



Syndicated Tracking Study for Quick Service Restaurants

Presented by: SANDELMAN  
EDGE .COM

**Executive Report**

**Brand X**  
**Oct - Dec 2005**  
**Sample Market**

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# Methodology

- Quick-Track® is part of the Foodservice Consumer Monitor®, an ongoing syndicated research study. Quick-Track is a quantitative research study that tracks key consumer behavioral and attitudinal measures for all major fast-food and pizza chains in individual markets.
- Data is collected from respondents via telephone interviews conducted on a continuous basis throughout the quarter. Respondents are selected via a computer-generated random sample of listed and unlisted telephone numbers within the DMA. Respondents are males and females, between the ages of 16 and 64, who purchase food from fast-food and pizza restaurants at least once in a typical month. The data is weighted slightly to reflect the proper distribution of the population by sex and age in the DMA.
- In addition to the basic measures, attribute ratings are also included in this study. These attribute ratings provide ratings for selected chains on twelve key attributes that define a chain's overall image -- quality, service, facilities, and value.
- Fieldwork is performed by Datascension, Inc. from their central telephone facilities.



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# Glossary-User Segments

## QSR Usage

All Users -- Respondents who purchase food from quick-service restaurants at least once in a typical month. This is the Total Sample of respondents.

- Super Heavy Users -- Respondents who purchased food at all QSRs 20 or more times in the past month.
- Heavy Users -- Respondents who purchased food at all QSRs 12-19 times in the past month.
- Moderate Users -- Respondents who purchased food at all QSRs 4-11 times in the past month.
- Light Users -- Respondents who purchased food at all QSRs 0-3 times in the past month.

## Chain Type Usage

- Burger Chain Users -- Respondents who purchased food from any of the tracked burger chains at least two times in the past month.
- Chicken Chain Users -- Respondents who purchased food from any of the tracked chicken chains at least once in the past month.
- Mexican Chain Users -- Respondents who purchased food from any of the tracked Mexican chains at least once in the past month.
- Sandwich Chain Users -- Respondents who purchased food from any of the tracked sandwich chains at least once in the past month.
- Pizza Chain Users -- Respondents who purchased food from any of the tracked pizza chains at least once in the past month.

## Chain Usage

- *Chain X* Users -- Respondents who purchased food from *Chain X* at least once in the past month.



# Glossary-Tracking Measures

- Brand Awareness - The percentage of consumers in a given segment who know of a specific QSR chain. This measure is important in determining a chain's overall presence in consumers' minds. Brand awareness is also the first stage of consumer development - consumers must be aware of a chain before they can develop an opinion or choose to go to that chain. Brand awareness can be broken down into the following components:
  - First Mention -- The first QSR chain mentioned. This measure is often called top-of-mind awareness and is an indication of the chain's saliency in consumers' minds. The higher the percentage, the more the chain stands out in the quick-service restaurant category.
  - Other Unaided -- Other QSR chains that consumers can recall without being prompted. This measure is usually viewed as part of unaided brand awareness and is seldom used alone.
  - Unaided Brand Awareness -- The sum of a chain's first mentions and other unaided brand awareness. This measure can be used to define the percentage of consumers who currently consider the brand as part of their decision set. Respondents usually mention 4 to 5 chains that are most relevant to them.
  - Aided Brand Awareness -- After unaided awareness is collected, consumers are prompted with the names of chains that were not recalled on an unaided basis. This measure is rarely used alone, but is used in combination with unaided brand awareness to provide total brand awareness.
  - Total Brand Awareness -- The sum of first mention, other unaided, and aided brand awareness. This measure is a good indication of the chain's distribution and longevity in the market.



# Glossary – Tracking Measures

- Advertising Awareness - The percentage of consumers in a given segment who have seen, heard, or read advertising for the chain within the past month or so. This measure is used to monitor the impact of recent advertising relative to other chains. Advertising awareness can be broken down into the following components:
  - First Mention -- The first QSR chain for which consumers recall advertising in the past month. This measure is often called top-of-mind advertising awareness and is an indication of the advertising's saliency in consumers' minds. The higher the percentage, the more the advertising stands out in the quick-service restaurant category.
  - Other Unaided -- Other QSR chains' advertising that consumers can recall without being prompted. This measure is usually viewed as part of unaided advertising awareness and is seldom used alone.
  - Unaided Advertising Awareness -- The sum of a chain's first mentions and other unaided advertising awareness. This measure can be used to monitor the impact or intrusiveness of an advertising message, especially relative to other chains with similar media spending.
  - Aided Advertising Awareness -- After unaided advertising awareness is collected, consumers are prompted with the names of chains for which advertising was not recalled on an unaided basis. This measure is rarely used alone, but is used in combination with unaided advertising awareness to provide total advertising awareness.
  - Total Advertising Awareness -- The sum of first mention, other unaided, and aided advertising awareness. This measure is a good indication of media reach, share of voice, and relative media spending.



# Glossary – Tracking Measures

- Purchase Levels - The percentage of consumers of a given segment who have purchased at least once from a chain during a given time period. Purchase levels are used to measure the breadth of a chain's customer base. Other terms for purchase level could include "brand reach," "brand penetration," "customer base," and "user base". Purchase levels are also used to measure customer retention. Quick-Track monitors purchase levels with the following time periods:
  - Ever -- The percentage of consumers of a given segment who have ever purchased from a chain. This measure is synonymous with "trial." Trial is also an early phase of consumer development following brand awareness and consideration.
  - Past 3 Month Purchase Level -- The percentage of consumers of a given segment who have purchased from a chain in the past 3 months. This measure provides a broad indication of a chain's current customer base. Long-term customer retention can be calculated by dividing the percentage of past 3 month purchasers by the trial percentage. Considering the pace at which consumers purchase from various QSR chains, "trier-rejecters" are defined as those who have tried a chain but have not purchased from that chain in the past 3 months.
  - Past Month Purchase Level -- The percentage of consumers of a given segment who have purchased from a chain in the past month. This measure is important because it has the strongest correlation with share. This measure also represents the segment who could be considered a chain's regular customers. Short-term customer retention can be calculated by dividing the percentage of past month purchasers by the past 3 month purchase level. In addition, "lapsed-users" are defined as those who have purchased from a chain in the past 3 months but not in the past month.
- Past Month Purchase Frequency - The average number of times past month chain users purchased from that chain in the past month. Past month purchase frequency is an indication of chain loyalty. Often, as a chain's past month purchase level (base of regular customers) increases, purchase frequency will decline somewhat as a larger, less loyal customer base includes some newer users who purchase less frequently. The opposite is also often the case -- as a chain's customer base shrinks its frequency increases, because the chain is left with a smaller, more loyal base. The most successful marketing efforts both expand the customer base and increase purchase frequency among those customers.

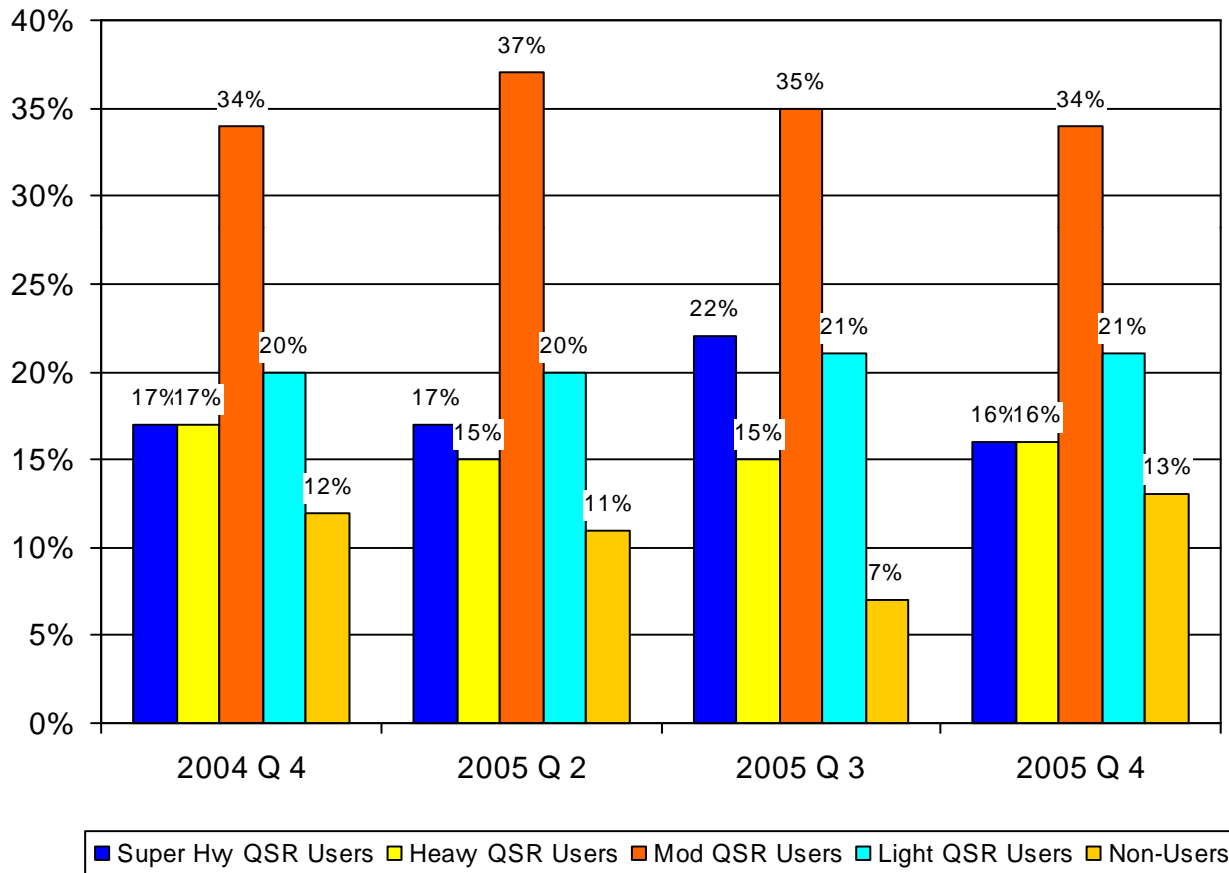


# Glossary – Tracking Measures

- Share of Past Month Purchase Occasions - The percentage of occasions of a given segment that are dedicated to a particular chain. The base of past month purchase occasions for any segment is the sum of all past month users' occasions for that segment devoted to all chains. Share of occasions can be segmented by four dayparts (breakfast, lunch, dinner, snacks) and four service modes (eat-in, drive-thru, carry-out, delivery). Share is the primary marketing measurement of success because share can vary independently from category changes. For instance, a chain can succeed by having a larger share of a shrinking category, or a chain may not be getting its fair share despite increased sales as the chain has a smaller share of a growing category. It is important to note that Quick-Track share is based on share of occasions, not share of dollars.
- Overall Rating of the Last Purchase Occasion - Respondents rate their last occasion at each chain they have purchased from in the past 3 months on an overall basis using a five-point scale with “1” being “poor” and “5” being “excellent”. The overall rating is reported as the percentage of respondents who rate the chain either excellent or very good (top two box score). Mean ratings are also available in the detailed tabulations. This measure indicates the strength of a chain's overall brand image.
- Attribute Ratings - Respondents rate select chains they have patronized during the past 3 months on 12 key attributes using a five-point scale with “1” being “poor” and “5” being “excellent”. Each attribute rating is reported as the percentage of respondents who rated the chain either excellent or very good (top two box score). Mean ratings are also available in the detailed tabulations. Attribute ratings are used to show strengths and weaknesses relative to other chains on key aspects of a chain's brand image.



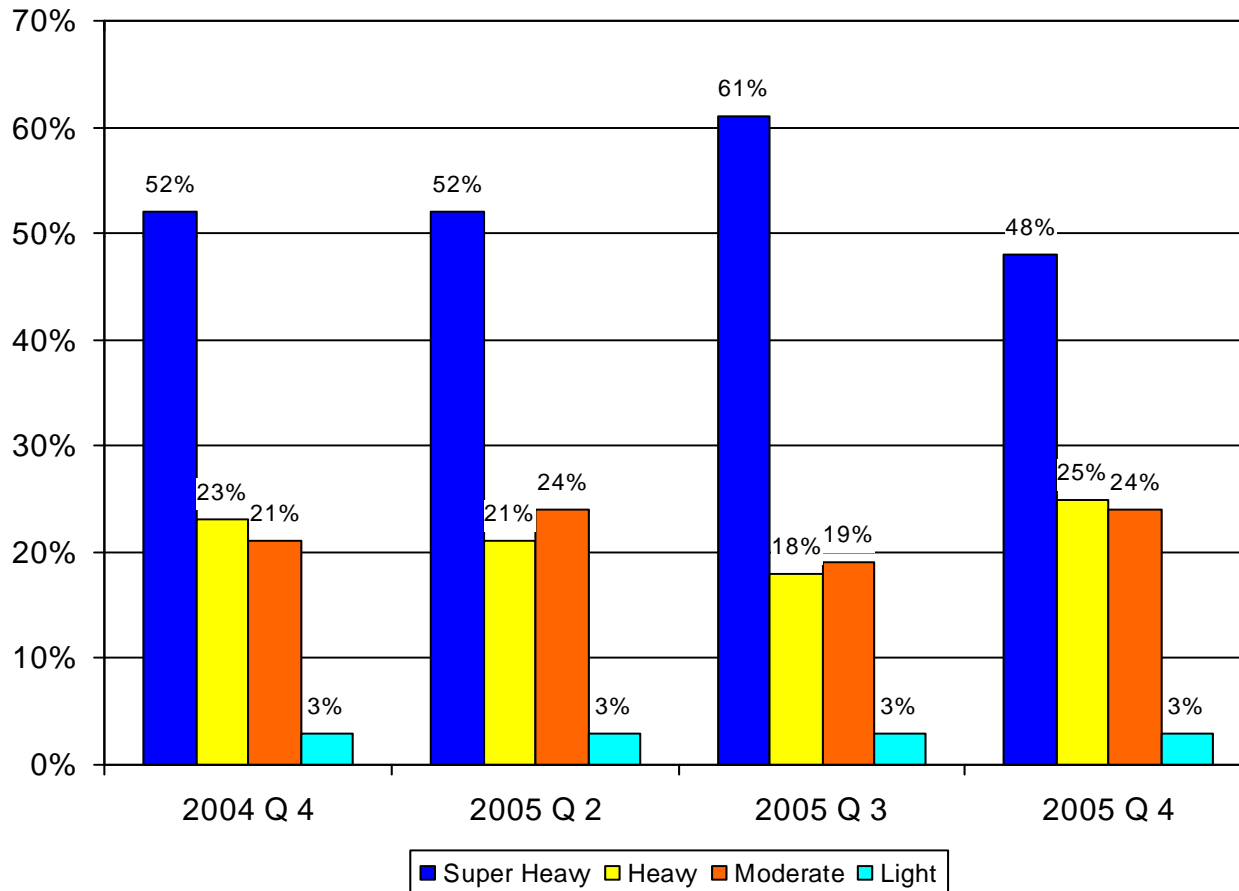
### QSR Incidence Among Those 16-64 Yrs. Old



- For a fee of \$500, reports include written analysis, which provides clients with an executive summary, plus bulleted insights and implications.
- Reports start by focusing on the QSR category overall.
- This chart shows the incidence of heavy, moderate and light QSR users over time.



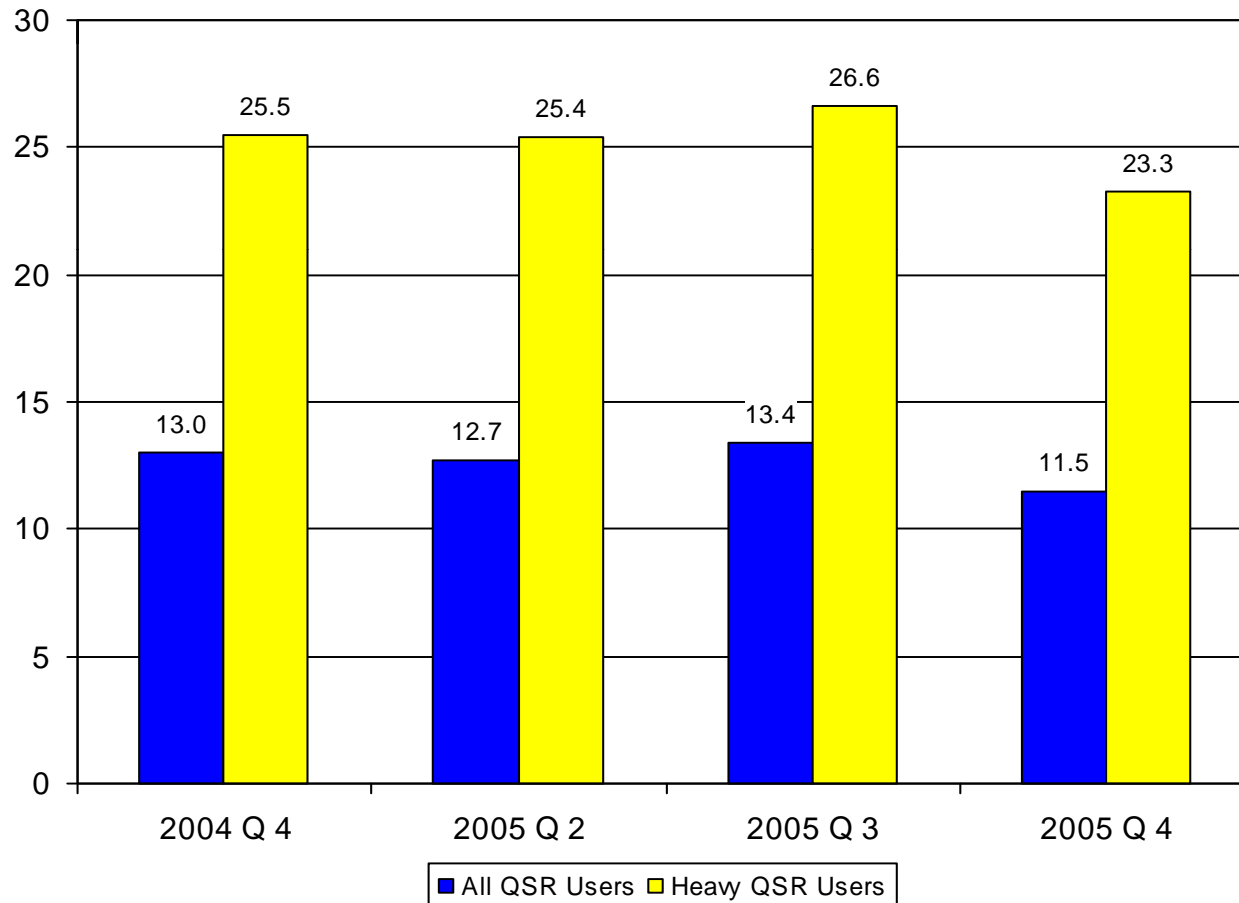
### Contribution to Total QSR Purchases



- QSR contribution is the percentage of past month occasions accounted for by each usage group, in this case heavy, moderate and light QSR users.



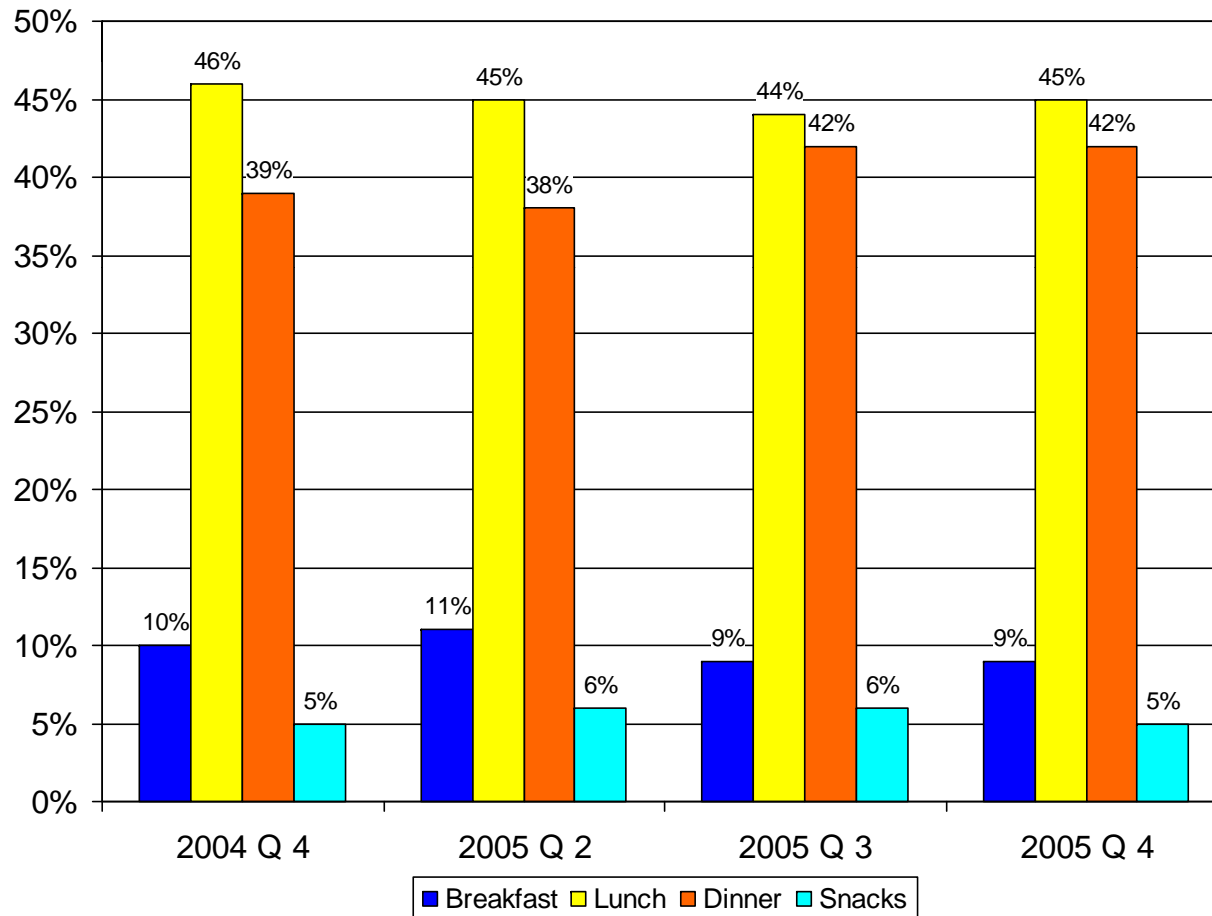
### Past Month QSR Purchases Per Person



- QSR purchases per person provide an indication of the vitality of the category by market and quarter. Total past-month occasions are provided here for all and heavy QSR users trended over time.



