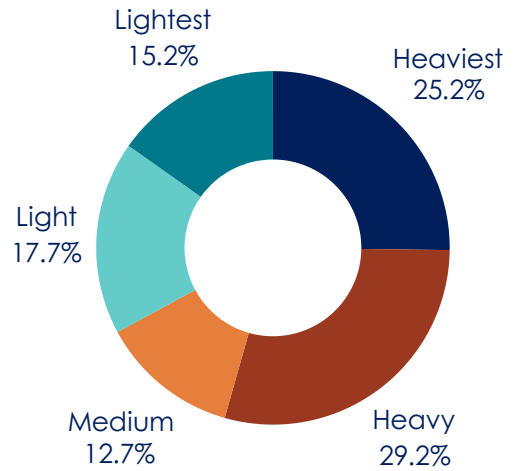
Toledo Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

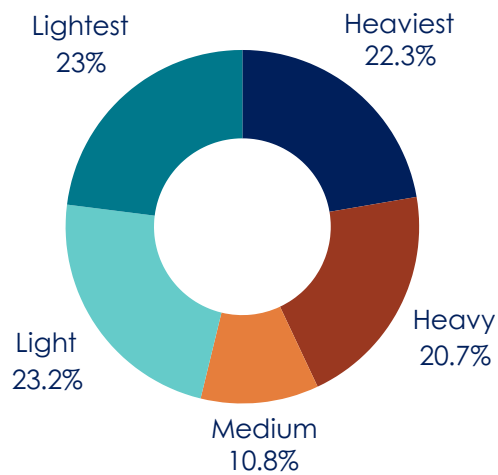
Radio Exposure:



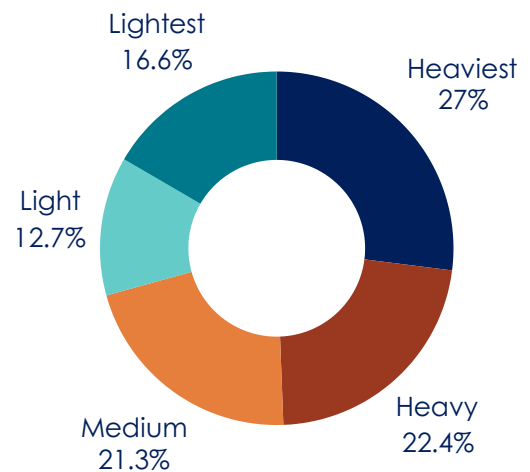
TV Exposure:



Newspaper Exposure:



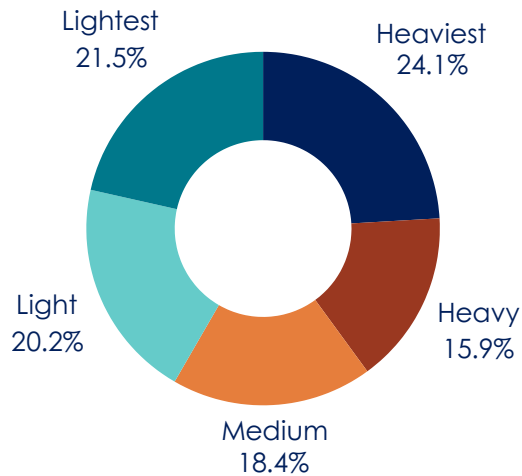
Miles Traveled:



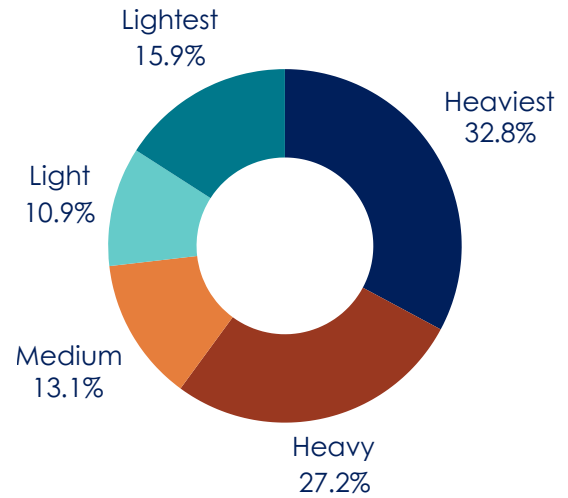
Toledo Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

