



Research Dynamics, Inc.

MARKETING RESEARCH STUDY

FOR

RESTAURANT A

- Consumer Fried Chicken Restaurant Usage Survey -

Prepared for:

Restaurant A

January, 2009

MARKETING RESEARCH

www.researchdynamics.com

303 Gateway Place • Highlands, TX 77562 • 817-336-1560 • 1-800-395-2752 • FAX 817-336-0077 • info@researchdynamics.com

Table of Contents

	Page
I. Background and Objectives.....	1
II. Methodology.....	2
III. Summary of Findings.....	3
IV. Conclusions.....	6
V. Detailed Findings	
A. Unaided Awareness Of Fast-Food Restaurants That Serve Fried Chicken.....	11
B. Usage Of Fast-Food Restaurants For Fried Chicken	13
C. Change In Visitation To Restaurants.....	15
D. Reasons For Change In Visits To Restaurant A	16
E. Restaurant A Customer Profile.....	28
F. Rating Of Primary Fast-Food Restaurant For Fried Chicken.....	34
G. Overall Opinion Of Restaurant A.....	37
H. Sample Demographic Profile	38
VI. Appendix	

Background and Objectives

As it develops various marketing and advertising strategies, Restaurant A is interested in learning more about the fried chicken usage habits and attitudes of consumers. In order to find out this marketplace information, Restaurant A commissioned Research Dynamics, Inc. to conduct a marketing research survey.

Specific questions to be answered by this study include:

- On an unaided basis, how many respondents are aware of various fast-food restaurants that serve fried chicken?
- How many respondents have purchased fried chicken at various fast-food restaurants in the past three months? What is respondents' primary fast-food restaurant for fried chicken?
- Have respondents' visits to various restaurants increased, decreased, or stayed the same in the past year?
- Why has there been a change in respondents' visits to Restaurant A in the past year?
- What is the usage and demographic profile of Restaurant A customers?
- How do respondents rate their primary fast-food restaurant for fried chicken in various categories?
- What is respondents' overall opinion of Restaurant A?

Methodology

- A total of 300 random telephone interviews were conducted among adults living in specified zip codes.
- Respondents were qualified as being an adult who had purchased fried chicken at a fast-food restaurant in the past three months. Fried chicken was taken to include fried chicken sandwiches and chicken strips/nuggets, but not grilled chicken or roasted chicken.
- Interviews were conducted between December 12 and December 20, 2008.
- The margin of error for results based on the total sample of 300 respondents is +/- 6 points. This means that if all adults in the specified zip codes were interviewed, in 95 out of 100 cases the results would differ by no more than 6 points in either direction from the results of the 300 respondents interviewed for this study.
- A copy of the questionnaire is appended.

Summary of Findings

1. Unaided Awareness Of Fast-Food Restaurants That Serve Fried Chicken

- On an unaided basis -- in which a list of restaurants is not read to respondents -- 83% of the survey sample named **KFC** as a fast-food restaurant that serves fried chicken.
- While trailing first-place **KFC** by a wide margin, three restaurants' unaided awareness scores were only five points apart (**Restaurant A** 46%, **Popeye's** 45%, **Church's** 41%).
- The fifth restaurant on the survey questionnaire, **Chick-Fil-A**, was named on an unaided basis as a fast-food restaurant that serves fried chicken by 31% of respondents.

2. Usage Of Fast-Food Restaurants For Fried Chicken

- In the past three months, 71% of the survey sample reported having visited **Chick-Fil-A** for fried chicken; this was good for a 12-point lead over second-place **KFC** (59%). **Restaurant A** has received visits from 35% of respondents in the past three months, followed by **Popeye's** (30%) and **Church's** (25%).
- When asked to name the fast-food restaurant at which they most often purchase fried chicken, 41% of those surveyed said **Chick-Fil-A** is their primary restaurant for fried chicken, with 27% naming **KFC**. Only three points separated the three other restaurants listed on the survey questionnaire in terms of being named respondents' primary restaurant for fried chicken: **Popeye's** (10%), **Restaurant A** (9%), **Church's** (7%).

3. **Change In Visitation To Restaurants**

- Only one of the five restaurants listed on the survey questionnaire saw more respondents say their visits to the restaurant had Increased in the past year than said visits had Decreased in the past year -- **Chick-Fil-A** (34% Increased visits, 9% Decreased visits).
- Far more respondents reported a Decrease in visits to **Restaurant A** in the past year, as compared to Increased visits (21% vs. 4%). Likewise, the percentage of survey participants who said their visits to the three other focus restaurants was higher than the percentage who Increased their visits in the past year: **KFC** (24% vs. 12%), **Popeye's** (14% vs. 9%), **Church's** (16% vs. 6%).

4. **Reasons For Change In Visits To Restaurant A**

- **Convenient location** was given as the top reason respondents have Increased their visits to Restaurant A in the past year.
- As to why their usage of Restaurant A has Decreased in the past year, as with Increased visits, **Convenient location** was also named most often as why Restaurant A visits have Decreased. Also receiving several mentions as reasons respondents' visits to Restaurant A have Decreased in the past year were **Quality of food** (with greasy food mentioned several times), **Health/Lifestyle**, and **Customer service**.

5. **Rating Of Primary Fast-Food Restaurant For Fried Chicken**

- In terms of the Excellent ratings from its primary customers in the seven performance areas that were rated, **Chick-Fil-A** fared best among the five restaurants listed on the survey questionnaire, having the highest Excellent score on five of the seven attributes tested. On the other end, **KFC** had either the fourth place or fifth place Excellent score in six of the seven performance areas rated.

5. **Rating Of Primary Fast-Food Restaurant For Fried Chicken** (continued)

- **Restaurant A** highest Excellent rating score from its primary customers was on the attribute **Accuracy of your order** (70% Excellent, second-place among the five restaurants). Otherwise, **Restaurant A** Excellent ratings ranked second or third among the five restaurants in four areas (in addition to its second-place Excellent score on **Accuracy of your order**), though its 30% Excellent score on **Speed of service** was the lowest primary customer rating among the five restaurants.

6. **Overall Opinion Of Restaurant A**

- Overall opinion of Restaurant A among the survey sample was **Excellent** according to 10% of respondents, with an additional 36% of those surveyed giving the restaurant a **Good** rating (for a combined 46% **Excellent/Good** rating). A **Fair** rating of Restaurant A was assigned by 28% of respondents, **Poor** by 9% (combined 37% **Fair/Poor** rating), with 17% of respondents having **No opinion** of Restaurant A.

7. **Restaurant A Customer Profile**

- The 106 Restaurant A customers exhibited the following characteristics:
 - 2.3 average visits in the past month
 - 35% of visits for breakfast, 33% for lunch, 32% for dinner
 - 39% of visits eaten at home, 29% in car, 22% inside the restaurant, 10% at work
 - Median age of 61
 - 26% have children
 - 37% subscribe to the local Sunday newspaper
 - 86% ever make purchases using coupons they receive in the mail

Conclusions

- 1) Overview Of Competitive Landscape. Taking all of this survey's result together, Restaurant A finds itself in a competitive situation in which its survey results were quite similar to Popeye's and Church's, and competitor KFC had rather uneven survey results. However, by far the strongest performance belonged to Chick-Fil-A, and we will begin our look at specific implications of this survey by discussing Chick-Fil-A, before moving on to Restaurant A and the survey's other focus restaurants.
- 2) Chick-Fil-A. As in the two other markets in which we have conducted this survey, when respondents were asked to rate their primary restaurant for fried chicken in seven performance areas, Chick-Fil-A's primary customers rated the restaurant much more favorably than the other restaurants were rated by their primary customers (with large competitive leads in Excellent score on the attributes Cleanliness of restaurant, Attitude of employees, and Quality of food). In addition, 34% of respondents reported an Increase in their Chick-Fil-A visits in the past year, as compared to only 9% whose usage of Chick-Fil-A Decreased in the past year; in stark contrast, all four of the other restaurants listed on the survey questionnaire in this market, and the two other markets, saw more respondents say their past year visits had Decreased than say their past year visits had Increased.

