



GUTCHECK

Quick Service Restaurants
Concept Prioritizer™



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BACKGROUND & OBJECTIVES

GutCheck desired a deeper understanding across the Quick Service Restaurant (QSR) industry in terms of how favorites are chosen, and how individuals and families develop loyalties and habits. Additionally, the team desired knowledge about the most important trends in QSRs and how they influence key metrics associated with the business.

What drives QSR loyalty, and which restaurants best deliver on today's important attributes?

Through scorecard analysis, evaluate a set of QSR trends based on:

- Likelihood to Motivate a Visit
- Uniqueness
- Driver of Loyalty
- Adds Value
- Represents an Improvement Over Current Options
- Personal Relevance

For those with children under age 10, determine which restaurants best deliver a family-friendly experience

Capture likes and improvements for respondents' favorite QSRs

STIMULI TESTED

Attributes Tested
Low prices
Variety of menu options
Great tasting food
Pleasant staff
High quality food
Fast preparation
Clean environment
Family-friendly atmosphere
Online/mobile ordering option

METHODOLOGY

This study was conducted via an online quantitative survey. Each survey lasted approximately 6 minutes

Method	# of Concepts
Grid	10 Attributes

# of Concepts per Respondent	# of Respondents per Concept
10	200

Audience	
Gender	Males and Females
Age	18-65
Frequency of QSR Visit	Capture
Awareness of Popular QSRs	At least 8
QSR Most Often Visited	Capture

Frequent Visitors	50% of Sample
Visits QSR everyday, multiple times per week, or once a week	

Infrequent Visitors	50% of Sample
Visits QSR three times per month, once or twice a month, once every few months, once every 6 months, or once a year or longer	

FINDINGS

OVERALL KEY FINDINGS

For frequent visitors, all aspects of a QSR's food drive loyalty, more than restaurant atmosphere or other intangible qualities

- Taste, quality, and price of food all ranked as top attributes
 - Respondents likely visit QSRs because they offer quick, affordable food, potentially indicating that if they wanted more add-ons (like atmosphere, service, etc.), they would likely visit a traditional restaurant
- Specific offerings, like family-friendly environment and online/mobile ordering option, were least likely to drive loyalty
 - These are seen as nice-to-have extras but are not enough to drive loyalty
 - Family-friendly atmosphere did not perform well, even for households with children, indicating that food is truly the driving factor
 - However, family-friendly atmosphere was important to households with children under age 10

Concept Name	Driver of Loyalty
Taste of food	83%
Quality of food	76%
Price of food	79%
Cleanliness	71%
Menu variety	65%
Speed of preparation	65%
Friendliness of staff	62%
Healthy options	59%
Family-friendly atmosphere	52%
Online/mobile ordering option	28%
Mean	64%

OVERALL KEY FINDINGS

For infrequent visitors (not loyal to QSRs), the food and cleanliness of a QSR motivate visits

- Cleanliness is more important to infrequent visitors compared to frequent visitors
- Food remains important to both frequent and infrequent visitors
- Healthy options and online/mobile ordering options remain unimportant

Concept Name	Likelihood to Motivate A Visit
Taste of food	81%
Cleanliness	71%
Quality of food	67%
Price of food	63%
Friendliness of staff	53%
Menu variety	52%
Family-friendly atmosphere	44%
Speed of preparation	42%
Healthy options	37%
Online/mobile ordering option	16%
Mean	53%

“Likelihood to Motivate a Visit” is a more relevant metric than “Driver of Loyalty” for infrequent visitors, as they do not have loyalty to QSR restaurants

Healthy options were less likely to motivate a visit for infrequent visitors, likely because they view QSRs as an occasional treat