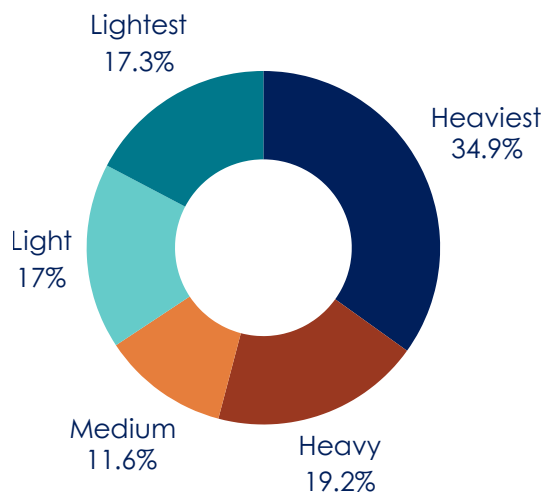
Internet Usage:



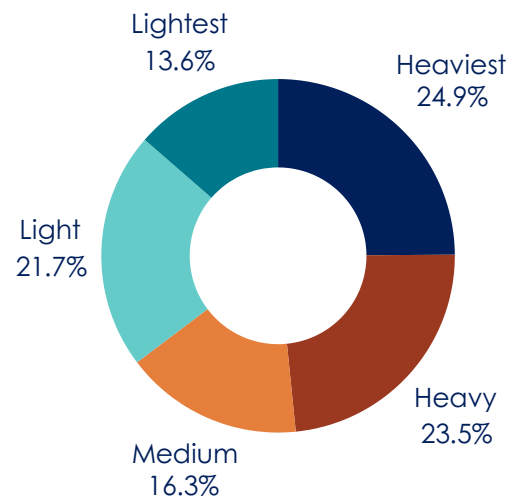
Digital Video Display Usage:



Money Spent on Groceries:



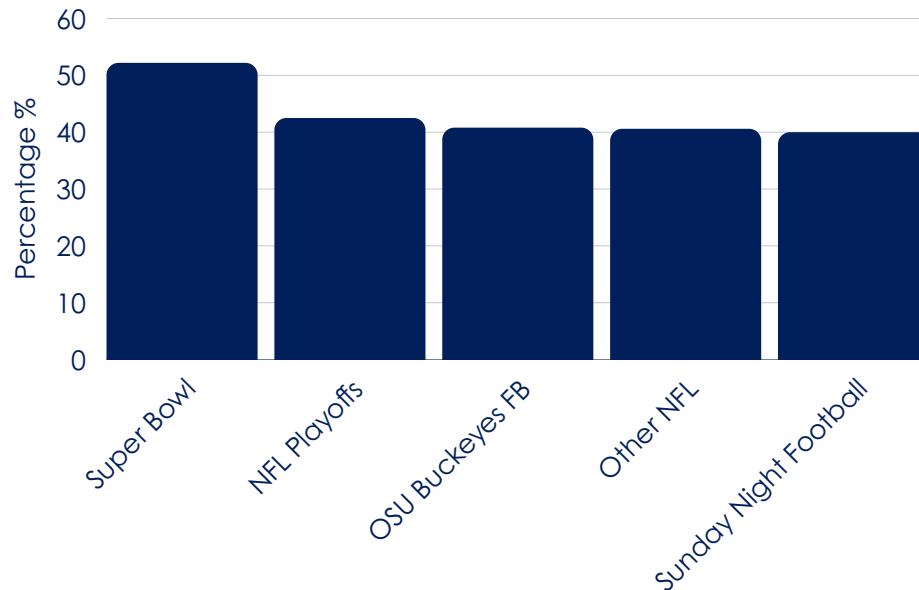
Eco-friendly Activities:



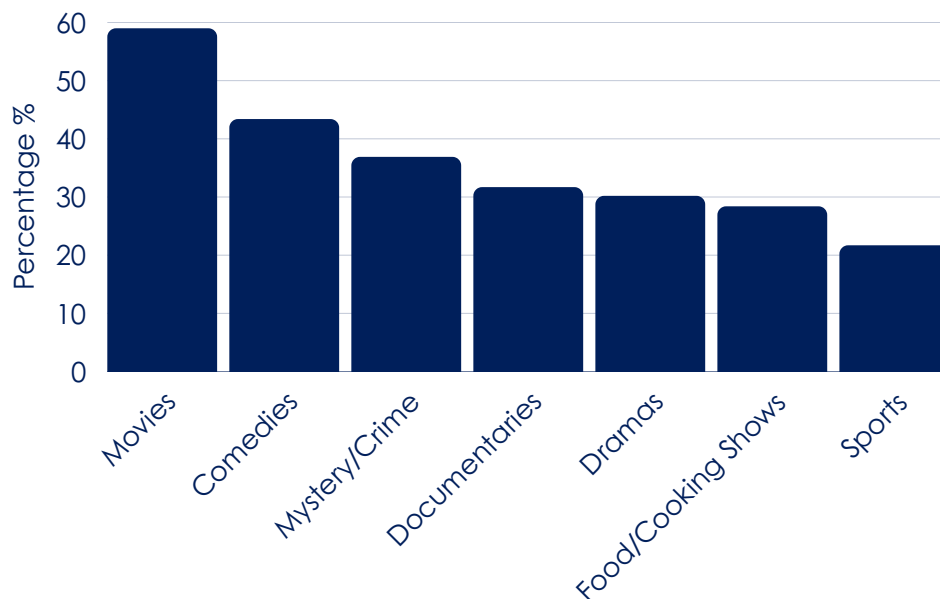
Toledo Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Top Sports Watched on TV past 12 months



TV Programs - Typically Stream Online (any device)

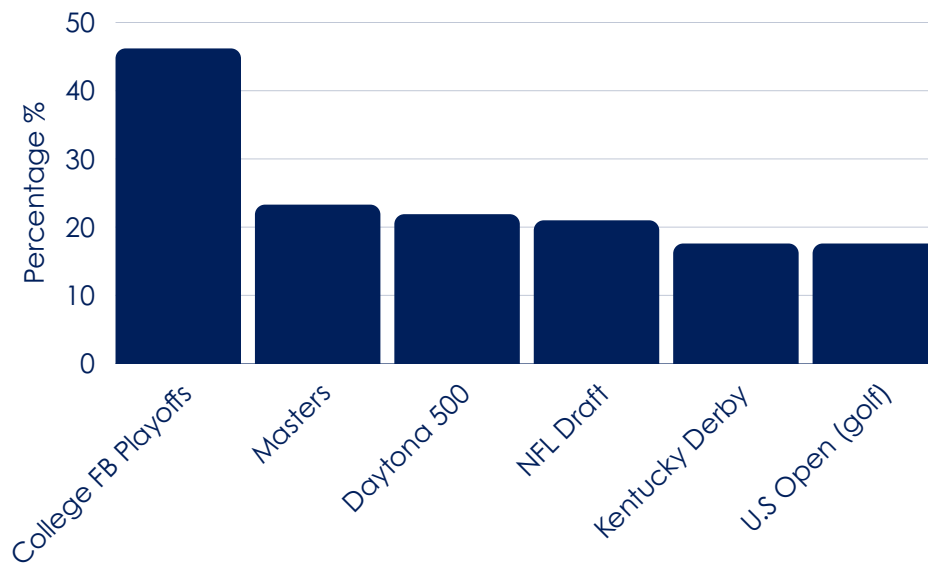


Brandience Insight: The dual loyalty to Ohio State and Detroit sports creates cross-market promotional opportunities, especially for chains with locations in both regions.