What was different in this survey from the two other markets is that Chick-Fil-A was the leader in both past three months' usage and as respondents' primary restaurant for fried chicken, and, despite not being seen as a "traditional" fried chicken restaurant by some people (which likely resulted in lower unaided awareness scores in the two other markets), had a respectable level of unaided name awareness. Based on these results, it is undeniable that Chick-Fil-A is a formidable competitor when it comes to fried chicken restaurants in the area.

3) Suggestions For Near-Term, Restaurant A Vs. Competitors. Given Chick-Fil-A's performance in this survey's various results, it would appear that Restaurant A short-term competitive focus might best be directed toward the three other restaurants that were a focus of this survey -- KFC, Popeye's, and Church's. The appropriateness of this strategic emphasis is buttressed by the fact that Restaurant A scores on the major survey measures were not just competitive, but indeed quite similar, to two of these restaurants, Popeye's and Church's.

How close were the major survey results for Restaurant A, Popeye's, and Church's? In unaided awareness, Restaurant A, Popeye's, and Church's scores were only five points apart; this difference was 10 points in past three months' usage, and just three points as respondents' primary fast-food restaurant for fried chicken. All three restaurants saw a higher percentage of respondents say their visits had Decreased, as opposed to Increased, in the past year, with Restaurant A actually faring the worst on this measure, as 4% of the survey sample said they had Increased their visits to Restaurant A in the past year, compared to 21% whose Restaurant A usage had Decreased. Finally, when each restaurant's primary customers rated the performance of their primary restaurant for fried chicken in seven performance areas, Restaurant A, Popeye's, and Church's were each rated fairly similarly by their primary customers.

The other restaurant included on the survey questionnaire, KFC, had results that did not fit any sort of meaningful pattern. As we have seen in the two other markets in which this survey was conducted, KFC had strong unaided awareness and usage, but had low attribute performance ratings, and twice as many respondents said their visits to KFC had Decreased in the past year as said their KFC visits had Increased in the past year. These results for KFC suggest that while the restaurant's name awareness and usage are certainly a factor in the market, its poor performance ratings will quite possibly eat into its usage level over time.

Given the above-mentioned survey results, especially the extremely close results for Restaurant A, Popeye's, and Church's, Restaurant A might be well-served by analyzing how its product, operations, and service compare to Popeye's and Church's, and then stressing its competitive strengths in the restaurant's marketing efforts. The goal of such efforts would be to distance Restaurant A from Popeye's and Church's in awareness, usage, and performance ratings, and then over the longer-term devote marketing strategies to showing what makes Restaurant A preferable to market leader Chick-Fil-A.

Next we'll look at specific areas from this survey's results that might help Restaurant A separate itself from Popeye's, Church's, and KFC.

- 4) Quality Of Food At Restaurant A. In one of this survey's more notable results, when the 12 survey participants who said they had Increased their visits to Restaurant A in the past year were asked why their visits to Restaurant A had Increased, there was basically no mention of the restaurant's Quality of food. Given the importance of Quality of food to any restaurant's success, it has to be a little concerning to Restaurant A that its Quality of food was hardly cited as a reason for Increased visits to Restaurant A in the past year.

On the other hand, Quality of food reasons were heard as reasons for Decreased usage of Restaurant A in the past year, as well as reasons why respondents have Not visited Restaurant A in the past three months. As in the two other markets in which this survey was conducted, in this survey we heard Restaurant A fried chicken described as too greasy by several survey participants, but other aspects of the chicken were also mentioned (such as the level of spiciness or the chicken's crispiness).

After taking an in-depth look at the quality of its fried chicken, including perhaps visiting individually with customers to learn more about their thoughts regarding its chicken, Restaurant A should make any changes to its fried chicken product that will speak more to the desires of Restaurant A customers than is perhaps the case currently, based on the above-mentioned survey results.

As it communicates to the public -- through its advertising and marketing efforts -- any changes it makes to its fried chicken product, and as it stresses the quality of its products, one vehicle Restaurant A might consider for getting people into the restaurant to try its fried chicken would be Specials, which were cited by a few respondents as the reason they have Increased their visits to Restaurant A in the past year, and so it would stand to reason that if some current customers Increased their usage of Restaurant A because of Specials, others might as well if such Specials are adequately marketed as being available.

- 5) Breakfast Menu Items. As in the two other markets in which we have conducted this survey, we again see Breakfast being a quite popular meal occasion at Restaurant A. In this market, among all Restaurant A customers surveyed, there was almost an even split in terms of when they visit Restaurant A, as Breakfast visits accounted for basically the same percentage of past month visits as Lunch visits and Dinner visits.

And, when Restaurant A customers were asked what food item they primarily purchase at Restaurant A, two breakfast items, Chicken biscuits and Steak biscuits, received a noticeable amount of mention.

Restaurant A should give strong consideration to the extent to which it promotes its Breakfast menu, and perhaps should think about marketing its Breakfast menu more aggressively than it currently does, given the popularity of the Breakfast items at Restaurant A among this survey's Restaurant A customers. Such marketing of its popular Breakfast menu might result in Restaurant A Lunch and Dinner customers visiting the restaurant for an additional meal occasion (i.e., Breakfast), and might also serve as a way of introducing Restaurant A to people who have never tried the restaurant.

6) Convenient Location. While some aspects of a restaurant, such as Quality of food that we discussed earlier in these Conclusions, can be controlled somewhat easily by making whatever changes are needed to the restaurant's menu items, Location is another matter. In this survey, Convenient location was prominently mentioned both as a reason for Decreased past year visits to Restaurant A and as a reason survey participants have Not visited Restaurant A in the past three months.

Changing a restaurant's Location is not something that can be done overnight of course, but as it considers future restaurant locations, Restaurant A should keep in mind that many consumers in the market appear to place a premium on having a Convenient location.

DETAILED FINDINGS

Unaided Awareness Of Fast-Food Restaurants That Serve Fried Chicken

- The survey began with respondents being asked to name fast-food restaurants that serve fried chicken, without a list of restaurants being read; the resulting scores are referred to as "unaided awareness," and the restaurants named by at least 5% of respondents are shown in the table on the next page.
- Keep in mind that, as mentioned in the Methodology on page 2, fried chicken was taken to include fried chicken sandwiches and chicken strips/nuggets, but not grilled chicken or roasted chicken. Also, even though this survey question specified that respondents name fast-food restaurants, we included all restaurants mentioned in order to provide the full range of responses to this survey question.
- By a 37-point margin, **KFC** had the largest unaided awareness among the respondents surveyed (83%).
- Only five points separated the three restaurants that followed **KFC** in this unaided awareness measure: **Restaurant A** (46%), **Popeye's** (45%), and **Church's** (41%).
- Thirty-one percent (31%) of the survey sample named **Chick-Fil-A**, the fifth restaurant listed on the survey questionnaire, on an unaided basis.
- Three restaurants other than the five listed on the questionnaire received unaided name mention by more than 10% of the respondents: **Zaxby's** (13%), **Bojangles'** (12%), and **McDonald's** (12%).

