



GfK MRI

The Secret Sauce of Marketing to Frequent QSR Patrons

Insights for Marketers

Quick Serve Restaurant “Frequent Patrons” – like everyone else – possess wide-ranging attitudes and behaviors that affect their purchasing decisions. By identifying and understanding their attitudes and actions, marketers can gain insights to develop fully integrated strategies. This analysis summarizes findings from GfK MRI’s *Survey of the American Consumer* to provide key ingredients for the QSR marketer’s secret sauce.

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The Secret Sauce of Marketing to Frequent QSR Patrons

Introduction

Quick Serve Restaurant “Frequent Patrons” are on the lookout for ways to live healthier, but like many of us they habitually make unhealthy choices. And some care – conceptually – about supporting companies that are environmentally responsible, but will not give up convenience to be green themselves.

Glossary

Frequent Patrons: Top two quintiles of adult QSR Patrons (visited in last month)

Synonym: Frequent Users

All Patrons: Visited Chain Type in last 30 days at least once.

Synonym: All Users, Total Users

By identifying the attitudes and behaviors of QSR Patrons, especially Frequent Users (top two quintiles), marketers can gain insights to develop partnerships, sponsorships, promotions, menu offerings and communications strategies. GfK MRI provides key ingredients for the QSR marketer’s secret sauce. Our *Survey of the American Consumer* offers insights about patrons ages 18+ on a broad spectrum of issues – including areas of interest to QSR marketers about customer attitudes and behaviors regarding:

- Dining, health and nutrition.
- Corporate transparency and environmental responsibility.
- Mobile activities, particularly those pertinent to marketers.

GfK MRI used the Sandelman Research Chain Type Usage categorization of QSR brands – with permission from Sandelman – as a foundation for this analysis. Sandelman categorizes QSRs into six groups; five of which are used here: Burger, Chicken Sandwich, Mexican and Pizza. (Sandelman’s miscellaneous category is not included.)

[McDonald’s](#) recently pledged \$2 million to aid disaster relief efforts in Japan.

34% of McDonald’s customers say they expect the brands they buy to support social causes.

Insights are presented from two perspectives:

Part One – Attitudes and behaviors of Frequent Patrons across Chain Types compared to a base of All Adults.

Part Two – Attitudes and behaviors of Frequent Patrons drilled down to GfK MRI Life Cycle data for Burger, Sandwich and Mexican Chain Types. These insights show how consumers react differently based on “where they are in life” – such as their age, their marital status and whether or not they have children.

Part Three – The methodology and an appendix are provided.

Part One

Attitudes and Actions: Comparing Frequent QSR Patrons Across Chain Types

When attitudes and behaviors of Frequent QSR patrons are compared across Chain Types, marketers can see where consumers stand on issues important to the industry. From aspiring to eat healthy to saying that trusting a company impacts purchase decisions, Frequent Users often think and act in ways different than All Adults.

Dinner and a Movie

Frequent Mexican Chain Type Patrons are 80% more likely than All Adults to go to the movies 2-3 times a month. Frequent Sandwich Chain Patrons are 62% more likely, and Frequent Burger Chain Patrons are 29% more likely.

Frequent Users also contradict themselves. Discrepancies between what they say and what they do are repeatedly seen in their attitudes and behaviors involving food, health and nutrition as well as transparency and environmental issues.

Dining, Overall Health & Nutrition

On several issues important to QSR marketers, Frequent Chain Type Users share similar attitudes and behaviors with the adult population as a whole, but they also differ on other important points. For instance, here are statements for which significant numbers of consumers in both groups respond comparably:

- I am always looking for new ways to live a healthier life.
- I enjoy trying different types of food.
- I prefer cooking with fresh food rather than canned or frozen.

Some of the differences between Frequent Chain Type Patrons and All Adults, however, show that Frequent Users, not surprisingly, possess attributes that drive heavy QSR usage, such as often eating on the run and preferring alternatives to cooking.

Additionally, understanding the divide between what Frequent Users *say* and what they *do* provides marketable insights. For instance, although they claim they are always looking for ways to live healthier, when it comes to “walking the walk,” they do not follow through, and they admit it. Marketers can integrate this knowledge into campaigns that further emphasize healthy QSR offerings.

