



Quick Service Restaurant (QSR)

Panel Research Summary

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Q3 2022

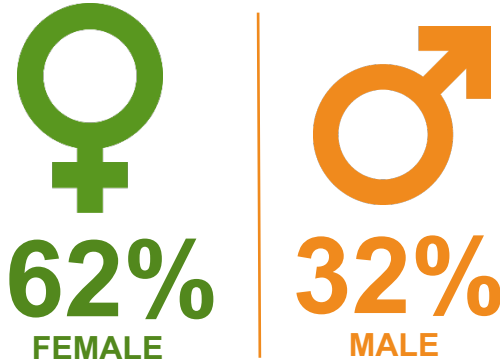
Fast Food / Fast Casual Research Panel Demographics

PARTICIPANTS

5,173
US CUSTOMERS

In summer 2022 we surveyed 5,173 North American consumers and asked them about their most recent Fast Food / Fast Casual dining experience in the past three months.

GENDER



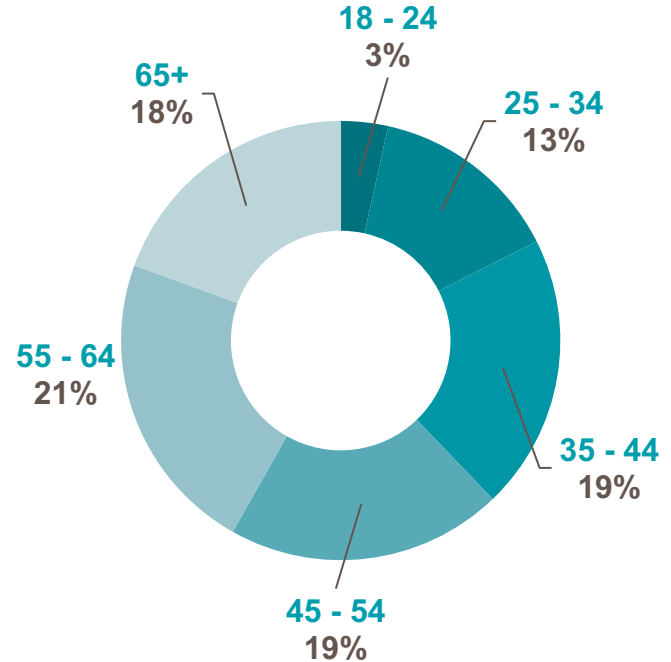
6%: Other or left blank

HOUSEHOLD INCOME

49% EARN MORE THAN **\$50K**

(Of responders who answered)

