

# 2017 Southwest Food Service Marketing Report

Consumer Perceptions & Attitudes



# Contents

- 3 Introduction
- 7 Selected Highlights
- 10 What We Found
  - 10 Consumers don't play favorites with restaurants
  - 13 Awareness drives preference
  - 16 Taste gets top billing
  - 19 We leave the cooking to others
  - 22 Freshness tops convenience & variety
  - 25 The ingredients for memorable restaurant advertising
- 28 Appendix
  - 29 Methodology
  - 29 Respondent profiles
  - 30 Data
  - 33 Questionnaire
  - 35 About LAVIDGE & Mosaic Multicultural

# Introduction

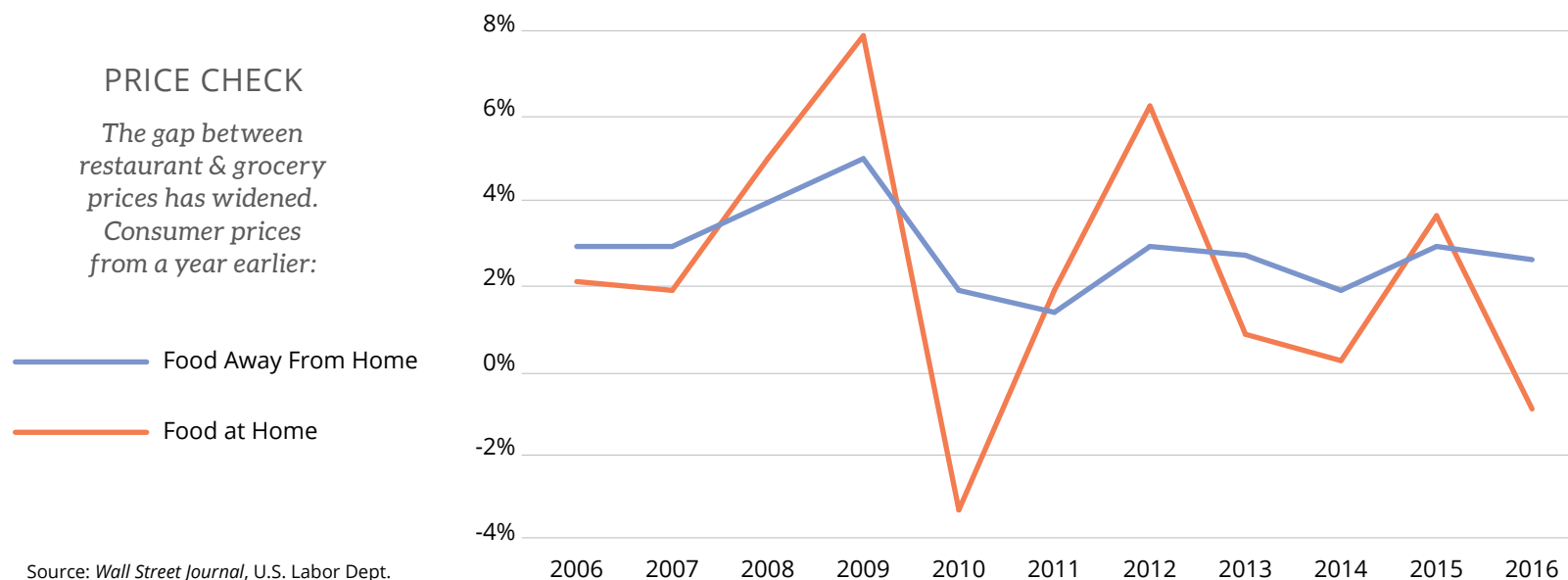
Americans are dining out less frequently, and restaurants aren't happy.

Since 2009, the restaurant industry has mostly seen zero growth. According to a recent survey from Reuters/Ipsos, a third of us report eating out less often. The primary reason we're staying home? Cost.<sup>1</sup>

The news isn't rosy for restaurants and other food service companies. Some have felt forced to raise menu prices due to minimum wage increases and consumer demand for higher quality food. And consumers—who are paying more

for rent and healthcare—appear to be turning away from restaurants due, in part, to lower prices at grocery stores.

Restaurants continue to face fierce competition from each other—even Chipotle, which struggled to overcome its highly publicized E. coli battle, opened 57 new locations during the first quarter of 2017. Restaurants are also facing less familiar rivals, such as mailed meal-kit services Blue Apron, Hello Fresh and Plated. Grocery stores are getting in the game, too, with expanded made-to-order deli departments and quality pre-made meals.



But for all the talk about a restaurant recession, there's also good news. Although several chains are struggling—including Ruby Tuesday, Applebee's and Tony Roma's—others are doing well. The Darden family of restaurants (which includes Olive Garden and The Capital Grille) posted better-than-expected earnings during its most recent quarter. Bloomin' Brands (Outback Steakhouse, Carrabba's Italian Grille and Fleming's) posted an increase of 3.3% in its earnings per share (EPS). McDonald's first-quarter 2017 saw strong earnings and same-store sales growth, as well, with a 4% global sales increase.

For Americans, dining out is serious business. The National Restaurant Association says the industry employs 14.7 million people—about 1 in 10 working adults. It is estimated that the industry will hit nearly \$800 billion this year, which would beat 2016 by more than 4%.

“Our efforts to build a better McDonald's are yielding meaningful results with continued positive momentum and a strong start to 2017 that includes ***positive comparable sales across all segments, higher global guest counts & enhanced profitability.***”

Steve Easterbrook  
PRESIDENT & CEO, McDONALDS

However, the American restaurant industry isn't homogenous. In January 2016, San Diego raised the minimum wage from \$10 per hour to \$11.50. Forbes reports that since the jump, "the number of food service jobs in San Diego has dropped sharply, with perhaps as many as 4,000 jobs lost, or never created in the first place."

But Arizona—which raised the minimum wage from \$8.05 to \$10 at the beginning of 2017—has experienced a boom in its bars and restaurants. The state's Office of Economic Opportunity reports that the number of people working in restaurants and bars increased by 7,800 new workers, with a year-over-year bump of 8%.

#### CONSUMERS SAY:

9 in 10

consumers say they enjoy going to restaurants.

2 in 5

consumers say restaurants are an essential part of their lifestyle.

7 in 10

consumers say their favorite restaurant foods provide flavors they can't easily duplicate at home.

8 in 10

consumers say dining out with family & friends is a better use of their leisure time than cooking & cleaning up.

SOURCE: National Restaurant Association

Restaurants that want to grow revenue in what's mostly perceived as tough times for the food service industry would be wise to focus on the Hispanic market. They're considered very brand loyal and eating is often a family event. According to the National Restaurant Association, Hispanics spend 16% more on visits to fast-food restaurants than non-Hispanic households, and they're more likely to dine with children.

For all the ups and downs of the restaurant industry, some things have remained constant for the sector: a focus on sales, traffic and cash flow. In the past year alone, several national restaurant chains have chosen new agencies to help jump-start business, including Applebee's, Captain D's, Subway and Chili's Grill & Bar.

Restaurant marketers are continually looking for effective messaging strategies that will generate more foot traffic and mobile ordering. That's what this report is designed to address.

Earlier this year, LAVIDGE and Mosaic Multicultural conducted two consumer marketing studies:

- [2017 Southwest Healthcare Marketing Report](#)
- [2017 Southwest Personal Care Marketing Report](#)

Now, the food service industry receives our attention. We think you'll find the consumer perceptions and attitudes about restaurant advertising and marketing very insightful. Enjoy your meal.