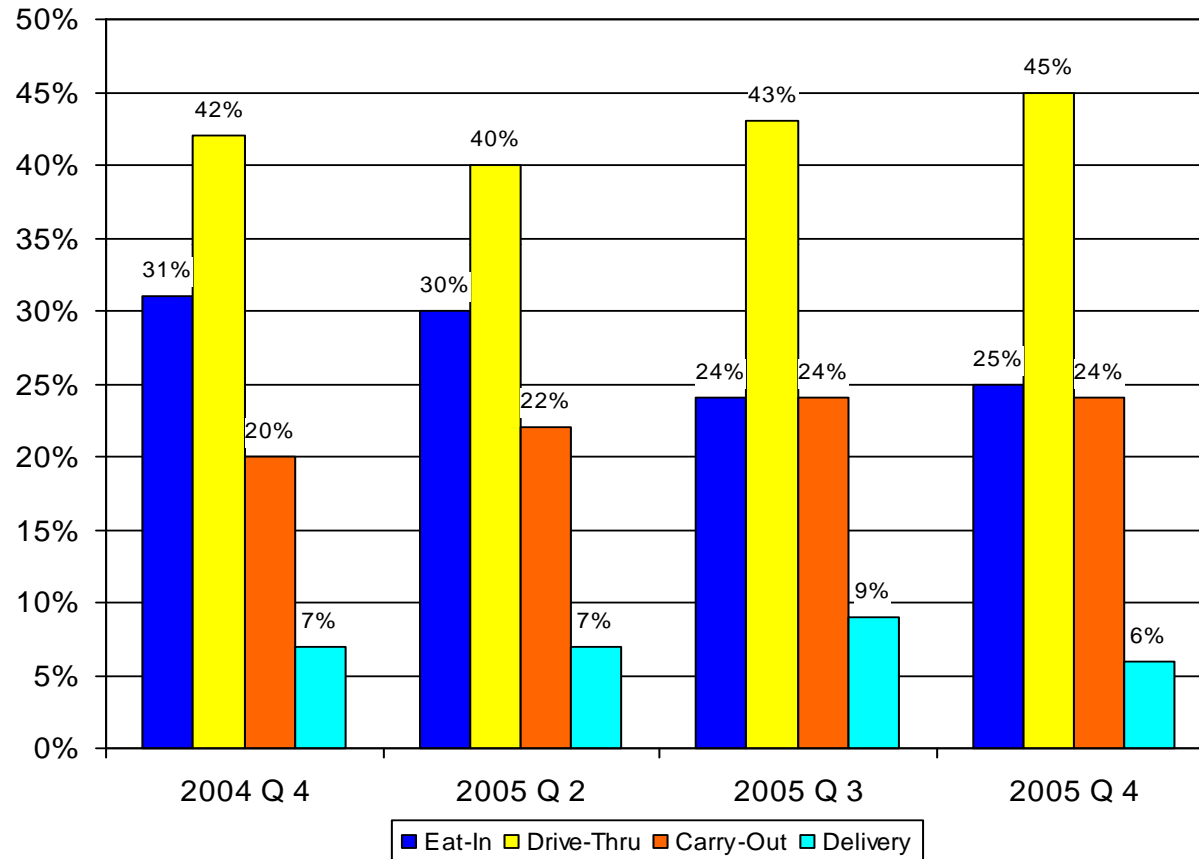
### Share of QSR Occasions by Daypart



- Total QSR occasions can be sliced by daypart to show the size of each segment and changes over time. This information also can be provided by chain type and for a variety of demographic segments.



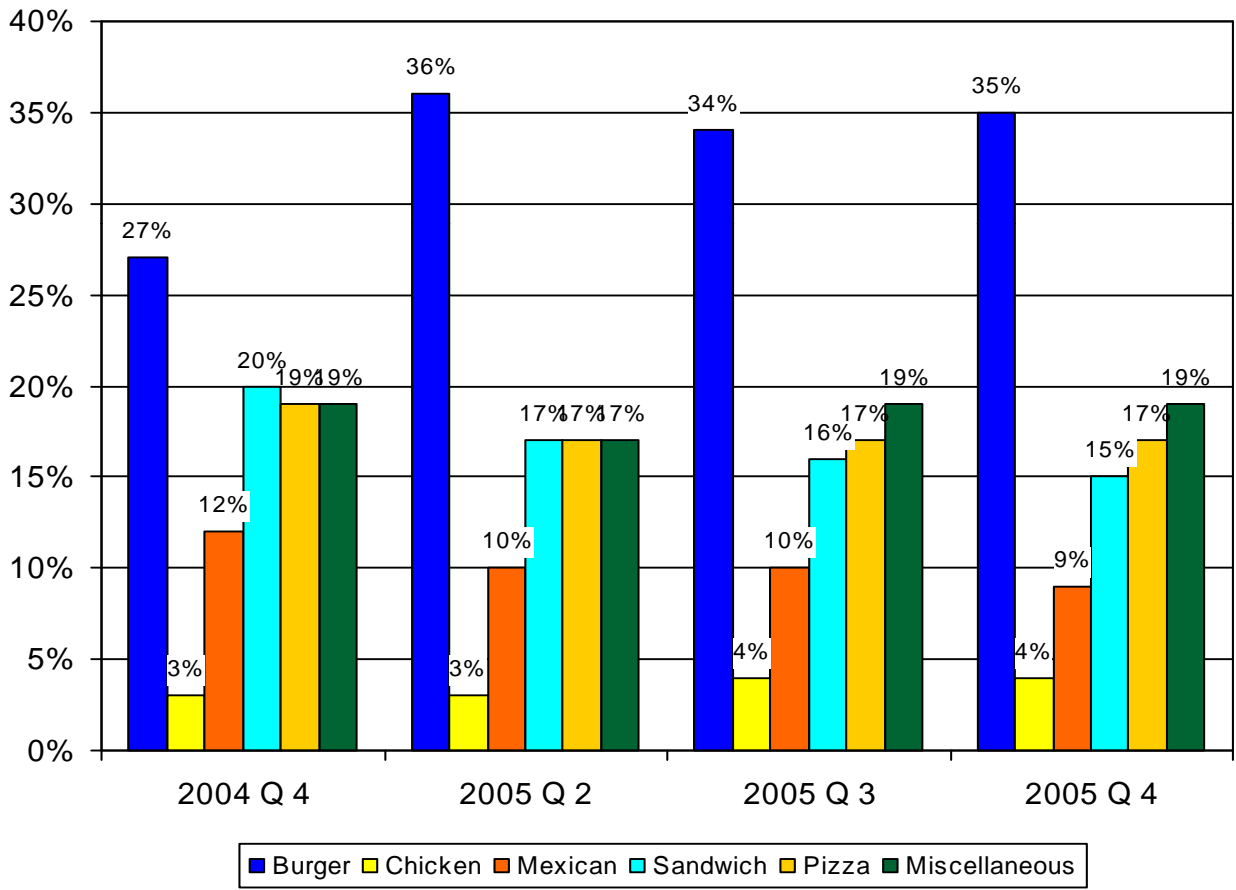
**Share of QSR Occasions by Service Mode**



- Total QSR occasions also can be sliced and trended by service mode. This information can also be filtered by chain type or demographic segment with our relational database.



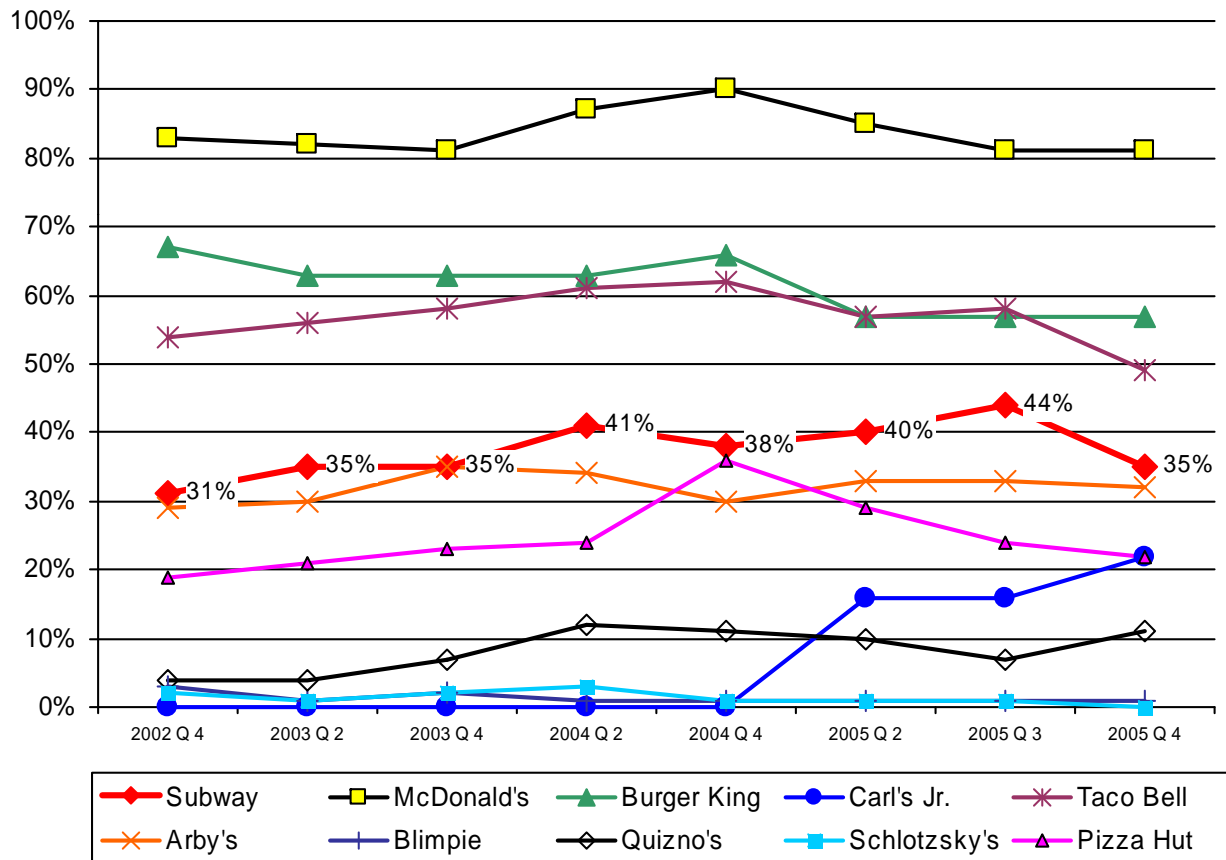
### Share of QSR Occasions by Chain Type



- Data is also provided by chain type so you can monitor shifts in consumer usage of the Burger, Chicken, Mexican, Sandwich, Pizza and Misc. segments.



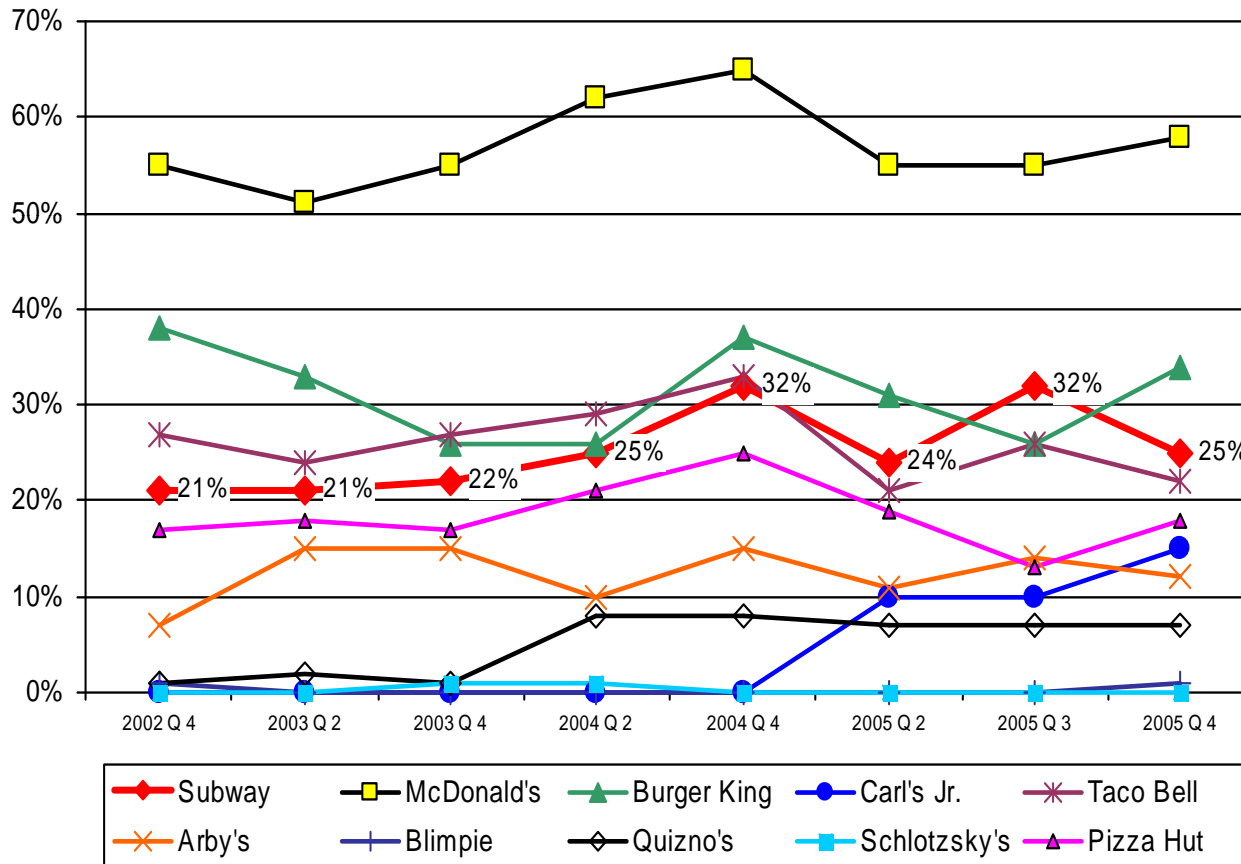
## Unaided Brand Awareness



- Key awareness and usage measures are shown by chain over time. You can select which chains are charted. Subscribers have access to all key awareness, usage and demo data for all chains monitored in the market.
- This information also can be filtered by demographic and usage groups on your computer.



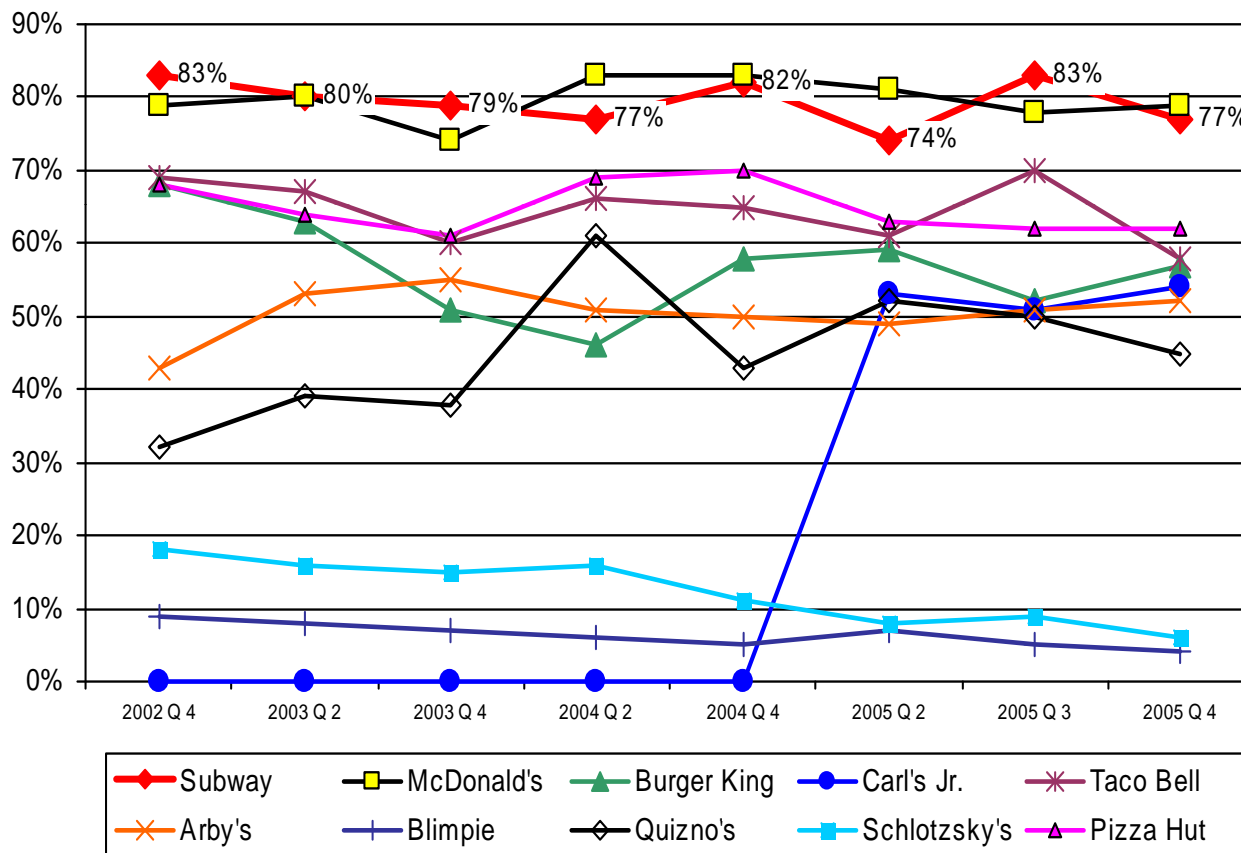
## Unaided Advertising Awareness



- Unaided advertising awareness helps monitor the impact of the advertising message. More relevant and memorable creative executions tend to generate above-average results at the chain level.



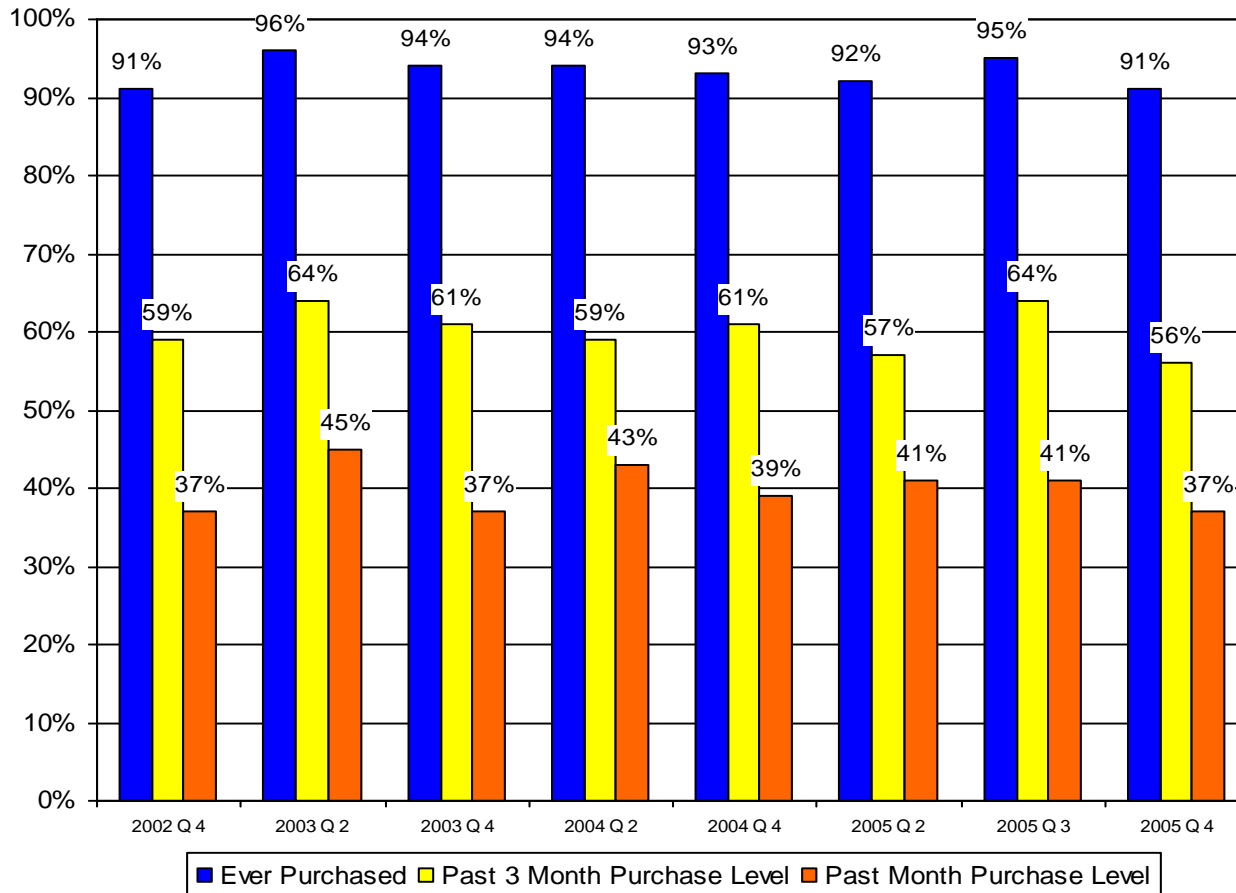
## Total Advertising Awareness



- Quick-Track provides information on unaided and total brand and advertising awareness for up to 34 chains in each market.
- Total advertising awareness tends to measure media spending and share of voice. A strong, relevant message can also drive increases in this measure.



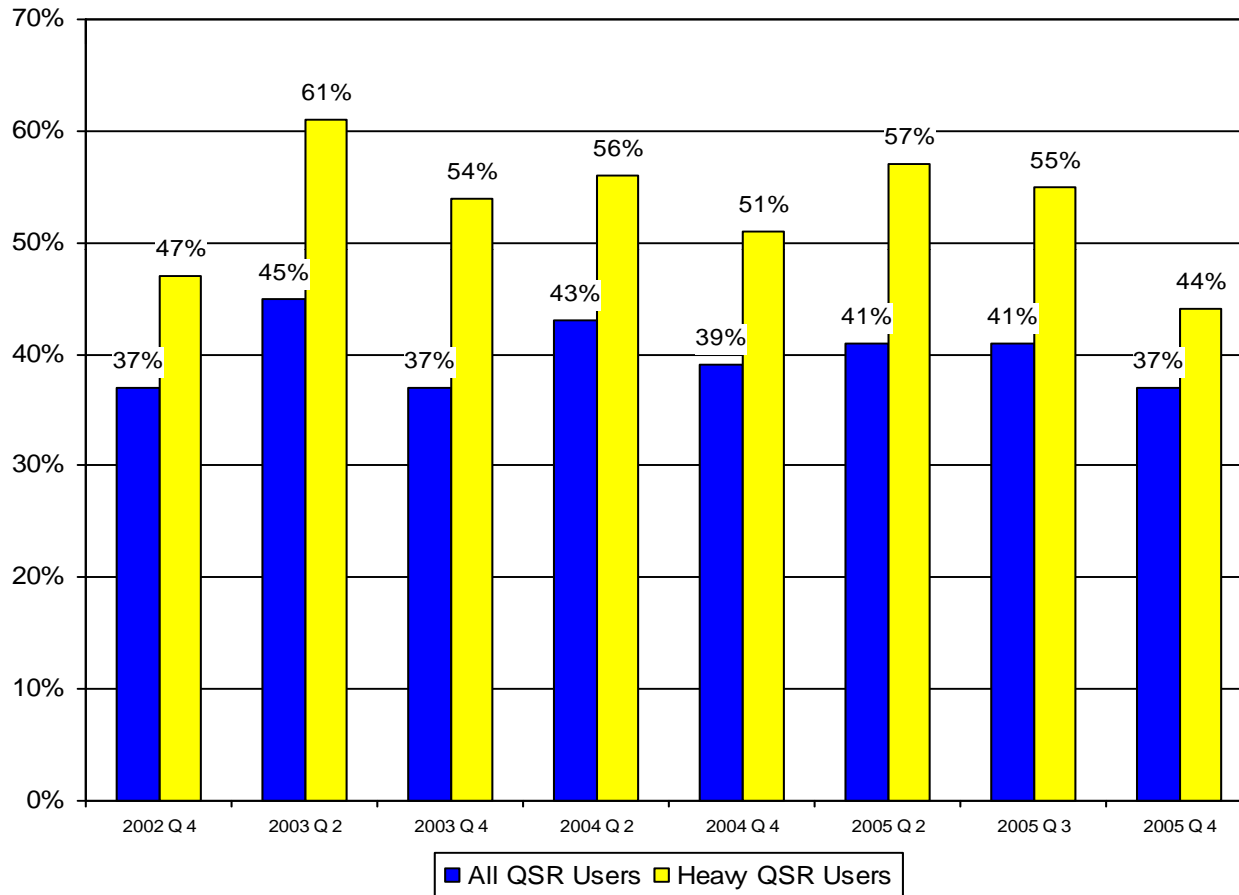
### Brand X Purchase Levels



- Purchase levels include trial (ever purchased), past-3-month and past-month usage.
- This chart also illustrates customer retention levels over time.