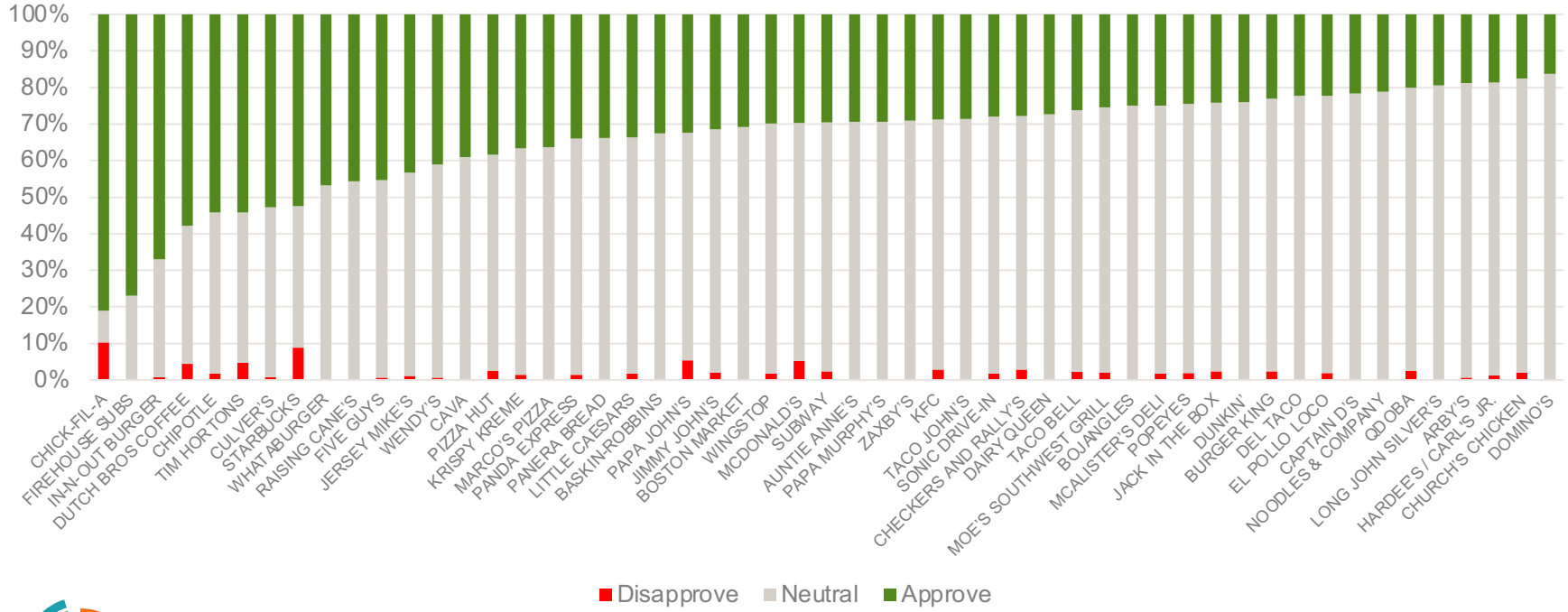
AGE



8% did not answer

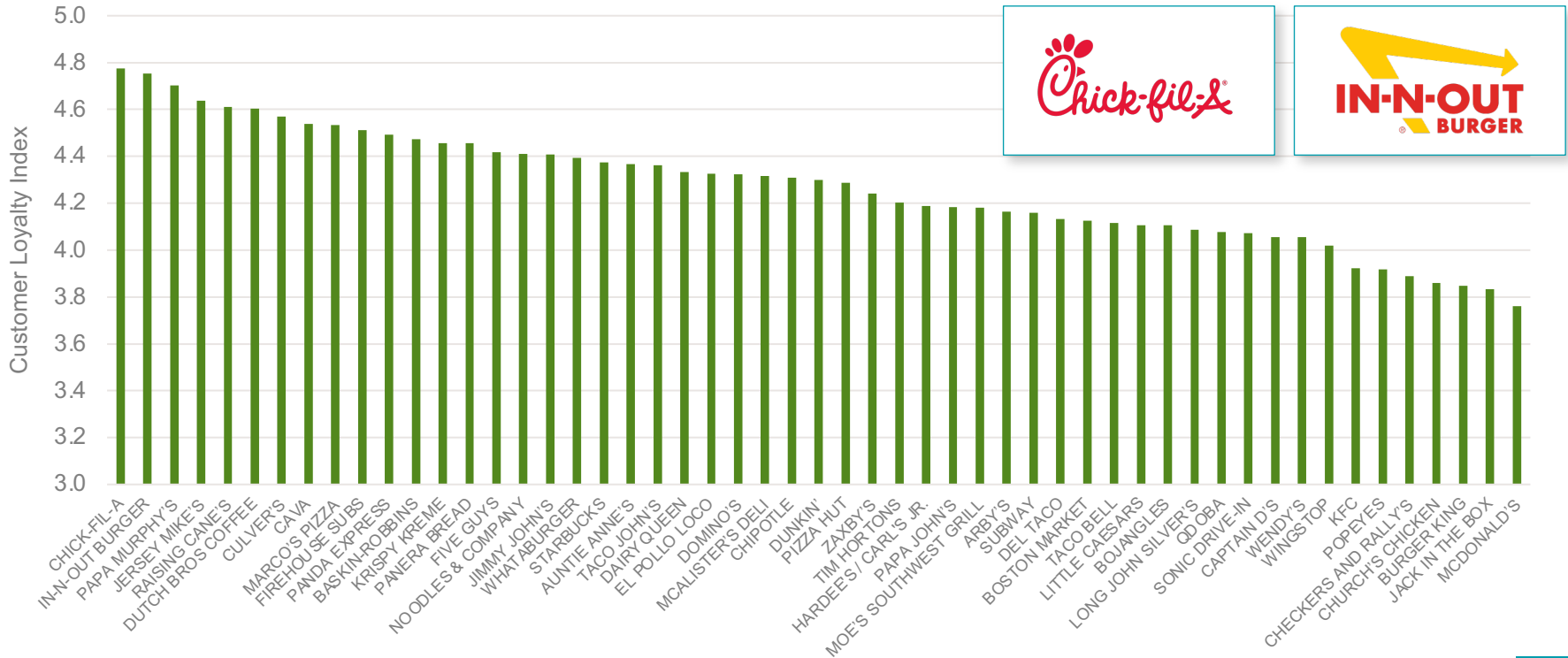
For Brand Image and Values, **Chick-Fil-A** and **Starbucks** are the most polarizing brands