**Mark Suarez**  
PRINCIPAL & MANAGING DIRECTOR,  
MOSAIC MULTICULTURAL

**Tim Trull**  
MANAGING DIRECTOR, STRATEGY  
LAVIDGE

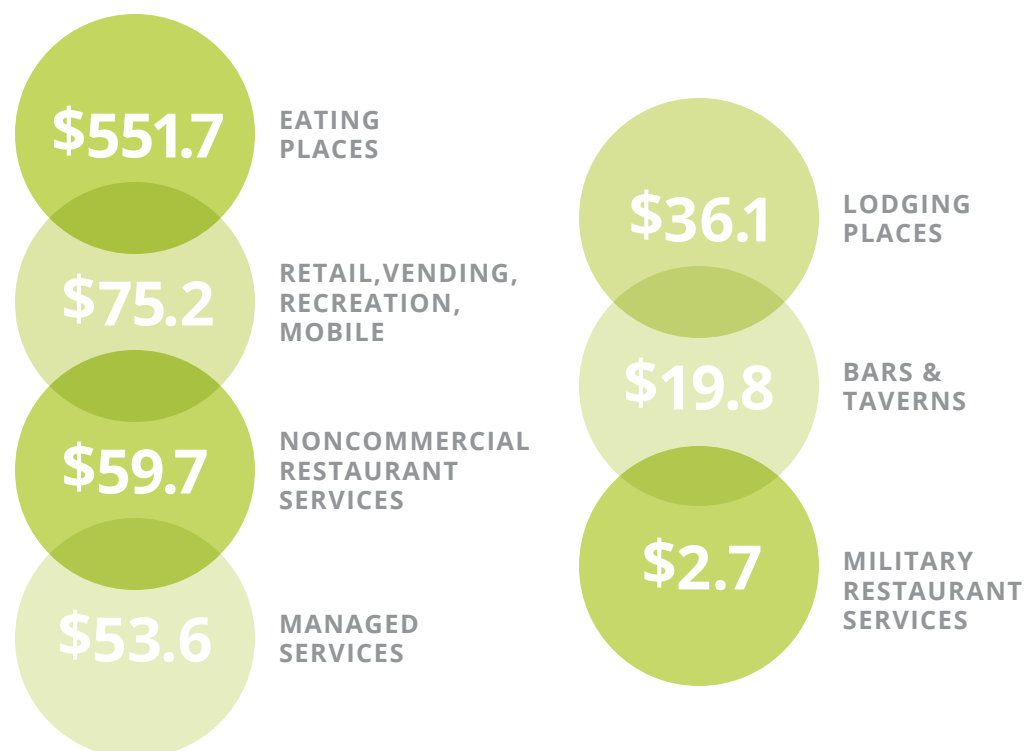


## Selected Highlights

Our society emphasizes freedom and boundless opportunity. But for all our promised unlimited choices, we have only two when it comes to eating: we can do it at home or dine out.

Even when we pick up food or have it delivered, we pay others to produce the meal. So, again, two choices: make it yourself or have it prepared by a restaurant or grocery.

According to the U.S. Bureau of Labor Statistics, the average American household spends \$3,008 annually on restaurant meals or takeout.<sup>1</sup> Here's how the National Restaurant Association breaks down its 2017 sales projections (in billions) for the restaurant industry:



1: U.S. Bureau of Labor Statistics, [Consumer Expenditure Survey, 2015](#)

This \$798.7 billion opportunity is the reason restaurants, groceries and other food service companies are competing so aggressively. And that's why we're bombarded by restaurant advertising.

But what marketing will be most effective? Good question.

LAVIDGE and Mosaic Multicultural fielded this survey to obtain consumer perceptions and attitudes about the food service industry. Here's a taste of what we discovered.

## CUSTOMERS DON'T PLAY FAVORITES

Without any prompts, we asked consumers what restaurant they frequent most often. There were no clear winners here. Nearly 50% of the respondents opted for a restaurant named by fewer than four other people. For casual restaurants, the leader was Olive Garden, which was preferred by 9% of respondents. McDonald's won the fast-food crown, with 4%.

## AWARENESS DRIVES PREFERENCE

As marketers, we expected to see this, but we were surprised at just how closely brand awareness aligns with consumer behavior. 23% of respondents said McDonald's "does the best job at advertising"—and 21% cited McDonald's as the fast-food restaurant they go to most often. That close parallel was repeated with the runner-up, Subway, which garnered a 13% "best advertising" share and 11% frequency.

## TASTE GETS TOP BILLING

In a result that might elicit a "duh," more than 60% of respondents say that *tasty* is the word that best describes their most frequented restaurant. At 54.6%, the second most popular descriptive word is *friendly*. The third most referred statement underscores the importance of good-tasting food: *delicious*, 52.4%.

## WE LEAVE THE COOKING TO OTHERS

When asked their top reason for choosing to dine out, 33% of consumers said they *don't want to cook*, *don't have the time* to do it or *"can't cook"* at all. The second most cited reason for dining out was to be with others—19% to *spend time with family*, and 12% to *be with "other people."*



# MADE FRESH DAILY

We HAVE  
Locations  
NEAR You!

## FRESHNESS TOPS CONVENIENCE & VARIETY

Here's help for food service branding executives seeking marketing messages that will resonate with consumers: 56.5% of our respondents said that "Made fresh daily" was the most persuasive restaurant marketing statement. The runners-up were "We have locations near you" and "Order anything you want all day."

ORDER  
ANYTHING  
YOU WANT  
ALL DAY

## PICTURE PERFECT

A restaurant is probably making a big mistake if it doesn't include food images in its advertising and marketing; 36% of respondents said pictures will create the most memorable ad. This was closely followed by promotional offers, such as specials and coupons, which ranked second at 32%.

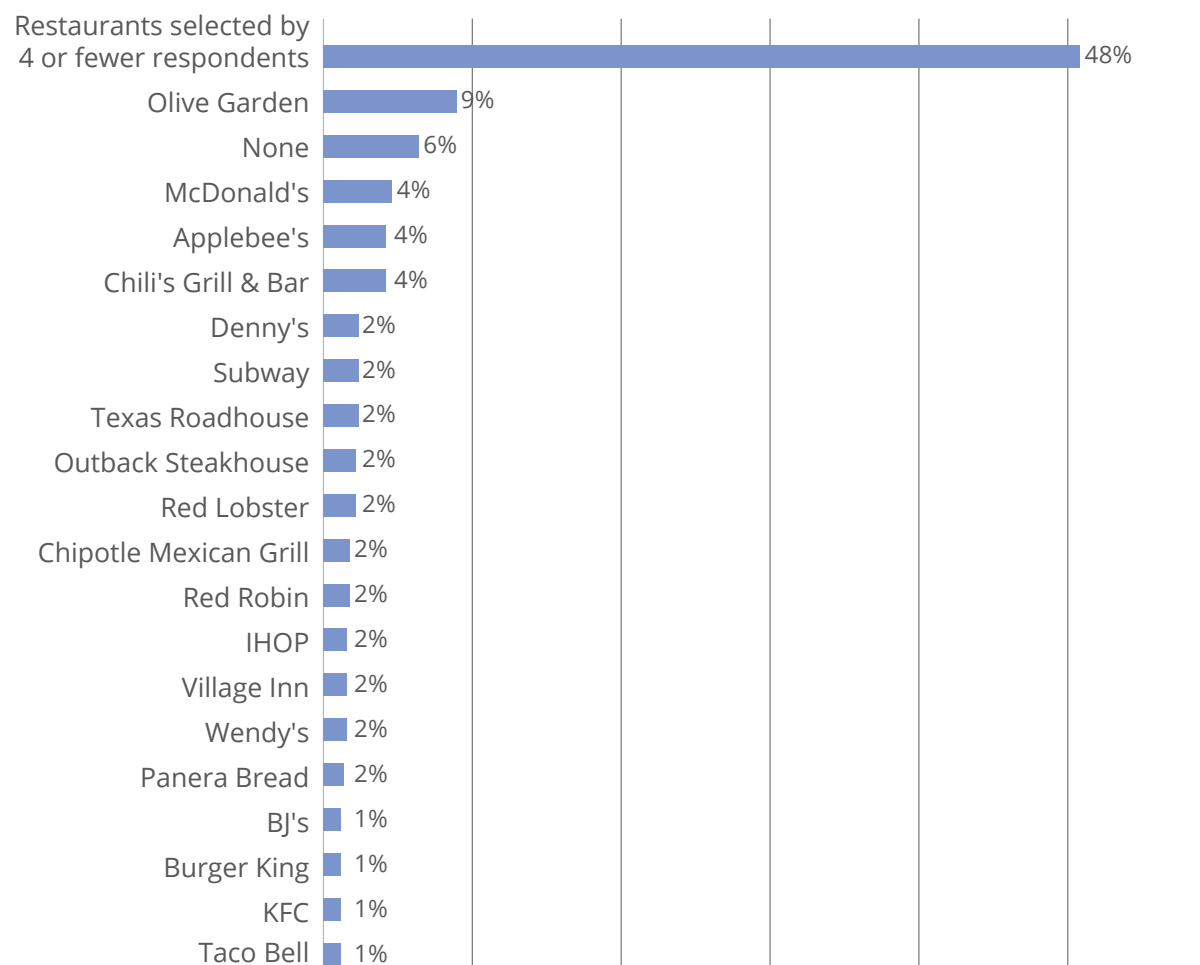
## LAUGHTER PROMPTS RESTAURANT FAVORABILITY

Our respondents have provided clear direction for agency creative directors. Humorous ads were ranked by 53% as being the best tactic for restaurant advertising.