(please see table on the next page)

**Unaided Awareness Of Fast-Food Restaurants That Serve Fried Chicken
(continued)**

<u>Unaided Awareness</u>	<u>Total (300)</u>
KFC	83%
Restaurant A	46
Popeye's	45
Church's	41
Chick-Fil-A	31
Zaxby's	13
Bojangles'	12
McDonald's	12
Wendy's	8
Burger King	6

Usage Of Restaurants That Serve Fried Chicken

- Respondents were next asked at which of five restaurants they had purchased fried chicken in the past three months, as well as the fast-food restaurant at which they most often purchase fried chicken. The "purchased past three months" column on the next page reflects the percentage of respondents who have purchased from a restaurant in the past three months, while the "purchase most often" column shows each restaurant's percentage of primary customers.

Purchased/Past Three Months

- Two restaurants have been visited for fried chicken purchases by well over half of all respondents in the past three months. Seven in ten of those surveyed said they have purchased fried chicken in the past three months at **Chick-Fil-A** (71%), while 59% had purchased fried chicken at **KFC**. Despite, as we just saw on the previous page, **Chick-Fil-A** having the fifth-highest unaided awareness (perhaps because for some people Chick-Fil-A doesn't come to mind as much on an unaided basis if they doesn't consider Chick-Fil-A's product "traditional" fried chicken), **Chick-Fil-A** ranked number one in past three months' usage.
- Just over one-third of respondents, 35%, have purchased fried chicken at **Restaurant A** in the past three months, 30% at **Popeye's**, and 25% at **Church's**.

Purchase Most Often

- **Chick-Fil-A** (41%) and **KFC** (27%) were named by a combined 69% of survey participants as the fast-food restaurant at which they most often purchase fried chicken.
- As in the past three months' usage discussed above (and as in the unaided awareness results on the previous page), there was little difference in the percentage of respondents who said either **Popeye's** (10%), **Restaurant A** (9%), or **Church's** (7%) is the restaurant at which they most often purchase fried chicken.

(please see table on the next page)

**Usage Of Restaurants That Serve Fried Chicken
(continued)**

<u>Restaurants</u>	<u>Purchased/ Past Three Months (300)</u>	<u>Purchase Most Often (300)</u>
Chick-Fil-A	71%	41%
KFC	59	27
Restaurant A	35	9
Popeye's	30	10
Church's	25	7

In The Past Year, What Change Has Taken Place In Respondents' Visits To Various Restaurants?

- For the five restaurants listed below, respondents were asked what change has taken place in their visits to each restaurant in the past year.
- Past year net visitation (Increased visits minus Decreased visits) was negative for four of the five focus restaurants shown in the table below, but for **Chick-Fil-A**, not only was net visitation positive, it was quite positive, as 34% of those surveyed said their visits to **Chick-Fil-A** had Increased in the past year, while just 9% reported a Decrease in visits.
- Though it has seen a higher percentage of Decreased visits than Increased visits in the past year, the difference was not especially large for **Popeye's** (9% Increased visits, 14% Decreased visits).
- The three other restaurants listed on the survey questionnaire all saw substantially more respondents say their visits to those restaurants had Decreased in the past year, as opposed to Increase in the past year: **KFC** (12% Increased visits, 24% Decreased visits), **Church's** (6% Increased visits, 16% Decreased visits), and with the largest negative net visitation in the past year, **Restaurant A** (4% Increased visits, 21% Decreased visits).

<u>Restaurants</u>	<u>Change In Visits In The Past Year</u>			
	<u>In- creased</u> (300)	<u>De- creased</u> (300)	<u>Stayed The Same</u> (300)	<u>No Opinion</u> (300)
Chick-Fil-A	34%	9	46	11
KFC	12%	24	54	10
Popeye's	9%	14	33	44
Church's	6%	16	32	46
Restaurant A	4%	21	49	26

Note: Percentages read across.

Why Have Respondents' Visits To Restaurant A Increased In The Past Year?

- The 12 respondents who said their visits to Restaurant A had Increased in the past year were asked why their visits have Increased. On the next page are listed the individual reasons given for Increased visits to Restaurant A in the past year. Keep in mind that each bullet point on the next page represents the thoughts of only one respondent, so we recommend focusing on trends rather than attaching too much importance to one response.
- If there is one point to be taken from the list on the next page, it is that there was very little mention of the Quality of food at Restaurant A as a reason visits to the restaurant had Increased in the past year; it is highly unusual for Quality of food to get so little mention as a reason a restaurant's visits had Increased in the past year.
- On a positive note, and in another departure from what we typically see, a relatively high percentage of those respondents who said they have Increased their visits to Restaurant A in the past year -- three (3) of the 12 respondents -- said **Prices**, especially **Specials**, is the reason for their Increased usage.
- **Convenient location** was the leading reason given for an Increase in visits to Restaurant A in the past year.

(please see table on the next page)

**Why Have Respondents' Visits To Restaurant A Increased In The Past Year?
(continued)**

Why Restaurant A Visits Increased/Past Year (Mentioned by 1 respondent each)

Convenient Location

- More convenient.
- It is close by.
- Nearby where I live.
- Location closer.
- Can get to it quickly.
- Close by.
- Convenient.

Prices

- They have better specials than the other restaurants.
- Meal deal for \$2.49 is such a great value.
- Has a weekend special, good price and quality.

Lifestyle

- Stop there when traveling; have travelled a lot lately.

Menu Variety

- Like the selection, especially breakfast items. Like hours of operations.

Why Have Respondents' Visits To Restaurant A Decreased In The Past Year?

- The 62 survey participants who said their visits to Restaurant A had Decreased in the past year were asked why their visits have Decreased. Listed on the next two pages are the individual reasons given for Decreased visits to Restaurant A in the past year (with the respondent's primary fast-food restaurant for fried chicken in parenthesis). Keep in mind that each bullet point on the next two pages represents the thoughts of only one respondent, so we recommend focusing on trends rather than attaching too much importance to one response.
- **Convenient location** was cited as the leading reason respondents have Decreased their visits to Restaurant A in the past year.
- Besides **Convenient location**, other reasons mentioned by several survey participants each for their past year Decrease in usage of Restaurant A were **Quality of the food**, **Health/Lifestyle**, and **Customer service**.
- Regarding **Quality of food**, the chief issue respondents had with the fried chicken at Restaurant A was that it is **Greasy**.
- **Health/Lifestyle** comments revolved around the goal of not eating as many fried foods.
- Included among those respondents who said **Customer service** is why they have Decreased their visits to Restaurant A in the past year were a couple of people who mentioned instances of unfriendly service at the restaurant.