SCORECARD METRICS (n=200), TOP BOX

Total - Concept vs. Mean Scorecard

Concept Name	Likelihood to Motivate Visit	Uniqueness	Driver of Loyalty	Adds Value	Improvement Over Current Option	Personal Relevance
Taste of food	83%	40%	76%	53%	50%	84%
Cleanliness	74%	37%	64%	38%	41%	73%
Quality of food	72%	44%	73%	52%	52%	77%
Price of food	67%	35%	69%	N/A	43%	67%
Friendliness of staff	62%	37%	58%	32%	41%	54%
Menu variety	60%	36%	61%	36%	38%	52%
Speed of preparation	52%	35%	55%	28%	36%	47%
Family-friendly atmosphere	49%	30%	47%	31%	31%	43%
Healthy options	47%	41%	50%	35%	46%	48%
Online/mobile ordering option	21%	28%	24%	19%	23%	22%
Mean	58%	36%	57%	36%	40%	57%

GutCheck Concept vs. Mean Scorecard Comparison

Statistical significance is determined by a 2-tailed test and sample size of N=200 per concept.

Sorted by Likelihood to Motivate Visit. Scores are TB on a 5 point scale.

Shading Legend: Significance compared to the mean > 90% > 80% < 80% < 90%

SCORECARD METRICS (n=100), TOP BOX

Frequent Visitors - Concept vs. Mean Scorecard

Concept Name	Likelihood to Motivate Visit	Uniqueness	Driver of Loyalty	Adds Value	Improvement over Current Option	Personal Relevance
Taste of food	85%	45%	83%	59%	55%	85%
Quality of food	77%	51%	76%	55%	56%	82%
Cleanliness	76%	41%	71%	45%	46%	78%
Price of food	70%	45%	79%	N/A	46%	71%
Friendliness of staff	70%	42%	62%	36%	47%	60%
Menu variety	68%	44%	65%	42%	41%	61%
Speed of preparation	62%	43%	65%	34%	45%	55%
Healthy options	56%	50%	59%	43%	54%	57%
Family-friendly atmosphere	53%	36%	52%	38%	35%	48%
Online/mobile ordering option	25%	35%	28%	24%	30%	28%
Mean	64%	43%	64%	38%	46%	63%

GutCheck Concept vs. Mean Scorecard Comparison

Statistical significance is determined by a 2-tailed test and sample size of N=100 per concept.

Sorted by Likelihood to Motivate Visit. Scores are TB on a 5 point scale.

Shading Legend: Significance compared to the mean

> 90% > 80% < 80% < 90%

SCORECARD METRICS (n=100), TOP BOX

Infrequent Visitors - Concept vs. Mean Scorecard

Concept Name	Likelihood to Motivate a Visit	Uniqueness	Driver of Loyalty	Adds Value	Improvement Over Current Option	Personal Relevance
Taste of food	81%	35%	69%	46%	44%	83%
Cleanliness	71%	32%	57%	31%	36%	68%
Quality of food	67%	37%	69%	49%	48%	71%
Price of food	63%	24%	58%	N/A	40%	63%
Friendliness of staff	53%	32%	53%	27%	34%	48%
Menu variety	52%	28%	56%	29%	34%	43%
Family-friendly atmosphere	44%	23%	41%	23%	26%	38%
Speed of preparation	42%	27%	44%	21%	27%	39%
Healthy options	37%	32%	41%	27%	37%	39%
Online/mobile ordering option	16%	21%	19%	13%	15%	16%
Mean	53%	29%	51%	30%	34%	51%

GutCheck Concept vs. Mean Scorecard Comparison

Statistical significance is determined by a 2-tailed test and sample size of N=100 per concept.