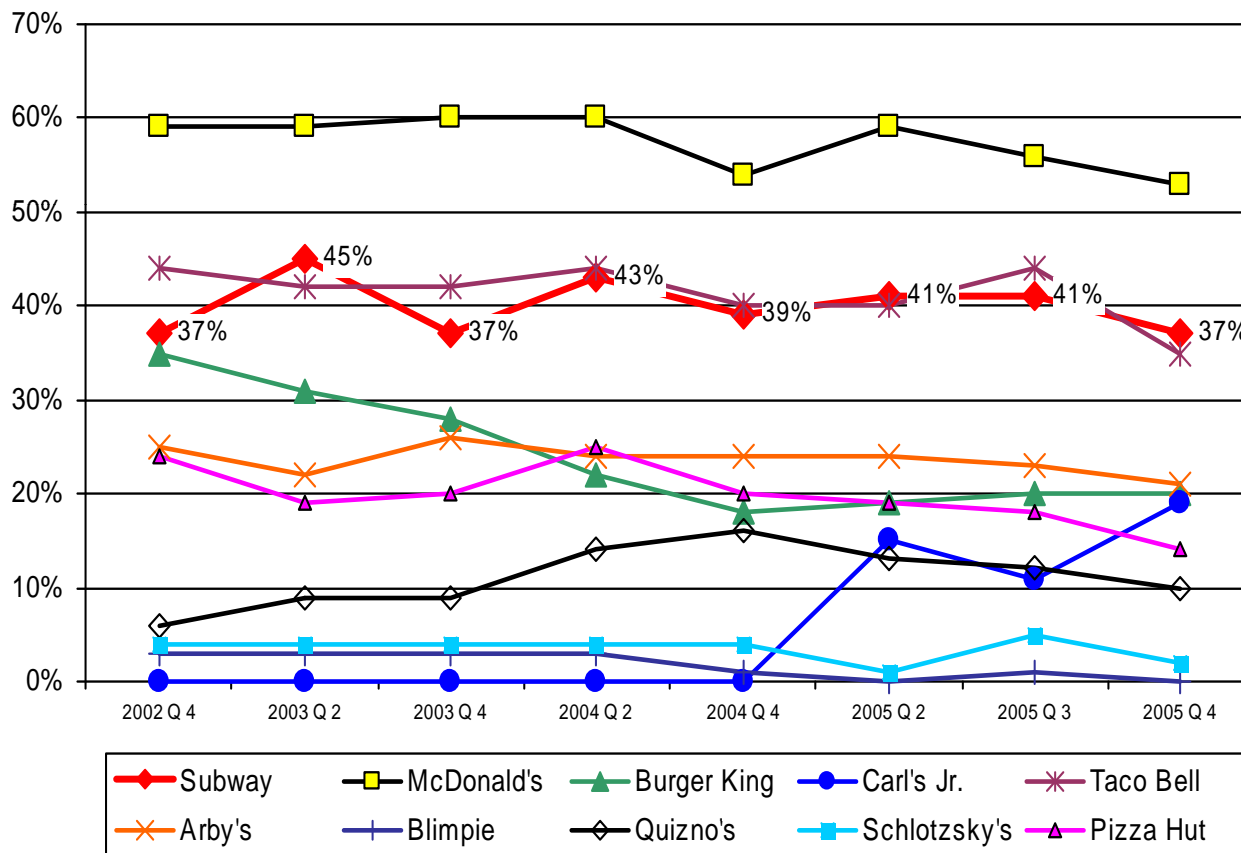
### Brand X Past Month Purchase Levels



- Key information is charted for heavy QSR users to show how chains are performing with this important segment.



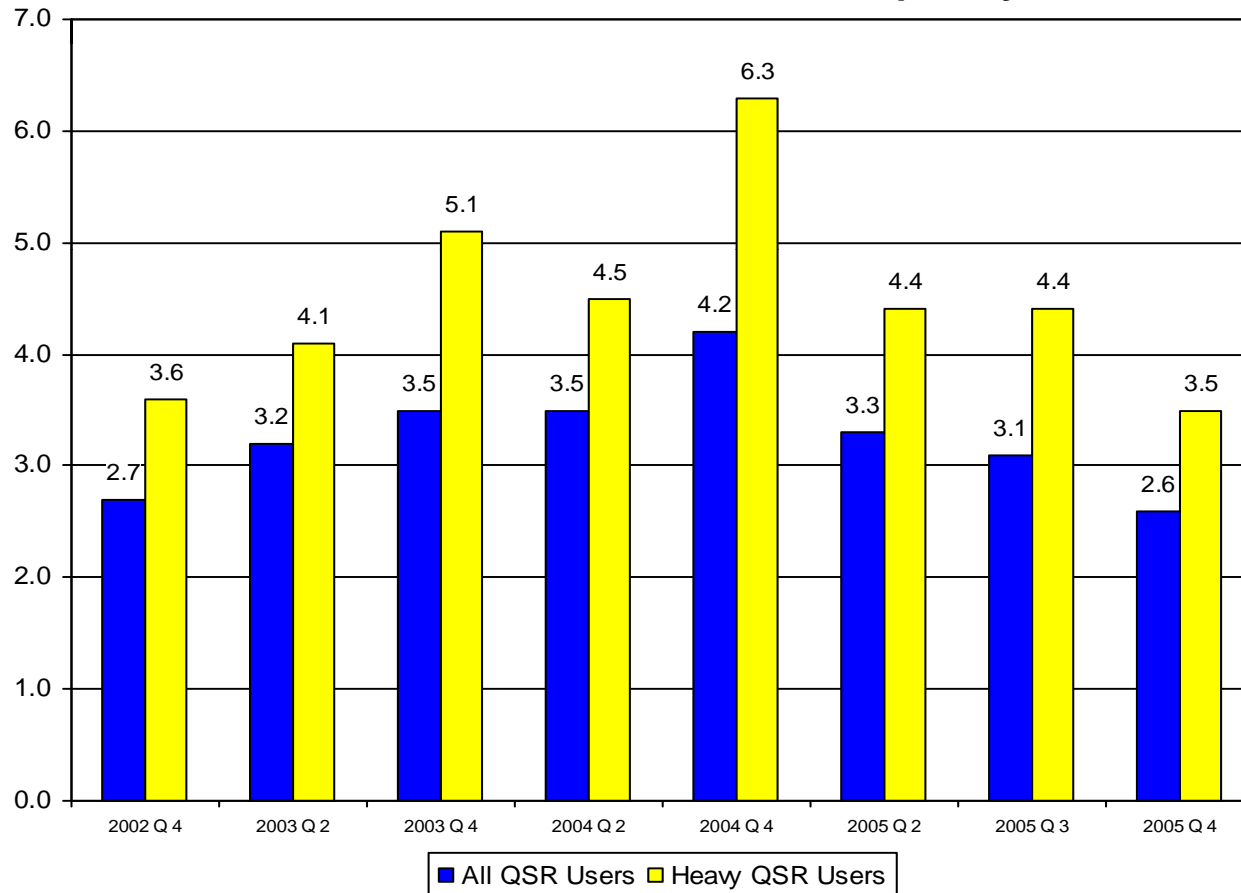
### Past Month Purchase Levels



- Past-month purchase level monitors the breadth of a chain's customer base, i.e., how many QSR users are visiting the chain on a past-month basis.
- This chart shows trend over time for a set of competitors.



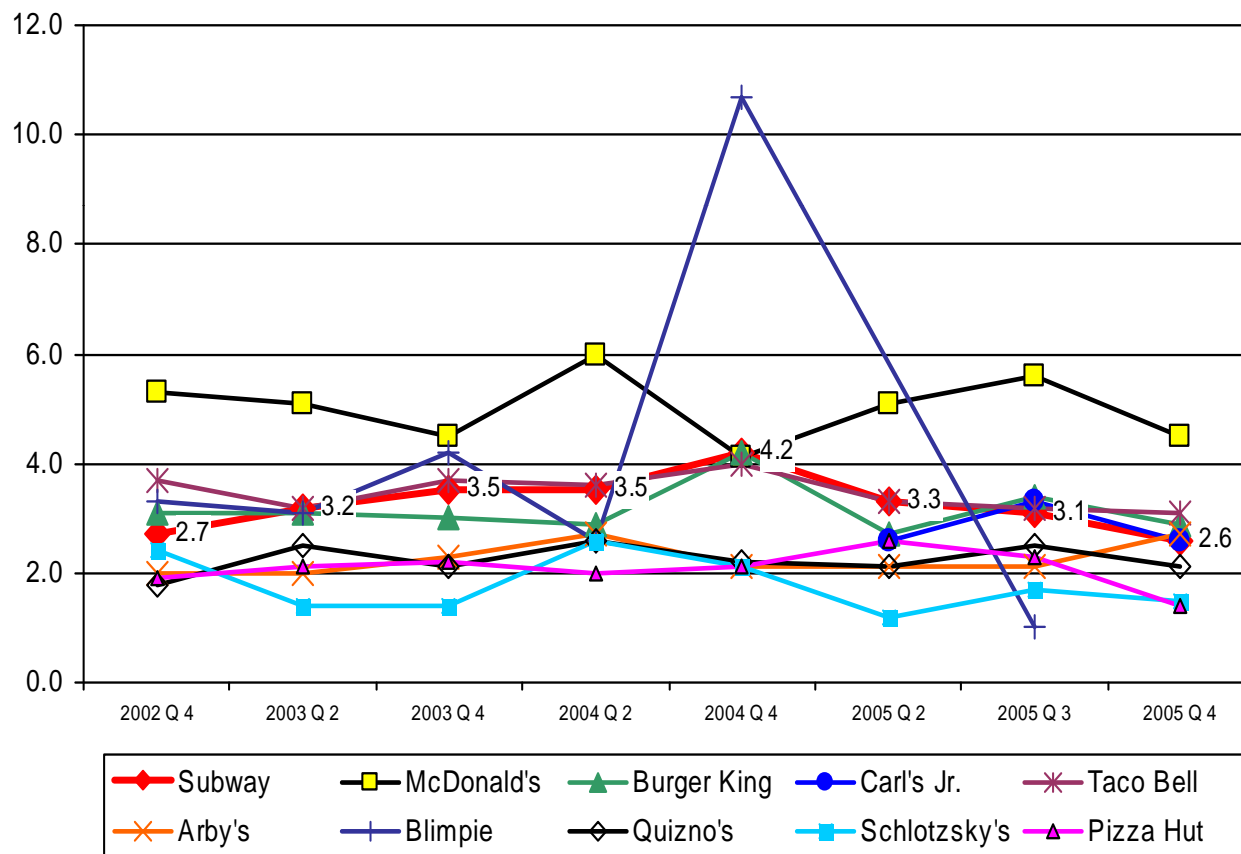
### Brand X Past Month Purchase Frequency



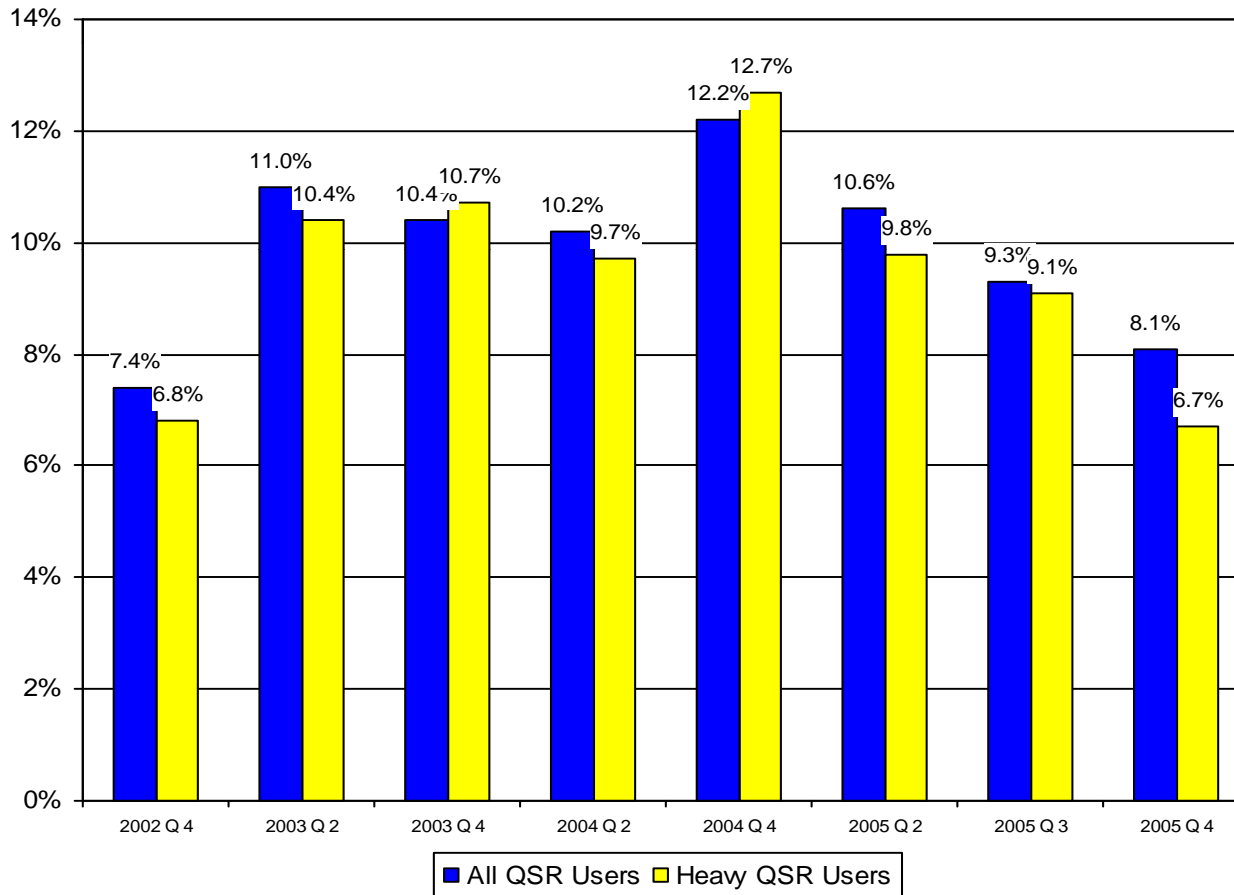
- Past-month purchase frequency is an indication of customer loyalty.



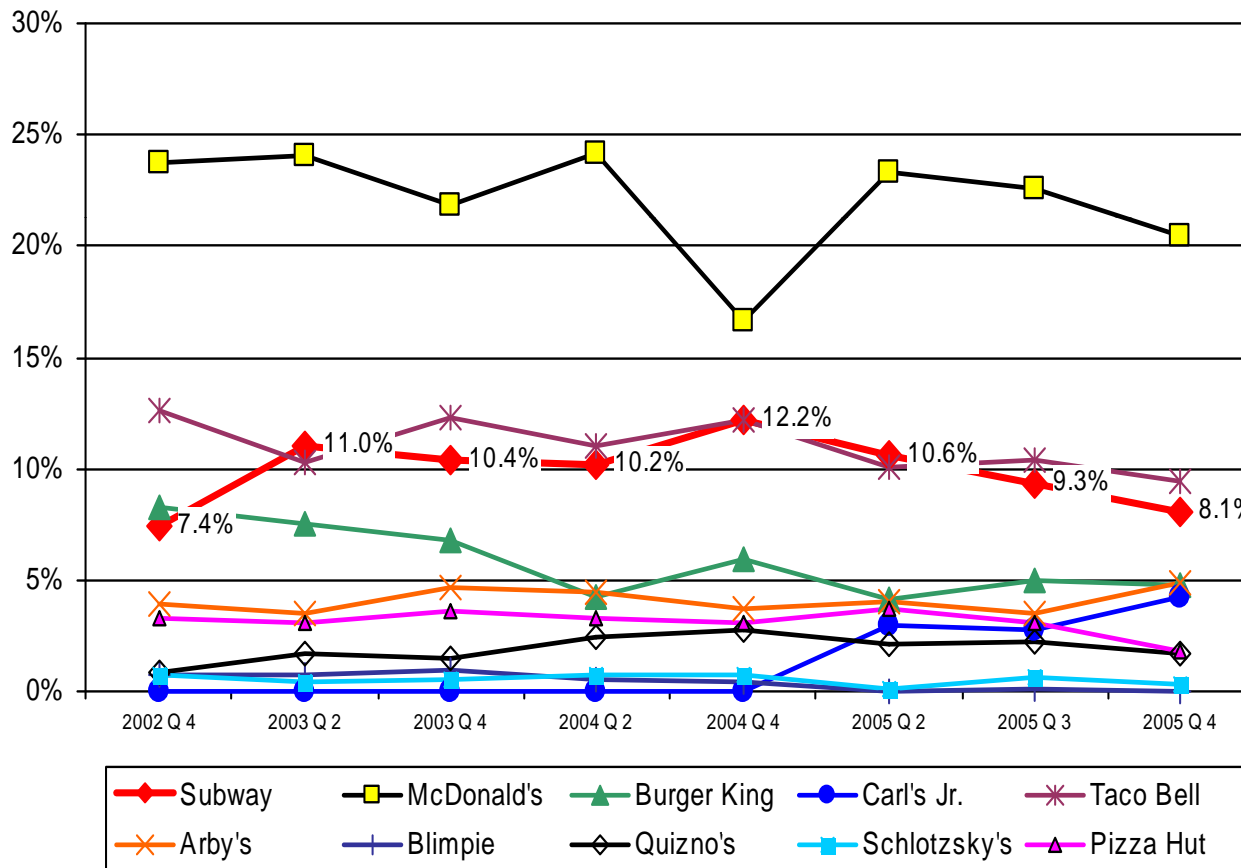
## Past Month Purchase Frequency



## Brand X Share of Past Month Purchases



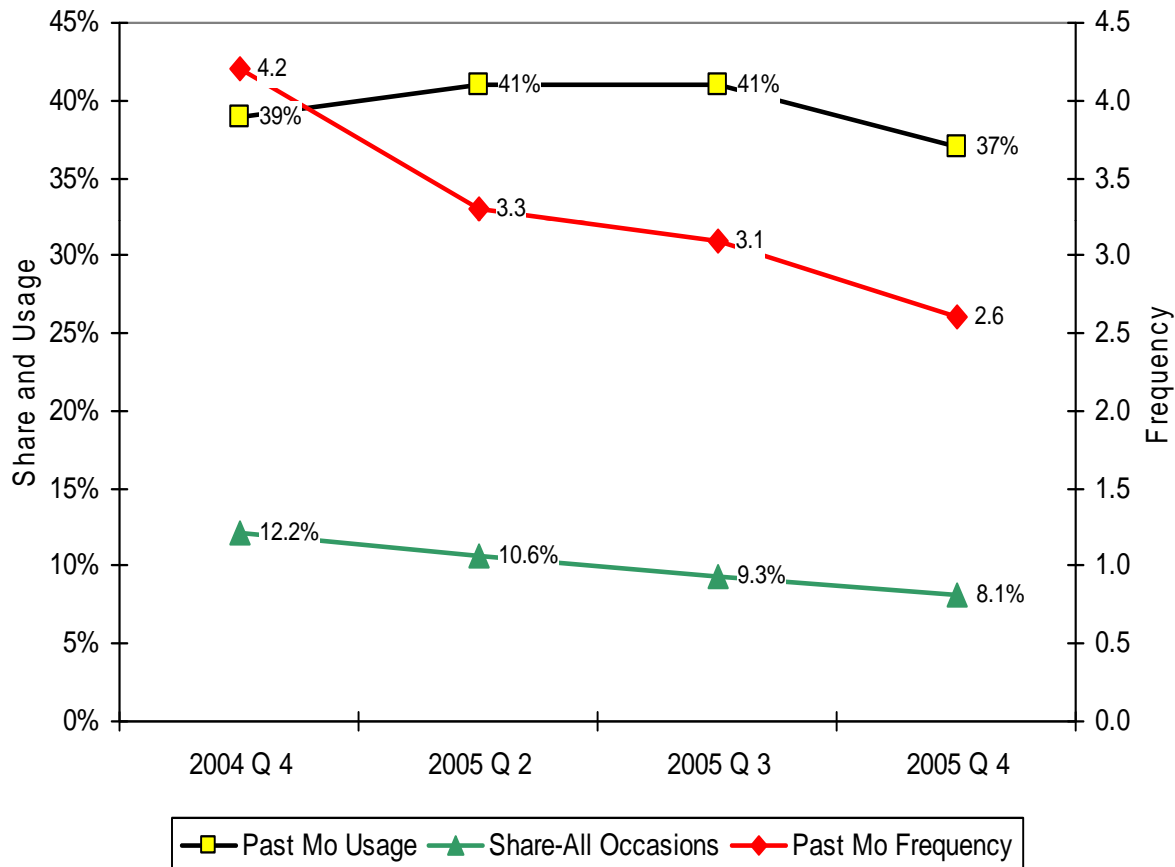
## Share of All QSR Occasions



- Share of occasions is a primary indicator of marketing success.
- This chart is based on all QSR occasions, but the information also can be provided by chain type to show how chains are performing in their segment.
- This information can also be sliced by chain to show what other chains your users patronize.