# What We Found

## CONSUMERS DON'T PLAY FAVORITES WITH RESTAURANTS

WHAT RESTAURANT DO YOU GO TO MOST OFTEN?



Before we can market restaurants to consumers—before marketing anything, really—it’s crucial to understand purchasing behavior. So, prior to creating an advertising or public relations campaign for a restaurant, we must discover customer preferences. That’s exactly what we’ve done.

Our first question, unaided, asked consumers in the Southwest U.S. to name the single restaurant they frequented most often. The consensus is . . . there is no consensus. We should have predicted this, because of the large number of establishments from which to choose.

And unlike in dense metropolitan areas such as New York City, where 56% of households do not have a car, vehicle ownership in the Southwest is very high. Few can walk to work or restaurants, here. Together, variety and access form a perfect storm of leveling the playing field for food service.

When asked to name the restaurant they go to most often, 48% of respondents chose one identified by fewer than four other people. For example, only two people selected The Cheesecake Factory and one person chose The Capital Grille. An additional 6% of responders said they don’t have a restaurant they go to often.

*There are 9,314 eating & drinking establishments in Arizona alone.*



Because of this diffusion, the top-named restaurants get only a small slice of the pie. For casual restaurants, the leader was Olive Garden, which was preferred by 9% of respondents. That's an impressive showing for the chain that was in decline just a few years ago. But several improvements have turned the tide, including new staffing practices, culinary innovation, a new catering delivery service, and installation of tabletop tablets that have expedited ordering and service. More than 10% of the Olive Garden's total sales are from its takeout program, OG to Go.

McDonald's was the fast-food victor, with 4% of respondents saying it was the restaurant they went to most often. McDonald's is the world's largest fast-food restaurant company. For any industry, brand leaders often find themselves playing defense. Smaller competitors and challenger brands can take more risks and are often nimbler. But McDonald's continues to invent. The chain has been on a roll since introducing All Day Breakfast in 2015. R.J. Hottovy, an equity analyst at Morningstar, told [Forbes](#) that McDonald's will likely continue to prosper because of its "speed of service, greater menu/marketing decisions at the regional level, and adopting consumer-facing technologies."

The only other two casual restaurants that made any substantial impact in the survey were Applebee's and Chili's Grill & Bar, each at 4%.

## SURVEY RESPONDERS SAID . . .

“

ON MCDONALD'S:

*"They seem to be constantly at the forefront of letting people know what they have to offer, and they don't use a ton of gimmicks. They seem more concerned with making sure that folks are interested in what is on their regular menu."*

ON JACK IN THE BOX:

*"I really like the Jack character. The commercials make me smile, laugh and hungry."*

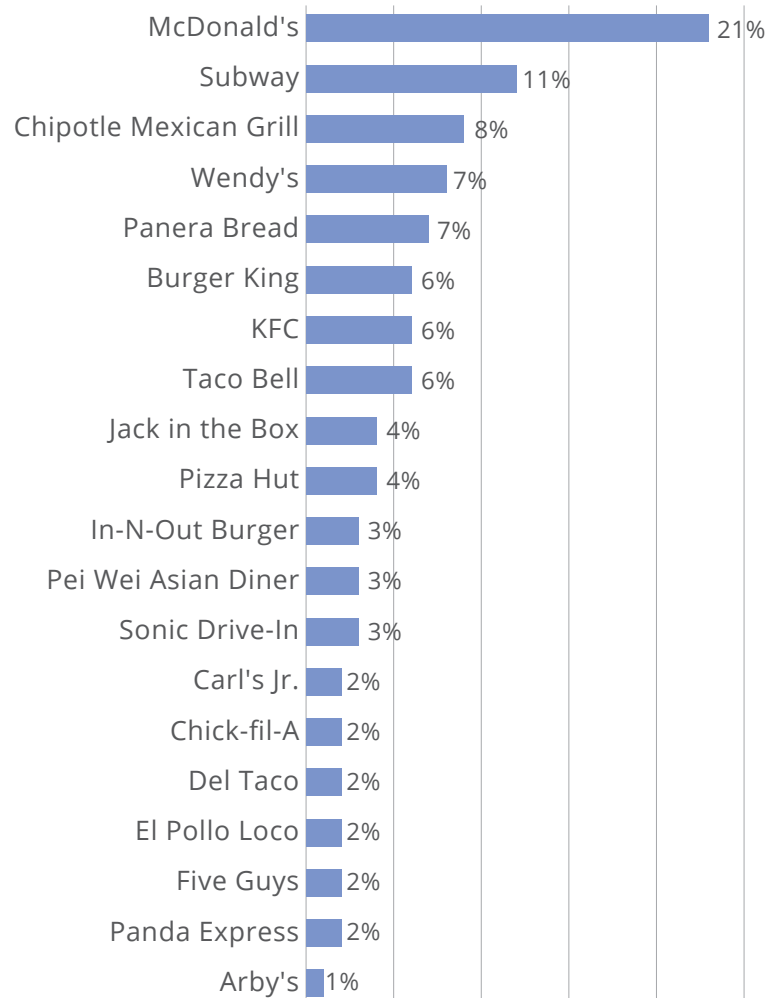
ON SONIC:

*"There isn't a day I do not see at least one of their commercials."*

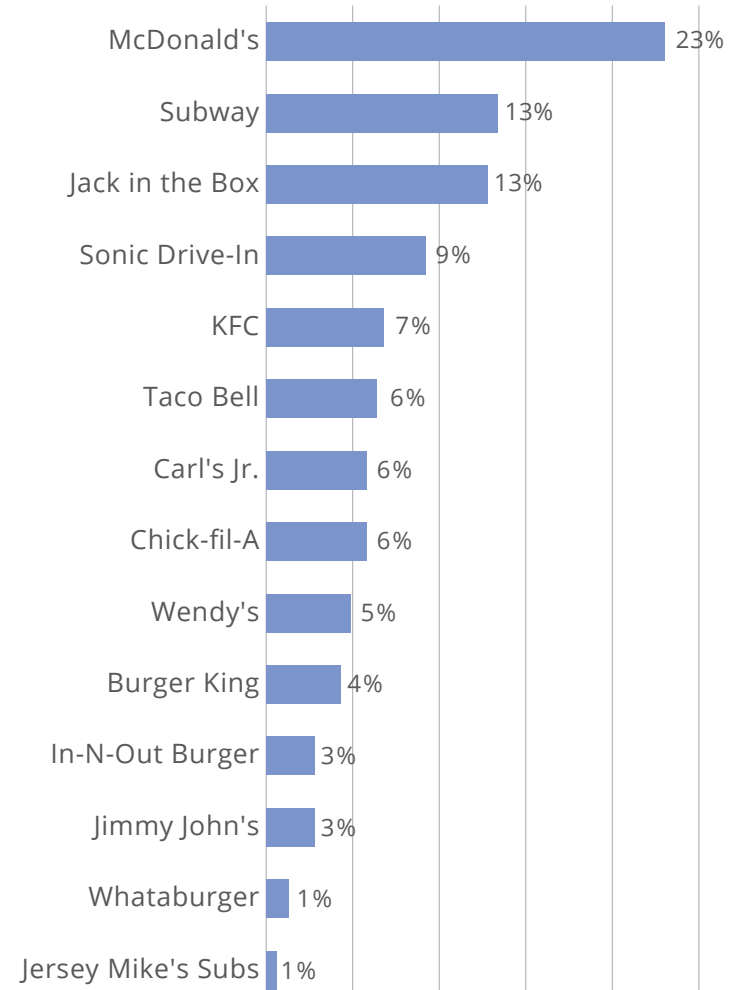
”

## AWARENESS DRIVES PREFERENCE

### MOST VISITED QSR



### BEST QSR ADVERTISING



Agencies like to use this well-known maxim: *Awareness drives preference*. It's agency-speak for "buy a lot of media"—TV, radio, outdoor, digital, direct mail. This could be interpreted as a money-making ploy. After all, agencies usually earn commissions on placed media. But reach and frequency does indeed drive preference. The idea is simple: high brand recognition results in consumer purchases. This is why movie studios bombard us with trailers and why some companies' spots seem to be permanent fixtures wherever our eyes land.