(please see tables on the next two pages)

**Why Have Respondents' Visits To Restaurant A Decreased In The Past Year?
(continued)**

Why Restaurant A Visits Decreased/Past Year (Mentioned by 1 respondent each)

Convenient Location

- Not one close by. (Chick-Fil-A)
- Location. (KFC)
- Not one near. (KFC)
- Not one nearby. (Chick-Fil-A)
- Out of the way; not one close by. (Popeye's)
- It is too far from my home. (KFC)
- Not convenient to where I live. (Chick-Fil-A)
- Not convenient. (Chick-Fil-A)
- Location is inconvenient to me. (Chick-Fil-A)
- Not in my area. (Chick-Fil-A)
- Location. (Church's)
- Not many locations around. Don't like the chicken because it is greasy. (Chick-Fil-A)
- Moved and Restaurant A not as convenient. (Restaurant A)
- Not convenient. (KFC)
- Location. (Chick-Fil-A)
- Location. (KFC)
- Location is out of my way. (Popeye's)
- It's not close to my home. (Chick-Fil-A)
- Location. (Chick-Fil-A)
- Not close to me. (Chick-Fil-A)
- It's not convenient to me. (Republic)
- Other places are closer. (Popeye's)

Quality Of The Food

- Does not taste good. Prefer Popeye's. (Popeye's)
- Didn't like the taste. (KFC)
- A little too greasy; I can't have a lot of greasy food. (Chick-Fil-A)
- Food quality went down, not what expected. (Popeye's)
- Food is too greasy; tastes like use old grease, too. (Church's)
- Do not like pieces of chicken, only sandwiches. (Chick-Fil-A)
- Food was not well done, and it was also not fresh. (Chick-Fil-A)
- Doesn't have original recipe flavor; I don't care for their flavor. (Popeye's)
- Not as good as it used to be. (KFC)
- Too fattening and greasy. (Chick-Fil-A)
- Got sick after visit. (KFC)

Why Have Respondents' Visits To Restaurant A Decreased In The Past Year? (continued)

Why Restaurant A Visits Decreased/Past Year (Mentioned by 1 respondent each)

Health/Lifestyle

- Health reasons. (Chick-Fil-A)
- Went on Weight Watchers. Pieces are small and hard. (KFC)
- Change in diet. (KFC)
- Been out of town a lot. (KFC)
- Not eating fried food as much now. (Popeye's)
- Trying to get my cholesterol down by not eating as much fried chicken as in the past. (Church's)
- Cook most of my fried chicken at home. (Chick-Fil-A)
- Not eating fried food. (KFC)
- Trying not to eat greasy food as much. (KFC)
- Cutting back on fried chicken. (Chick-Fil-A)

Customer Service

- Service was not good. (KFC)
- Out of items on menu four times, such as chicken breasts, spicy chicken strips, sandwich, and mashed potatoes. Trouble with cashiers, not nice, argue with each other; four people work with your meals, gets all mixed up, too chaotic. (Wendy's)
- Service is bad; don't get order correct. (Chick-Fil-A)
- Service is awful, customer service is just not good, out of stuff all the time. (Restaurant A)
- Don't get good service at Restaurant A. They got a bad health report. (Chick-Fil-A)
- Service is bad, not friendly, act like don't care. (Chick-Fil-A)

Prefer Other Restaurants

- Prefer Chick-Fil-A. (Chick-Fil-A)
- Just like Popeye's the best. (Popeye's)
- Not as good as KFC. My order was shorted. Poor management over waitresses. (KFC)

Prices

- They don't usually have specials to get me to come in to the restaurant, not many coupons. (Chick-Fil-A)
- Lack of specials. Location. (Church's)

Menu Variety

- Not enough variety in menu. (Chick-Fil-A)

No Specific Reason Given (6 respondents)

Why Have Respondents Not Visited Restaurant A In The Past Three Months?

- Those respondents who have not purchased from Restaurant A in the past three months were asked why they have not done so.
- The individual reasons given for not having visited Restaurant A in the past three months are shown on the next six pages; each response was mentioned by one respondent. The restaurant in parenthesis next to each comment indicates that particular respondent's primary fast-food restaurant for fried chicken. Keep in mind that to some degree the reasons given for not having purchased from Restaurant A in the past three months will mirror those reasons given when respondents whose usage of the restaurant had decreased in the past year were asked why their visits had decreased (see pages 19 and 20).
- Easily the leading reason survey participants said they have not visited Restaurant A in the past three months was **Convenient location**.
- There were also many people for whom **Quality of food** was the main reason they have not been to Restaurant A in the past three months. Specifically, Restaurant A having **Greasy** fried chicken was mentioned by several respondents, with the level of **Salt**, **Spiciness**, and **Crispiness** each being commented on by a couple of respondents.
- **Health/Lifestyle** reasons, a **Preference for other restaurants**, **Customer service**, and **Prices** were the other categories of reasons for not visiting Restaurant A in the past three months that were given by more than a few survey participants, though not especially often.

(please see tables on the next six pages)

**Why Have Respondents Not Visited Restaurant A In The Past Three Months?
(continued)**

Why Haven't Visited

Restaurant A In Past Three Months (Mentioned by 1 respondent each)

Convenient Location

- Not convenient. (Chick-Fil-A)
- Do not have one in the area where I live. (KFC)
- Too far from home. (Chick-Fil-A)
- None close by. (KFC)
- Location is too far away. (KFC)
- Convenience. (Wendy's)
- Not one near. (KFC)
- Not many around here; harder to get to. (KFC)
- Really out of the way, not convenient. (Chick-Fil-A)
- Locale of Restaurant A. Prefer KFC; like their spices and how they do the chicken. (KFC)
- Not one close by. (KFC)
- Not a location near where I live. (Chick-Fil-A)
- Not close to my home. (Popeye's)
- It is not in my area where I live. (KFC)
- Too far away. (KFC)
- Not convenient. (Chick-Fil-A)
- Do not know where one is located in my area. (Chick-Fil-A)
- There is not a Restaurant A close by. (Chick-Fil-A)
- There is not a Restaurant A close by. (Chick-Fil-A)
- Do not have one nearby. (Chick-Fil-A)
- There is not one close by. (KFC)
- There is not one located near where I live. (Popeye's)
- There is not one close by. (Chick-Fil-A)
- None close to my home. (Popeye's)
- Not close by my neighborhood, don't go that way. (Church's)
- Inconvenient. (KFC)
- Not convenient. (Zaxby's)
- Not one close. (Chick-Fil-A)
- There is not one close by. (Chick-Fil-A)
- Not convenient. (Chick-Fil-A)
- Far away since I moved. (KFC)
- Not near me. (Church's)
- Not around here. (KFC)
- Not close. (KFC)
- Don't have one in my area. (Chick-Fil-A)
- Location. (KFC)
- Not one in this town. (Church's)

**Why Have Respondents Not Visited Restaurant A In The Past Three Months?
(continued)**

Why Haven't Visited

Restaurant A In Past Three Months (Mentioned by 1 respondent each)

Convenient Location (continued)

- Not convenient to my home. (Chick-Fil-A)
- It's not convenient. I would rather have Chick-Fil-A. (Chick-Fil-A)
- Not close to me. (Republic)
- There is not one close to me. (Chick-Fil-A)
- There isn't one close to me. (KFC)
- It's not close to where I live. (KFC)
- Not close to me. (Church's)
- Hard to get in and out, there is a blind turn. (Chick-Fil-A)
- Not convenient. (Chick-Fil-A)
- Not one around here close. (Chick-Fil-A)
- Don't have one in my town. (Chick-Fil-A)
- Location. (Chick-Fil-A)
- Not as close as KFC. (KFC)
- Not close. (KFC)
- Location is out of our way. (KFC)
- Not in local area. (Chick-Fil-A)
- Not convenient. (Chick-Fil-A)
- Others are more convenient. (Chick-Fil-A)
- Location is inconvenient to me. (Chick-Fil-A)
- Not near me. (Chick-Fil-A)
- Not many locations around. Don't like the chicken because it is greasy. (Chick-Fil-A)
- Out of the way. (Arby's)
- Not close enough. (KFC)
- Location. (Church's)
- Don't know where one is. (Chick-Fil-A)
- Not on my way to work. (Chick-Fil-A)
- None around where I live. (Chick-Fil-A)
- It is not convenient. Too greasy. (Chick-Fil-A)
- Not convenient to go there. (KFC)
- Not convenient for me to go there. (Chick-Fil-A)
- When I worked I would stop at Restaurant A often for lunch; it is not convenient now because I am not working. (Popeye's)
- Other places are closer to my home. (KFC)
- There is not one in my town. (Chick-Fil-A)
- Not one in my area. (Church's)
- Not convenient; too far away from where I live. (Chick-Fil-A)
- Not convenient. (Chick-Fil-A)