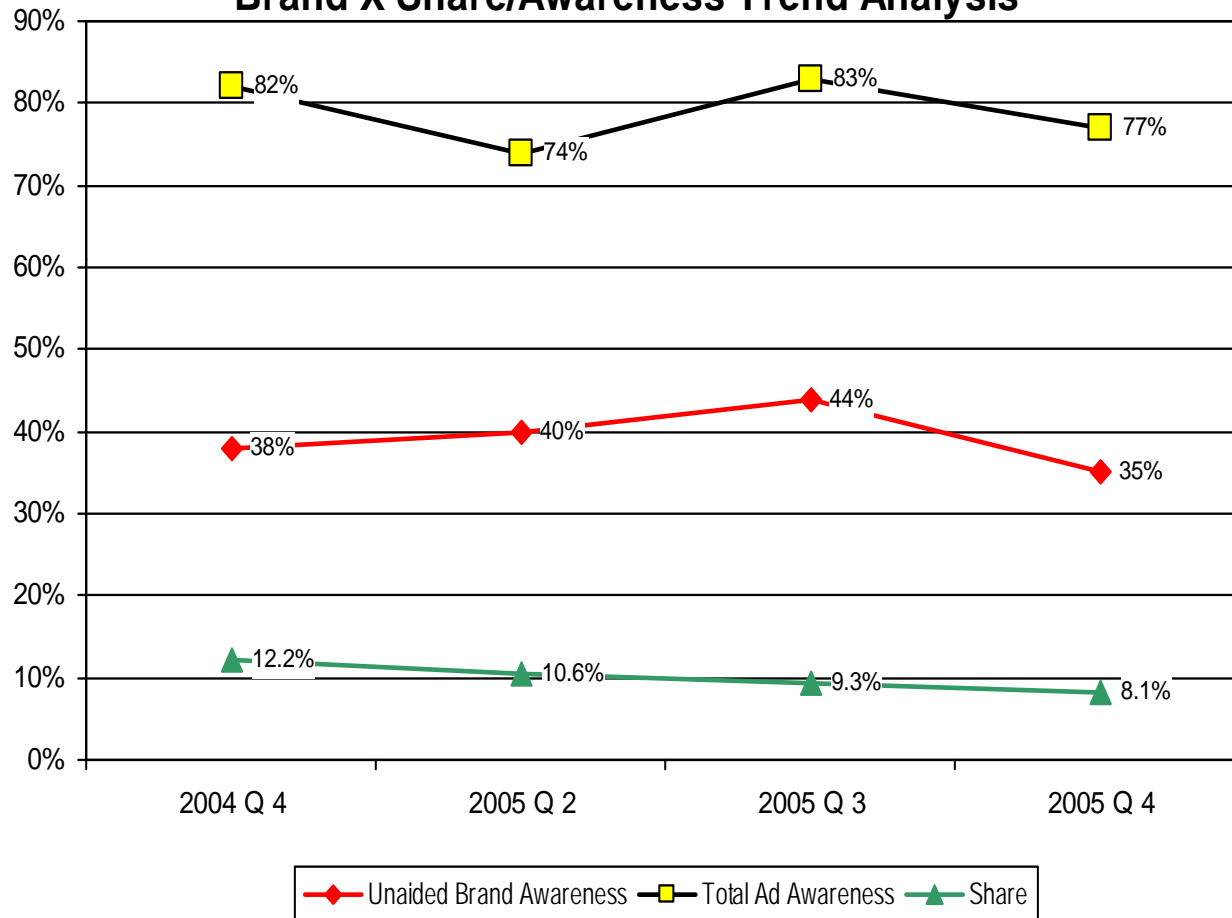
### Brand X Share/Usage/Frequency Trend Analysis



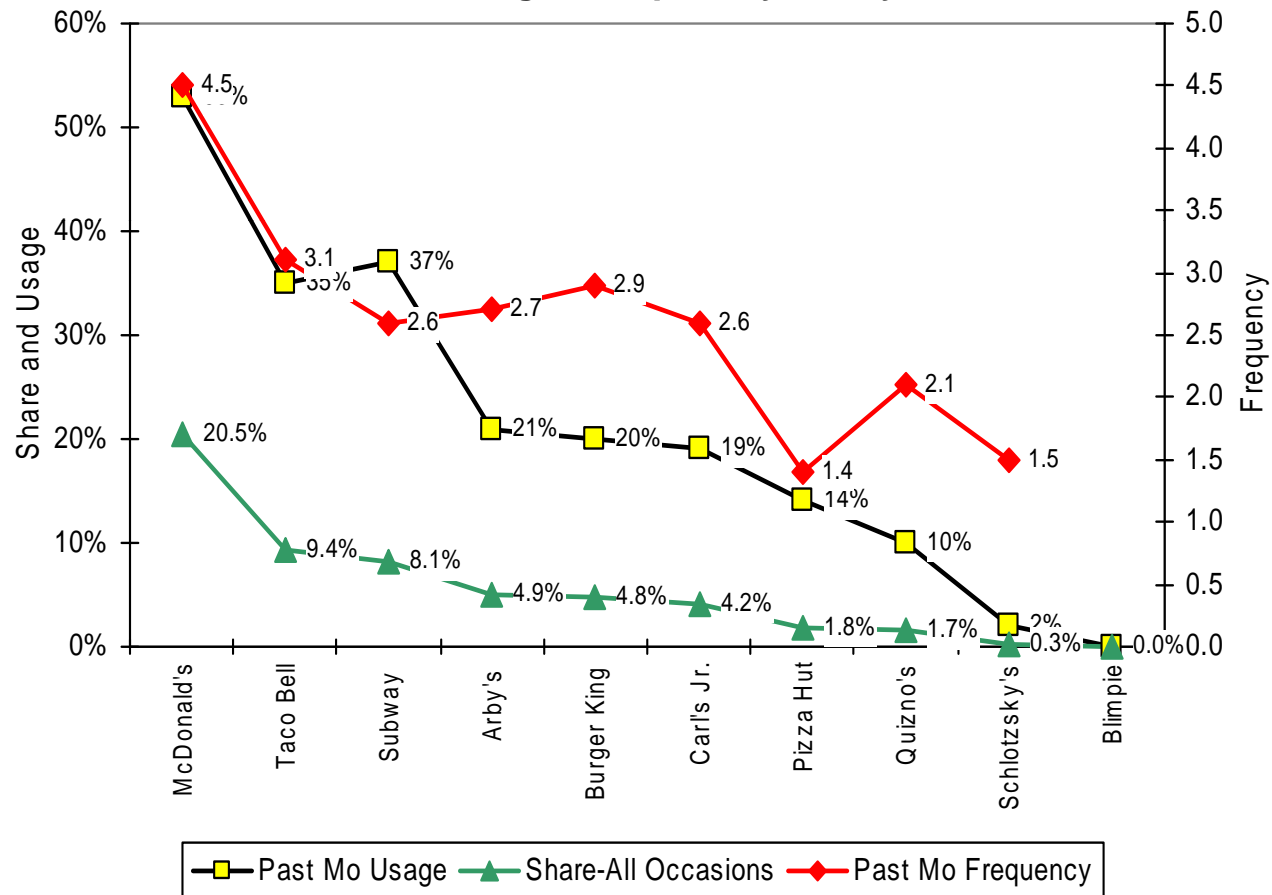
- Quick-Track reports include charts that show how market penetration (past month usage) and customer loyalty (frequency) impact share.
- Other charts compare awareness levels and share.



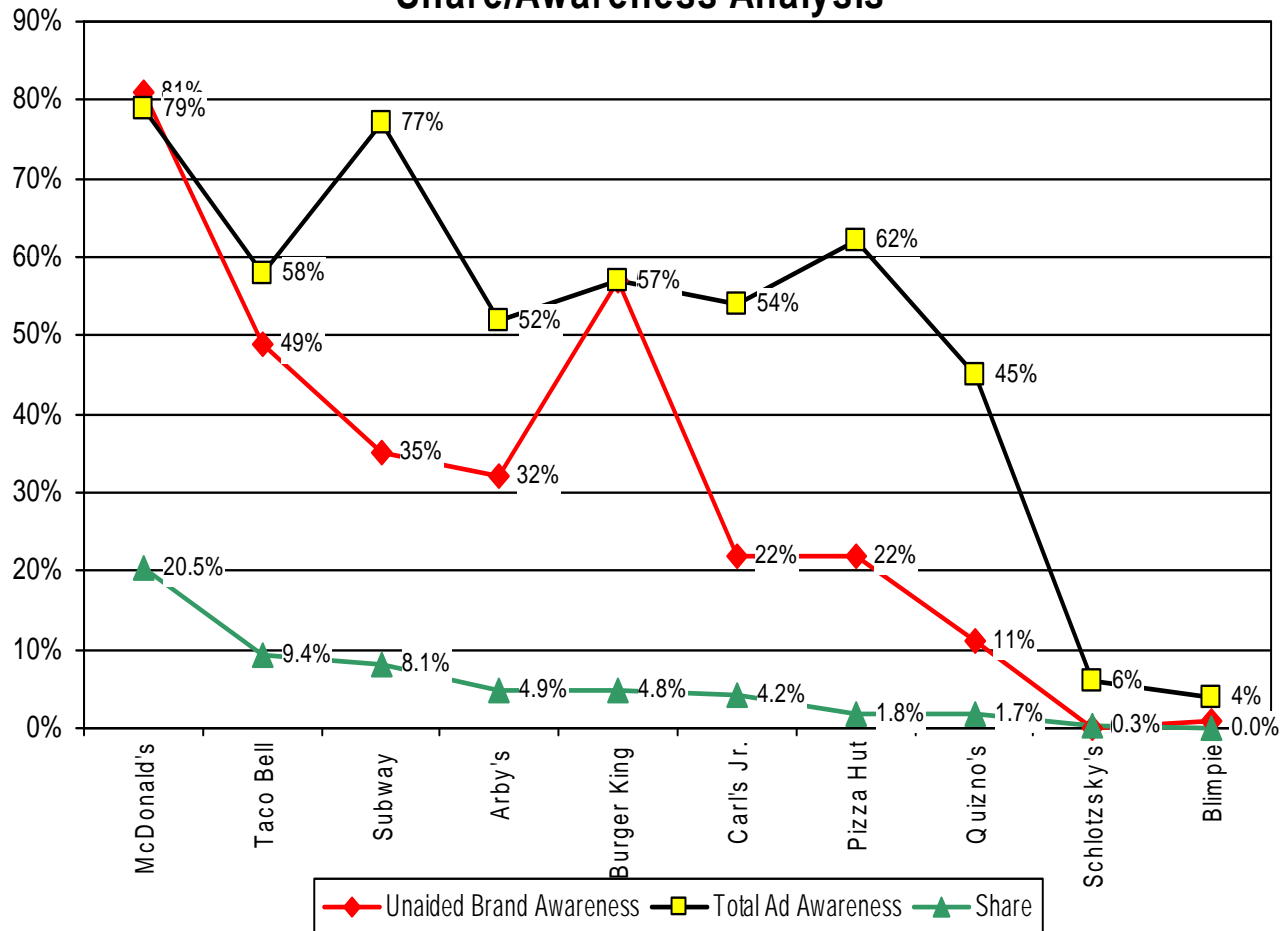
### Brand X Share/Awareness Trend Analysis



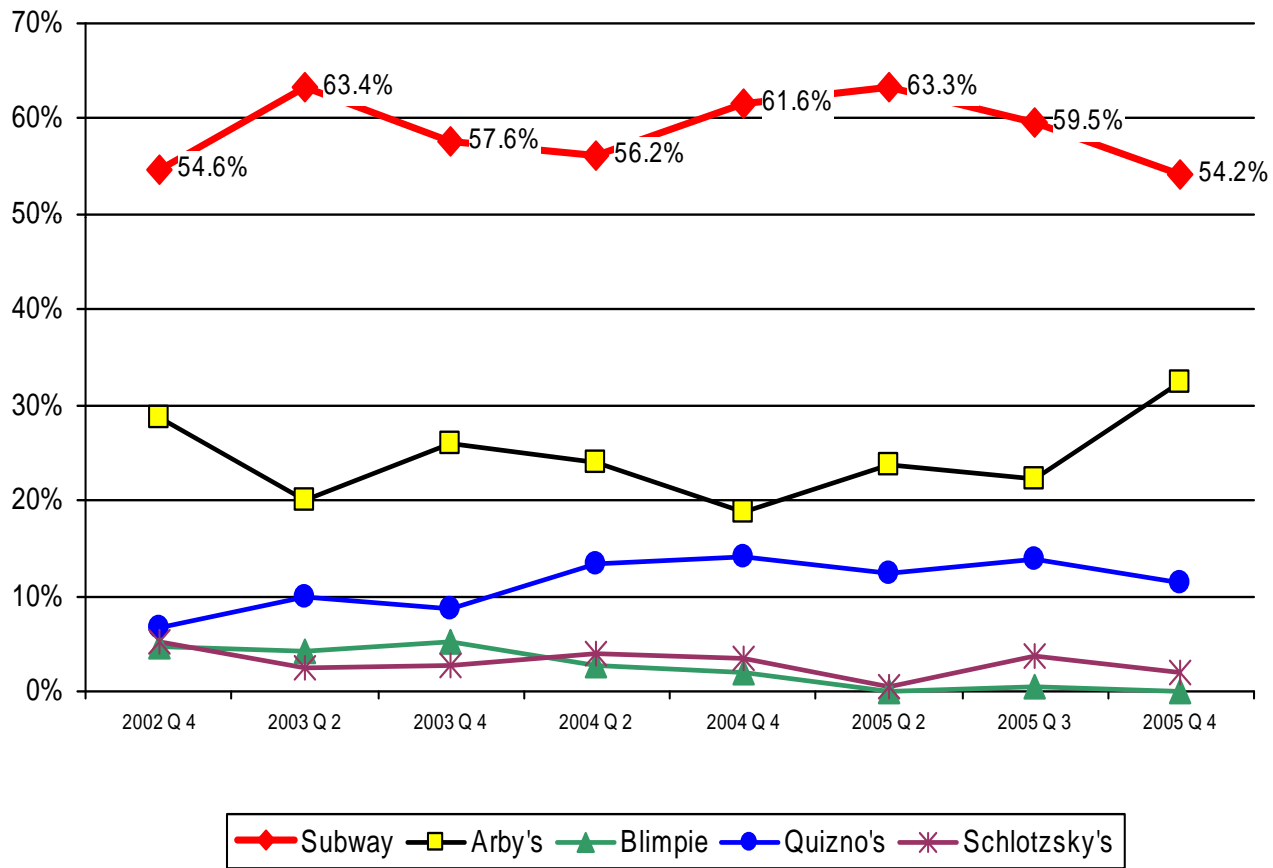
## Share/Usage/Frequency Analysis



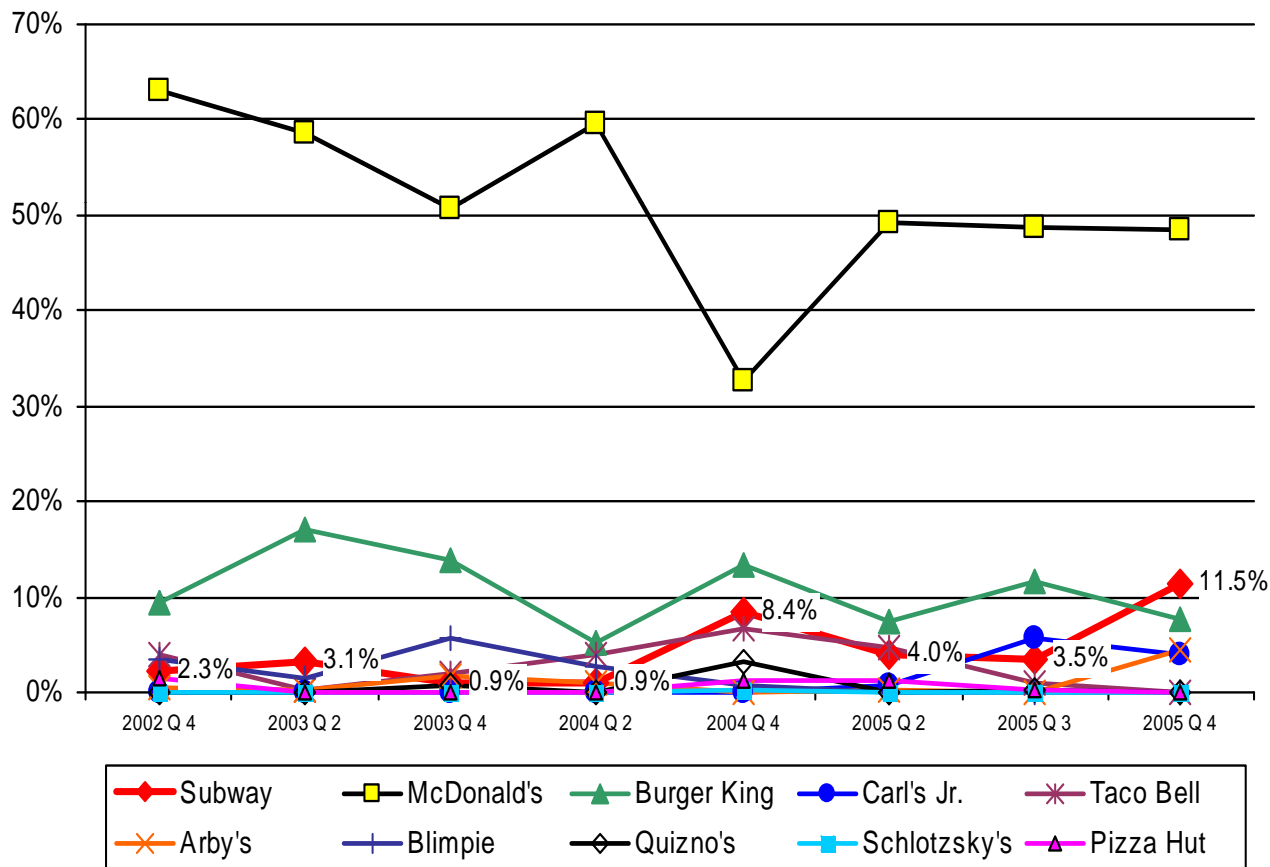
## Share/Awareness Analysis



## Share of Sandwich Chain Occasions



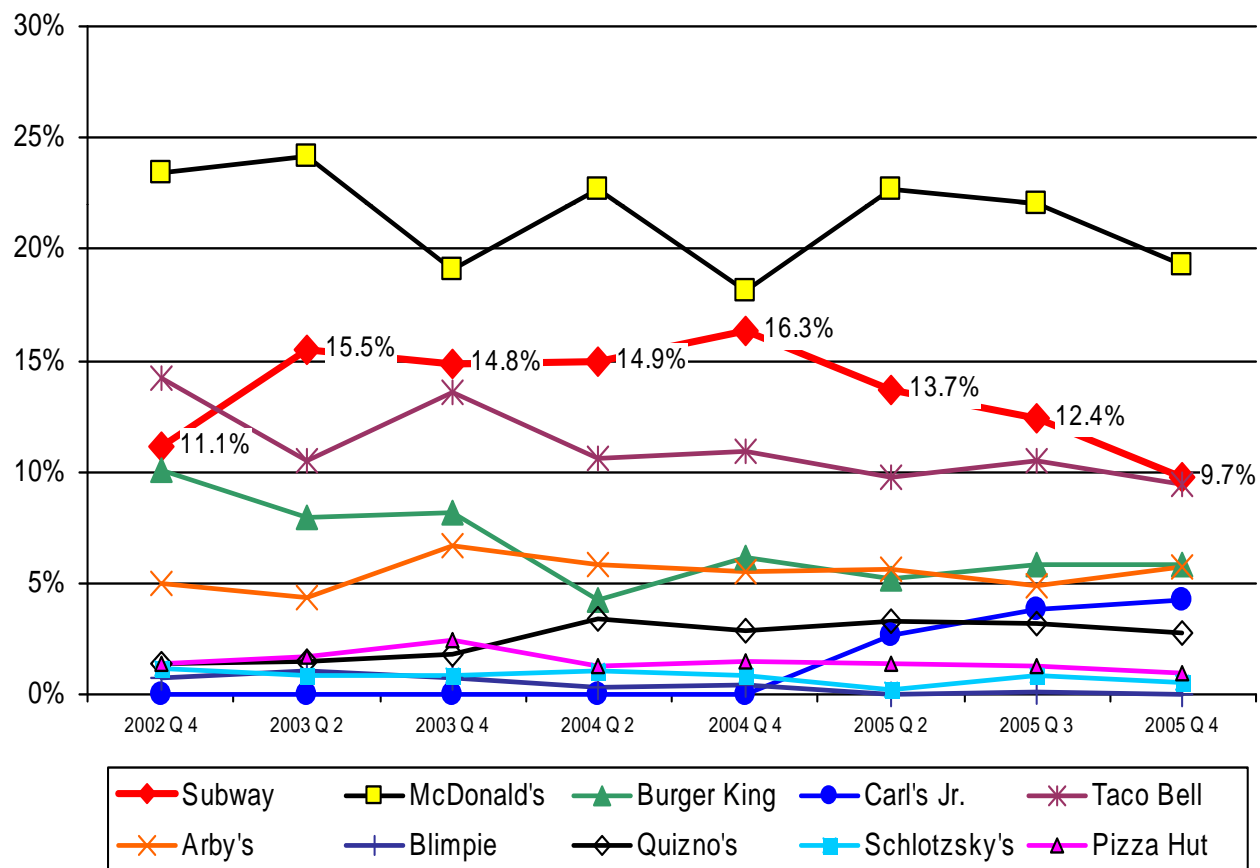
## Share of Breakfast Occasions



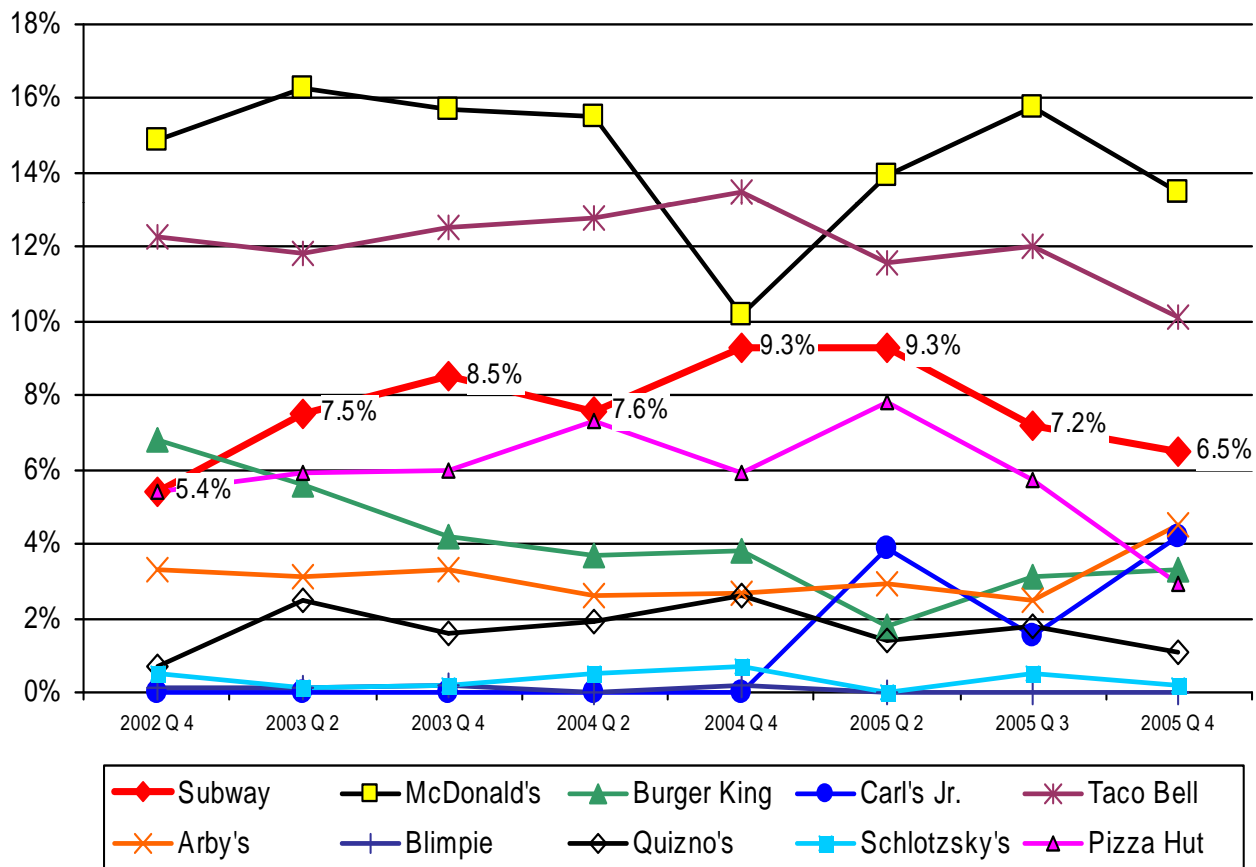
■ Share is also provided by daypart and service mode.