The following table summarizes differences among Frequent QSR Chain Type Patrons using the “+” symbol to indicate a greater than expected tendency to agree with statements and the “-” symbol to indicate a less than expected tendency to agree.

Dining, Food & Nutrition						
Frequent QSR Patrons compared to All Adults						
Frequent QSR Customers Index high (+) or low (-)						
+ Index 110-119	++++ Index 140-149	- Index 80 - 90				
++ Index 120-129	+++++ Index 150 or greater	-- Index 70 - 79				
+++ Index 130-139						
	Total Adults	Freq. Burger Chain Patron	Freq. Chicken Chain Patron	Freq. Sandwich Chain Patron	Freq. Mexican Chain Patron	Freq. Pizza Chain Patron
I try to eat healthy these days and pay attention to nutrition.	81%	-				-
In general, I feel I eat right.	79%	-				
I try to eat a healthy breakfast daily.	63%	-			-	
Dinners in my house are usually planned ahead of time.	62%				-	
I'd rather prepare a meal than eat in a restaurant	62%			-		
I follow a regular exercise routine.	56%	-				-
Often, I eat meals on the run.	43%	+++	++	++	+++	++
I don't pay much attention to my intake of fat.	43%	+	+		+	+
I prefer picking up quick meals to cooking.	38%	++	++	++	++	+++
I regularly eat organic food.	32%	-				

Transparency and Environmental Responsibility

QSR Frequent Patrons – like consumers in general – place a premium on trusting companies with which they do business. In fact, upwards of seven in ten say they would pay more for products made by a trustworthy company. But that confidence can be blanket – many do not go beyond saying that trust matters in any level of detail.

Frequent QSR Patrons also align with All Adults on a few other transparency and environmental issues, in addition to trust:

- I am willing to pay more for a product that is environmentally safe.
- A company's environmental record is important to me in my purchasing decisions.

Shown below are instances where Frequent Patrons differ from All Adults:

Frequent QSR Patrons Transparency and Environmental Responsibility Frequent QSR Customers Index low (-) compared to Total Adults						
+ Index 110-119		++++ Index 140-149		- Index 80 - 90		
++ Index 120-129		+++++ Index 150 or greater		-- Index 70 - 79		
+++ Index 130-139						
	Total Adults	Freq. Burger Chain Patron	Freq. Chicken Chain Patron	Freq. Sandwich Chain Patron	Freq. Mexican Chain Patron	Freq. Pizza Chain Patron
I always check the ingredients and nutritional content of food products before I buy them.	58%	—			—	—
I am willing to give up convenience in return for a product that is environmentally safe.	52%				—	
I feel I am more environmentally conscious than most.	43%	—	—			

Cell Phone Activities

Although marketers are leveraging mobile devices for a range of strategies, many consumers' participation in all that mobile has to offer has not yet reached mass adoption. Frequent QSR Users, however, are significantly more likely to "visit," "text" and more, via their cell phones – giving marketers touch points for connecting with patrons on the go.

The following table shows cell phone activities among All Adults and those activities for which Frequent QSR Patrons are more likely to participate.

Frequent QSR Patrons More likely than Total Adults to use cell phones for range of activities						
Frequent QSR Customers Index high (+) compared to All Adults						
	+ Index 110-119	++++	Index 140-149		- Index 80 - 90	
	++ Index 120-129	+++++	Index 150-189		-- Index 70 - 79	
	+++ Index 130-139	++++++	Index 190 or greater			
	Total Adults	Freq. Burger Chain	Freq. Chicken Chain	Freq. Sandwich Chain	Freq. Mexican Chain	Freq. Pizza Chain
Visited search engine or website for news, maps/directions or sports, weather, entertainment or financial information	15%	++	++ ++	++ ++	++ +++	++ +++
Received text message "alert"	10%	+++	++ +++	++ ++	++ ++	++ ++
Watched video clip	7%	++ ++	+++	++ +++	+++ +++	++ +++
Used text to vote in contest, make choice or give opinion	4%	++ +++	++ +++	++ +++	+++ +++	+++ +++
Signed up for text "alert" service	4%	++ +++	+++ +++	++ +++	+++ +++	+++ +++
Looked at ad sent via text	4%	++ ++	++	+++	++ +++	+++ +++
Used text to respond to ad	2%	++ +++	+++ +++	++ +++	+++ +++	+++ +++