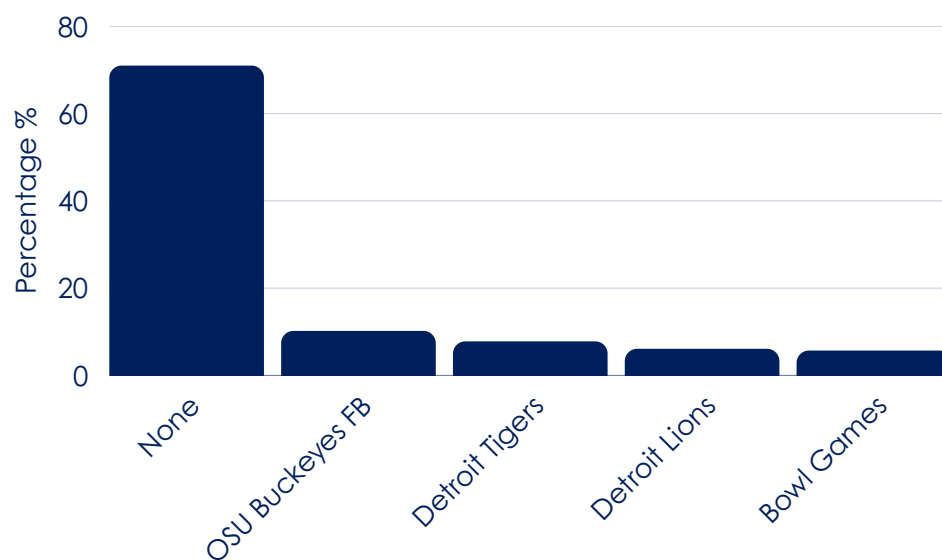
Toledo Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Special TV Programs Watched past 12 months



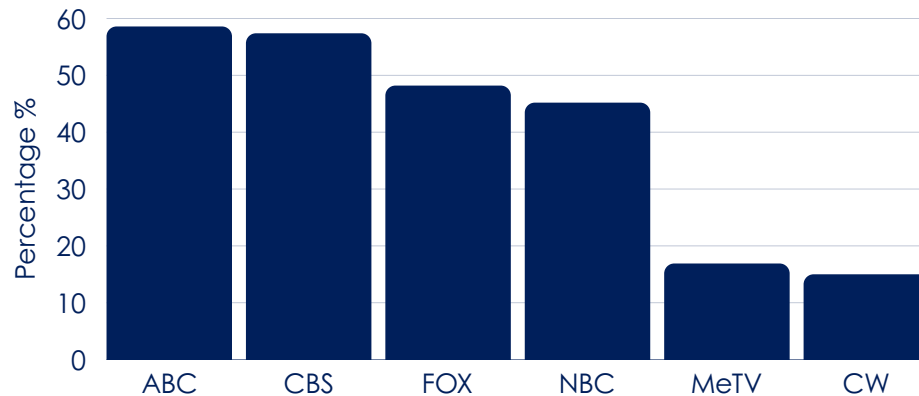
Sports Listened to on Radio past 12 months



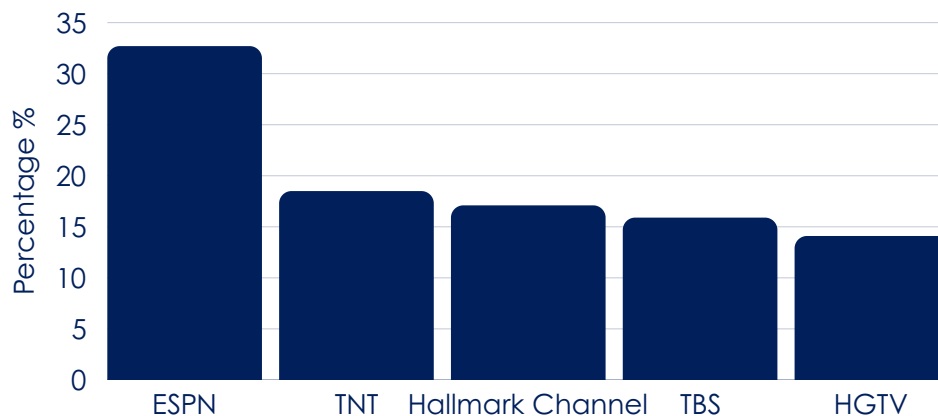
Toledo Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Broadcast Stations Watched Past 7 Days