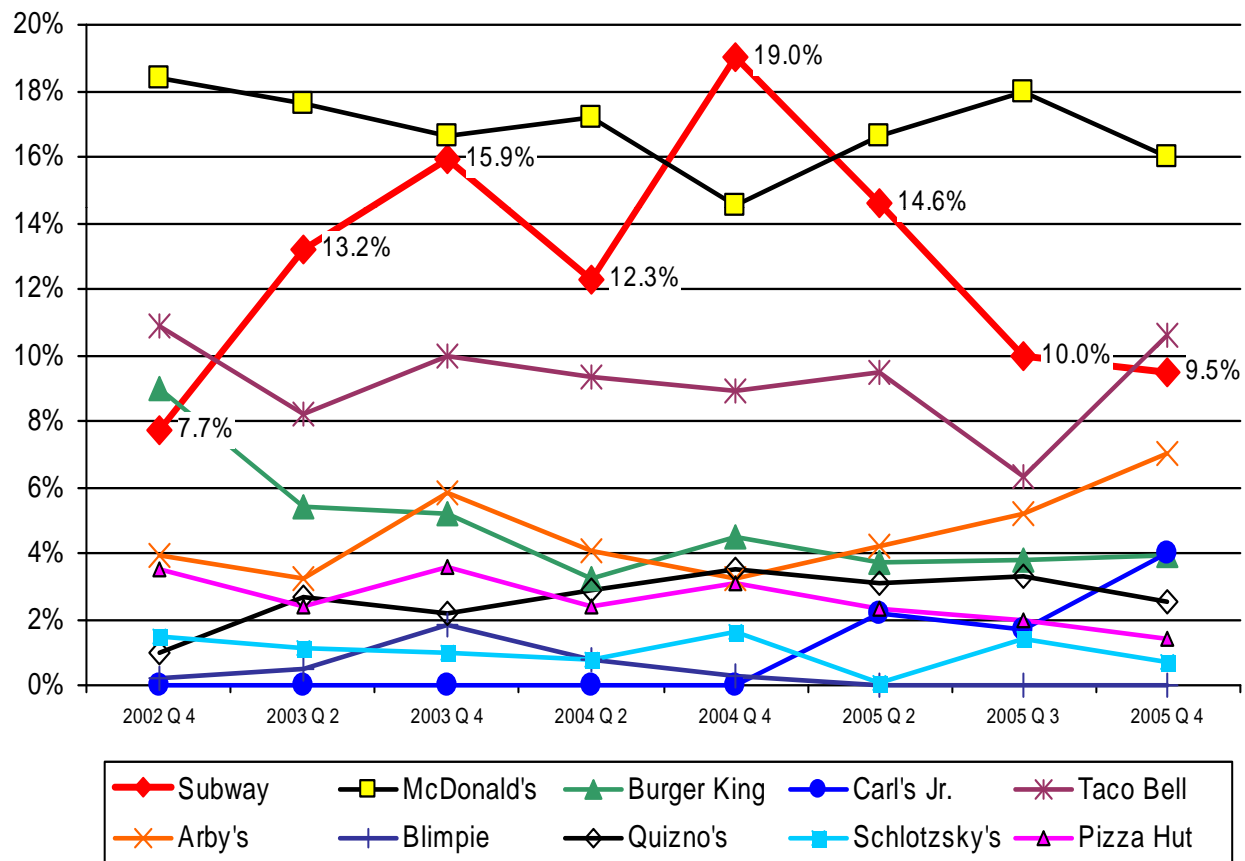
## Share of Lunch Occasions



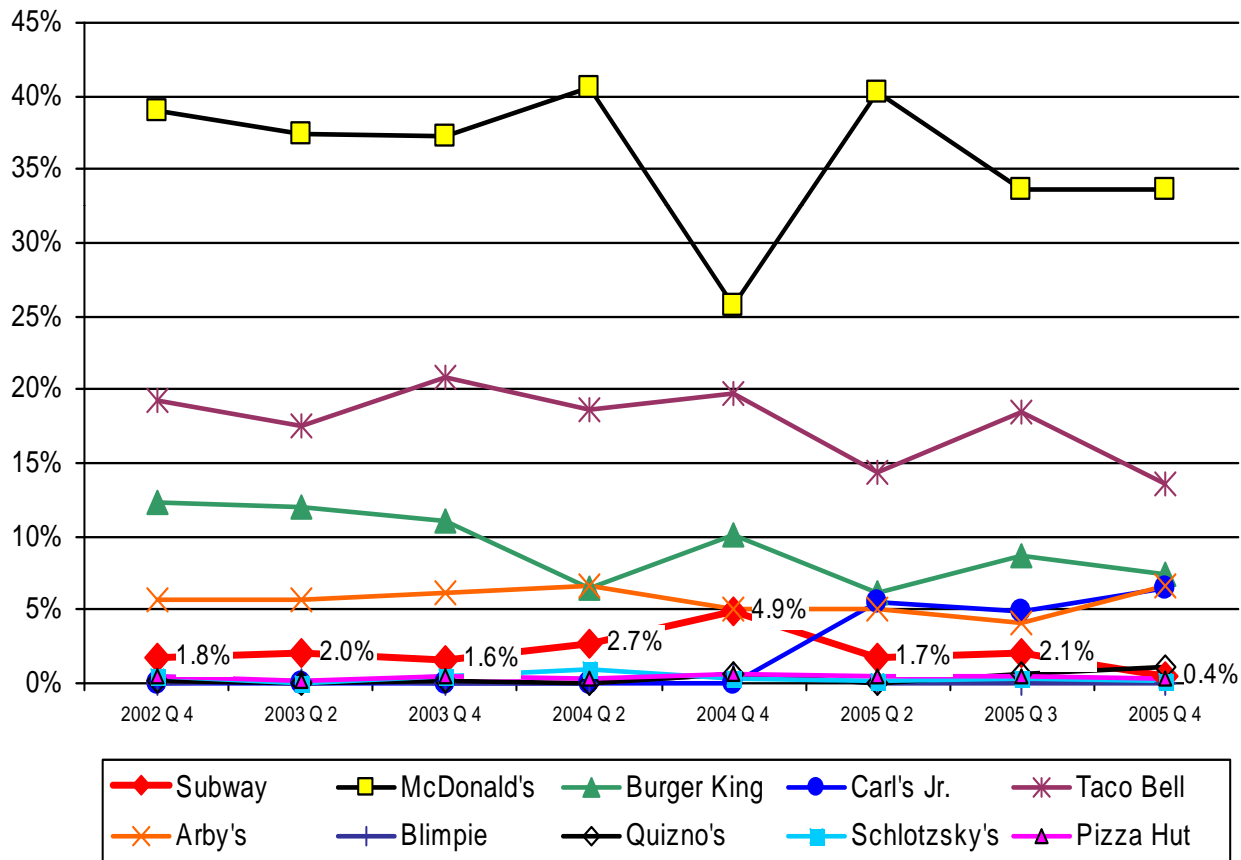
## Share of Dinner Occasions



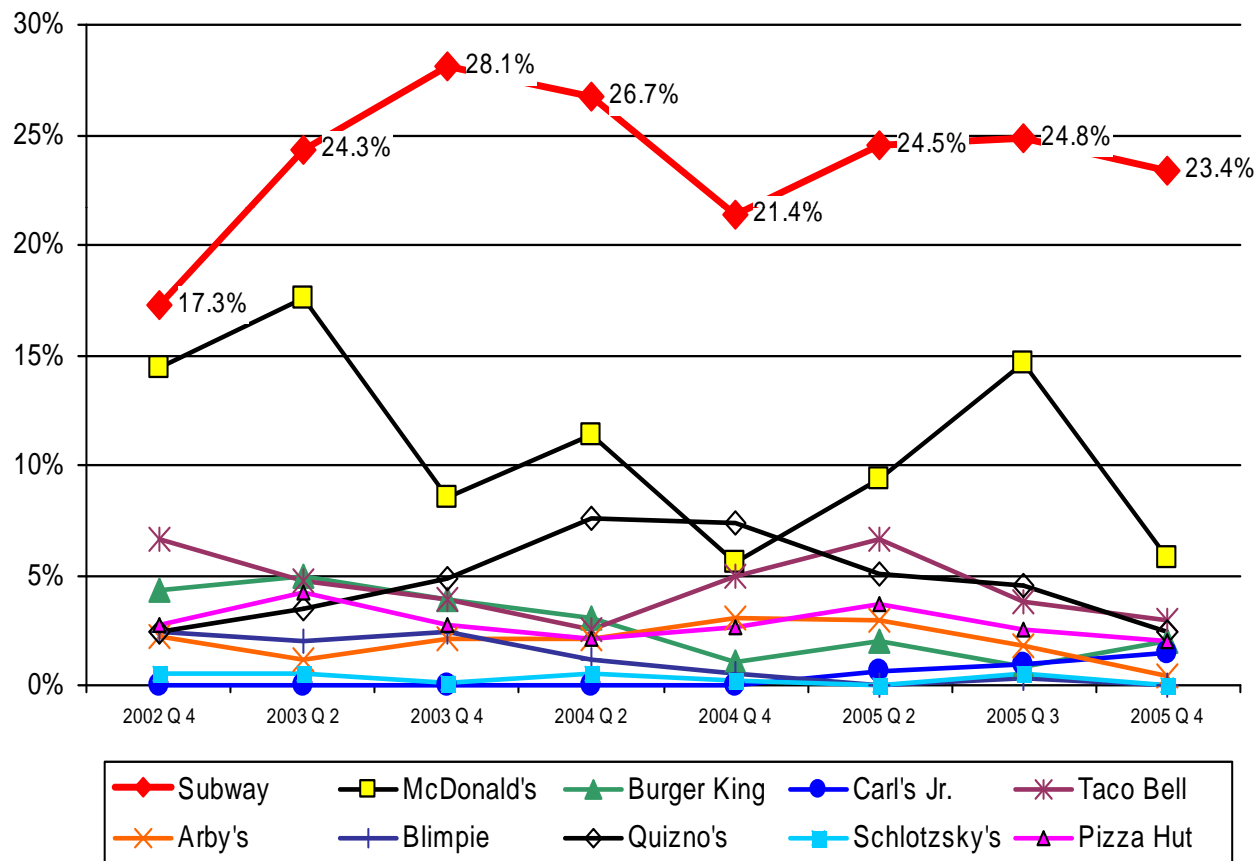
## Share of Eat-In Occasions



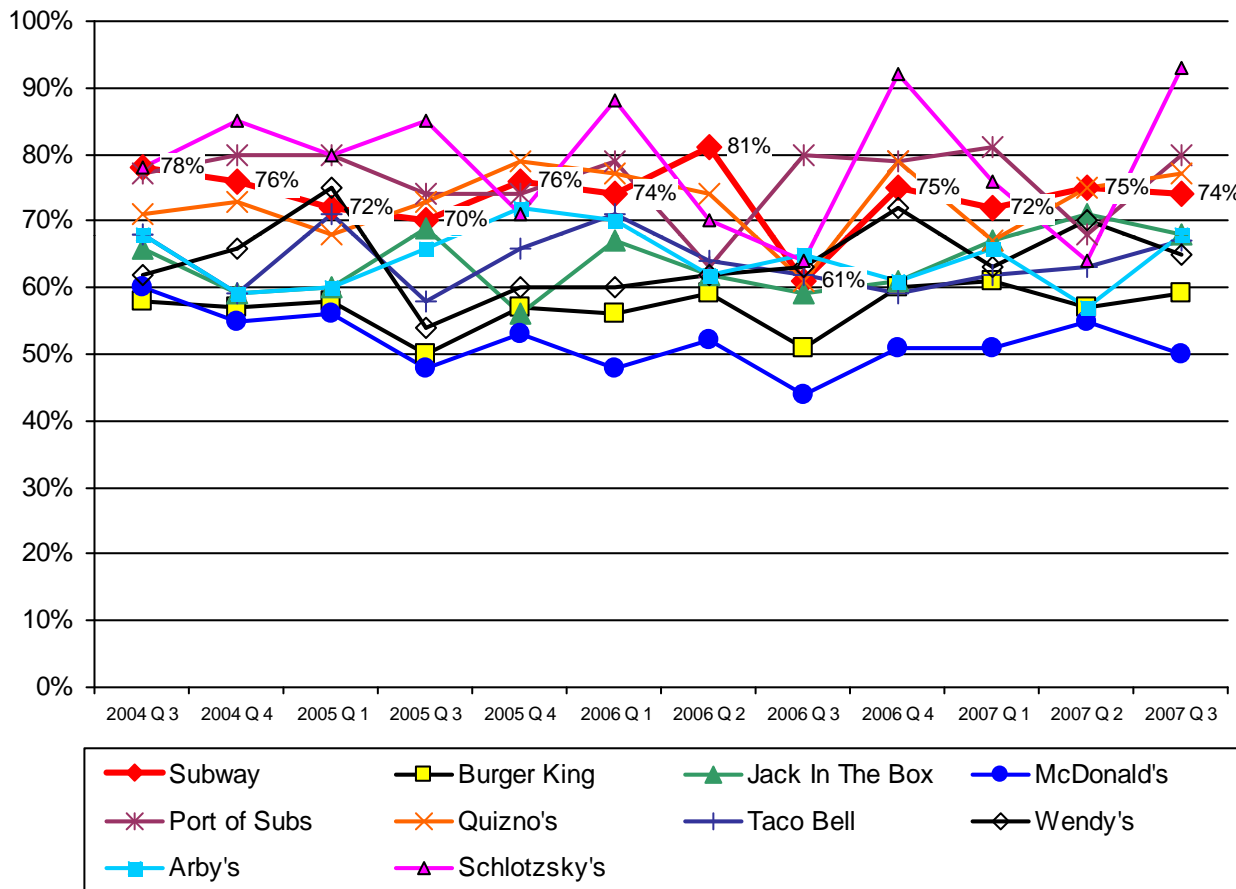
## Share of Drive-Thru Occasions



## Share of Carry-Out Occasions



**Rating of Last Occasion (Excellent/Very Good-Net)**



- The rating of the last occasion is collected among past-3-month users of each monitored chain. Respondents rate these chains on a 5-point scale (1=poor, 5=excellent).
- This chart reports the top-2-box results (those rating the chain excellent and very good), an indication of overall satisfaction.



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# Attribute Ratings

- A different market and time period has been selected to illustrate attribute ratings reporting.
- Clients select which chains they'd like to track on 15 attributes. In 2008, we added 2 attributes: indulgence and affordability.



# Relative Ratings

- A client's ratings are indexed to the average of its competitive set.

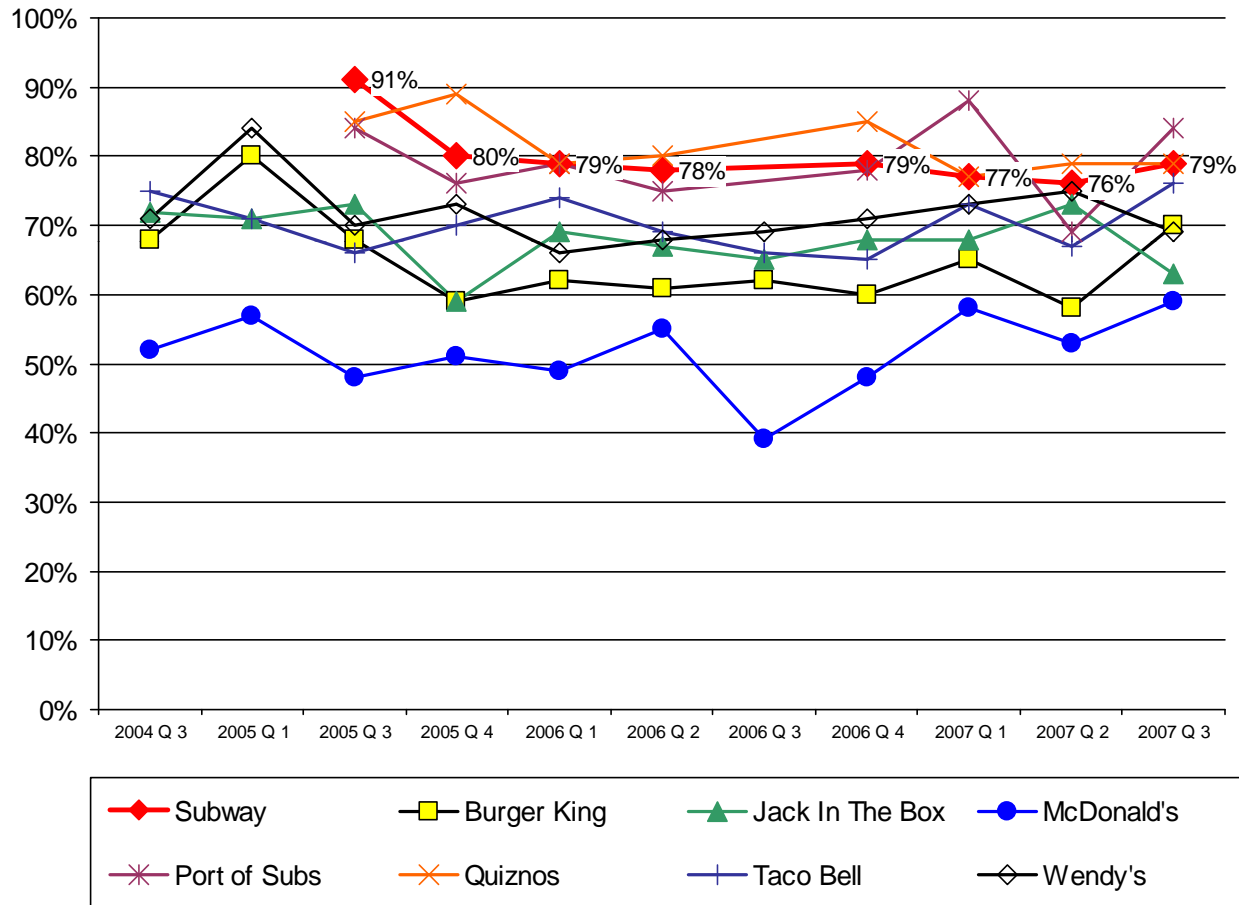
	Subway [160]	Burger King [143]	Jack In The Box [184]	McDonald's [172]	Port of Subs [69]	Quizno's [93]	Taco Bell [144]	Wendy's [130]
Taste	<b><u>110</u></b>	96	86	79	<b><u>119</u></b>	<b><u>110</u></b>	<b><u>106</u></b>	95
Quality	<b><u>119</u></b>	95	83	70	<b><u>127</u></b>	<b><u>127</u></b>	84	98
Temperature	<b><u>106</u></b>	94	96	73	<b><u>117</u></b>	<b><u>117</u></b>	98	101
Variety	100	97	95	88	<b><u>110</u></b>	102	<b><u>108</u></b>	101
Healthiness	<b><u>167</u></b>	66	68	68	<b><u>145</u></b>	<b><u>131</u></b>	65	105
Friendliness	<b><u>117</u></b>	99	96	78	<b><u>112</u></b>	105	94	101
Speed	103	99	87	83	<b><u>109</u></b>	<b><u>110</u></b>	<b><u>112</u></b>	97
Accuracy	<b><u>118</u></b>	84	94	80	<b><u>116</u></b>	<b><u>112</u></b>	98	100
Cleanliness	<b><u>116</u></b>	91	84	81	<b><u>115</u></b>	<b><u>121</u></b>	97	97
Kid Appeal	76	<b><u>139</u></b>	91	<b><u>161</u></b>	89	58	97	98
Convenience	98	<b><u>117</u></b>	<b><u>106</u></b>	<b><u>127</u></b>	94	73	95	93
Value	98	<b><u>109</u></b>	89	103	101	84	<b><u>109</u></b>	<b><u>107</u></b>
Like me	<b><u>114</u></b>	95	84	79	<b><u>117</u></b>	<b><u>111</u></b>	<b><u>106</u></b>	95

**Above Average**

**Below Average**



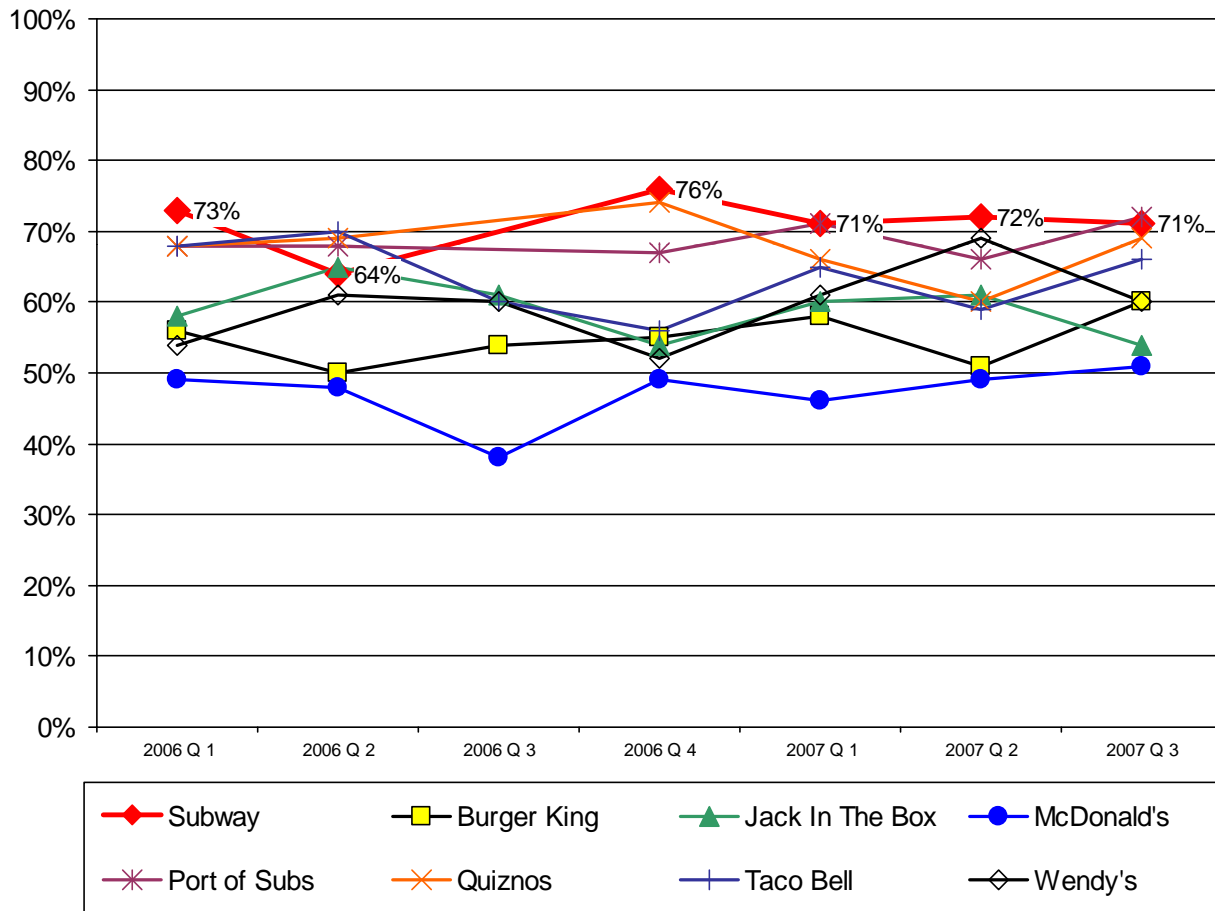
**Taste or Flavor of Food (Excellent/Very Good-Net)**



- Trend data is provided for each attribute where available. Clients can assess how they're ranked on each attribute and importantly if they're gaining ground or losing ground against their competitors on these attitudinal measures.