Not only are Frequent Patrons as a whole more likely than All Adults to use mobile devices for many activities, but Frequent Patrons of individual Chain Types are considerably more likely than All Users of that Chain Type to use cell phones for activities that can be leveraged by marketers. Shown below are indices of Burger, Sandwich and Mexican Frequent Chain Type Patrons compared to Any User of those corresponding Chains:

**Frequent Burger, Sandwich and Mexican Chain Type Patrons
More likely than All Patrons to use cell phones for mobile activities**

Frequent Patrons compared to All (corresponding) Chain Patrons (1+ times in past 30 days)

+ Index 110-119	++++ Index 140-149	- Index 80 - 90
++ Index 120-129	+++++ Index 150-189	-- Index 70 - 79
+++ Index 130-139	++++++ Index 190 or greater	

	Freq. Burger Patrons Index	Freq. Sandwich Patrons Index	Freq. Mexican Patrons Index
Visited search engine or visited website for news, maps/directions or sports, weather, entertainment, financial information	+	++	++
Received text message "alert"	++	++	
Signed up for a text message "alert" service	++ ++	++ +++	+++
Watched video clip	+++	+++	++ ++
Used text to vote in contest, make choice, or give opinion	++ ++	++ ++	++ +++
Looked at ad sent with text	+++	+	+++
Used text messaging to respond to ad	++ +++	++ ++	++ +++

Part Two

Life Cycles – A Closer Look at Frequent Burger, Sandwich and Mexican Chain Type Patrons

GfK MRI data show that it's not always enough to treat a standard target as monolithic whole when marketing to Frequent Chain Type Patrons. Analyzing customers by Life Cycle can bring out attitudinal and behavioral differences that distinguish certain consumers. Featured here are Frequent Chain Type Patrons in Age 35-49 Life Cycle groups who:

- Live in 1 Person Households
- Are Married and live in households:
 - With no children younger than 18
 - Where the youngest child is < 6
 - Where the youngest child is 6-11
 - Where the youngest child is 12-17

The top two quintiles of Burger and Sandwich Chain Type Patrons are more likely than All Adults to take the diabetes drug Glucophage.

They also over index for the purple pill, Nexium, used to treat acid reflux.

Like Frequent Users in general, most Life Cycle groups of Frequent Users possess attitudes and behaviors attractive to fast food marketers. However a closer look shows many instances where certain Life Cycles are even *more* likely than the Chain Type's typical Frequent Users to claim attributes QSR marketers can leverage.

Subway Patrons index 133 against All Adults for using Weight Watchers.

Trust appears again as a critical issue across all Life Cycle groups, but to varying degrees, it does not extend to finer points like evaluating labels or being mindful of a company's environmental responsibility.

Shown below is a comparison of Burger, Sandwich and Mexican Chain Types. Examples of Life Cycle data are provided for dining, food and health as well as transparency and environmental responsibility issues.

Burger Chain Type Frequent Patrons

Dining, Nutrition and Health

Life Cycle groups of Frequent Burger Patrons have a lot in common with Frequent Burger Patrons as a whole, such as agreeing that:

- In general, I feel I eat right.
- I try to eat health healthy these days and pay attention to my nutrition.
- I am always looking for ways to live a healthier life.
- I try to eat a healthy breakfast everyday.
- I enjoy trying different types of food.
- I don't pay much attention to my intake of fat.
- I follow a regular exercise routine.

But there are several instances where certain Life Cycle groups possess more strongly-held sentiments. Identifying them can help marketers fine-tune strategies:

Frequent Burger Patrons Life Cycle Impacts Dining Food & Nutrition Actions and Attitudes						
Frequent Burger Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Burger Patrons						
	+ Index 110-119 ++ Index 120-129 +++ Index 130-139	++++ Index 140-149 +++++ Index 150 or greater			- Index 80 - 90 -- Index 70 - 79	
	All Freq. Burger Chain Patrons	1 person HH	Married No Children	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
I'm a creature of habit; I stick to the food I like.	68%	+				
I prefer cooking with fresh food rather than canned/frozen.	67%	-				
I'd rather prepare a meal than eat in a restaurant.	56%	-	+			
Dinners in my house are usually planned in advance.	56%	-			+	
Often, I eat on the run.	56%	++				
I prefer picking up quick meals to cooking.	49%	+				+
I regularly eat organic food.	28%					--

Transparency and Environmental Responsibility

Life Cycle groups of Frequent Burger Patrons align with All Frequent Burger Patrons on a few transparency and environmental attitudes and behaviors:

- If a product is made by a company I trust, I'll buy it even if it is slightly more expensive.
- I am willing to pay more for a product that is environmentally safe.
- I always check the ingredients and nutritional content of food products before I buy them.
- I am willing to give up convenience in return for a product that is environmentally safe.