**We were expecting to see the same thing in our survey.**

**OR MAYBE WE WERE CROSSING OUR FINGERS**

**But we were pleasantly surprised to see an extremely strong link between brand awareness & consumer behavior.**

When answering a survey question about which fast-food restaurant does the "very best job at advertising," 23% of respondents chose McDonald's. No shocker there. McDonald's is the 19th largest global advertiser, and it spends the most of any restaurant brand in the U.S. This high awareness aligns with the 21% of respondents who said McDonald's is their most frequented fast-food restaurant.

Yes, it helps that McDonald's has the most restaurants in the U.S. of any QSR other than Subway. But store proliferation alone can't buy preference. Advertising does the trick. Offering breakfast all day helps, too.

The same formula works for the runner-up, Subway, which was selected by 11% of our respondents as the fast-food restaurant they eat at most. That corresponds closely to the 13% who said it has the best advertising.

From there, the comparisons between perceived advertising quality and reported purchasing behavior fall away. The other top "best advertising" restaurants (Jack in the Box, Sonic, KFC and Taco Bell) don't match up with those most visited (Chipotle, Wendy's, Panera Bread and Burger King). But the numbers driving the percent ranking are small—right behind them by just a percent or two are KFC, Taco Bell and Jack in the Box.

#### SURVEY RESPONDERS SAID . . .

“

ON KFC:

*"It's interesting to see who the new person will be playing Colonel Sanders."*

ON TACO BELL:

*"They always have new menu items to talk about, and always provide something informative about their new and old dishes. Their ads are also somewhat funny."*

ON SUBWAY:

*"Videos of sandwiches are always beautiful and have a fresh and healthy edge."*

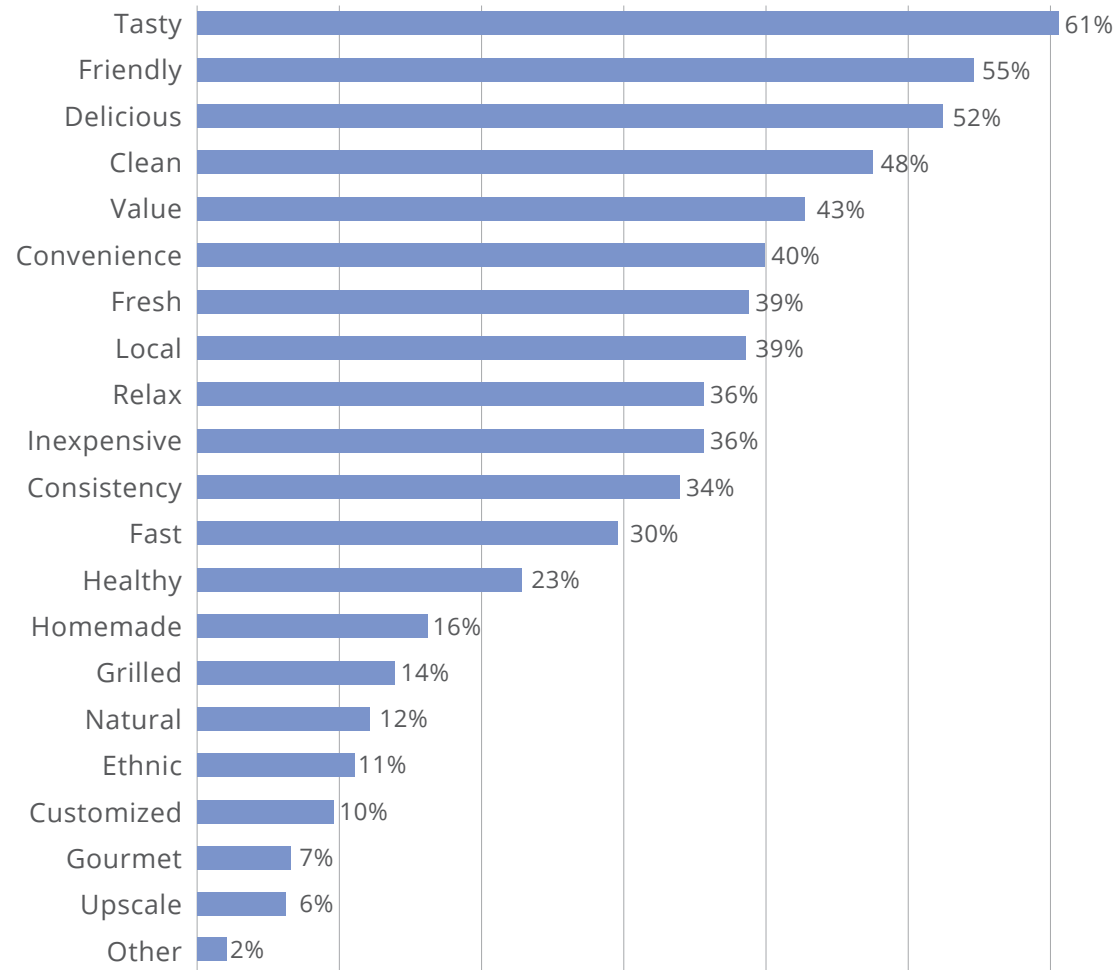
”



## TASTE GETS TOP BILLING

### FREQUENTLY VISITED RESTAURANT DESCRIPTIONS

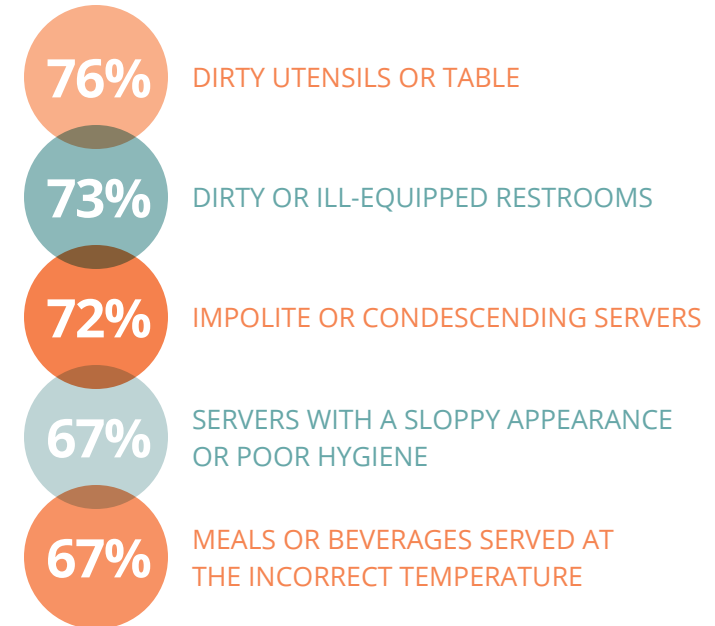
*"Which of the following words best describe the restaurant you go to most often?"*



We should have seen this coming. When asked to choose words that best described the restaurant they go to most often, 60.6% of respondents chose **tasty**. And at 52.4% the third most popular word was **delicious**. We weren't trying to fool people; we wanted to determine how slight shades of the same word might resonate differently among consumers. Although they are related, **tasty** topped **delicious** by more than 8%, which is significant. The message is clear: taste must come first.