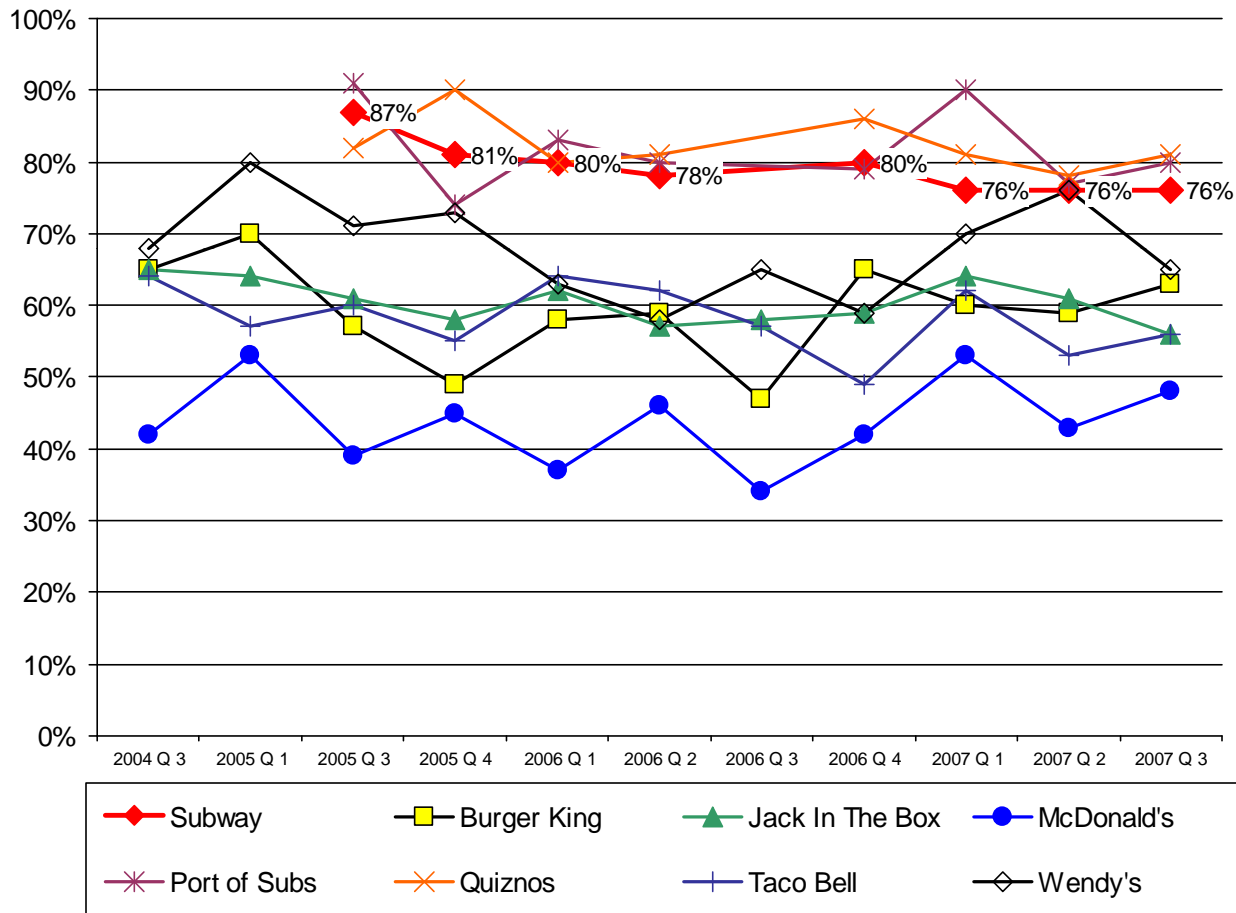
Someone like me (Excellent/Very Good-Net)



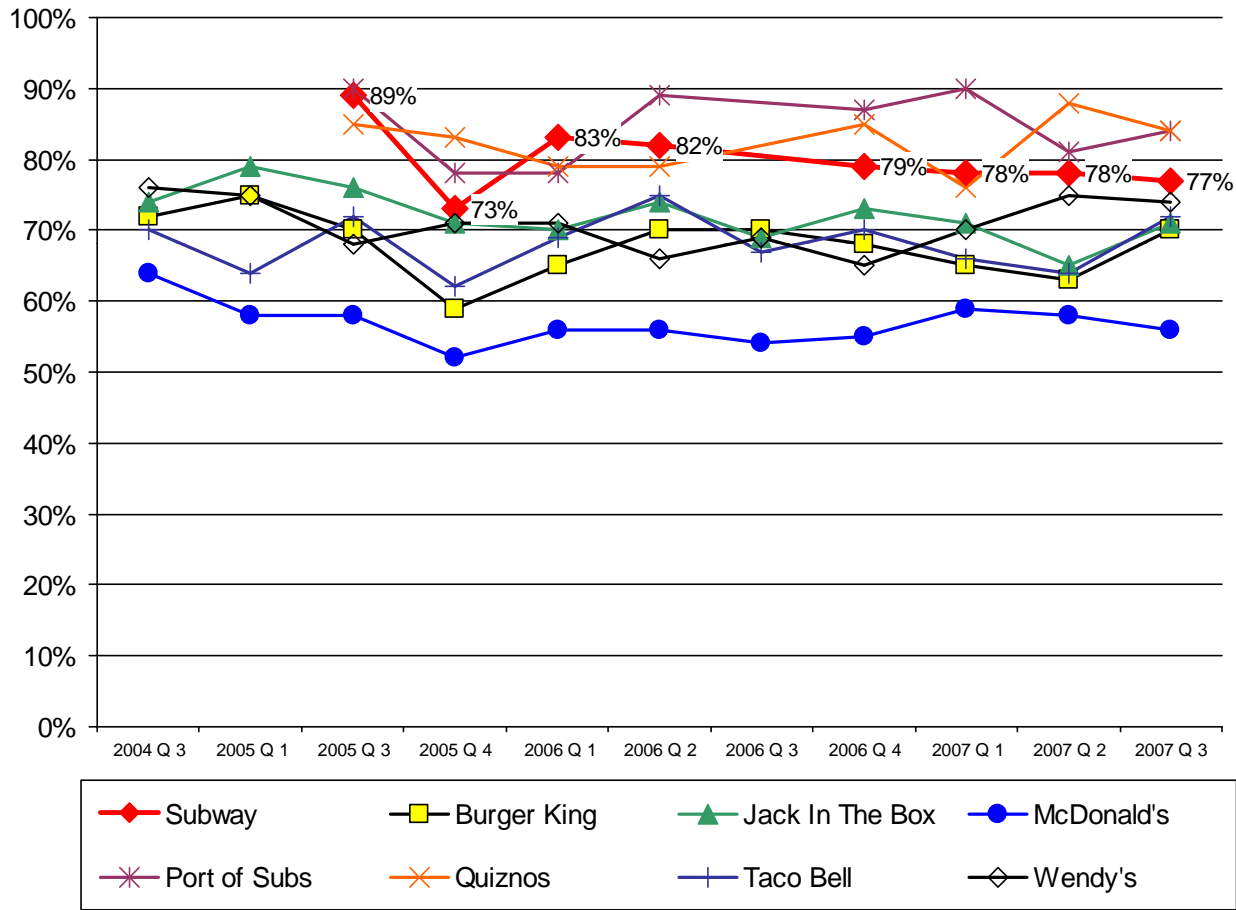
■ A good measure of brand affinity.



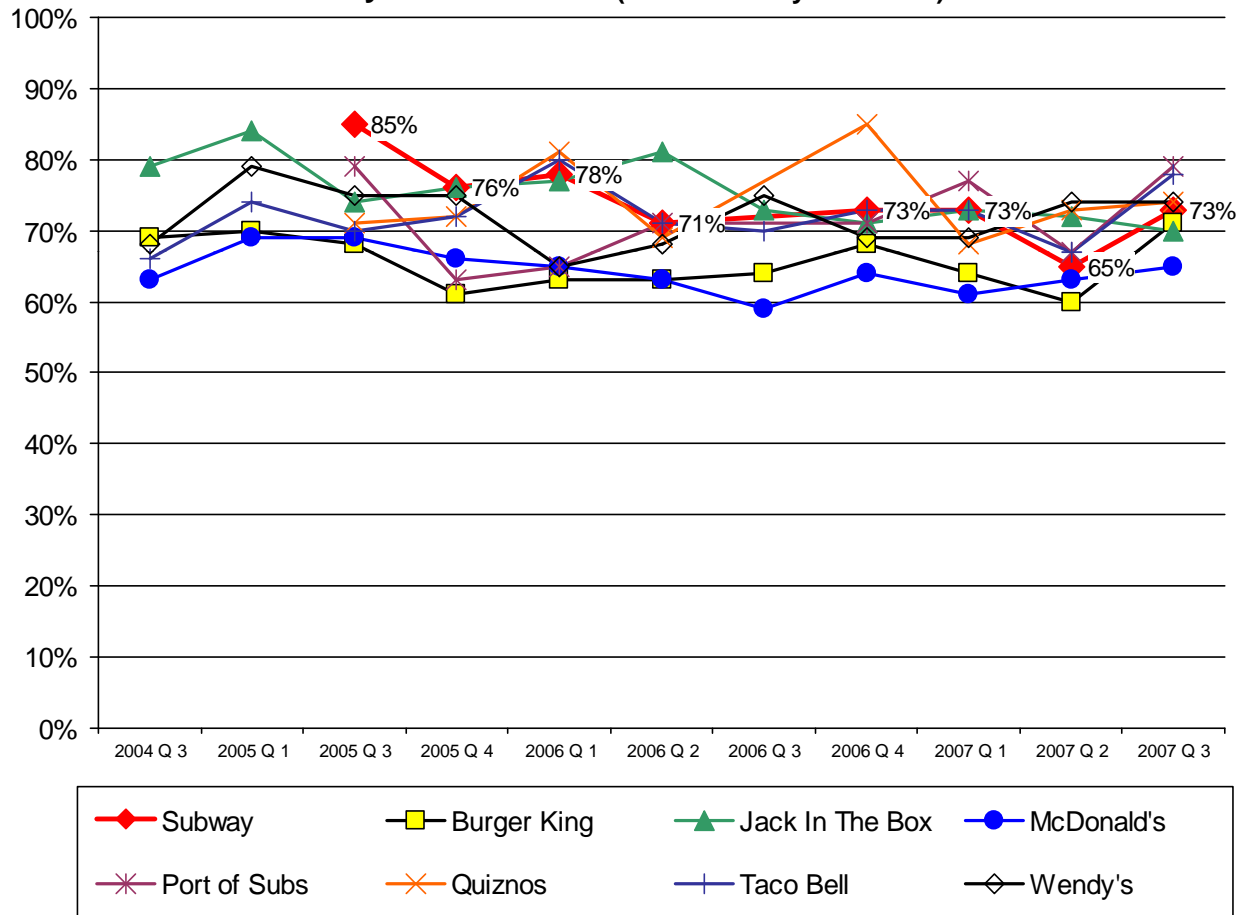
**Quality of Ingredients (Excellent/Very Good-Net)**



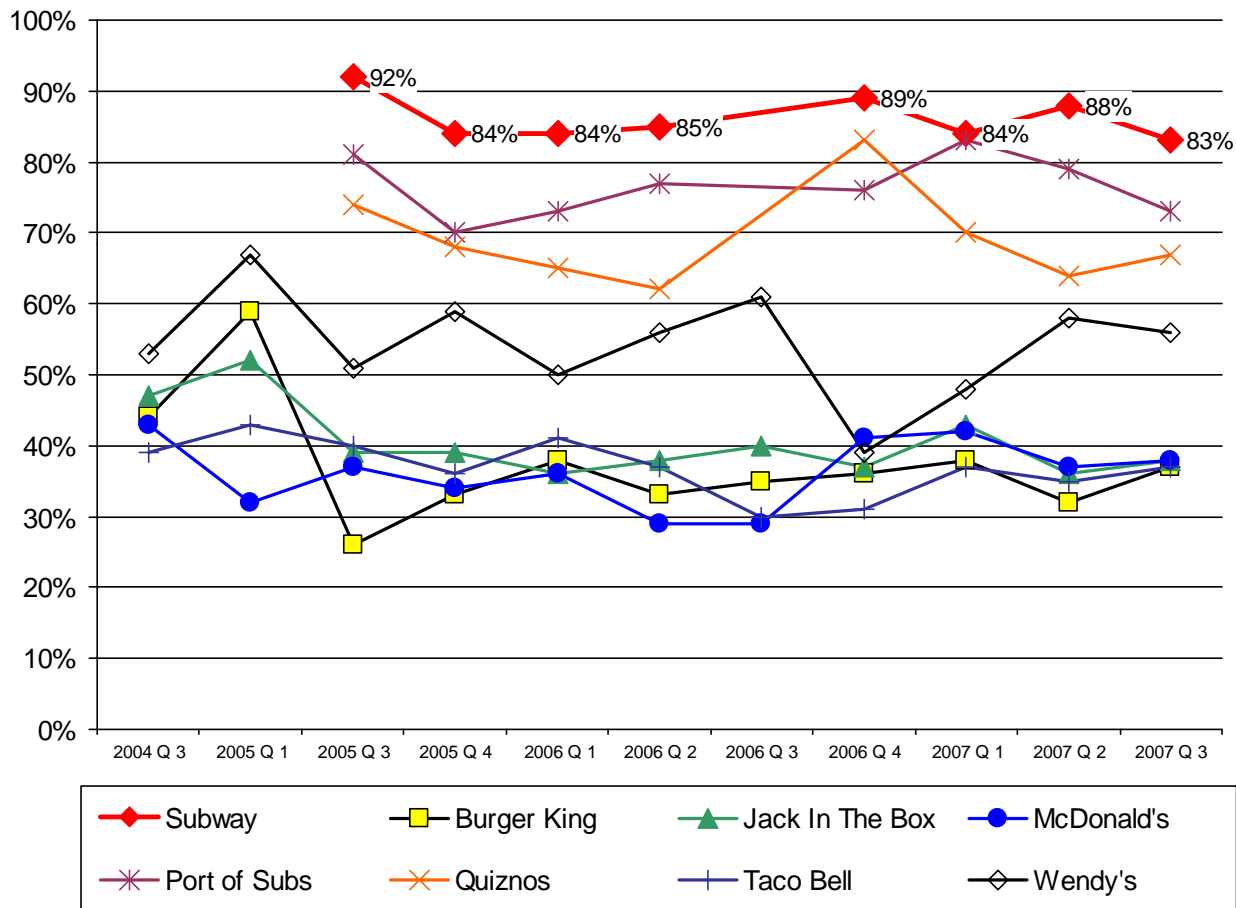
**Temperature of Food (Excellent/Very Good-Net)**



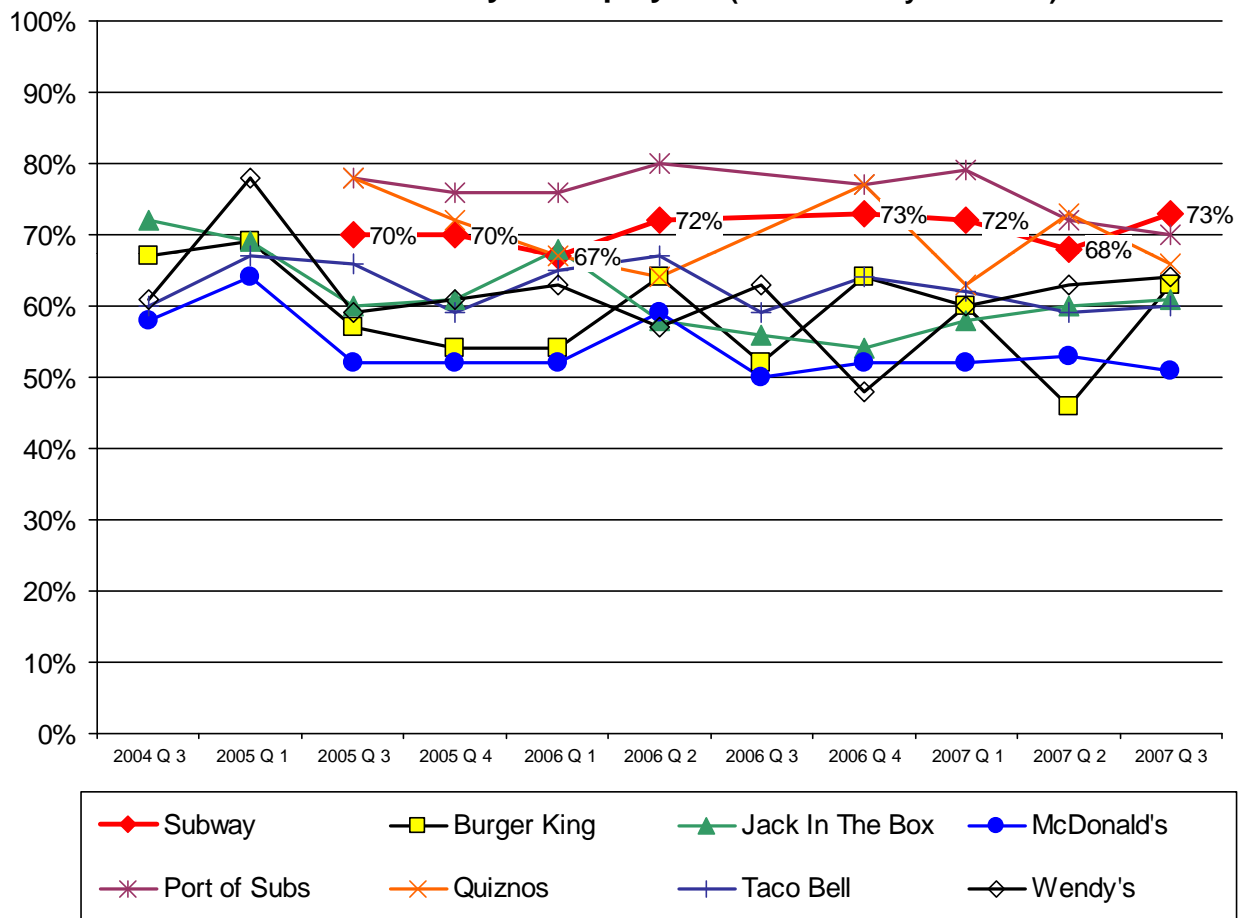
Variety of Menu Items (Excellent/Very Good-Net)



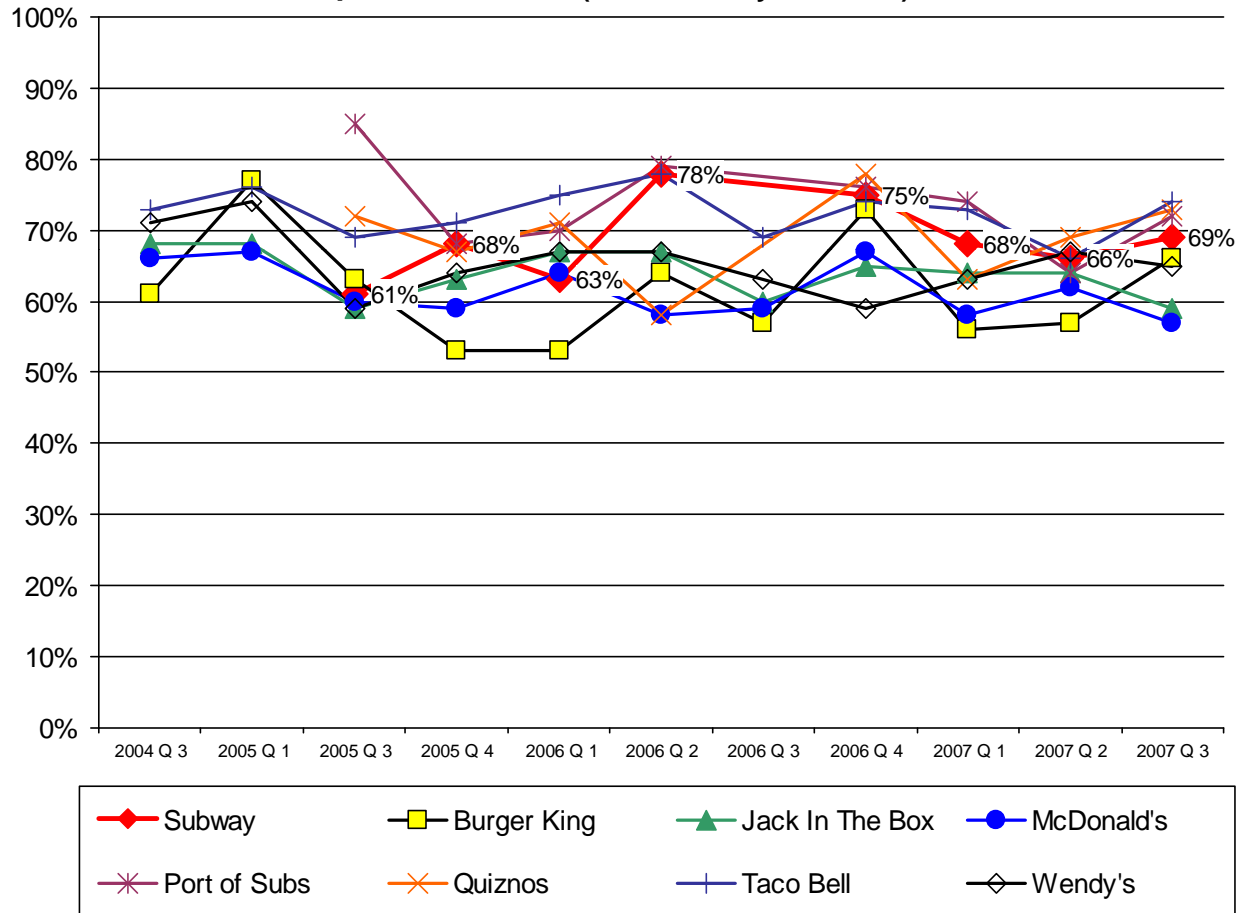
**Availability of Healthy/Nutritious Food (Excellent/Very Good-Net)**