Married couples with children, however, stand out as being less likely to agree with key “green” sentiments:

Frequent Burger Patrons Life Cycle Impacts Transparency and Environmental Responsibility Actions and Attitudes				
Frequent Burger Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Burger Patrons				
+ Index 110-119 ++ Index 120-129 +++ Index 130-139	++++ Index 140-149 +++++ Index 150 or greater	– Index 80 - 90 – – Index 70 - 79		
	All Freq. Burger Chain Patrons	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
A company's environmental record is important in my purchasing decisions.	44%		–	
I feel I am more environmentally conscious than most.	37%	–		–

Sandwich Chain Type Patrons

Dining, Health and Nutrition

Across all Life Cycle groups, Frequent Patrons of Sandwich Chain Types respond similarly to the following statements:

- I try to eat healthy these days and pay attention to my nutrition.
- I am always looking for ways to live a healthier life.
- I enjoy trying different types of food.
- I'd rather prepare a meal than eat in a restaurant.

Life Cycle groups, however, possess several attitudes and behaviors that differ, especially pertaining to unhealthy living. This perhaps is a call to ramp up marketing of healthful advantages that Sandwich restaurants already promote, when targeting these subgroups.

Frequent Sandwich Patrons Life Cycle Impacts Dining Food & Nutrition Actions and Attitudes						
Frequent Sandwich Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Sandwich Patrons						
		+ Index 110-119 ++ Index 120-129 +++ Index 130-139	++++ Index 140-149 +++++ Index 150 or greater		- Index 80 - 90 -- Index 70 - 79	
	All Freq. Sandwich Chain Patrons	1 Person HH	Married No Children	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
In general, I feel I eat right.	76%		-			-
I prefer cooking with fresh food rather than canned/frozen.	72%	-				-
I'm a creature of habit; I stick to the food I like.	67%	+		-		
I try to eat a healthy breakfast everyday.	64%			-		-
I follow a regular exercise routine.	58%	-			-	-
Dinners in my house are usually planned in advance.	58%	--	-		-	
Often, I eat on the run.	54%	++				
I don't pay much attention to my intake of fat.	42%	+				
I regularly eat organic food.	32%		-	+	-	
I prefer picking up quick meals to cooking.	46%	+		-		

Transparency and Environmental Responsibility

Frequent Sandwich Users all agree with the statement “I am willing to pay more for a product that is environmentally safe.”

While couples with older children (12-17) are more prone to cite the importance of corporate trust, overall, married couples with kids are less likely to agree with certain green statements:

Frequent Sandwich Patrons Life Cycle Impacts Transparency and Environmental Responsibility Actions and Attitudes					
Frequent Sandwich Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Sandwich Users					
+ Index 110-119 ++ Index 120-129 +++ Index 130-139	++++ Index 140-149 +++++ Index 150 or greater	– Index 80 - 90 – – Index 70 - 79			
	All Freq Sandwich Chain Patrons	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17	
If a product is made by a company I trust, I'll buy it even if it costs slightly more.	76%				+
I always check the ingredients and nutritional content of food products before I buy them.	57%		–		–
I am willing to give up convenience in return for a product that is environmentally safe.	50%	–			
A company's environmental record is important in my purchasing decisions.	44%		–		
I feel I am more environmentally conscious than most.	42%				–

Mexican Chain Type Patrons

Dining, Health and Nutrition

Across all Life Cycle groups, Frequent Patrons of Mexican Chain Types respond similarly to the following statements:

- I am always looking for ways to live healthier.
- In general, I feel I eat right.
- I try to eat a healthy breakfast everyday.
- I prefer picking up quick meals to cooking.