**Friendly** was the second-most popular answer, with 54.6% of respondents preferring it well ahead of **clean**, **value** and **convenience**. This can be interpreted two ways. First, it's possible that consumers enjoy the friendly service they get from their favorite restaurants. Or, they may be fed up with the poor service they have experienced elsewhere.

A 2014 survey by [Consumer Reports](#) found that lack of friendliness was related to two of the top five restaurant complaints:



It may be a little sad that only 22.8% of respondents identified **healthy** as a word describing their most frequented restaurant. Either they are admitting to enjoying unhealthy food, or they are confused. There's evidence it may be the latter. A 2017 survey by the [International Food Information Council Foundation](#) found that consumers are confused about what makes a food healthy. About 78% of those surveyed report finding conflicting information about what they should or shouldn't eat. And 56% said that this made them doubt their food choices.

But it's likely our respondents weren't confused about what healthy means. Admitting that their favorite restaurant isn't best described as healthy seems to be an accurate reflection of the state of American health. A 2016 poll by NPR and Truven Health Analytics found that 75% of us say we eat healthy. But there's no compelling evidence to support that. The [U.S. Centers for Disease Control and Prevention](#) reports that more than 36% of us are obese—or about 1 in 3 adults. And 80% of us don't eat the proper amounts of fruits and vegetables.

Despite this apparent disconnect, research from [Technomic](#), a healthcare-based consulting firm, suggests that restaurants should still offer fresh and healthy food choices. This is particularly true for restaurants that want to attract Hispanic consumers. A full 70% of Hispanics say that a healthy lifestyle is important to them, and 43% of Hispanic consumers report ordering healthy menu items when dining out.

#### SURVEY RESPONDERS SAID . . .

“

ON JIMMY JOHNS:

*“They have very entertaining commercials about their freaky fast delivery. But they also really do have freaky fast delivery in reality. I often find myself surprised when ordering from them.”*

ON CARL'S JR.:

*“Their new ads are the best, just food and catchy music, no stupid beverage plug or showing college kids I can't relate to who are laughing and eating fries. I just want to see the food and what's in it. I don't care how many kids are giggling hysterically over their burgers.”*

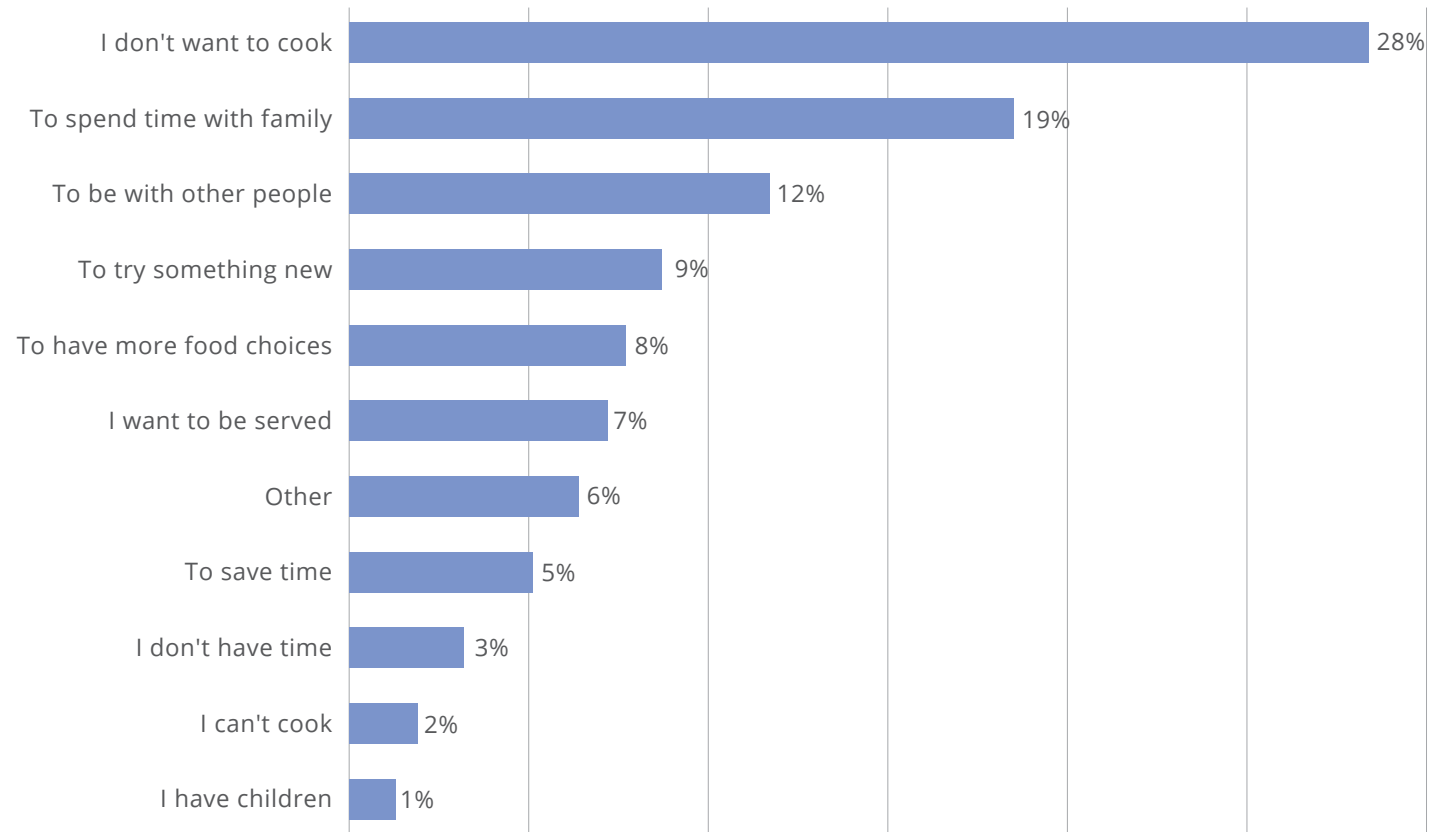
ON CHICK-FIL-A:

*“The ads are hilarious, but the chicken is great. I've never eaten anything there I didn't like.”*

”

## WE LEAVE THE COOKING TO OTHERS

### TOP REASONS FOR DINING OUT



You may get differing opinions, but according to Jan Whitaker in [Restaurant-ing through History](#), America's first restaurant was Julien's Restorator, which opened in Boston in 1793. Whitaker says that the restaurant "presented diners with a written menu from which they could choose, and charged them only for what they ordered rather than following the prevailing custom of providing a buffet-type meal at a set price."

Whether or not Julien's Restorator was the first American restaurant, customers likely chose it for the same reasons as today: they probably didn't want to cook or know how to prepare food. Ditto our survey respondents.

When asked their top reason for choosing to dine out, 1 of every 3 consumers said they don't want to cook (28%), don't have to time to do it (3%) or "can't cook" (2%). No wonder there seems to be a restaurant on every corner.

The second most cited reason for dining out was to be with others—19% to spend time with family, and 12% to be with "other people." The days of nuclear families eating dinner at the same table have been disappearing for years—only 50% of us eat together at home on a regular basis. Anne Fishel, a professor at Harvard Medical School, laments this fact:

*"Twenty years of research has shown that family dinners are great for the brain (enhancing preschool vocabulary and raising test scores), body (improving cardiovascular health in teens and lowering the odds of obesity) & spirit (reducing rates of behavioral problems, stress and substance abuse)."*<sup>2</sup>

But in some ways, restaurants (and bars, let's admit) are the places where much of the socializing-while-eating takes place. We take the family out for dinner. Co-workers head to a local eatery for lunch or stop at a bar after work for happy hour. Olive Garden has recognized this in its Never Ending Family Table branding: "We're all family here, so pull up a seat."

Although 26.2% of survey responders have at least one child age 17 or younger in the household, only 1% identified "I have children" as their top reason for eating out. However, having children is certainly related to the 19% who chose spending time with family as their motivator for eating at a restaurant. And because younger palates prefer different cuisine than their parents, the 8% who chose "more food choices" may have been thinking of their children.