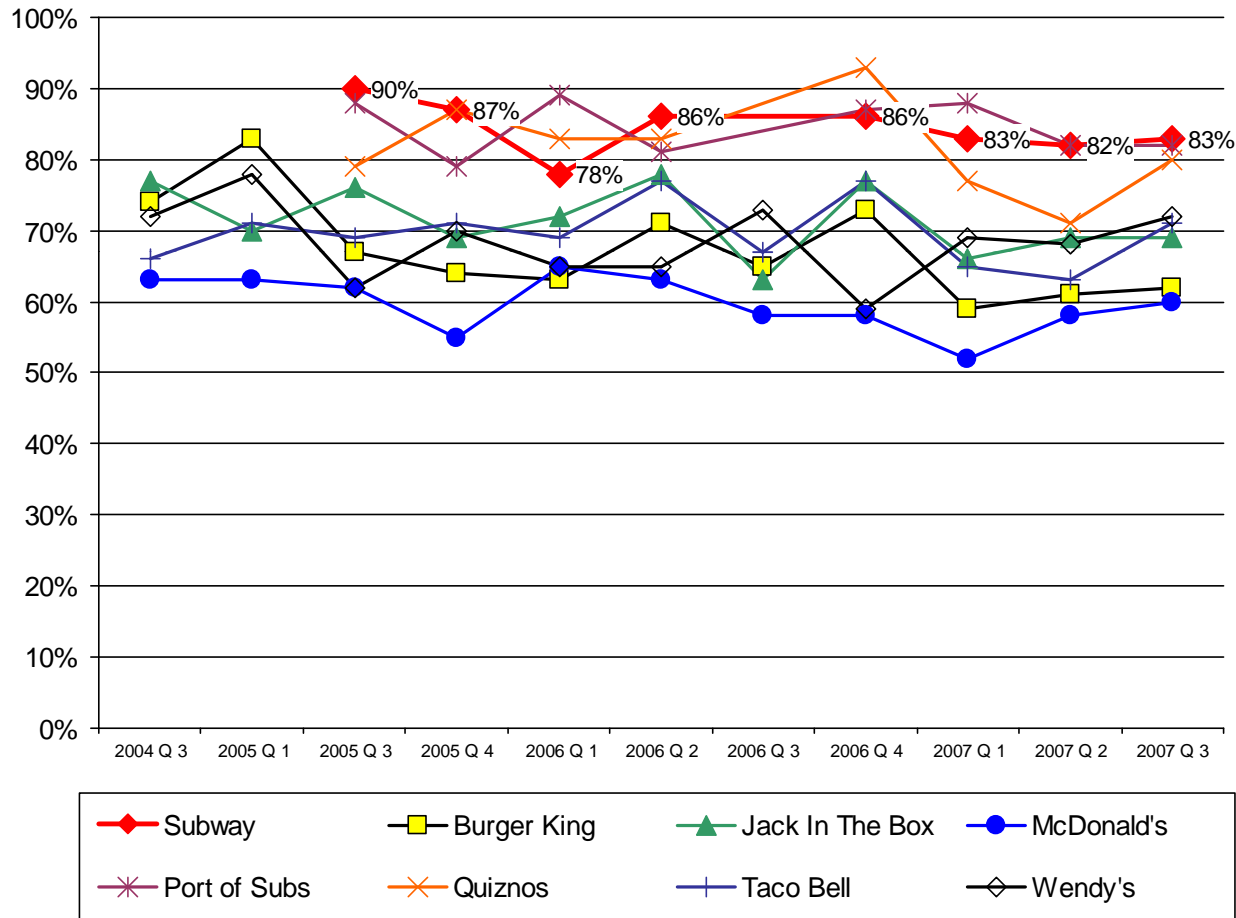
**Friendliness/Courtesy of Employees (Excellent/Very Good-Net)**



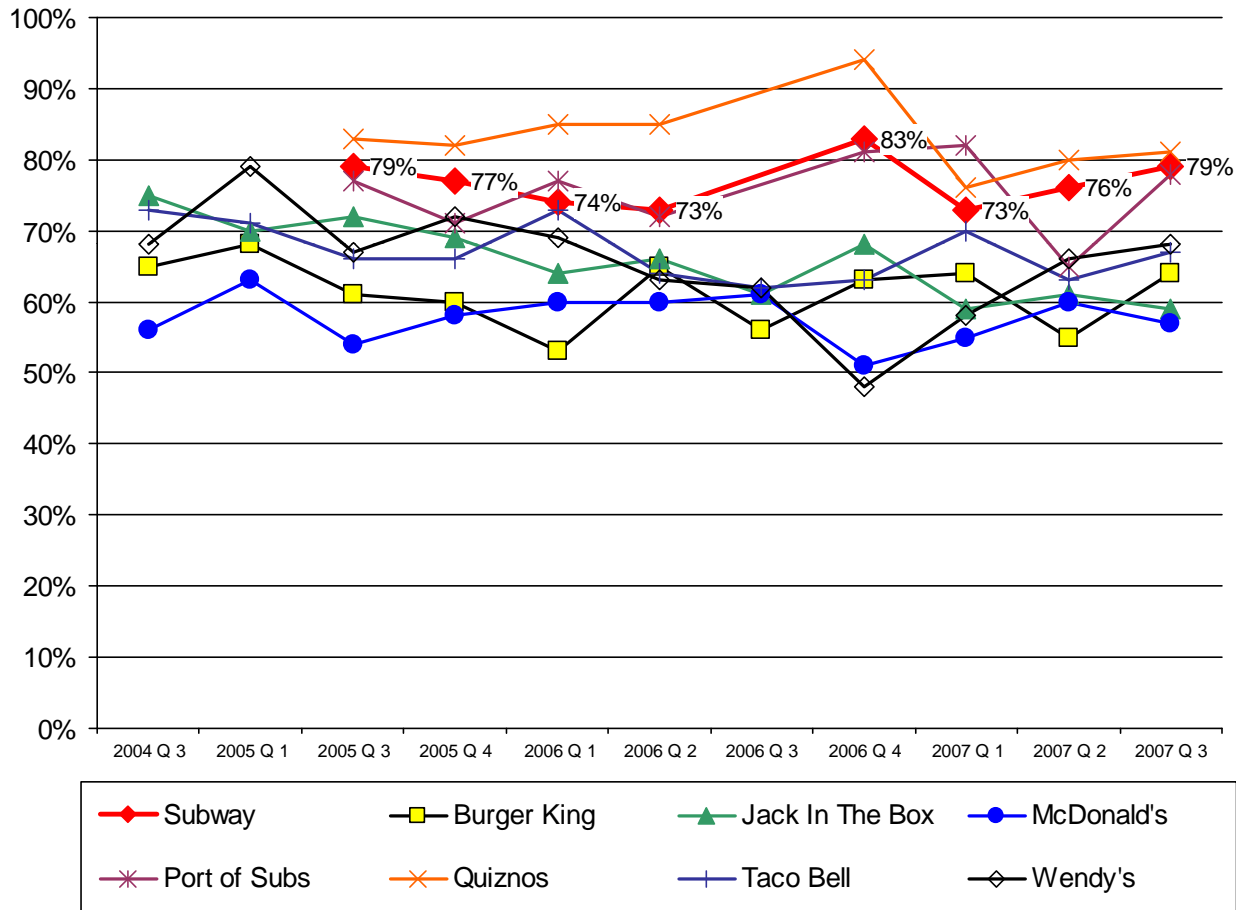
**Speed of Service (Excellent/Very Good-Net)**



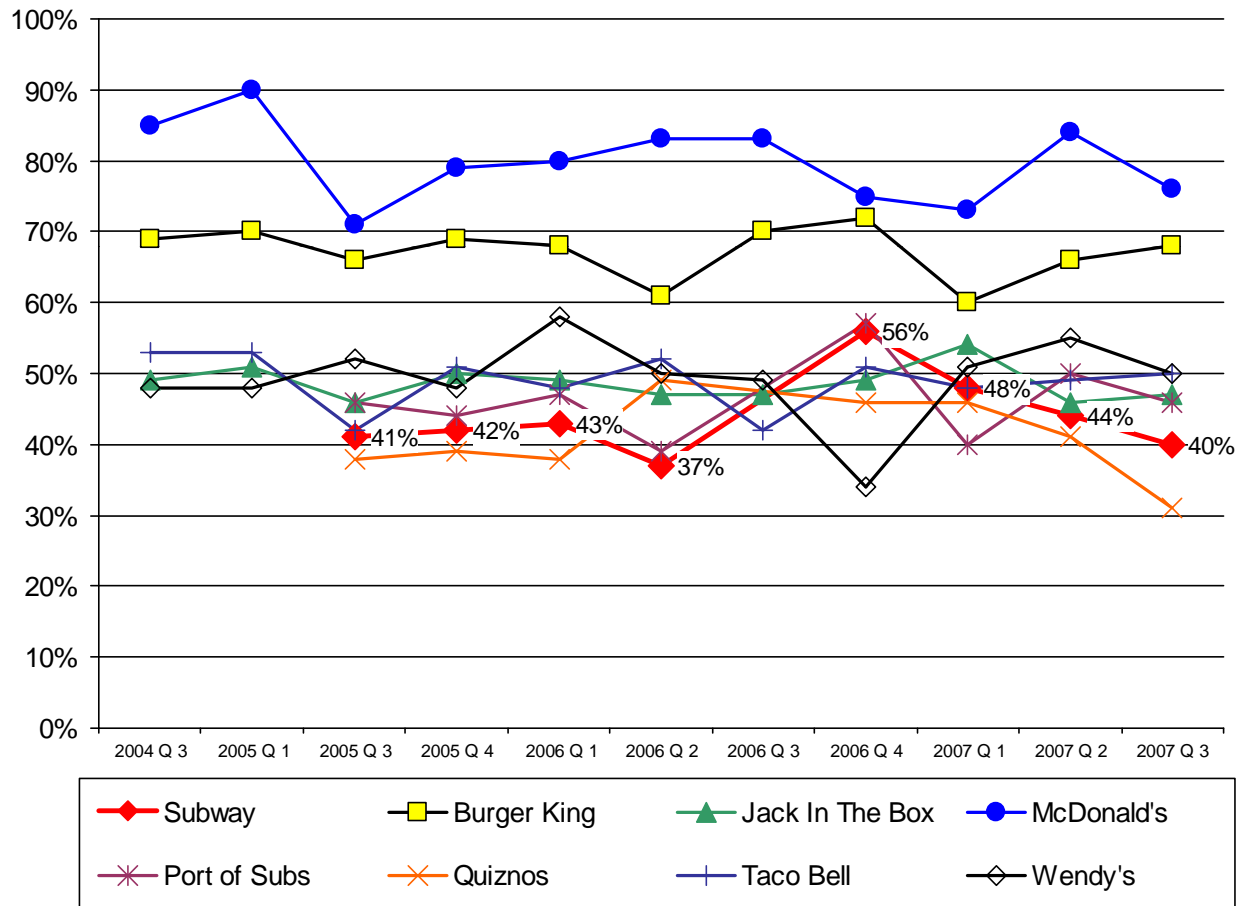
**Accuracy in Filling Orders (Excellent/Very Good-Net)**



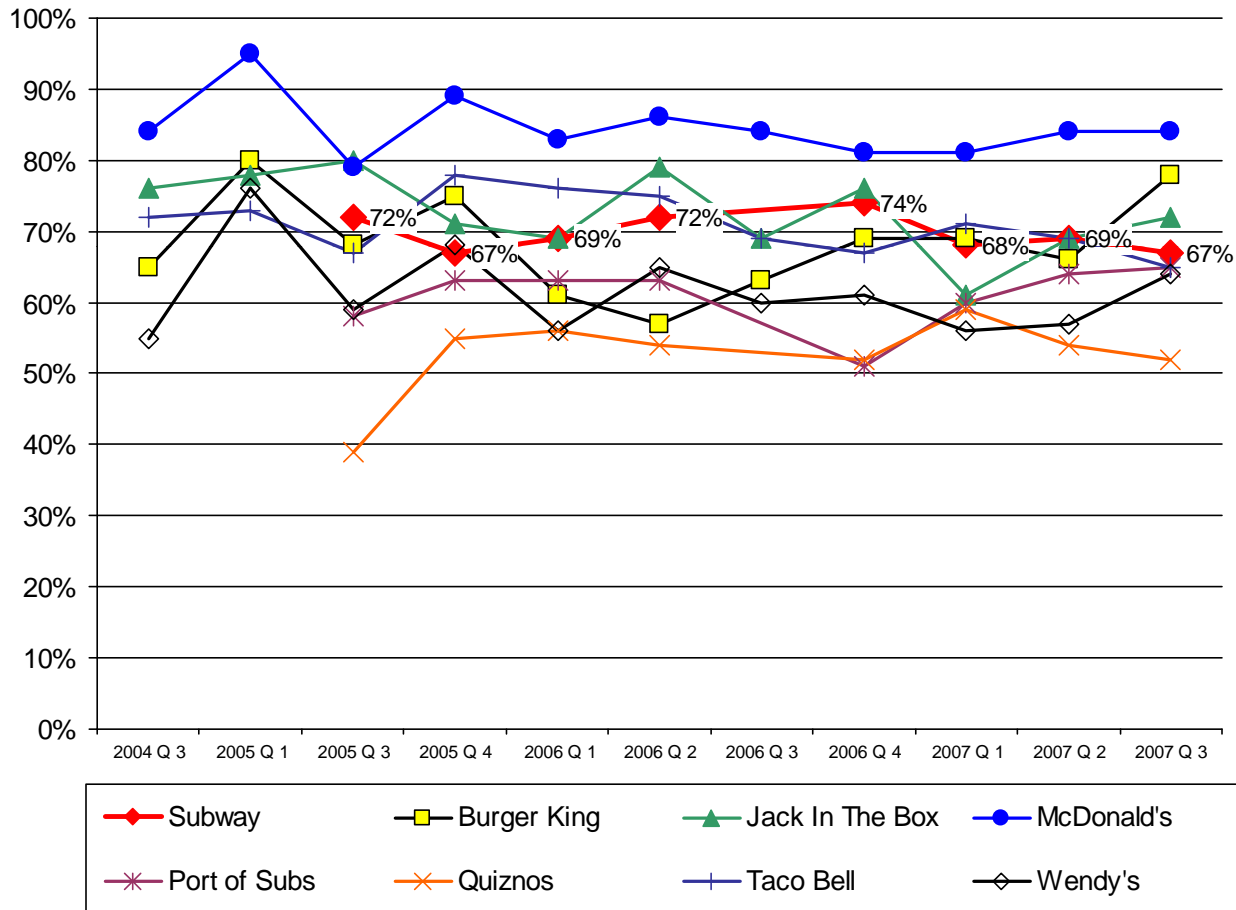
### Cleanliness of Restaurant (Excellent/Very Good-Net)



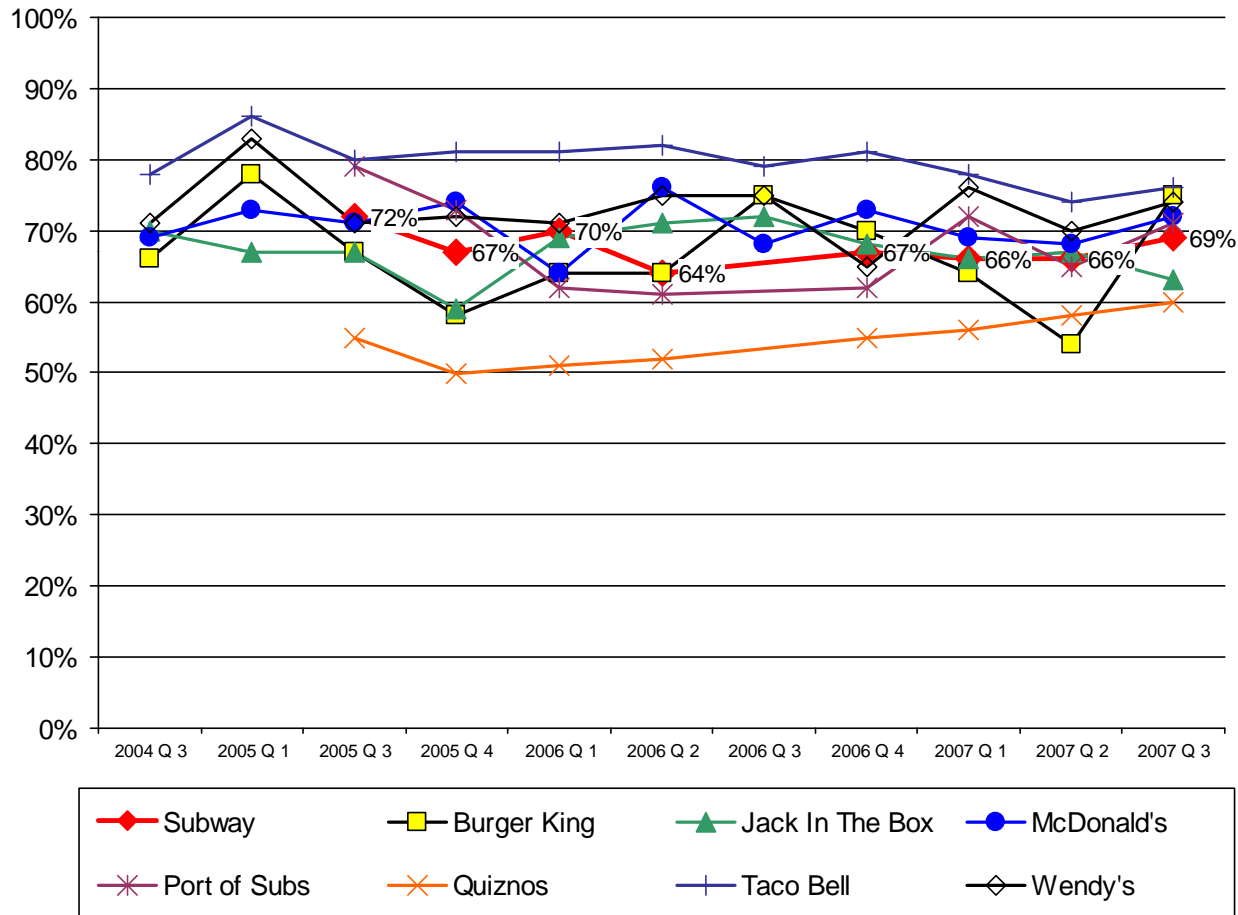
### Overall Appeal to Kids (Excellent/Very Good-Net)