- Out of the way. (Chick-Fil-A)

Why Have Respondents Not Visited Restaurant A In The Past Three Months? (continued)

Why Haven't Visited

Restaurant A In Past Three Months (Mentioned by 1 respondent each)

Convenient Location (continued)

- Convenience; it's not that far, but the time it takes to get there is too long. (Chick-Fil-A)
- Out of the way. (Chick-Fil-A)
- Not one in our location. (Bojangles')

Quality Of The Food

- Didn't like the taste. (KFC)
- Fry their chicken too hard. (Church's)
- Chicken was not cooked, could see blood in it. (KFC)
- Don't like their chicken; does not taste good. (Popeye's)
- The way it is cooked, too doughy. (Popeye's)
- Too greasy. Off the beaten path for me. (Chick-Fil-A)
- Grease. (Chick-Fil-A)
- Chicken is too salty. (Popeye's)
- Food quality went down, not what expected. (Popeye's)
- Chicken is too greasy for my taste. (Popeye's)
- Stopped going there a long time ago; didn't care for the way the chicken was fried. (Chick-Fil-A)
- Too greasy. Too heavy. (Chick-Fil-A)
- I like spicy chicken. (Popeye's)
- Restaurant A chicken is too greasy. Trying not to eat too much food that is fried. (KFC)
- The chicken is too greasy. (Chick-Fil-A)
- Don't like it; it has been a long time since I ate there, but have bad memories of it. (Chick-Fil-A)
- Their chicken is too greasy. (Chick-Fil-A)
- Got sick after visit. (KFC)
- Don't like the food; too greasy. (KFC)
- Chicken not crispy enough. (Chick-Fil-A)
- Food is too greasy. (Church's)
- Don't like the taste of the chicken; too spicy. (KFC)
- Restaurant A has a lower grade of chicken; their chicken has a lot more veining, affects the texture, don't like to bite through it. (Popeye's)
- I don't like their food. (Zaxby's)
- The food always seems to be cold when you get it. (Chick-Fil-A)
- It's been a long time since I have eaten there, but I did like the cinnamon roll. (Chick-Fil-A)
- Doesn't have good quality chicken. (Chick-Fil-A)

- I don't care for their flavor. (KFC)

Why Have Respondents Not Visited Restaurant A In The Past Three Months? (continued)

Why Haven't Visited

Restaurant A In Past Three Months (Mentioned by 1 respondent each)

Quality Of The Food (continued)

- Don't care for the taste, it's too bland. (Popeye's)
- Too much salt. (KFC)
- Don't like the taste. (Chick-Fil-A)
- Don't like it because it is not crispy. (KFC)
- Don't like the taste. (Church's)
- Don't like the taste, the spices. (Zaxby's)

Health/Lifestyle

- I am trying to eat better. (Chick-Fil-A)
- Not eating fried food as much now. (Popeye's)
- Don't eat out much. (Chick-Fil-A)
- Try to stay away from fried food. (Chick-Fil-A)
- Do not eat heavy fried chicken, just sandwiches. (Chick-Fil-A)
- Watching fried food. (KFC)
- Don't eat fast food too often. (Chick-Fil-A)
- Do not eat much fried chicken. There is not a Restaurant A near my home. (Chick-Fil-A)
- Try to stay away from so much fried food. (Chick-Fil-A)
- Not supposed to eat fried foods. (KFC)
- Don't go out to eat very often. (Church's)
- Try to stay away from lots of fried food. (Chick-Fil-A)
- Don't eat fried chicken very often. (Chick-Fil-A)
- Very seldom eat fried chicken out. (Chick-Fil-A)
- I don't eat much fast food. (KFC)
- I don't like fried chicken that much. (Burger King)
- Don't eat a lot of chicken. Family likes certain items at other restaurants, such as fried okra at Church's. (Chick-Fil-A)
- Don't eat out that much. (Popeye's)

Why Have Respondents Not Visited Restaurant A In The Past Three Months? (continued)

Why Haven't Visited

Restaurant A In Past Three Months (Mentioned by 1 respondent each)

Prefer Other Restaurants

- Just prefer Chick-Fil-A. (Chick-Fil-A)
- Like Chick-Fil-A. (Chick-Fil-A)
- I prefer Popeye's. (Popeye's)
- Prefer Chick-Fil-A, just my taste. (Chick-Fil-A)
- Restaurant A is good, but prefer KFC. (KFC)
- Just think KFC uses better quality chicken and spices. (KFC)
- Don't like as well as KFC. (KFC)
- Prefer to eat chicken sandwiches or chicken nuggets from Chick-Fil-A. (Chick-Fil-A)
- Prefer Chick-Fil-A. (Chick-Fil-A)
- Enjoy Chick-Fil-A, why change? (Chick-Fil-A)
- Like KFC better. (KFC)
- Prefer Chick-Fil-A. (Chick-Fil-A)
- Prefer KFC. (KFC)
- Have other fast-food restaurants I prefer. (Chick-Fil-A)
- Prefer KFC over all fried chicken places. (KFC)

Customer Service

- Restaurant A is too slow. (KFC)
- Don't care for the service; unprofessional. (KFC)
- Given up on going there because of being out of items on the menu and the cashiers not being nice. (Wendy's)
- Don't get good service at Restaurant A. They got a bad health report. (Chick-Fil-A)
- Management and bad service; Restaurant A was a favorite at one time, but they let the management go down hill. (Chick-Fil-A)
- Poor service. (Chick-Fil-A)
- They are unfriendly. Quality of food not good. Poor service. Health rating was very low. (Chick-Fil-A)
- Service is bad. (Chick-Fil-A)

**Why Have Respondents Not Visited Restaurant A In The Past Three Months?
(continued)**

Why Haven't Visited

Restaurant A In Past Three Months (Mentioned by 1 respondent each)

Prices

- Prices are too high. (KFC)
- Do not care for their chicken. Do not get enough for the money. Awhile back I ordered chicken wings and paid dearly from them, but did not receive my money's worth. (Chick-Fil-A)
- Church's is a better deal. (Church's)
- Their prices seem to be higher than other chicken places. (Zaxby's)
- No specials very often. (Chick-Fil-A)
- Use coupons only to purchase chicken when I receive them. (Popeye's)
- Lack of specials. Location. (Church's)

Cleanliness/Appearance

- Dirtiness of the store; whole place is dirty and poorly run. (KFC)
- The building and surroundings look dirty. (Popeye's)
- Don't like the feel when you go in Restaurant A. (Chick-Fil-A)

No Specific Reason Given (31 respondents)

Restaurant A Customer Profile

- Following the general awareness, attitude, and usage questions about various restaurants, a series of questions was asked only of Restaurant A customers in order to construct a profile of the 106 Restaurant A customers.
- The table on page 30 shows results for the Restaurant A-specific survey questions, comparing All Restaurant A customers to Primary Restaurant A customers, while listed beginning on page 31 are the food items customers said they primarily purchase at Restaurant A.

Number Of Visits To Restaurant A/Past Month

- The average of **2.3 visits** to Restaurant A in the past month among All Restaurant A customers surveyed rose to **3.3 visits** for Primary Restaurant A customers.

Restaurant A Visits/Past Month

- There was an amazingly even distribution of how All Restaurant A customers said their past month usage divided by occasion: 35% for **Breakfast**, 33% for **Lunch**, 32% for **Dinner**.
- **Breakfast** visits accounted for 19% of Primary Restaurant A customers' visits in the past year, less than the 37% of visits for **Lunch** among Primary Restaurant A customers, and the 44% of visits for **Dinner**.

