Quick Service Restaurant (QSR)
Panel Research Summary
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.
For Brand Image and Values, Chick-Fil-A and Starbucks are the most polarizing brands.
Chick-Fil-A leads all brands in the Customer Loyalty Index followed closely by In-N-Out Burger
Burger Restaurants

N = 1,679
QSR Panel Research
Market Force
Q3 2022
Burger - Key Findings

Which brand ranks supreme?

IN-N-OUT BURGER

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?

IN-N-OUT BURGER

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

QSR Panel Research
Market Force
Q3 2022
Chicken - Key Findings

Which brand ranks supreme?

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

84% CLI Score

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?

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

Bojangles

6% Problem Experience
100% Resolved to Satisfaction

Which brand drives long term customer value?

Chick-fil-A

58% Share of Wallet

4.6 / 5 Brand Trust
Coffee, Breakfast and Bakery Restaurants

N = 624

QSR Panel Research
Market Force
Q3 2022
### Key Findings

#### Which brand ranks supreme?

<table>
<thead>
<tr>
<th>Brand</th>
<th>CLI Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dutch Bros Coffee</td>
<td>74%</td>
</tr>
<tr>
<td>Krispy Kreme</td>
<td>66%</td>
</tr>
</tbody>
</table>

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?

- **Starbucks**
  - 8% Problem Experiences
  - 60% Resolution

- **Panera Bread**
  - 5% Problem Experience
  - 33% Resolved to Satisfaction

#### Which brand drives long term customer value?

- **Dunkin’ Donuts**
  - 50% Share of Wallet
  - 4.4 / 5 Brand Trust
Dessert/Snack Restaurants

N = 151

QSR Panel Research
Market Force
Q3 2022
Dessert / Snack - Key Findings

**Which brand ranks supreme?**

- **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?**

- **Auntie Anne’s**
  - **0.0%** Problem Experience
  - **0%** Resolved to Satisfaction

- **Baskin-Robbins**
  - **52%** Share of Wallet
  - **4.3 / 5** Brand Trust

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

N = 532

QSR Panel Research
Market Force
Q3 2022
Mexican - Key Findings

Which brand ranks supreme?

**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?

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

Which brand drives long term customer value?

**Taco John’s**

61% CLI Score

**Taco Bell**

49% Share of Wallet

4.2 / 5 Brand Trust
Pizza Restaurants

N = 421

QSR Panel Research
Market Force
Q3 2022
Pizza - Key Findings

Which brand ranks supreme?

Marco’s takes 2nd place with a CLI score of 68% with a CLI score of 72%

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?

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

Which brand drives long term customer value?

52% Share of Wallet

Brand Trust

4.5 / 5
Sandwich Restaurants

N = 566

QSR Panel Research
Market Force
Q3 2022
# Sandwich - Key Findings

## Which brand ranks supreme?

<table>
<thead>
<tr>
<th>Brand</th>
<th>CLI Score</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firehouse Subs</td>
<td>74%</td>
<td>2nd</td>
</tr>
</tbody>
</table>

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

## What drives satisfaction?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Jersey Mikes Subs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Quality</td>
<td></td>
</tr>
<tr>
<td>Value Received for Money Spent</td>
<td></td>
</tr>
<tr>
<td>Atmosphere in the Restaurant</td>
<td></td>
</tr>
<tr>
<td>Friendliness of Staff</td>
<td></td>
</tr>
<tr>
<td>Speed of Service</td>
<td></td>
</tr>
</tbody>
</table>

## Which brand has the least problem experiences?

<table>
<thead>
<tr>
<th>Brand</th>
<th>Problem Experience</th>
<th>Resolution to Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jersey Mikes Subs</td>
<td>3%</td>
<td>0%</td>
</tr>
</tbody>
</table>

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

## Which brand drives long term customer value?

<table>
<thead>
<tr>
<th>Brand</th>
<th>Share of Wallet</th>
<th>Brand Trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>McAlister’s Deli</td>
<td>49%</td>
<td>4.5 / 5</td>
</tr>
</tbody>
</table>

Firehouse Subs
Key Takeaways
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.

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.

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.
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.

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?

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

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 to connect with us today!
Thank you!

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