Life Cycle groups also possess many attitudes and behaviors different from those of All Frequent Mexican Chain Type Users:

Frequent Mexican Patrons Life Cycle Impacts Dining Food & Nutrition Actions and Attitudes						
Frequent Mexican Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Mexican Chain Type Patrons						
		+ Index 110-119 ++ Index 120-129 +++ Index 130-139	++++ Index 140-149 +++++ Index 150 or greater		- Index 80-90 -- Index 70-79 --- Index 60-69	
	All Freq. Mexican Chain Patrons	1 Person HH	Married No Children	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
I try to eat healthy these days and pay attention to my nutrition.	74%				+	
I enjoy trying different types of food.	73%			-		
I prefer cooking with fresh food rather than canned/frozen.	67%	-	+			
I'm a creature of habit; I stick to the food I like.	64%		++			
Often, I eat on the run.	57%	++				-
I'd rather prepare a meal than eat in a restaurant.	57%	--		+	+	+
I follow a regular exercise routine.	52%					++
Dinners in my house are usually planned in advance.	55%					-
I don't pay much attention to my intake of fat.	48%				---	

Transparency and Environmental Responsibility

Many Frequent User Life Cycle groups of Mexican Chains are more likely than All Frequent Patrons of this Chain Type to express the importance of transparency and environmental issues. The only statement that both Life Cycle groups and All Frequent Users respond to comparably is, "I am willing to give up convenience in return for a product that is environmentally safe."

Frequent Mexican Chain Type Patrons Life Cycle Impacts Transparency and Environmental Responsibility Actions and Attitudes					
Frequent Mexican Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Mexican Type Patrons					
+ Index 110-119		++++ Index 140-149		- Index 80 - 90	
++ Index 120-129		+++++ Index 150 or greater		-- Index 70 - 79	
+++ Index 130-139					
	All Freq. Mexican Chain Patrons	Lives in 1 person HH	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
If a product is made by a company I trust, I'll buy it even if it costs slightly more.	70%			+	+
I am willing to pay more for a product that is environmentally safe.	51%	++		+	
I always check the ingredients and nutritional content of food products before I buy them.	50%	+	+	++	
A company's environmental record is important in my purchasing decisions.	46%		-		++++

Part Three

Methodology - About this Analysis

GfK MRI interviews approximately 26,000 U.S. adults in person each year to produce the [Survey of the American Consumer™](#). Included in the *Survey* are insights on consumer media use, consumption of more than 6,000 products in 550 categories, lifestyles and attitudes. Because these interviews are structured as an area probability study, the results are projectable to the entire U.S. adult population. The *Survey* also serves as a foundation for an array of GfK MRI research products that answer the market's need for granular, cross-media and consumer-focused information.

GfK MRI is part of The GfK Group, based in Nuremberg, Germany. The Group delivers a range of information and consultancy services in three business sectors: Custom Research, Retail & Technology and Media. It is the No. 4 market research organization worldwide, operates in more than 100 countries and employs over 10,000 staff, more than 80% of whom are based outside of Germany. For further information on GfK MRI, visit our Web site www.gfkmri.com.

GfK MRI measures more than 60 QSR brands. Chain Types and brands included in this analysis include ¹:

Burger Chains - A & W; Burger King, Carl's Jr., Checkers, Hardee's, Jack in the Box, McDonald's, Sonic Burger, Steak 'N Shake, Wendy's, Whataburger and White Castle.

Chicken Chains - Bojangles, Boston Market, Chick-Fil-A, Church's Fried Chicken, El Pollo Loco, KFC, Popeye's and Wing-Stop.

Sandwich - Arby's, Au Bon Pain, Blimpie Subs & Salads, Panera Bread, Quizno's, Schlotzsky's and Subway.

Mexican - Baja Fresh Mexican Grill, Chipotle Mexican Grill, Del Taco, Taco Bell and Taco Time.

Pizza - Chuck E Cheese, Domino's Pizza, Godfather's Pizza, Little Caesars, Papa John's, Pizza Hut, Pizza Inn, Round Table Pizza, Sbarro.

The top two quintiles of QSR usage are based on number of visits in last 30 days. The top two quintiles represent numbers of visits per Chain Type as follows: Burger – 8+, Chicken – 5+, Sandwich – 5+, Mexican – 5+ and Pizza – 4+.