Brand Image and Company Values



Chick-Fil-A leads all brands in the Customer Loyalty Index followed closely by In-N-Out Burger

The Customer Loyalty Index Combines Satisfaction and Recommendation



Burger Restaurants

N = 1,679

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Burger - Key Findings

Which brand ranks supreme?



82%

CLI Score

Culvers takes 2nd place with a CLI score of 72%

What drives satisfaction?

Food Quality

Atmosphere in the Restaurant

Speed of Service

Value Received for Money Spent

Friendliness of Staff

Which brand has the least problem experiences?



3%

Problem Experience

100%

Resolved to Satisfaction

Culver's takes 2nd place with 7% Problem Experiences and 43% Resolution

Which brand drives long term customer value?

FIVE GUYS

47%

Share of Wallet



4.5 / 5

Brand Trust



Chicken Restaurants

N = 905

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Chicken - Key Findings

Which brand ranks supreme?



84%

CLI Score

Raising Cane's takes 2nd place with a CLI score of 72%

What drives satisfaction?

Food Quality

Atmosphere in the Restaurant

Speed of Service

Friendliness of Staff

Value Received for Money Spent

Which brand has the least problem experiences?

Bojangles

6%

Problem Experience

100%

Resolved to Satisfaction

Chick-Fil-A takes 2nd place with 6% Problem Experiences and 67% Resolution

Which brand drives long term customer value?



58%

Share of Wallet



4.6 / 5

Brand Trust



Coffee, Breakfast and Bakery Restaurants

N = 624

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Coffee / Breakfast / Bakery - Key Findings

Which brand ranks supreme?



74%

CLI Score

Krispy Kreme takes 2nd place with a CLI score of 66%

What drives satisfaction?

Food Quality

Atmosphere in the Restaurant

Value Received for Money Spent

Speed of Service

Friendliness of Staff

Which brand has the least problem experiences?



5%

Problem Experience

33%

Resolved to Satisfaction

Starbucks takes 2nd place with 8% Problem Experiences and 60% Resolution

Which brand drives long term customer value?



50%

Share of Wallet



4.4 / 5

Brand Trust

Dessert/Snack Restaurants

N = 151

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Dessert / Snack - Key Findings

Which brand ranks supreme?



62%

CLI Score

Dairy Queen takes 2nd place with a CLI score of 55%

What drives satisfaction?

Food Quality

Value Received for Money Spent

Speed of Service

Atmosphere in the Restaurant

Friendliness of Staff

Which brand has the least problem experiences?



0.0%

Problem Experience

0%

Resolved to Satisfaction

Baskin-Robbins takes 2nd place with 5% Problem Experiences and 0% Resolution

Which brand drives long term customer value?



52%

Share of Wallet



4.3 / 5

Brand Trust



Mexican Restaurants

N = 532

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Mexican - Key Findings

Which brand ranks supreme?

taco john's

61%

CLI Score

El Pollo Loco takes 2nd place with a CLI score of 60%

What drives satisfaction?

Food Quality

Value Received for Money Spent

Atmosphere in the Restaurant

Speed of Service

Friendliness of Staff

Which brand has the least problem experiences?

taco john's

6%

Problem Experience

0%

Resolved to Satisfaction

Moe's Southwest Grill takes 2nd place with 10% Problem Experiences & 40% Resolution

Which brand drives long term customer value?


TACO BELL

49%

Share of Wallet



4.2 / 5

Brand Trust



Pizza Restaurants

N = 421

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Pizza - Key Findings

Which brand ranks supreme?



72%

CLI Score

Marco's takes 2nd place with a CLI score of 68%

What drives satisfaction?