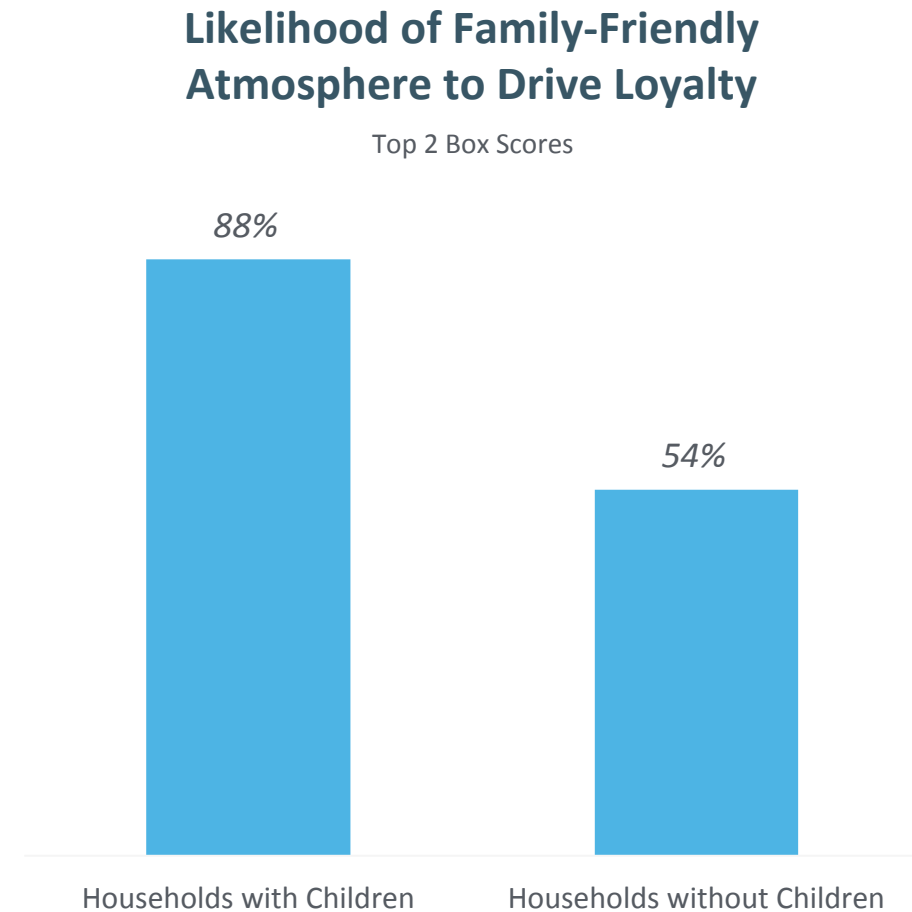
Sorted by Likelihood to Motivate a Visit. Scores are TB on a 5 point scale.