Where Eat Restaurant A Meal/Past Month

- Among All Restaurant A customers, the highest percentage of past month Restaurant A meals were eaten **At home** (39% of visits), while 29% were eaten **In the car**, 22% **Inside the restaurant**, and 10% **At work**.
- **Eating at home** was also given most often as the place Primary Restaurant A customers had eaten their meal (43% of past month visits), with one-third of the past month visits being eaten **Inside the restaurant** (32%), 23% eaten **In the car**, and just 2% **At work**.

(continued)

**Restaurant A Customer Profile
(continued)**

Food Item Primarily Purchase
At Restaurant A

- Pages 31-33 list the items that past three months' visitors to Restaurant A said they purchase most often at the restaurant.
- As one would expect, various types of **Fried chicken** were named most often when respondents were asked what food item they primarily purchase at Restaurant A; the specifics of those **Fried chicken** purchases can be found on pages 31 and 32.
- Other than **Fried chicken**, a couple of types of biscuits received several mentions as the food item survey participants said they most often purchase at Restaurant A: **Chicken biscuit** and **Steak biscuit**.

(please see table and lists on the next four pages)

**Restaurant A Customer Profile
(continued)**

	<u>Restaurant A Customers</u>	
	<u>All Customers</u> (106)	<u>Primary Customers</u> (27)
<u>Average Number Of Visits/Past Month</u>	<u>2.3</u>	<u>3.3</u>
<u>Restaurant A Visits/Past Month</u>		
Breakfast	35%	19%
Lunch	33	37
Dinner	32	44
<u>Where Eat Restaurant A Meal/Past Month</u>		
At home	39%	43%
In the car	29	23
Inside the restaurant	22	32
At work	10	2

Restaurant A Customer Profile (continued)

Food Item Primarily Purchase

At Restaurant A (Mentioned by 1 respondent each)

Fried Chicken

- Chicken plate lunch with vegetables.
- Two (2)-piece chicken dinner.
- Two (2) pieces of chicken.
- Chicken wings.
- Bucket of chicken with potato wedges.
- Plate lunch with vegetables.
- Crispy chicken with side item.
- Country fried steak.
- Regular chicken dinner.
- Chicken strips. Sausage gravy biscuit.
- Chicken tenders with gravy.
- Three (3) wings and biscuits.
- Leg and breast two (2)-piece combination.
- White meat chicken. Green beans. Cream potatoes. Sausage gravy biscuit.
- Chicken breast meal. Chicken strip meal.
- Chicken breast salad. Mashed potatoes.
- Chicken wings.
- Three (3) chicken wings and biscuit deal.
- Chicken. Biscuits.
- Two (2)-piece chicken dinner, dark.
- Chicken leg and breast.
- Chicken and dumplings. White meat chicken meal and sides.
- Meal; lite meat.
- Chicken strips. Three (3) wings. Two (2)-piece meal.
- Wings. Biscuits.
- Plate lunch chicken. Vegetables. Biscuits.
- Chicken pieces.
- Dinner for four, just chicken takeout.
- Chicken and vegetable plate.
- Chicken thigh family meal.
- Fried chicken. Potato salad. Rolls. Slaw.
- Two (2)-piece chicken special for \$2.49. Sausage and biscuit.
- Country fried steak. Vegetables.
- Snack pack of dark meat and side of vegetables. Chicken fingers for grandchildren.
- Chicken wings. Chicken breast.
- Two (2)-piece dinner.
- Chicken snack.

- Chicken wings.

**Restaurant A Customer Profile
(continued)**

Food Item Primarily Purchase

At Restaurant A (Mentioned by 1 respondent each)

Fried Chicken (continued)

- Chicken wings.
- Regular chicken dinner.
- Chicken fried steak with gravy.
- Three (3)-piece chicken meal.
- Chicken leg. Chicken breast snack.
- Chicken combo: chicken with mashed potatoes and slaw.
- Two (2)-piece meal, white meat.
- Chicken breast meal.
- Regular chicken deal.
- Chicken tenders.
- Two (2)-piece chicken with sides.
- Chicken wings.
- Chicken tenders.
- Regular chicken dinner.
- Chicken fried steak. Biscuit.
- Plate lunch of chicken, corn, and slaw.
- Chicken. Vegetables.
- Chicken. Vegetables.
- Bucket of chicken.
- Chicken wings. Biscuits.
- Two (2)-piece chicken breast and wing.
- Family bucket of fried chicken.
- Two (2)-piece chicken meal of chicken breasts.
- Three (3)-piece chicken meal with sides.
- Chicken tenders meal.
- Two (2)-piece meal.
- Three (3)-piece chicken meal with vegetables.
- Two (2)-piece fried chicken meal.
- Chicken wings.
- Meal deal. Family-size sides. Cinnamon swirls.
- Chicken dinners.
- Chicken strips.
- Chicken meals with vegetables.
- Fried chicken, all pieces. Grits and sausage.
- Dark chicken.
- Family pack: chicken, slaw, and mashed potatoes with gravy.

Restaurant A Customer Profile (continued)

Food Item Primarily Purchase

At Restaurant A (Mentioned by 1 respondent each)

Chicken Biscuit

- Chicken biscuit.
- Chicken biscuit.
- Chicken and biscuit.
- Chicken biscuits. Mixed chicken.
- Chicken and biscuit.
- Chicken biscuit.
- Chicken and biscuit.
- Chicken and biscuit.
- Chicken and biscuit.
- Chicken biscuit. Sausage biscuit.
- Chicken biscuit.

Steak Biscuit

- Steak biscuit and gravy.
- Steak and gravy biscuit.
- Steak and cheese sandwich.
- Steak and biscuits.
- Steak and biscuit.
- Steak and biscuit. Chicken breast.
- Steak and biscuit. Chicken pack.
- Steak biscuits. Pork chop biscuits.
- Steak biscuit. Coffee. Chicken biscuit.

Other Breakfast Items

- Biscuit and gravy.
- Biscuit and gravy.
- Sausage and gravy. Two (2)-piece meal deal.
- Bacon, egg, and cheese biscuit. Sausage gravy biscuit.

No Item Mentioned (7 respondents)

How Do Respondents Rate Their Primary Restaurant In Various Categories?

- Respondents were read a list of seven (7) product and service areas and asked to rate their primary restaurant's performance in each area, using a "1" to "5" scale, where "1" meant Poor and "5" meant Excellent. The individual results for this survey question are shown in the table on page 36; the table compares ratings given by primary customers of Restaurant A, primary customers of KFC, primary customers of Chick-Fil-A, primary customers of Popeye's, and primary customers of Church's.
- In looking at the Excellent performance ratings each restaurant received from its primary customers, **Chick-Fil-A** received generally higher ratings from its primary customers than did the four other restaurants from their primary customers. In five of the seven rated areas **Chick-Fil-A** had the highest Excellent score of all restaurants, including noticeable leads over all the other restaurants on **Quality of food** (77% Excellent), **Attitude of employees** (76% Excellent), and **Cleanliness of restaurant** (75% Excellent).
- **Restaurant A** ranked second in Excellent ratings among the five restaurants on **Accuracy of your order** (70% Excellent) and **Value for the money spent** (53% Excellent), and had the third-highest Excellent rating on **Attitude of employees** (53% Excellent), **Quality of food** (52% Excellent), and **Cleanliness of restaurant** (38% Excellent).
- Like **Restaurant A**, **Church's** did pretty well in the attribute performance ratings. On **Value for the money spent** (63% Excellent) and **Variety of menu items** (52% Excellent), **Church's** outscored all other restaurants in terms of Excellent score from primary customers. Furthermore, **Church's** Excellent scores ranked in the top three out of the five restaurants on all but one of the seven attributes (the exception being **Attitude of employees**, where it had the lowest Excellent score among the five restaurants, 36%).