This analysis provides examples of GfK MRI's psychographic and behavioral data. A wide range of other QSR insights are provided in the *Survey*. For more information, please call Paul Gold at (212) 884-9276 or send him an email at Paul.Gold@gfkmri.com.

¹. Other brands in the GfK-MRI data not included in this analysis are: Baskin-Robbins, Ben & Jerry's, Captain D's, Dairy Queen, Dunkin' Donuts, Einstein Bros. Bagel Shop, Fazoli's, Fudruckers, Krispy Kreme Doughnuts, Krystal, Long John Silver's, Orange Julius, Papa Murphy's, Rally's, Starbucks, TCBY, and Wienerschnitzel.

Appendix - Part One – Attitudes and Actions: Comparing Frequent QSR Patrons Across Chain Types

In this appendix, the tables include indices that are represented with symbols in Parts One.

Dining, Food & Nutrition Frequent QSR Patrons compared to All Adults						
Frequent QSR Customers Index high (+) or low (-)						
	Total Adults	Freq. Burger Chain Patron	Freq. Chicken Chain Patron	Freq. Sandwich Chain Patron	Freq. Mexican Chain Patron	Freq. Pizza Chain Patron
		Index	Index	Index	Index	Index
I try to eat healthy these days and pay attention to nutrition.	81%	89				89
In general, I feel I eat right.	79%	89				
I try to eat a healthy breakfast daily.	63%	89			90	
Dinners in my house are usually planned ahead of time.	62%				90	
I'd rather prepare a meal than eat in a restaurant.	62%			89		
I follow a regular exercise routine.	56%	85				89
Often, I eat meals on the run.	43%	131	128	125	133	128
I don't pay much attention to my intake of fat.	43%	118	117		113	119
I prefer picking up quick meals to cooking.	38%	129	126	121	129	132
I regularly eat organic food.	32%	87				

**Frequent QSR Patrons
Transparency and Environmental Responsibility**

Frequent QSR Customers Index low (-) compared to Total Adults

	Total Adults	Freq. Burger Chain Patron	Freq. Chicken Chain Patron	Freq. Sandwich Chain Patron	Freq. Mexican Chain Patron	Freq. Pizza Chain Patron
		Index	Index	Index	Index	Index
I always check the ingredients and nutritional content of food products before I buy them.	58%	85			87	88
I am willing to give up convenience in return for a product that is environmentally safe.	52%				90	
I feel I am more environmentally conscious than most.	43%	87	86			

**Frequent QSR Patrons
More likely than Total Adults to use cell phones for range of activities**

Frequent QSR Customers Index high (+) compared to All Adults

	Total Adults	Freq. Burger Chain	Freq. Chicken Chain	Freq. Sandwich Chain	Freq. Mexican Chain	Freq. Pizza Chain
		Index	Index	Index	Index	Index
Visited search engine or website for news, maps/directions or sports, weather, entertainment or financial information	15%	128	145	145	165	158
Received text message "alert"	10%	135	151	149	145	145
Watched video clip	7%	146	139	156	212	185
Used text to vote in contest, make choice or give opinion	4%	165	171	163	223	207
Signed up for text "alert" service	4%	160	190	181	198	205

Looked at ad sent via text	4%	148	125	136	187	200
Used text to respond to ad	2%	167	219	168	265	236

Frequent Burger, Sandwich and Mexican Chain Type Patrons More likely than All Patrons to use cell phones for mobile activities			
Frequent Patrons compared to All (corresponding) Chain Patrons (1+ times in past 30 days)			
	Freq. Burger Patrons Index	Freq. Sandwich Patrons Index	Freq. Mexican Patrons Index
	Index	Index	Index
Visited search engine or visited website for news, maps/directions or sports, weather, entertainment, financial information	118	122	124
Received text message "alert"	121	123	
Signed up for a text message "alert" service	146	150	131
Watched video clip	130	130	141
Used text to vote in contest, make choice, or give opinion	149	141	152
Looked at ad sent with text	132	116	134
Used text messaging to respond to ad	152	146	185

Appendix - Part Two
Life Cycles – A Closer Look at Frequent Burger, Sandwich and Mexican Chain Type Patrons