Shading Legend: Significance compared to the mean > 90% > 80% < 80% < 90%

ADDITIONAL FINDINGS

Family-friendly atmosphere drove loyalty for households with children

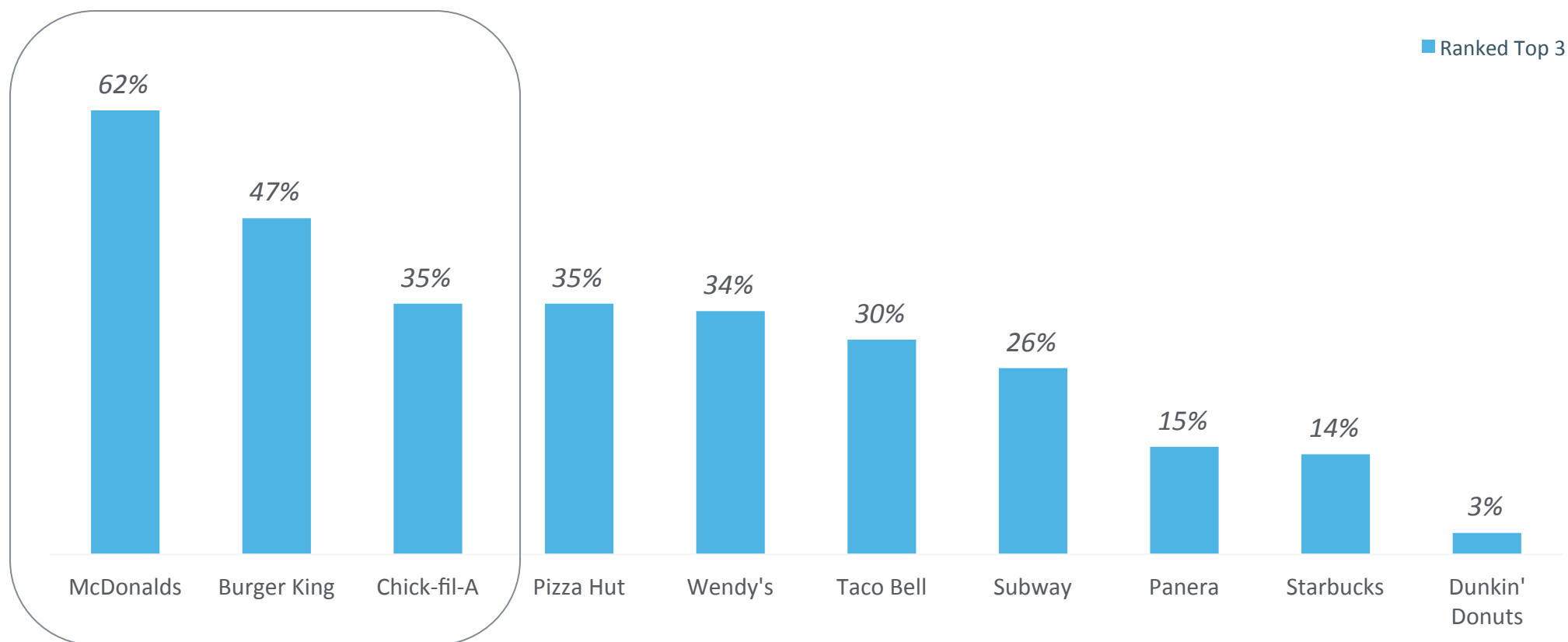
- As expected, when separated out by the presence of children, family-friendly atmosphere became significantly more important to those with children
- This could point to a family's need for quick, easy, and inexpensive meals
- Those without children did not respond adversely to the family-friendly attribute; it just did not drive the same amount of loyalty



Screening Question: How many children under the age of 10 do you currently have living at home?

METRICS (n=86), TOP 3 RANKS AGGREGATED

Traditional fast food restaurants were seen as the most family-friendly



Q9: Of the following quick service restaurants, please rank the top three most family-friendly restaurants, with #1 being the MOST family-friendly restaurant and #2 being the second most family-friendly restaurant and so on.



OPEN END CODING

KEY WORD CODING (n=155), LIKES

Basics like service and food options were most often identified as likable attributes of favorite QSRs



Q7: What do you like about your favorite quick service restaurant? Please type 2-3 sentences.

KEY WORD CODING (n=110), IMPROVEMENTS

Respondents are interested in healthier food at QSRs, as well as improvements in service



Healthy options may have ranked lower in other metrics if respondents are overall skeptical or unaware of QSRs' abilities to deliver on healthy options

Q8: What improvements would you make to your favorite quick service restaurant? Please type 2-3 sentences.

APPENDIX

APPENDIX: SAMPLE DEMOGRAPHICS

Gender	
Female	65%
Male	35%

Age	
Under 13	--
13 – 17	--
18 – 24	9%
25 – 34	31%
35 – 44	21%
45 – 54	23%
55 – 65	17%
66 or older	--

Children in Household	
0	57%
1	24%
2	11%
3	7%
4	1%
5 or more	2%

QSR Visit Frequency	
Everyday	4%
Multiple times per week	27%
Once a week	20%
Three times per month	19%
Once or twice a month	16%
Once every few months	11%
Once every 6 months	3%
Once a year or longer	2%
Never	--

APPENDIX: SAMPLE DEMOGRAPHICS

QSR Visited Most Often in Past Month	
McDonald's	30%
Wendy's	12%
Burger King	11%
Taco Bell	10%
Subway	9%
Dunkin' Donuts	7%
Chick-fil-A	6%
Panera Bread	5%
Starbucks	4%
Pizza Hut	4%
None of the above	3%

QSR Awareness	
McDonald's	100%
Starbucks	100%
Subway	100%
Burger King	100%
Wendy's	100%
Taco Bell	100%
Pizza Hut	100%
Dunkin' Donuts	99%
Chick-fil-A	97%
Panera Bread	97%
None of the above	--