### Convenience of Locations (Excellent/Very Good-Net)

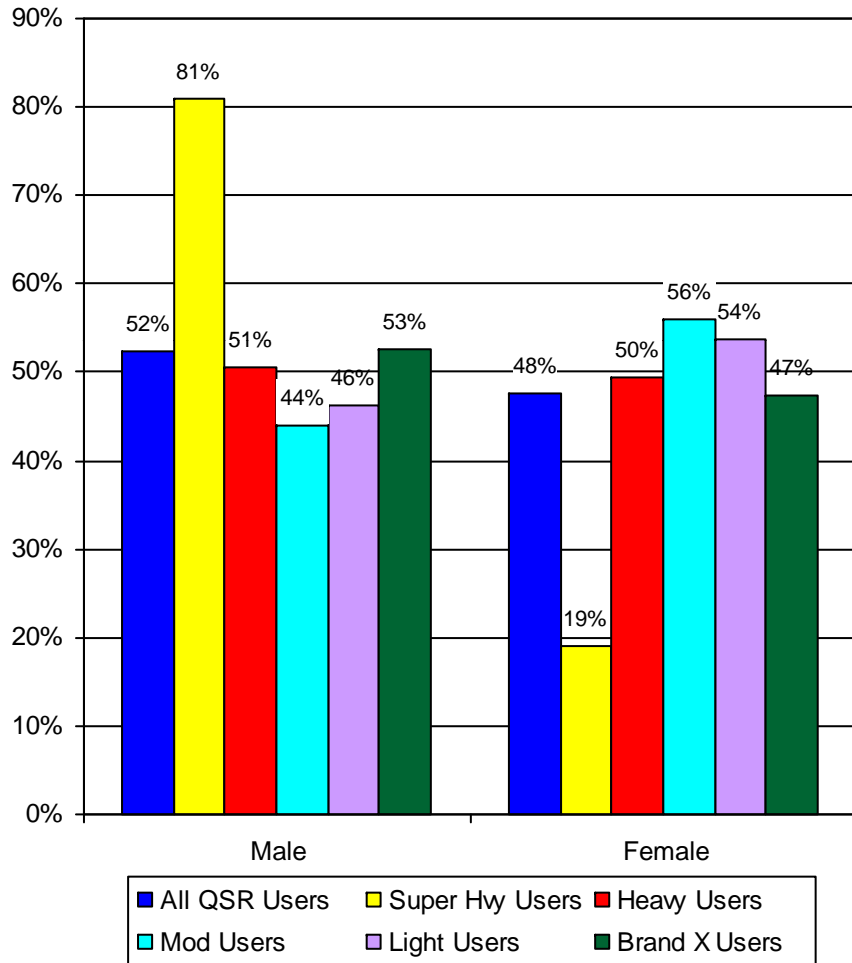


**Value For The Money (Excellent/Very Good-Net)**

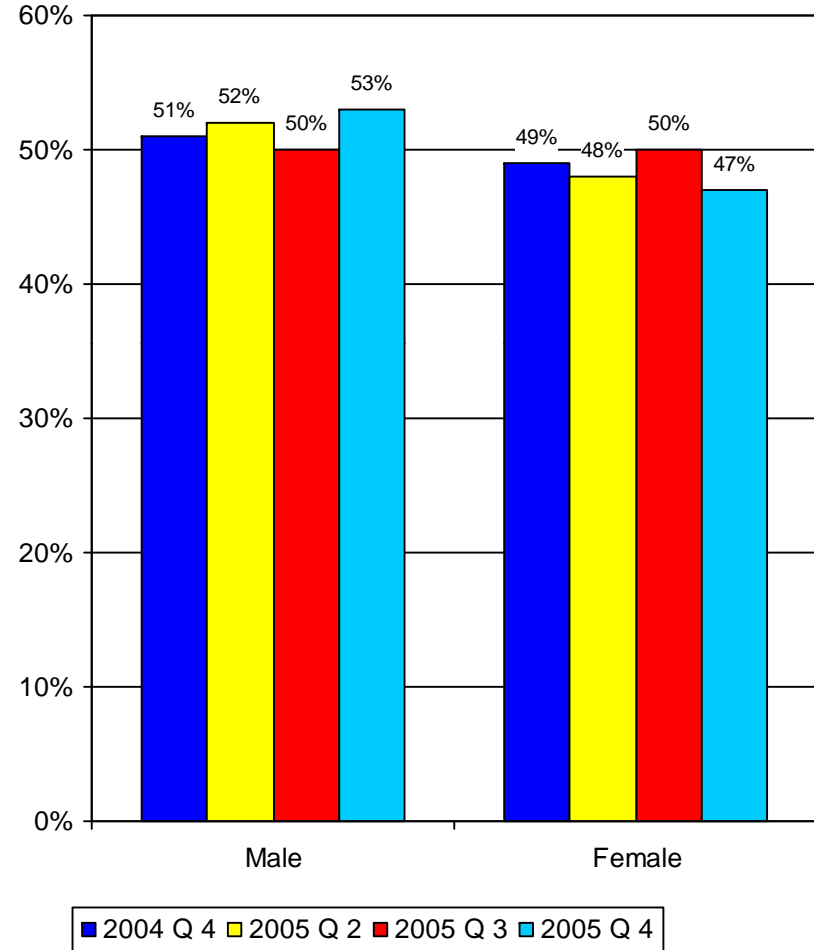


# Gender

By QSR Usage & Brand X Users - Current Period

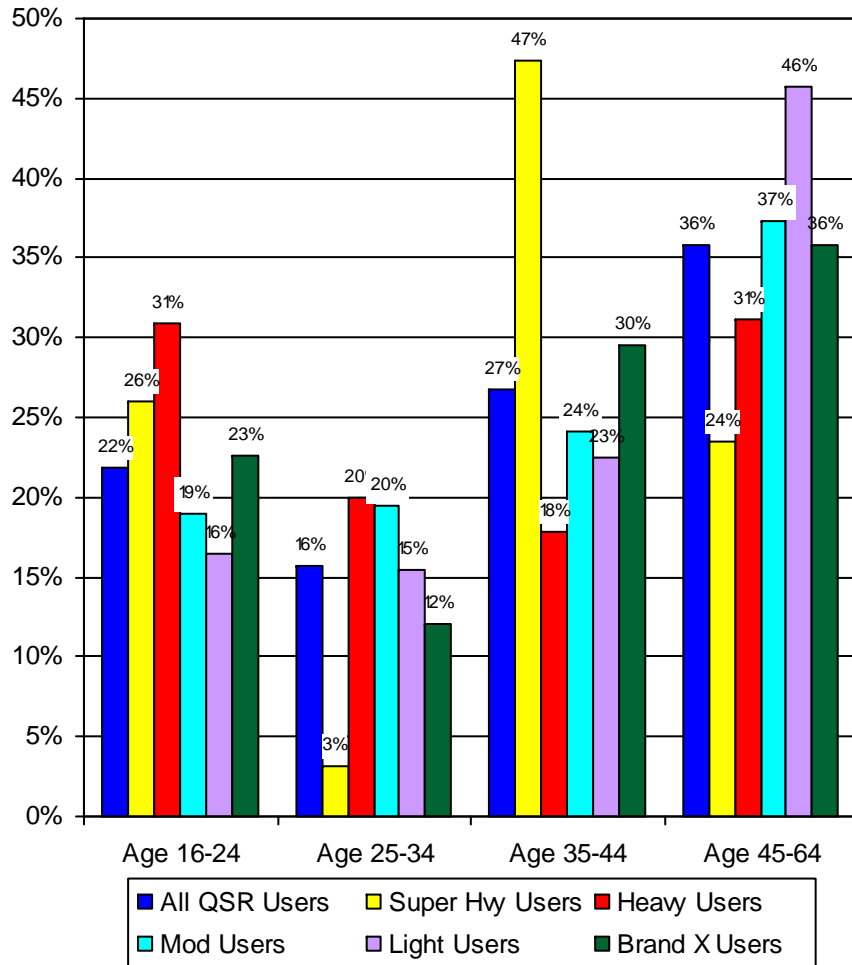


Brand X - Trends

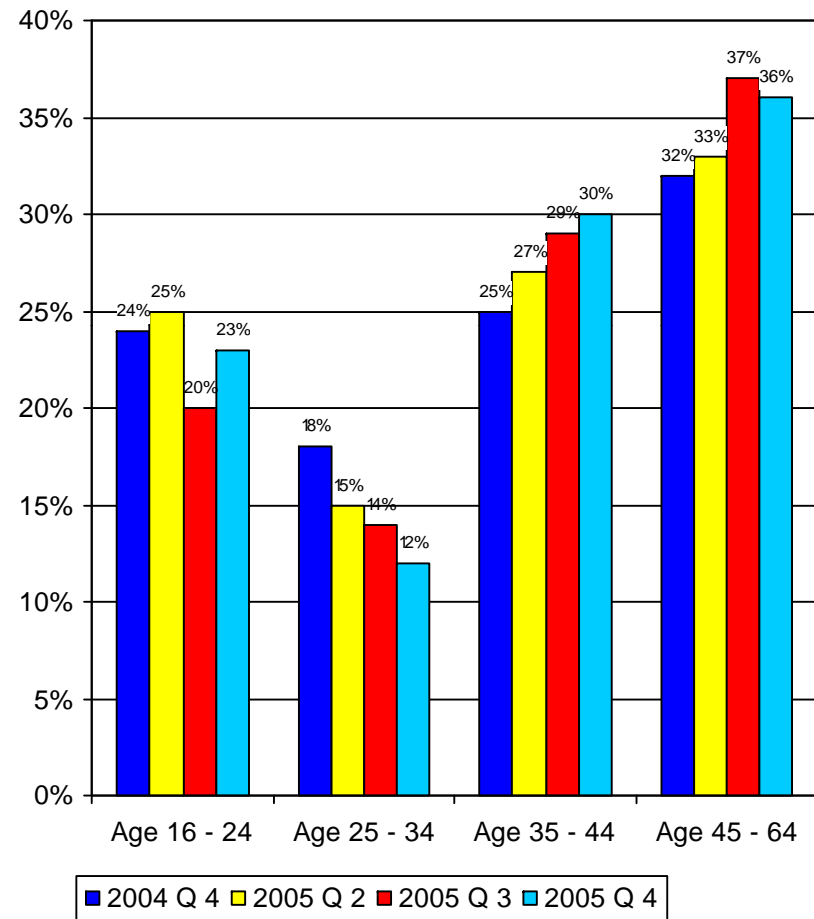


# Age

By QSR Usage & Brand X Users - Current Period

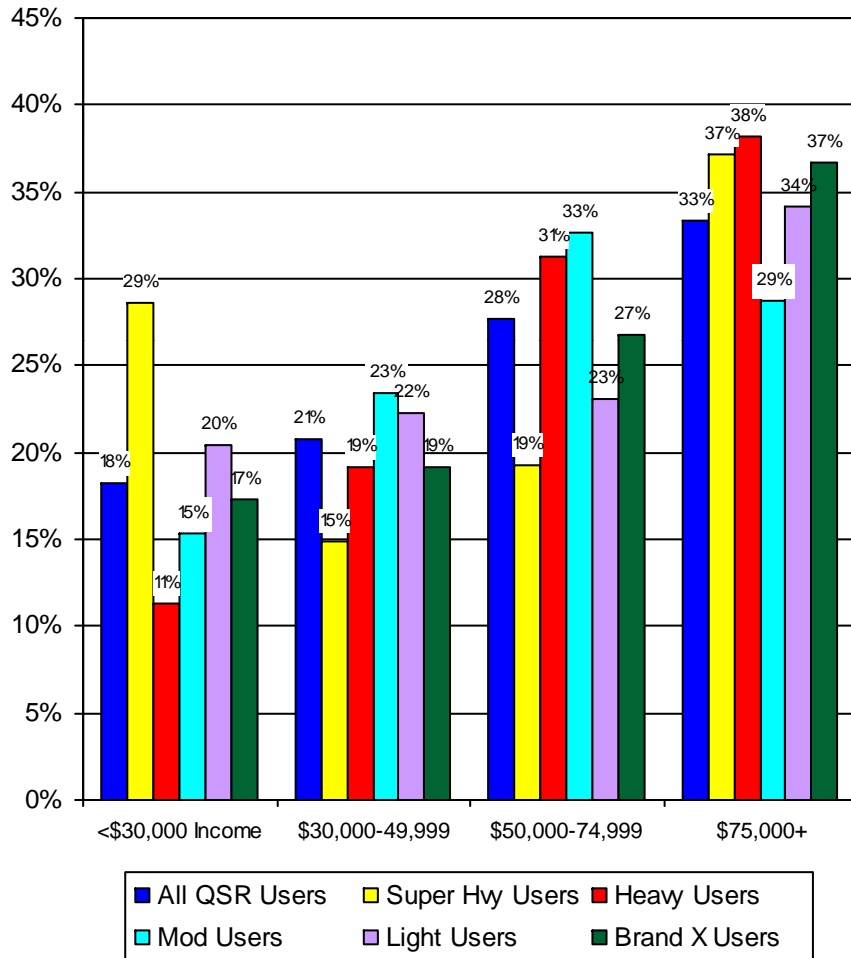


Brand X - Trends

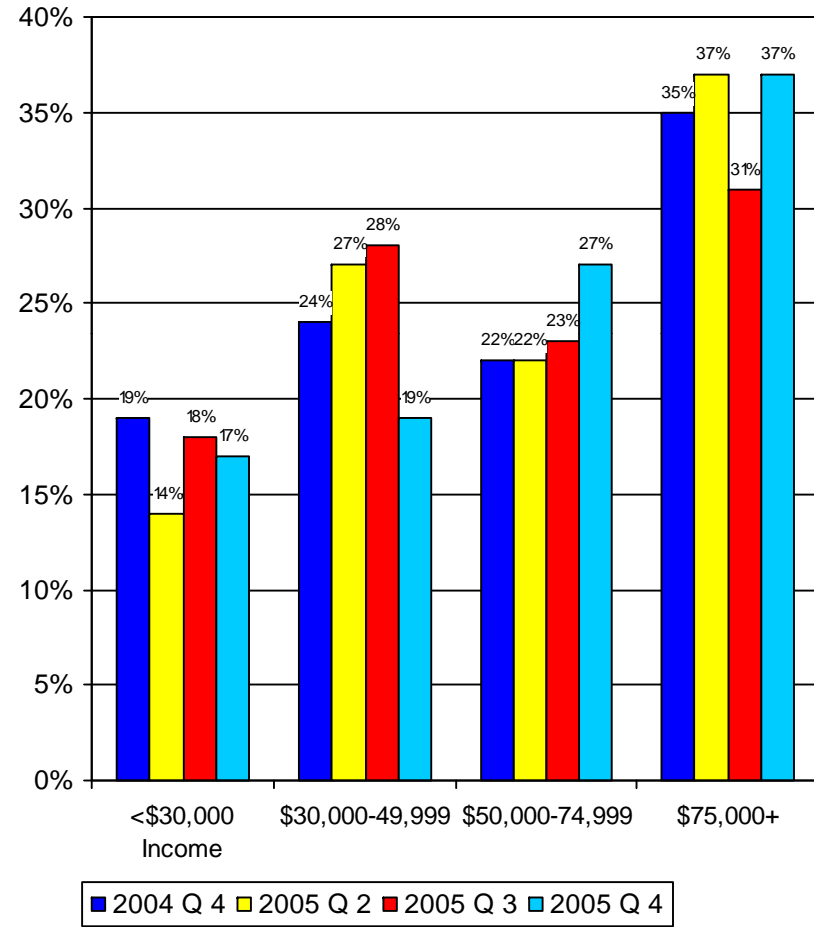


# Household Income

By QSR Usage & Brand X Users - Current Period

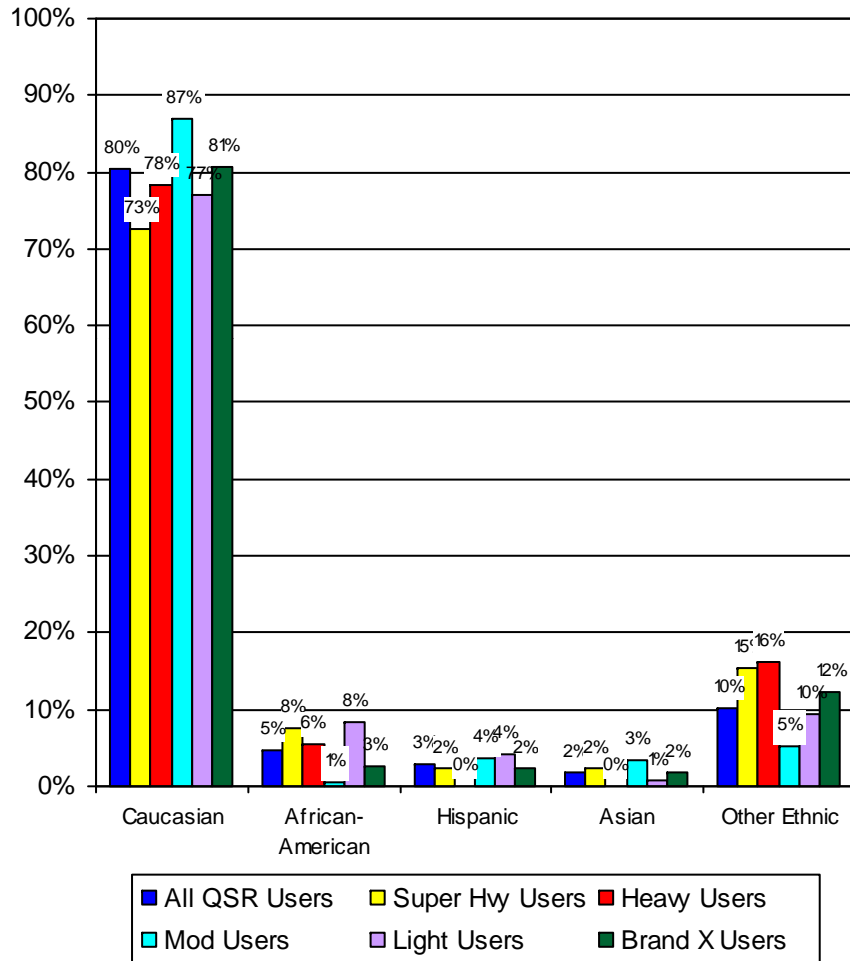


Brand X - Trends

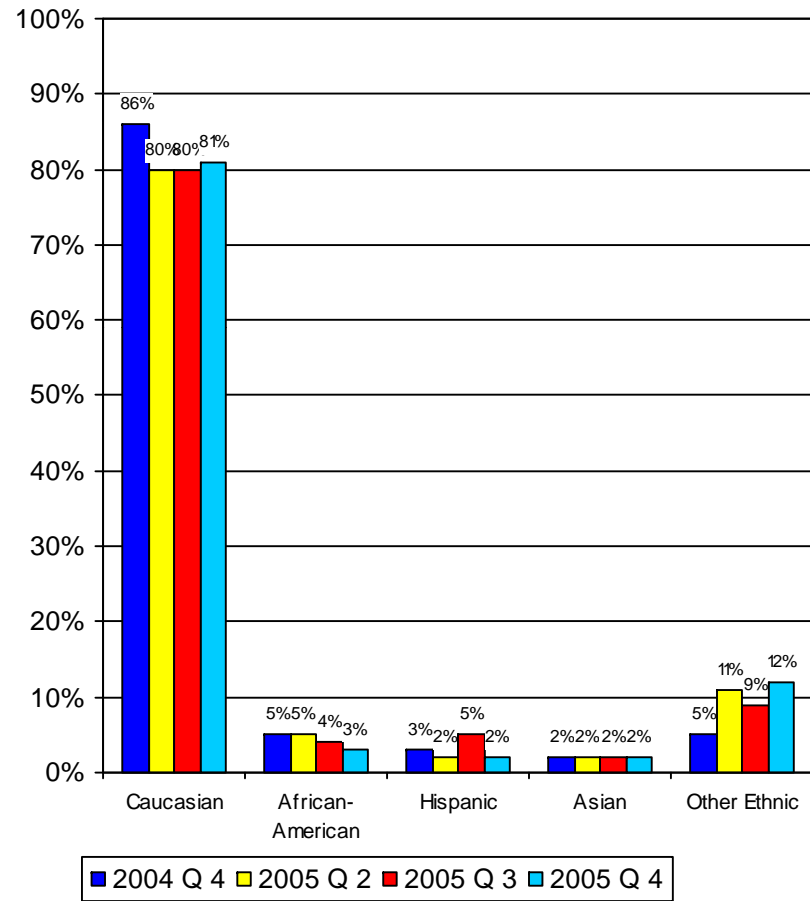


# Ethnicity

By QSR Usage & Brand X Users - Current Period

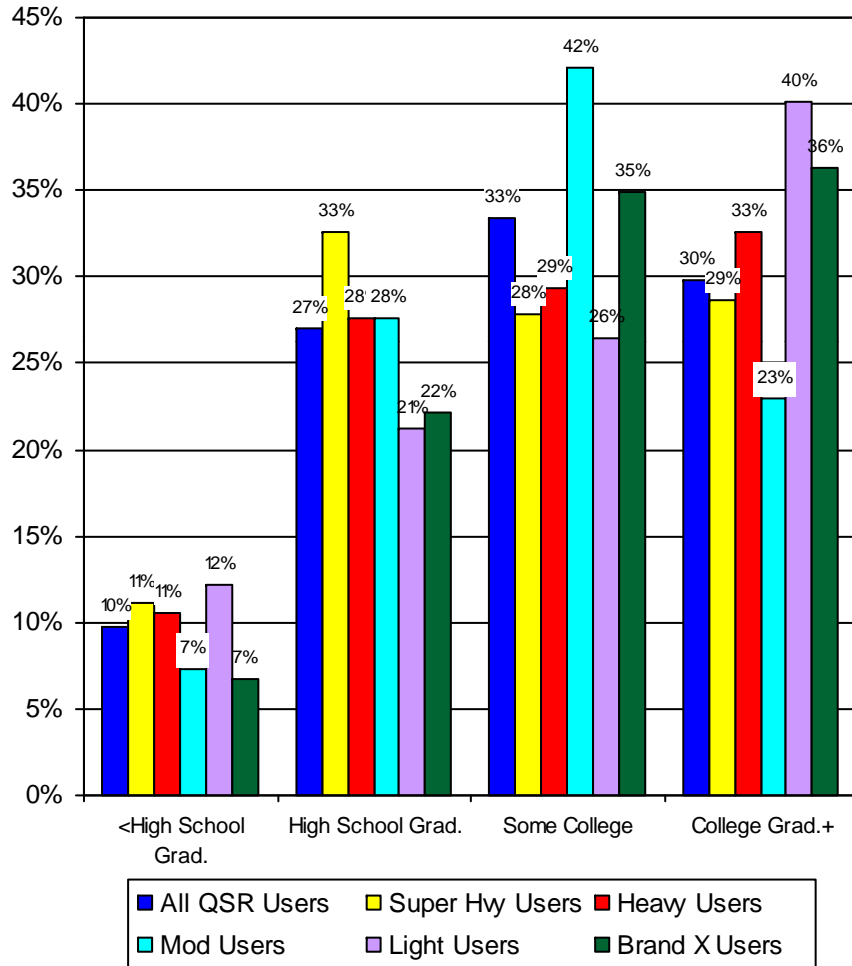


Brand X - Trends

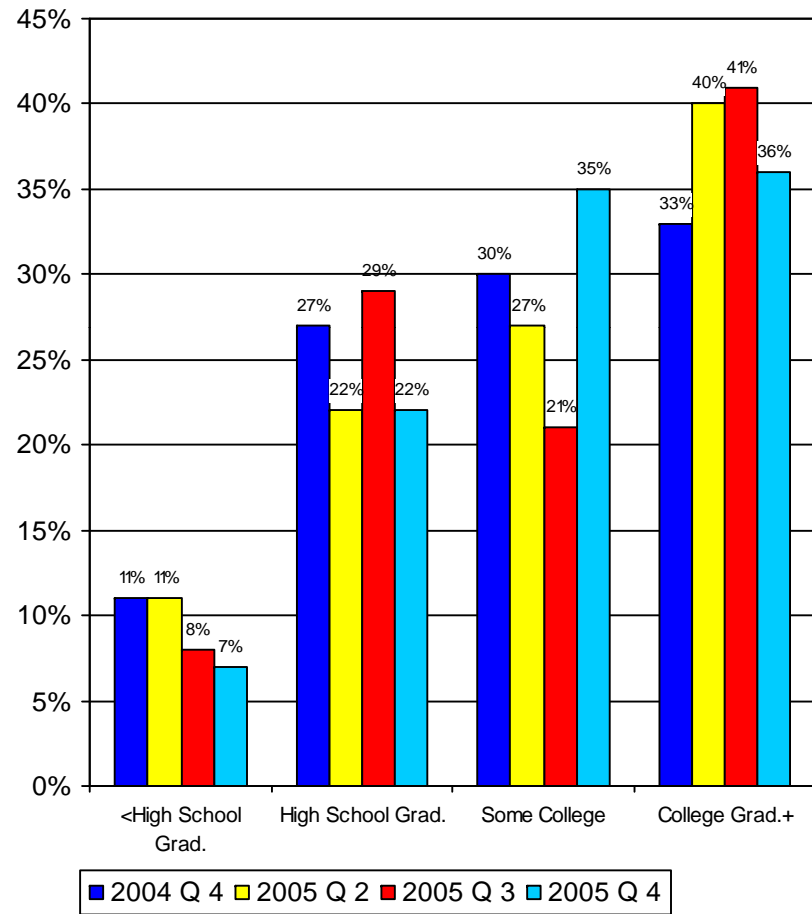


# Education

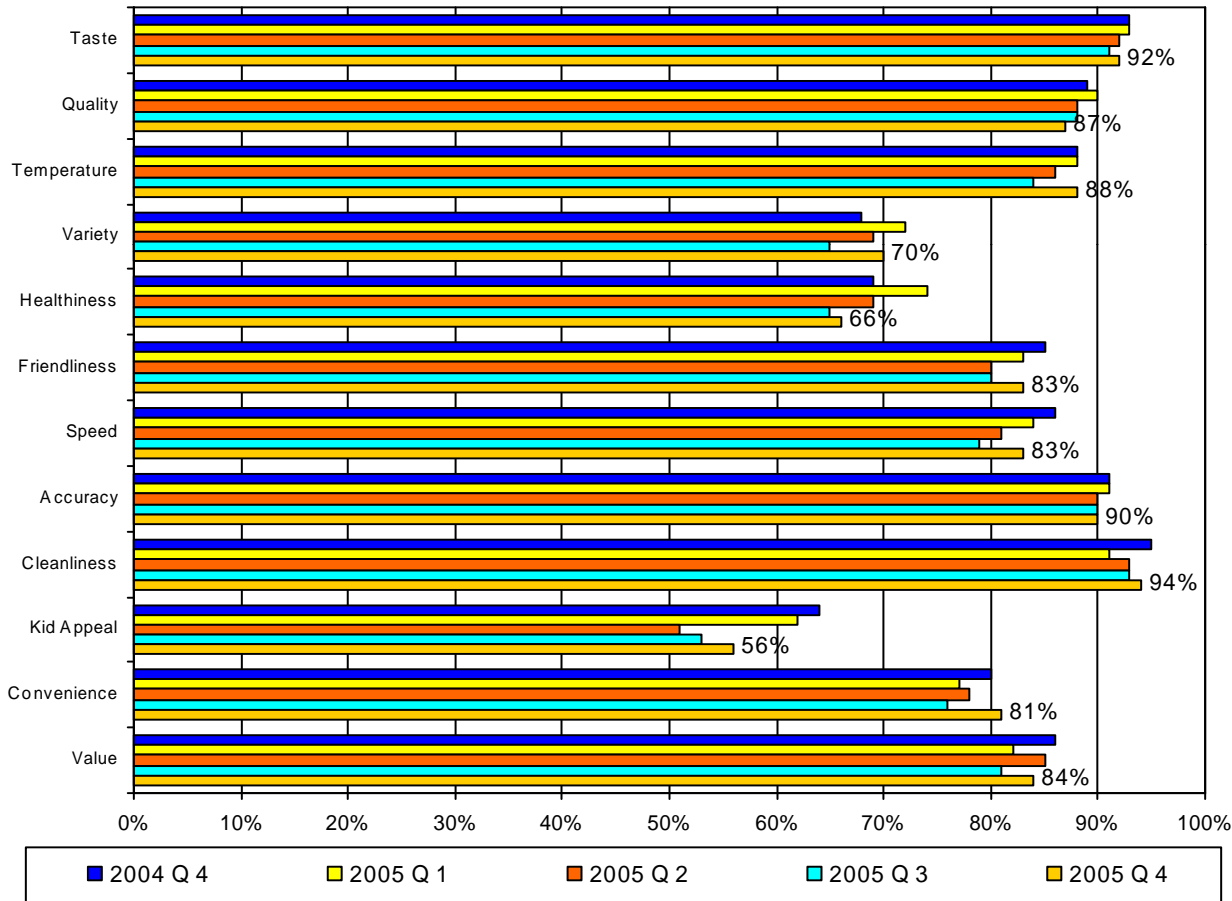
By QSR Usage & Brand X Users - Current Period



Brand X - Trends



**National Importance Trend (Extremely/Very Important-Net)**



- Quick-Track market-level studies include national trends in customer satisfaction attribute importance. Respondents are asked to rate each attribute on a scale of 1 to 5 (1=not at all important, 5=extremely important).



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## Contact information:

- Sales and Marketing
  - Paul Clarke (847) 277-7603
  - [paul@sandelman.com](mailto:paul@sandelman.com)
- SandelmanEdge.com help line
  - Jennifer Park (714) 993-0147
  - [jennifer@sandelman.com](mailto:jennifer@sandelman.com)