Cable Networks Watched Past 7 Days

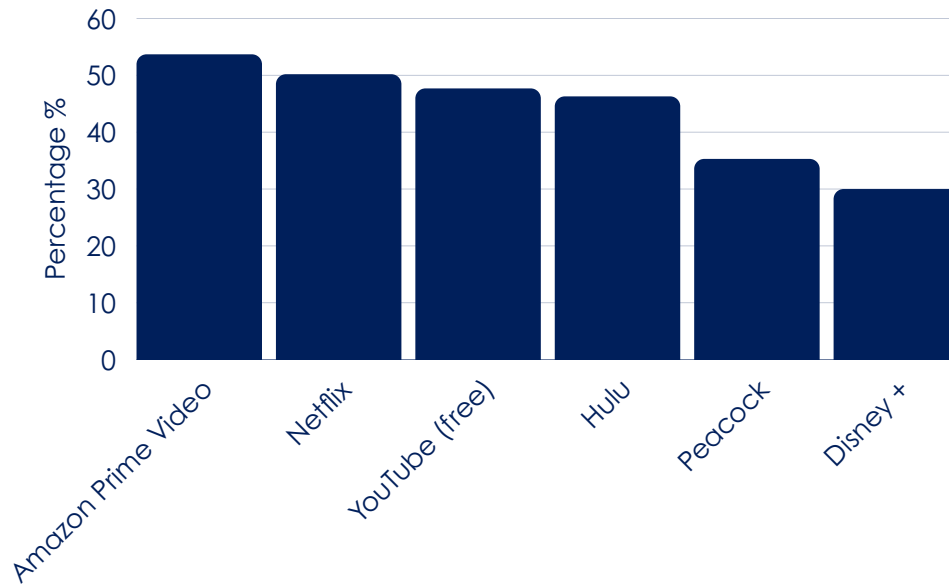


Brandience Insight: For Toledo, combine targeted OTT ads with emotionally resonant creative — the Hallmark viewership suggests messaging that emphasizes family, tradition, and shared moments may outperform pure value-focused ads.