## SURVEY RESPONDERS SAID . . .

“

ON MCDONALD'S:

*"Everyone knows 'I'm Loving it,' and they are kid friendly. Also, they have Ronald McDonald House."*

ON WENDY'S:

*"They have the most impressive tweets on Twitter."*

ON JACK IN THE BOX:

*"Their advertisements are direct, fun, believable, motivating and make me want to visit a location to check out the menu."*

ON BURGER KING:

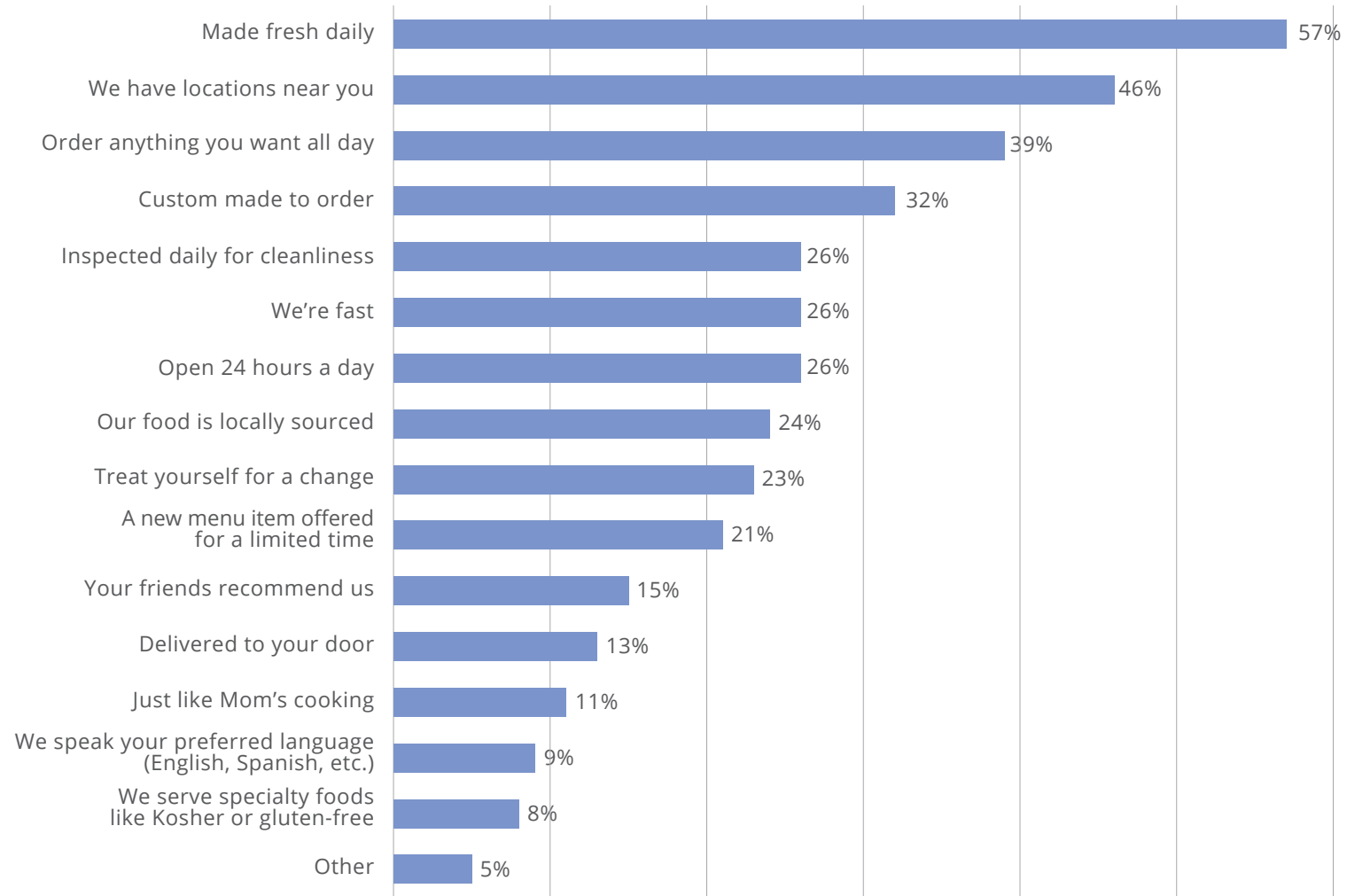
*"They send coupons."*

”

## FRESHNESS TOPS CONVENIENCE AND VARIETY

### PREFERRED MARKETING STATEMENTS

*"Please choose the marketing statements you feel would be the most persuasive in prompting you to visit the restaurant."*





Marketers are always looking for clear signals about how to market to consumers. Often, the data can be fuzzy and open to interpretation. But not here. In a big way, our responders have made their preference known—56.5% of them say that *“Made fresh daily”* is the marketing statement that would best persuade them to visit a restaurant. The next closest preferred statement is more than 10% behind, *“We have locations near you”* (46%).

Food service businesses have already picked up on the freshness wave. Next year, the Quarter Pounder you order at McDonald’s will be prepared with fresh, never-frozen beef. Wendy’s has long touted fresh ingredients. Other restaurants also claim to never use frozen beef, including In-N-Out Burger, Five Guys, Shake Shack, Whataburger, Smashburger and Culver’s. For all these restaurants, the challenge will be to keep prices low and ensure food safety.

Here’s another tip for product developers and marketers: Throw out the rules and let customers order what they want and when they want it. We’ve long known about consumers’ desire for personalization and customization. The third and fourth most popular marketing phrases are *“Order anything you want all day”* (38.8%) and *“Custom made to order”* (31.6%). Together, they speak to consumer empowerment. Marketers need only look as far as McDonald’s success with its All Day Breakfast to see how much “ordering anything” can impact sales.

56.5%  
of responders  
say that

**MADE  
FRESH  
DAILY**

is the marketing  
statement that would best  
**persuade them  
to visit a  
restaurant.**

Starbucks may have paved the way for our penchant for food customization. Julie Beck, a senior associate editor at [The Atlantic](#), says:

*“It’s been said that there are 87,000 ways to order a drink at Starbucks. You’ve got your non-fat milk, full-fat milk, soy milk and coconut milk; espresso shots; all the different flavored syrups, some of which are sugar-free; whipped cream; iced, hot or extra hot if you’ve got a Kevlar tongue; different sizes; different roasts of coffee; and on and on and on.”*

This may be a survival thing. More and more, millennials are demanding customization and are patronizing businesses that cater to their individual needs. It doesn’t matter that they may feel entitled or are perhaps spoiled—they want what they want, and are already driving our economy. As they age, they are likely to retain this “me first” mentality. So, restaurants desiring to stay relevant should look seriously at processes that inhibit flexibility.

Here’s a recipe for a successful restaurant: Offer food made with all-fresh ingredients and let customers order anything they want.

“

ON IN-N-OUT BURGER:

*“They don’t seem to do much advertising. The food speaks for itself and is delicious. Word-of-mouth gets around and this place is always packed no matter what location you go to.”*

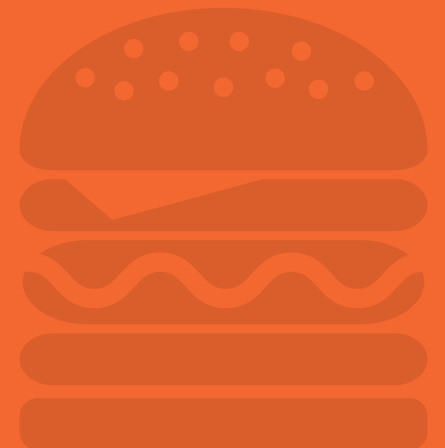
ON WHATABURGER:

*“They don’t focus on gimmicks.”*

ON SONIC:

*“I like their commercials that feature two guys drinking shakes. What I like the most is that their shakes are half price after 8 p.m.”*