Food Quality

Atmosphere in the Restaurant

Value Received for Money Spent

Speed of Service

Friendliness of Staff

Which brand has the least problem experiences?



0%

Problem Experience

NA%

Resolved to Satisfaction

Papa John's takes 2nd place with 8% Problem Experiences and 25% Resolution

Which brand drives long term customer value?



52%

Share of Wallet



4.5 / 5

Brand Trust

Sandwich Restaurants

N = 566

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Sandwich - Key Findings

Which brand ranks supreme?



74%

CLI Score

Firehouse Subs takes 2nd place with a CLI score of 65%

What drives satisfaction?

Food Quality

Value Received for Money Spent

Atmosphere in the Restaurant

Friendliness of Staff

Speed of Service

Which brand has the least problem experiences?



3%

Problem Experience

0%

Resolved to Satisfaction

Jimmy John's takes 2nd place with 4% Problem Experiences and 0% Resolution

Which brand drives long term customer value?



49%

Share of Wallet



4.5 / 5

Brand Trust

A photograph of a person's hands typing on a laptop keyboard. The person is wearing a light blue sweater. The laptop is on a wooden desk. In the background, there is a blurred office setting with a green mug and other people. The text "Key Takeaways" is overlaid in the center of the image.

Key Takeaways

Key Takeaways

1

Most all brands engender more positive than negative associations, but some are more polarizing than you might expect.

Press coverage can create both advocates and detractors and we see this, in particular with Chick-Fil-A, Starbucks, Papa John's and McDonalds. Consumer choice of brands visited become sticky quickly and can be hard to change. If there's an outright winner across cuisine types and brands, that winner is Firehouse Subs, who receive high positive affinity marks and no negative consumer associations.

2

Few brands stand out in problem handling and recovery.

Likely related to labor shortages continuing post-pandemic, we find that only In-n-Out Burger, Dutch Brothers Coffee, Jersey Mike's, and Papa Murphy's do reasonably well in handling problems and providing customer satisfying recovery. Any brand taking problem handling on as a KPI is likely to make significant gains in its cuisine category. Further, our data suggests that good performance in problem handling is strongly related to building and maintaining brand trust.

3

There are clear winners and losers in the competition for share of stomach (wallet).

We rate Five Guys, Chick-Fil-A, Taco Bell, Dunkin Donuts, McAlister's Deli, Dominos and Baskin-Robbins as winners in the battle for share of wallet, or share of stomach, in their respective cuisine categories. Many of these brands have massive footprints in the US, partially explaining their win here. However, several of these share of stomach winners are up against brands with much larger numbers of locations. This begs the question of how they win larger shares of consumers' stomachs against these competitors. Get insight into this by obtaining the full QSR report, or by requesting a briefing by a Market Force consultant.

Key Takeaways (cont.)

4

Share of wallet is impacted by recent experience and a concept we refer to as “Trust.”

Trust is persistent loyalty – borne of both recent experience and longer term consumer “credits” related to alignment between consumer and brand values. Brands with high Trust can leverage this concept to retain share of wallet through short-duration disappointing experiences that would otherwise erode share. High Trust brands include Chick-Fil-A, Firehouse Subs and In-N-Out Burger.

5

The keys to the kingdom of QSR category dominance remain in doing the basics well on a consistent basis.

Category leaders, and brands that perform well across the various cuisine types continue to provide good food, fast and accurate, in clean and engaging environments with friendly service-oriented staffs. The more things change, the more they stay the same... Request a full copy of the QSR report, or better yet, ask for a briefing, delivered by a Market Force consultant.

Hungry for more insight?

**Connect today to
schedule a full
briefing of the
complete findings
from our study.**



Scan the QR code or visit
[www.marketforce.com/qsr-
research-2022-connect](http://www.marketforce.com/qsr-research-2022-connect) to
connect with us today!

In a full briefing you will learn:

1. Rankings by attribute to understand how each brand delivers across the top elements of execution
2. Performance change over time by brand and category
3. How outlier brands are dominating their respective categories
4. What each brand needs to change most to attract more customers
5. The most influential factors today driving loyalty and wallet share
6. The impact of problems and accuracy on brand reputation
7. How brand trust empowers top brands to gain market share



Thank you!

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