Burger Chain Type Patrons - Appendix

Frequent Burger Patrons Life Cycle Impacts Dining Food & Nutrition Actions and Attitudes						
Frequent Burger Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Burger Patrons						
	Top Two Boxes Frequent Use	1 person HH	Married No Children	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
		Index	Index	Index	Index	Index
I'm a creature of habit; I stick to the food I like.	68%	110				
I'd rather prepare a meal than eat in a restaurant.	56%	87	112			
I prefer cooking with fresh food rather than canned/frozen.	67%	88				
Dinners in my house are usually planned in advance.	56%	83			110	
Often, I eat on the run.	56%	127				
I prefer picking up quick meals to cooking.	49%	112				112
I regularly eat organic food.	28%					70

**Frequent Burger Patrons
Life Cycle Impacts Dining Food & Nutrition
Actions and Attitudes**

Frequent Burger Patrons by Life Cycle Index high (+) or index low (-)
compared to All Frequent Burger Patrons

	Top Two Boxes Frequent Use	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
		Index	Index	Index
I feel I am more environmentally conscious than most.	37%	90		84
A company's environmental record is important in my purchasing decisions.	44%		89	

Sandwich Chain Type Patrons - Appendix

**Frequent Burger Patrons
Life Cycle Impacts Dining Food & Nutrition
Actions and Attitudes**

Frequent Burger Patrons by Life Cycle Index high (+) or index low (-)
compared to All Frequent Burger Patrons

	Top Two Boxes Frequent Use	1 Person HH	Married No Children	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
		Index	Index	Index	Index	Index
In general, I feel I eat right.	76%		88			87
I'm a creature of habit; I stick to the food I like.	67%	111		86		
I try to eat a healthy breakfast everyday.	64%			89		89
I follow a regular exercise routine.	58%	86			88	85
I prefer cooking with fresh food rather than canned/frozen.	72%	82				90
Dinners in my house are usually planned in advance.	58%	73	89		89	

Often, I eat on the run.	54%	123				
I prefer picking up quick meals to cooking.	46%	115		90		
I don't pay much attention to my intake of fat.	42%	119				
I regularly eat organic food.	32%		81	110	82	

Frequent Sandwich Patrons Life Cycle Impacts Transparency and Environmental Responsibility Actions and Attitudes				
Frequent Sandwich Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Sandwich Users				
	All Freq Sandwich Chain Patrons	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
	Index	Index	Index	Index
If a product is made by a company I trust, I'll buy it even if it costs slightly more.	76%			112
I always check the ingredients and nutritional content of food products before I buy them.	57%		89	89
I am willing to give up convenience in return for a product that is environmentally safe.	50%	89		
I feel I am more environmentally conscious than most.	42%			81
A company's environmental record is important in my purchasing decisions.	46%		89	

Mexican Chain Type Patrons - Appendix

Frequent Mexican Patrons Life Cycle Impacts Dining Food & Nutrition Actions and Attitudes						
Frequent Mexican Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Mexican Chain Type Patrons						
	All Freq. Mexican Chain Patrons	1 Person HH	Married No Children	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
		Index	Index	Index	Index	Index
I try to eat healthy these days and pay attention to my nutrition.	74%				119	
I enjoy trying different types of food.	73%			82		
I'm a creature of habit; I stick to the food I like.	64%		122			
I'd rather prepare a meal than eat in a restaurant.	57%	72		112	113	112
I follow a regular exercise routine.	52%					122
I prefer cooking with fresh food rather than canned/frozen.	67%	89	112			
Dinners in my house are usually planned in advance.	55%					88
Often, I eat on the run.	57%	121				86
I don't pay much attention to my intake of fat.	48%				67	

**Frequent Mexican Chain Type Patrons
Life Cycle Impacts Transparency and Environmental Responsibility
Actions and Attitudes**

Frequent Mexican Patrons by Life Cycle Index high (+) or index low (-) compared to All Frequent Mexican Type Patrons

Agree with Statement	All Freq. Mexican Chain Patrons	Lives in 1 person HH	Married Youngest Child <6	Married Youngest Child 6-11	Married Youngest Child 12-17
		Index	Index	Index	Index
If a product is made by a company I trust, I'll buy it even if it costs slightly more.	70%			111	111
I always check the ingredients and nutritional content of food products before I buy them.	50%	113	110	124	
I am willing to pay more for a product that is environmentally safe.	51%	129		115	
A company's environmental record is important in my purchasing decisions.	46%		90		140