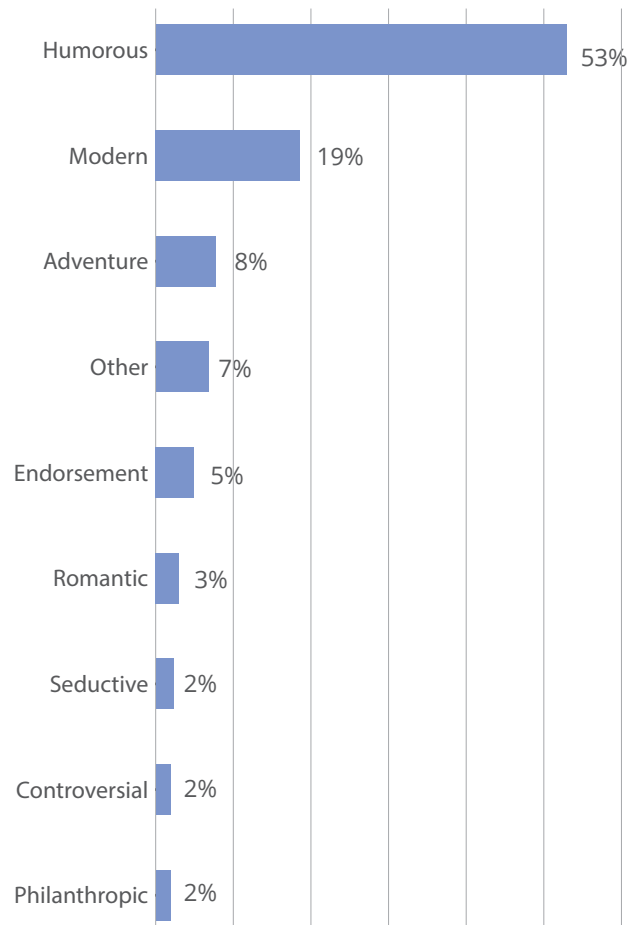
”



## THE INGREDIENTS FOR MEMORABLE RESTAURANT ADVERTISING

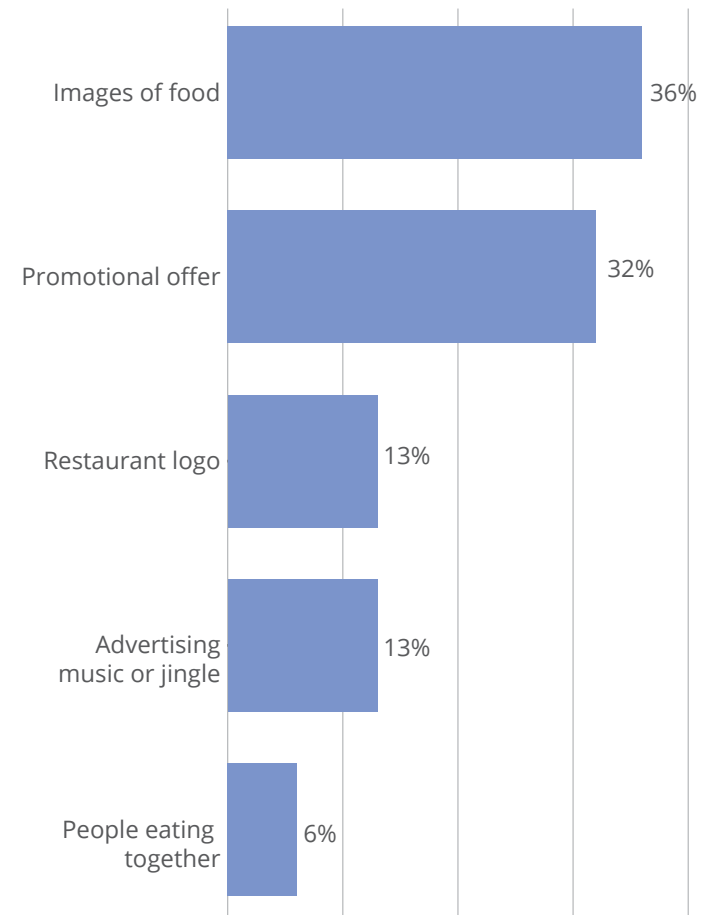
### MOST MEMORABLE ADVERTISING TYPE

*"Thinking about all the advertising you've seen that promotes any type of restaurant, what do you feel is the most memorable type or genre of restaurant advertising?"*



### MEMORABLE RESTAURANT VISUALS

*"Thinking about all the advertising you've ever seen that promotes any type of restaurant, what do you feel is the most memorable thing about restaurant advertising?"*



Our survey of consumers in the Southwest U.S. also provides direction about what kind of advertising elements they prefer. This data clarifies customer desires, but the results shouldn't be taken as a directive because then all marketing might appear the same.

Still...it's worthwhile data, a snapshot of consumer preferences. So, we should listen, especially when there is the kind of strong consensus we see here.

More than half of respondents, an impressive 53%, chose **humorous** as the most memorable type of genre for restaurant advertising. This was also seen in the open-ended questions that asked about establishment preferences. Multiple people commented about Jack in the Box's hilarious "big head" commercials, and a large number were impressed by Sonic's spots starring actors T.J. Jagodowski and Peter Grosz.

There's a reason so many restaurants lean on humorous advertisements and why people prefer them—they work. A 2015 study by [Nielsen](#) found that humor is the most appealing method to use in an advertising campaign, preferred by 50% of consumers in North America. Funny doesn't work everywhere; it drops to fourth place in Asia-Pacific and Latin America.

#### SURVEY RESPONDERS SAID . . .

“

ON KFC:

*“They have commercials that show tasty food.”*

ON TACO BELL:

*“I think they know who likes and buys their food. They always seem to be introducing new items to keep things fresh.”*

ON SUBWAY:

*“Because they use fresher ingredients than other fast-food places. The food in their commercials looks similar to what you get in real life.”*

”

But even in the U.S., there's no one-size-fits-all when it comes to humor. The Nielsen study notes that "while humor resonates well across generations, the preferred style of humor can differ dramatically. Older consumers prefer clever, light-hearted humor, while younger consumers prefer offbeat, sarcastic and slapstick humor."

When it comes to making food service advertising memorable, respondents want to see images of delicious food (36%). That's certainly not groundbreaking, but research from the Max Planck Institute of Psychiatry has found that when we see images of food, our bodies respond with increased levels of hormones that control how we eat and metabolize food. This is why many restaurants show images of their offerings on menu boards.

The second-most preferred advertising visuals are those with a promotional offer (32%). That's why specials, limited-time menu items and coupons are so powerful. Who doesn't want something new at a great price?



# APPENDIX

## Methodology

The objective of this research was to gather quantitative feedback from a random sample of adult consumers (18+) living in Arizona and other major markets in the Southwest U.S. A total of 531 online surveys were completed, with the following breakdown of completes by market: Arizona, 276; Denver, 51; Salt Lake City, 51; San Diego, 51; Las Vegas, 50; Albuquerque, 52.

Individual participants were provided by a major online survey panel, with the actual survey hosted by WestGroup Research in Phoenix, Arizona. The statistical margin of error for the overall sample is +/- 4.3% at the 95% confidence level, the standard error margin threshold for most public opinion research. Average survey length was approximately 9 minutes to complete.

Error margins for sub-segments of the sample (e.g., different age groups) will vary depending on the size of that sub-segment. Statistically significant findings are noted within the report where applicable.

Research was conducted by WestGroup Research on behalf of LAVIDGE and Mosaic Multicultural during May 2017.