(continued)

**How Do Respondents Rate Their
Primary Restaurant In Various Categories?
(continued)**

- **Popeye's** attribute performance ratings from its primary customers were pretty much middle-of-the-road. The restaurant's 31% Excellent score from its primary customers on **Value for the money spent** was the lowest Excellent score on that attribute among the five restaurants' primary customers; however, in the six other performance areas, **Popeye's** Excellent ratings ranked second on three attributes and fourth on three attributes.
- Of the five restaurants, **KFC's** primary customers rated the restaurant somewhat less favorably than the four other restaurants were rated by their primary customers. Except for its third-place 43% Excellent score on **Variety of menu items**, the Excellent scores for **KFC** from its primary customers ranked either next-to-last out of the five restaurants or last out of the five restaurants in all six of the other areas tested.
- Interestingly, only 10 points separated the Excellent score results for all five of the restaurants on the attribute **Variety of menu items**, indicating respondents see the five restaurants as performing equally well when it comes to **Variety of menu items**.

(please see table on the next page)

**How Do Respondents Rate Their
Primary Restaurant In Various Categories?**

	<u>Primary Restaurant</u>				
	<u>Restaurant</u> <u>A</u> (27)	<u>KFC</u> (83)	<u>Chick-</u> <u>Fil-A</u> (122)	<u>Popeye's</u> (29)	<u>Church's</u> (22)
<u>Cleanliness of restaurant</u>					
5-Excellent	38%	30%	75%	31%	46%
4	33	46	22	45	46
2-3	29	24	3	24	8
1-Poor	-	-	-	-	-
<hr/>					
<u>Speed of service</u>					
5-Excellent	30%	33%	64%	52%	41%
4	41	49	28	28	36
2-3	22	17	7	20	23
1-Poor	7	1	1	-	-
<hr/>					
<u>Accuracy of order</u>					
5-Excellent	70%	51%	80%	55%	64%
4	15	34	15	28	27
2-3	8	15	4	17	9
1-Poor	7	-	1	-	-
<hr/>					
<u>Attitude of employees</u>					
5-Excellent	53%	37%	76%	55%	36%
4	26	37	20	28	50
2-3	14	26	4	17	14
1-Poor	7	-	-	-	-
<hr/>					
<u>Variety of menu items</u>					
5-Excellent	42%	43%	42%	50%	52%
4	39	41	40	36	29
2-3	19	16	18	14	19
1-Poor -	-	-	-	-	-
<hr/>					
<u>Quality of food</u>					
5-Excellent	52%	46%	77%	48%	59%
4	37	43	20	35	27
2-3	11	11	2	17	14
1-Poor	-	-	1	-	-
<hr/>					
<u>Value for the money spent</u>					
5-Excellent	53%	38%	46%	31%	63%
4	33	36	44	52	23
2-3	14	24	10	17	14

1-Poor

-

2

-

-

-

What Is Respondents' Overall Opinion Of Restaurant A?

- The final survey question before the demographic section asked respondents to rate their overall opinion of Restaurant A as Excellent, Good, Fair, or Poor.
- A combined just under half of the survey participants, 46%, said their overall opinion of Restaurant A is basically favorable, that is, either **Excellent** (10%) or **Good** (36%).
- Overall opinion of Restaurant A was rated as **Fair** by 28% of the survey sample, with 9% assigning a **Poor** rating, and 17% having **No opinion** of Restaurant A.

<u>Opinion Of Restaurant A</u>	<u>Total (300)</u>
Excellent	10%
Good	36
Fair	28
Poor	9
No Opinion	17

Sample Demographic Profile

- The tables on pages 40 and 41 compare the demographic characteristics of seven groups of survey respondents: Total Sample; All Restaurant A customers; Primary Restaurant A customers; Primary KFC customers; Primary Chick-Fil-A customers; Primary Popeye's customers; Primary Church's customers.

Median Age

- The median age of all respondents is **56 years old**. (Note: The median is the middle value when all values are arrayed from the lowest value to the highest value.)
- **Restaurant A** customers included in the survey sample were slightly older than the other respondents (median age of **64 years old** for primary **Restaurant A** customers, median age of **61 years old** for all **Restaurant A** customers surveyed).

Family Status

- One-third of all survey participants said they **Have children living in their home** (33%).
- There was a fairly broad range in the percentage of each restaurant's primary customers who **Have children living in their home**; **Popeye's** primary customers were the most likely to **Have children at home**, at 45%, while only 19% of primary **Restaurant A** customers and just 9% of primary **Church's** customers said they **Have children at home**.

Subscribe To Local Sunday Newspaper?

- Among the total sample of respondents, 36% **Subscribe to the local Sunday newspaper**.
- Just over half the primary **Restaurant A** customers surveyed, 52%, report **Subscribing to the local Sunday newspaper** (highest percentage among the various restaurants' primary customers), while just 18% of **Church's** primary customers said they **Subscribe to the local Sunday newspaper**.

(continued)

Sample Demographic Profile (continued)

Ever Make Purchases Using Coupons Received In The Mail?

- Many of the people surveyed, 81%, said they have **Ever made a purchase using coupons they received in the mail.**
- Very little difference was noted in the percentage of each restaurant's primary customers who had **Ever made a purchase using coupons received in the mail.**

Ethnicity (Restaurant A customers only)

- Both among all customers of **Restaurant A** and primary customers of **Restaurant A**, there was roughly an even split in the ethnicity of the **Restaurant A** customers surveyed (52% **Caucasian**, 44% **African American** among all customers; 52% **African American**, 48% **Caucasian** among primary customers).

Gender

- The survey sample was comprised of 71% **Females**, 29% **Males**.
- On a relative basis, compared to the primary customers of the other restaurants, more primary customers of **Popeye's** were **Male** (41%), while fewer were **Female** (59%).

(please see tables on the next two pages)

**Sample Demographic Profile
(continued)**

	<u>Customer Type</u>						
	<u>Total Sample</u> (300)	<u>All Restaurant A</u> (106)	<u>PrimaryPri- Restaurant A</u> (27)	<u>Primary mary KFC</u> (83)	<u>Primary Chick-Fil-A</u> (122)	<u>Pop-eye's</u> (29)	<u>Primary Church's</u> (22)
<u>Age</u>							
18-34	9%	8%	4%	12%	12%	18%	-%
35-54	40	26	19	32	44	39	47
55 or more	51	66	77	56	44	43	53
<u>Median</u>	<u>56</u>	<u>61</u>	<u>64</u>	<u>58</u>	<u>51</u>	<u>51</u>	<u>56</u>
<u>Family Status</u>							
Children	33%	26%	19%	30%	38%	45%	9%
No children	67	74	81	70	62	55	91
<u>Local Television Channel Watch Most Often For Evening News</u>							
Channel 2	43%	42%	52%	44%	41%	39%	53%
Channel 5	26	26	26	24	23	35	14
Channel 11	10	9	4	11	11	3	14
Channel 3	4	7	7	2	4	3	9
Channel 46	3	2	-	4	2	-	5
Channel 4	2	1	-	2	3	-	-
Channel 6	1	-	-	1	1	3	-
Channel 8	1	-	-	-	1	-	-
Channel 9	1	1	-	2	1	-	-
Channel 14	1	-	-	-	-	3	-
Channel 24	1	1	-	-	1	-	-
Channel 17	1	-	-	-	2	-	-
Channel 30	1	-	-	-	1	-	-
None/Don't know	9	11	11	10	9	14	5
<u>Subscribe To Local Sunday Newspaper?</u>							
Yes	36%	37%	52%	34%	42%	28%	18%