Toledo Consumer Habits

Heavy QSR & Sit-Down Restaurant Users

Video Streaming Services/Apps Used Past 30 Days

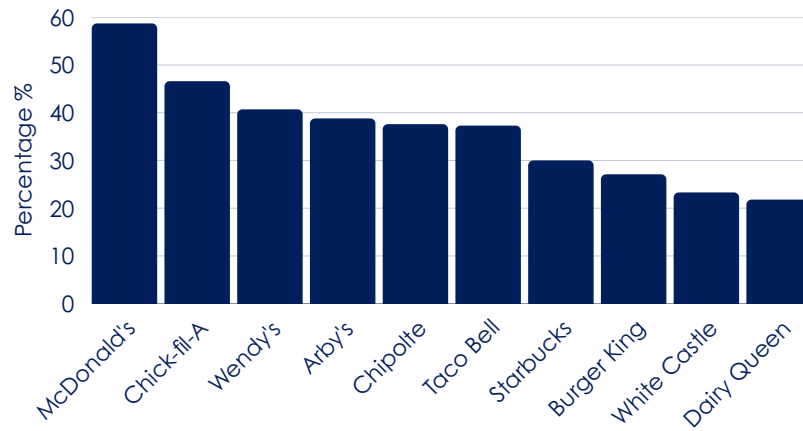


Top QSRs + Sit-Down Restaurants

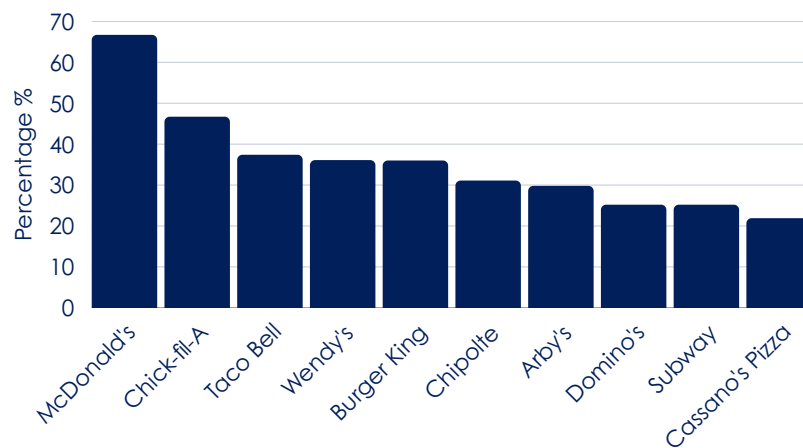
Top QSRs: Ohio Markets

Heavy QSR & Sit-Down Restaurant Users

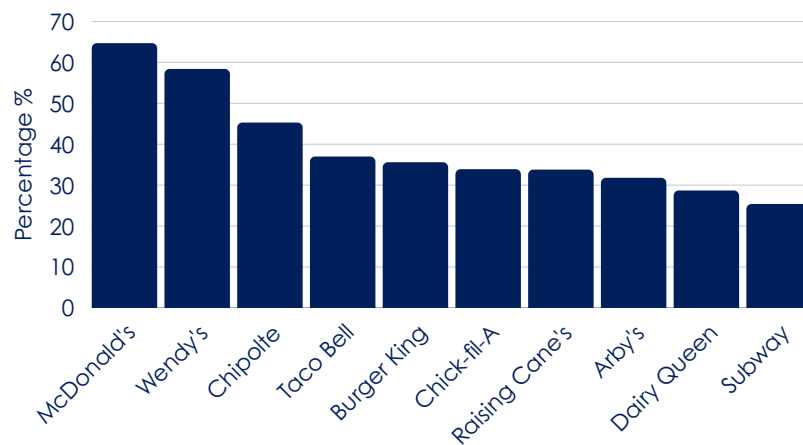
Cincinnati:



Dayton:



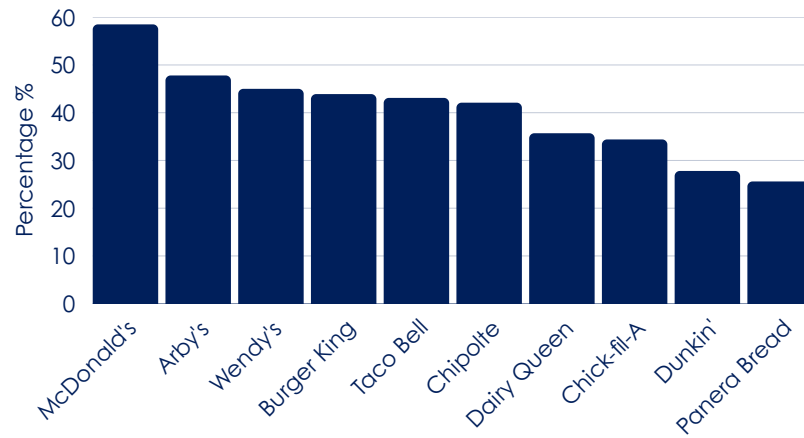
Columbus:



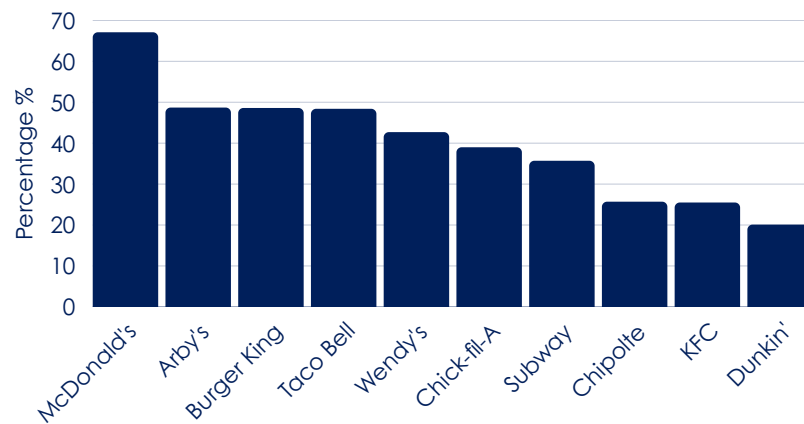
Top QSRs: Ohio Markets

Heavy QSR & Sit-Down Restaurant Users

Cleveland:



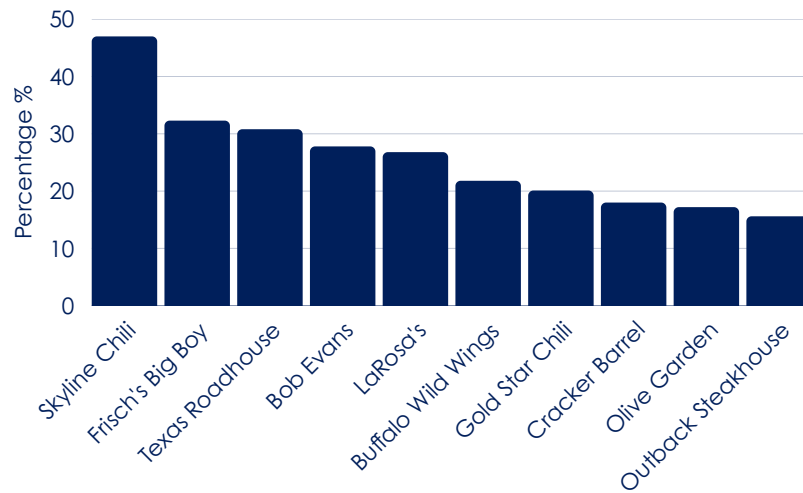
Toledo:



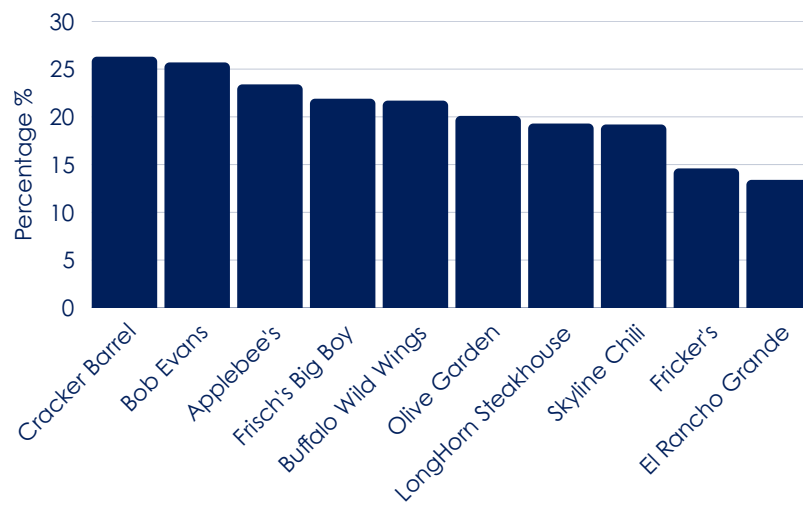
Top Sit-Down Restaurants: Ohio Market

Heavy QSR & Sit-Down Restaurant Users

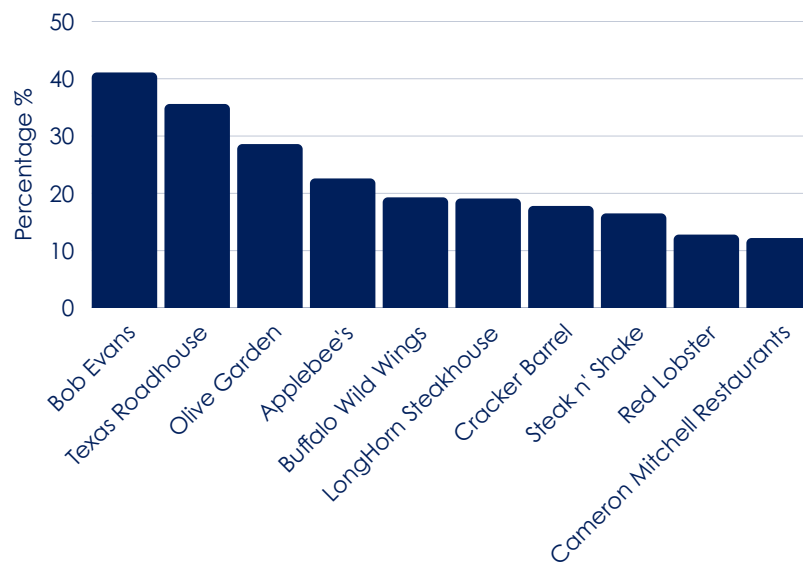
Cincinnati:



Dayton:



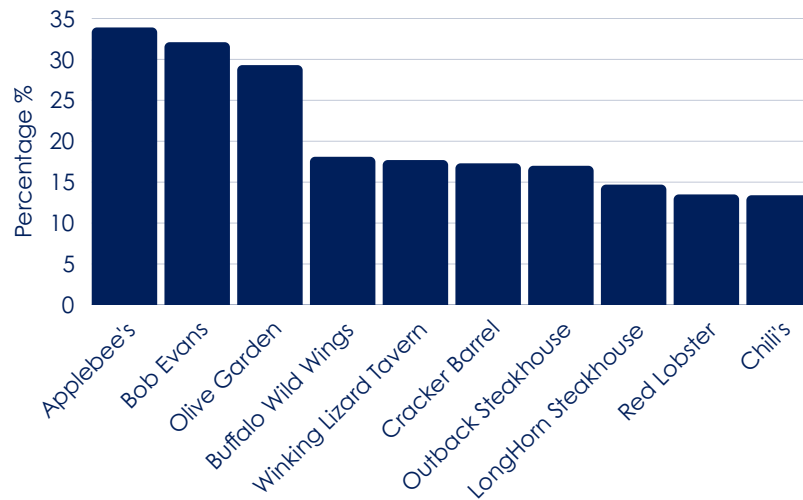
Columbus:



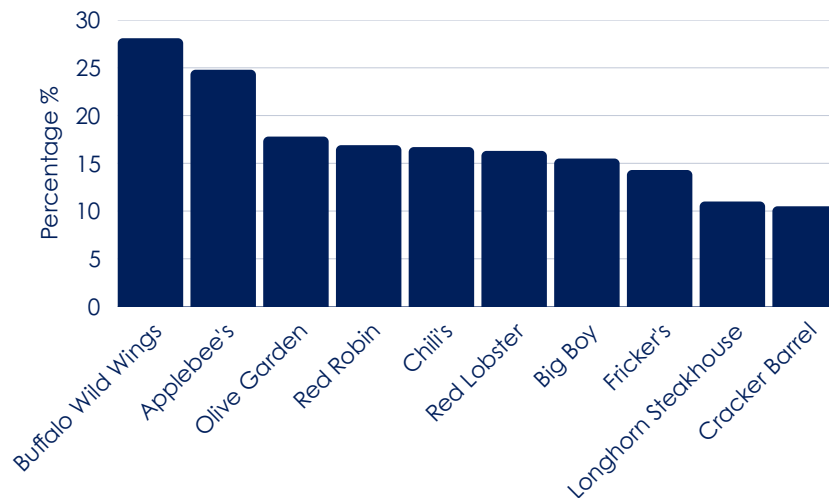
Top Sit-Down Restaurants: Ohio Market

Heavy QSR & Sit-Down Restaurant Users

Cleveland:



Toledo:





Thank you!

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