## Respondent profiles

### GENDER

Male	48%
Female	52%

### AGE

18-24	7%
25-34	17%
35-44	15%
45-54	14%
55-64	21%
65 +	26%

### EDUCATION

High school or less	17%
Some college or trade school	39%
College +	44%

### INCOME

Under \$35,000	29%
\$35,000 to \$49,999	16%
\$50,000 to \$74,999	23%
\$75,000 +	28%
No response	4%



# Data

## Most frequented restaurants

Restaurants selected by 4 or fewer respondents	48%
Olive Garden	9%
None	6%
McDonald's	4%
Applebee's	4%
Chili's Grill & Bar	4%
Denny's	2%
Subway	2%
Texas Roadhouse	2%
Outback Steakhouse	2%
Red Lobster	2%
Chipotle Mexican Grill	2%
Red Robin	2%
IHOP	2%
Village Inn	2%
Wendy's	2%
Panera Bread	1%
BJ's	1%
Burger King	1%
KFC	1%
Taco Bell	1%

## Most visited QSR

McDonald's	21%	In-N-Out Burger	3%
Subway	11%	Pei Wei Asian Diner	3%
Chipotle Mexican Grill	8%	Sonic Drive-In	3%
Panera Bread	7%	Carl's Jr.	2%
Wendy's	7%	Chick-fil-A	2%
Burger King	6%	Del Taco	2%
KFC	6%	El Pollo Loco	2%
Taco Bell	6%	Five Guys	2%
Jack in the Box	4%	Panda Express	2%
Pizza Hut	4%	Arby's	1%

## Best QSR advertising

McDonald's	23.0%	Chick-fil-A	5.8%
Subway	13.4%	Wendy's	4.9%
Jack in the Box	12.8%	Burger King	4.3%
Sonic Drive-In	9.2%	In-N-Out Burger	2.8%
KFC	6.8%	Jimmy John's	2.8%
Taco Bell	6.4%	Whataburger	1.3%
Carl's Jr.	5.8%	Jersey Mike's Subs	0.6%

## Data

Frequently visited restaurant descriptions

Tasty	60.6%	Local	38.6%	Grilled	13.9%
Friendly	54.6%	Relax	35.6%	Natural	12.1%
Delicious	52.4%	Inexpensive	35.6%	Ethnic	11.1%
Clean	47.5%	Consistency	33.9%	Customized	9.6%
Value	42.7%	Fast	29.6%	Gourmet	6.6%
Convenience	39.9%	Healthy	22.8%	Upscale	6.2%
Fresh	38.8%	Homemade	16.2%	Other	2.1%

Top reasons for dining out

I don't want to cook	28.4%
To spend time with family	18.5%
To be with other people	11.7%
To try something new	8.7%
To have more food choices	7.7%
I want to be served	7.2%
Other	6.4%
To save time	5.1%
I don't have time	3.2%
I can't cook	1.9%
I have children	1.3%

## Data

### Preferred marketing statements

Made fresh daily	56.5%
We have locations near you	46.0%
Order anything you want all day	38.8%
Custom made to order	31.6%
Inspected daily for cleanliness	26.4%
Open 24 hours a day	26.0%
We're fast	26.0%
Our food is locally sourced	24.3%
Treat yourself for a change	23.2%
A new menu item offered for a limited time	20.5%
Your friends recommend us	14.9%
Delivered to your door	13.2%
Just like Mom's cooking	11.3%
We speak your preferred language (English, Spanish, etc.)	9.4%
We serve specialty foods like Kosher or gluten-free	7.5%
Other	4.9%

### Most memorable advertising type

Humorous	52.9%
Modern	18.6%
Adventure	7.7%
Other	6.8%
Endorsement	4.9%
Romantic	3.0%
Seductive	2.3%
Controversial	1.9%
Philanthropic	1.9%

### Most memorable advertising visuals

Images of food	36.2%
Promotional offer	32.0%
Restaurant logo	13.2%
Advertising music or jingle	12.8%
People eating together	5.8%

# Questionnaire

This brief survey will ask for your opinions about different styles of restaurants, as well as the advertising and marketing messages you have received from them.

Simply click on the appropriate answer or, for open-ended questions, please provide as much detail as needed to express your opinion. Thanks in advance for your input!

---

1. Listed What restaurant do you go to most often? (open-ended)
2. Approximately how often do you eat at the following types of restaurants? (Please indicate # of times/month for each)
  - Fast food: Quick, drive-through restaurants such as McDonald's & Taco Bell
  - Fast casual: Restaurants that offer fresher food but not full table service, such as Chipotle, Panera & Pei Wei Asian Diner
  - Casual: Establishments that offer family dining and full table service, such as TGI Fridays, Applebee's & Olive Garden
  - Fine dining: Upscale restaurants such as Capital Grille, Hillstone & Ruth's Chris Steak House
3. Which of the following words best describe the restaurant you go to most often? (Select all that apply.)

• Local	• Upscale
• Fresh	• Gourmet
• Fast	• Delicious
• Healthy	• Grilled
• Friendly	• Natural
• Clean	• Tasty
• Customized	• Convenience
• Ethnic	• Value
• Relax	• Consistency
• Inexpensive	• Other (open ended)
• Homemade	
4. Please indicate your top reason for choosing to dine out.
  - I can't cook
  - I don't want to cook
  - I don't have time
  - To be with other people
  - I have children
  - To spend time with family
  - I want to be served
  - To save time
  - To have more food choices
  - To try something new
  - Other (open-ended)
5. Thinking specifically about fast-food restaurants, which of the following do you believe does the very best job of advertising? (Choose only one.)

• McDonald's	• KFC
• Wendy's	• Taco Bell
• Jack in the Box	• Subway
• Burger King	• Jersey Mike's Subs
• In-N-Out Burger	• Jimmy John's
• Whataburger	• Carl's Jr.
• Sonic Drive-In	• Chick-fil-A
6. Why did you choose "[top answer]" as the restaurant that does the best job of advertising? (open-ended)
7. Next, we'd like your opinions on marketing statements you might see from a fast-food restaurant. Please choose the marketing statements you feel would be the most persuasive in prompting you to visit the restaurant. (Choose all that apply.)
  - We speak your preferred language (such as English or Spanish)
  - Made fresh daily
  - Delivered to your door
  - Treat yourself for a change
  - A new menu item offered for a limited time
  - Your friends recommend us
  - Custom made to order
  - We have locations near you
  - We serve specialty foods like Kosher or gluten-free
  - Just like Mom's cooking
  - We're fast
  - Our food is locally sourced
  - Inspected daily for cleanliness
  - Open 24 hours a day
  - Order anything you want all day
  - Other (open ended)

8. Think about all the advertising you've ever seen that promotes any type of restaurant. What do feel is the most memorable thing about restaurant advertising? (Choose only one.)

- Images of food
- People eating together
- Advertising music or jingle
- Promotional offer
- Restaurant logo
- Other (open-ended)

9. Thinking about all the advertising you've seen that promotes any type of restaurant, what do you feel is the most memorable type or genre of restaurant advertising? (Choose only one.)

- Modern
- Humorous
- Controversial
- Seductive
- Endorsement
- Adventure
- Philanthropic
- Other (open-ended)

THE FOLLOWING QUESTIONS ARE FOR STATISTICAL PURPOSES ONLY.

10. Please indicate your gender:

- Male
- Female

11. What is the zip code where you live?

12. Which of the following includes your age?

- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older
- Prefer not to answer

13. Which includes the highest level of education you have completed?

- Some high school
- High school graduate or GED
- Some college or trade school
- College graduate (bachelor's degree)
- Post-graduate (master's degree or higher)
- Prefer not to answer

14. How many people are in your household?

- 1-2
- 3-4
- 5-6
- 7-8
- 9-10
- 11 or more

15. How many people in your household are under the age of 17?

- 1
- 2
- 3
- 4
- 5
- 6 or more

16. Which best describes your ethnic background?

- Caucasian / White
- African American
- Asian American
- Hispanic
- Pacific Islander
- Other (open ended)
- Prefer not to answer

17. Which includes your total household income last year before taxes?

- Under \$25,000
- \$25,000 to \$34,999
- \$35,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- Prefer not to answer



WestGroup Research, headquartered in Phoenix and founded in 1959, is the largest full-service market research firm in the Southwest U.S., serving a domestic and international client base.

## About LAVIDGE & Mosaic Multicultural

LAVIDGE is a Phoenix-based full-service advertising, public relations and digital marketing agency. Since 1982, LAVIDGE has specialized in discovering and communicating insights that engage, motivate and inspire. Agency clients include Phoenix Raceway, McDonald's, United Rentals and many more.

Mosaic Multicultural is a full-service multicultural marketing agency working in partnership with LAVIDGE to provide multicultural advertising, public relations and digital marketing service.



2777 East Camelback Road  
Suite 300  
Phoenix, AZ 85016  
480.998.2600  
[lavidge.com](http://lavidge.com)



2777 East Camelback Road  
Suite 300  
Phoenix, AZ 85016  
480.648.7539  
[mosaicmulticultural.com](http://mosaicmulticultural.com)