No

64

63

48

66

58

72

82

**Sample Demographic Profile
(continued)**

	Customer Type						
	Total Sample (300)	All Restaurant A (106)	PrimaryPri- Restaurant A (27)	Primary KFC (83)	Primary Chick- Fil-A (122)	Pop- eye's (29)	Primary Church's (22)
<u>Ever Make Purchases</u>							
<u>Using Coupons</u>							
<u>Receive In The Mail?</u>							
Yes	81%	86%	74%	85%	81%	83%	82%
No	19	14	26	15	19	17	18
<u>Ethnicity</u>							
(Restaurant A customers only)							
Caucasian	-%	52%	48%	-%	-%	-%	-%
African American	-	44	52	-	-	-	-
Latino	-	1	--	-	-	-	-
Other	-	3	--	-	-	-	-
<u>Gender</u>							
Female	71%	70%	63%	67%	79%	59%	73%
Male	29	30	37	33	21	41	27

Appendix

Respondent Telephone #

Interviewer

Date

Good evening, I'm _____ with Research Dynamics marketing research. We are conducting a brief public opinion survey about restaurants. We are not selling anything.

1. Are you at least 18 years old?

Yes.....1 -> CONTINUE
No.....2 -> ASK TO SPEAK TO ANY OTHER ADULT HOUSEHOLD MEMBER AND REPEAT INTRODUCTION ABOVE. IF NO ADULT AVAILABLE, EITHER MAKE NOTE TO CALL BACK OR TERMINATE.

2. In the past three months, have you purchased fried chicken from a fast-food restaurant?

Yes.....1 -> CONTINUE
No.....2 -> TERMINATE

3. Please tell me the names of all the fast-food restaurants you are aware of that serve fried chicken. (DO NOT READ LIST. CIRCLE ALL THAT APPLY. WRITE "OTHERS" IN BLANK. PROBE FOR MULTIPLES RESPONSES.)

Restaurant A.....1
KFC.....2
Popeye's.....3
Church's.....4
Chick-Fil-A.....5
Other [SPECIFY].....6

4a. Thinking about the past three months, at which of the following restaurants have you purchased fried chicken? (READ LIST ONE AT A TIME. CIRCLE ALL THAT APPLY IN 4a.)

4b. At which fast-food restaurant do you most often purchase fried chicken? (DO NOT READ LIST. CIRCLE ONE ONLY IN 4b.)

	<u>4b</u>	<u>4a</u>
	<u>Purchased/ Past Three Months</u>	<u>Purchase Most Often</u>
Restaurant A.....	1.....	1
KFC.....	2.....	2
Popeye's.....	3.....	3
Church's.....	4.....	4
Chick-Fil-A.....	5.....	5

5. For each of the following restaurants, would you say that your visits to that restaurant have Increased, Decreased, or Stayed about the same in the past year? (READ LIST ONE AT A TIME. ASK SCALE FOR EACH RESTAURANT. CIRCLE ONE ONLY FOR EACH RESTAURANT.)

	<u>In- crease</u>	<u>De- crease</u>	<u>Stay About The Same</u>	<u>No Opinion</u>
Restaurant A.....	1.....	2.....	3.....	0
KFC.....	1.....	2.....	3.....	0
Popeye's.....	1.....	2.....	3.....	0
Church's.....	1.....	2.....	3.....	0
Chick-Fil-A.....	1.....	2.....	3.....	0

5a. IF Restaurant A INCREASE: Why is that? (WRITE RESPONSE IN BLANK.)

5b. IF Restaurant A DECREASE: Why is that? (WRITE RESPONSE IN BLANK.)

5c. IF NOT Restaurant A IN QUESTION #4a.: What is the main reason you have not visited Restaurant A in the past three months?

6. ONLY ASK IF Restaurant A CIRCLED IN QUESTION #4a.: In the past month, approximately how many times have you visited Restaurant A? (WRITE NUMBER OF TIMES IN BLANK.)

7. ONLY ASK IF Restaurant A CIRCLED IN QUESTION #4a.: Of the ____ times you have visited Restaurant A in the past month, how many of those visits have been for breakfast? How many for lunch? How many for dinner? (WRITE NUMBER OF TIMES IN BLANKS LABELED "BREAKFAST," "LUNCH," AND "DINNER." PLEASE MAKE SURE TOTAL OF "BREAKFAST," "LUNCH," AND "DINNER" ADDS TO NUMBER WRITTEN IN "NUMBER OF TIMES" BLANK.)

_____ Breakfast

_____ Lunch

_____ Dinner

8. ONLY ASK IF Restaurant A CIRCLED IN QUESTION #4a.: What food item do you primarily purchase at Restaurant A? (INTERVIEWER: Please ask respondent to be as specific as possible.)

9. ONLY ASK IF Restaurant A CIRCLED IN QUESTION #4a.: And of the ____ times you have visited Restaurant A in the past month, where did you eat your meal? How did your visits divide between eating your meal... (READ EACH PLACE AND WRITE NUMBER OF TIMES IN EACH BLANK. PLEASE MAKE SURE TOTAL OF ALL PLACES ADDS TO NUMBER WRITTEN IN "NUMBER OF TIMES" BLANK.)

_____ At home

_____ In the car

_____ At work

_____ Inside the restaurant

10. You mentioned earlier that (READ "MOST OFTEN" RESTAURANT CIRCLED IN 4b. HERE) was your primary restaurant for fried chicken. I'd like you to rate ("MOST OFTEN" RESTAURANT) in a few areas. If "1" means Poor and "5" means Excellent, how would you rate ("MOST OFTEN" RESTAURANT) on... (READ LIST OF AREAS. CIRCLE THE NUMBER CHOSEN FOR EACH AREA.)

Cleanliness of restaurant.....1.....2.....3.....4.....5
Speed of service.....1.....2.....3.....4.....5
Accuracy of your order.....1.....2.....3.....4.....5
Attitude of employees.....1.....2.....3.....4.....5
Variety of menu items.....1.....2.....3.....4.....5
Quality of food.....1.....2.....3.....4.....5
Value for the money spent.....1.....2.....3.....4.....5

11. What is your overall opinion of Restaurant A? Would you say... (READ LIST OF ALL CHOICES AND THEN CIRCLE ONE ONLY.)

Excellent.....1
Good.....2
Fair.....3
Poor.....4
No Opinion (DON'T READ).....5

Now, just a few demographic questions that will be used for classification purposes only.

12. What is your age? (WRITE AGE IN BLANK.)

13. Are there any children currently living in your home? (CIRCLE ONE ONLY.)

Yes.....1
No.....2

14. What one local radio station do you listen to most often? (WRITE STATION IN BLANK.)

15. What *local* television channel do you watch most often for the evening news? (WRITE CHANNEL IN BLANK.)

16. Do you subscribe to the local Sunday newspaper? (CIRCLE ONE ONLY.)

Yes.....1
No.....2

17. Do you ever make purchases using coupons you receive in the mail? (CIRCLE ONE ONLY.)

Yes.....1
No.....2

18. INTERVIEWER DO NOT ASK. PLEASE CIRCLE:

Male.....1

Female.....2

This completes our interview. Thank you for your cooperation.