



Real Life.
Mapped.

Unwrapping the 2023 QSR Media strategy

Introduction

America's love of fast food chains has long been established, but with the rise of new options and new consumer behaviors, the difference in preferences between regions has become more pronounced.

Understanding the nuances across the country is what will, ultimately, help QSR brands to succeed.

In this short guide, we'll travel around the US to understand who QSR consumers are now, what they really want, how their preferences have adapted, what motivates them and where you can find them. Read on for a peek into consumers' minds and contact hello@blis.com

What's on people's minds when choosing a QSR restaurant

As the pandemic waned, quick-service restaurants gained market share. Though restaurants have yet to entirely return to pre-pandemic revenues, quick service and fast casual offerings have grown since 2021, with the US fast food and QSR business expected to be worth over \$450 billion by 2030.*

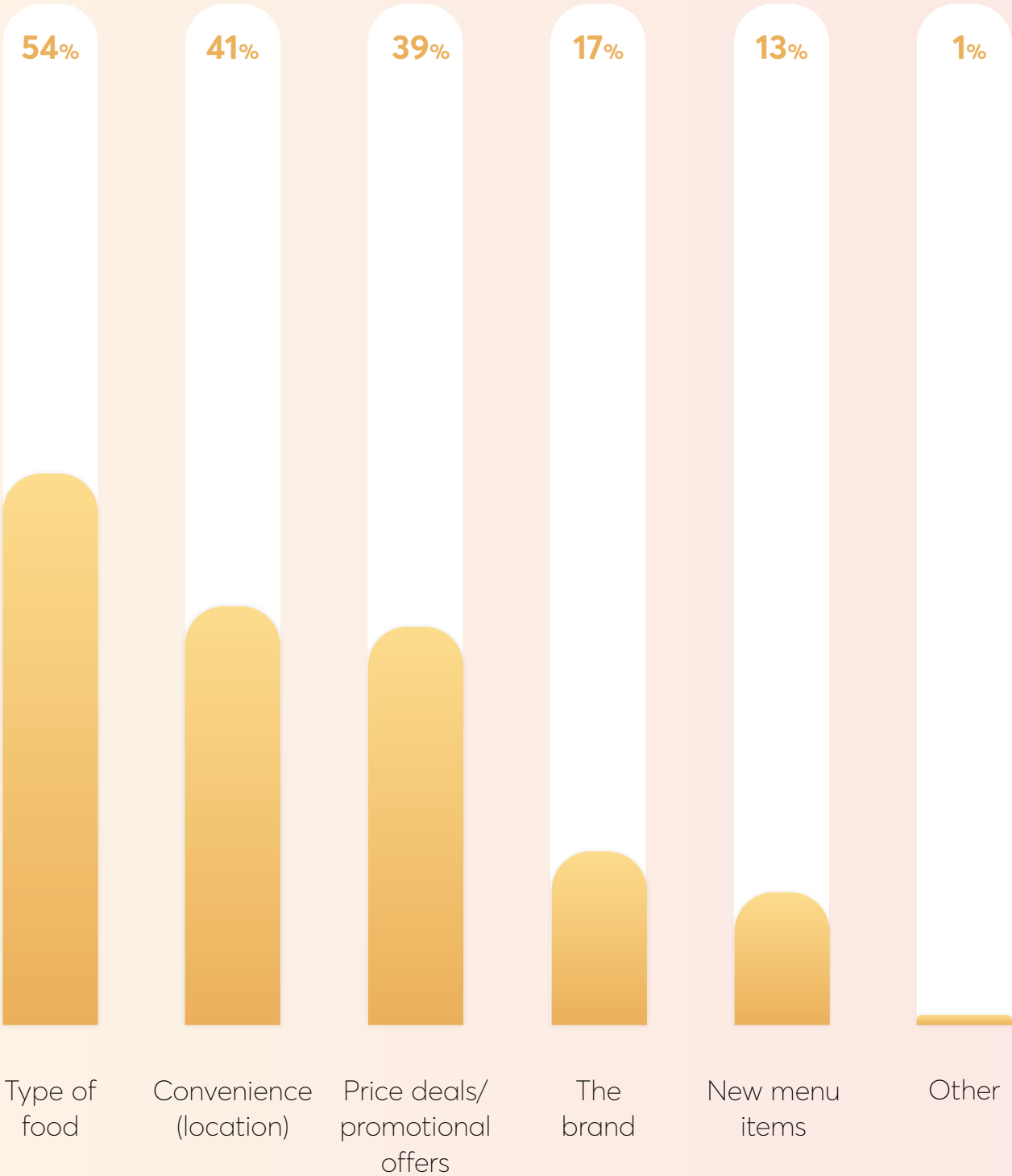
According to our findings, 96% of Americans eat fast food, and over a third (39%) do so many times in a month. While 7% of Americans order from fast food chains every day, households of four people are over 2x more likely to order it daily.



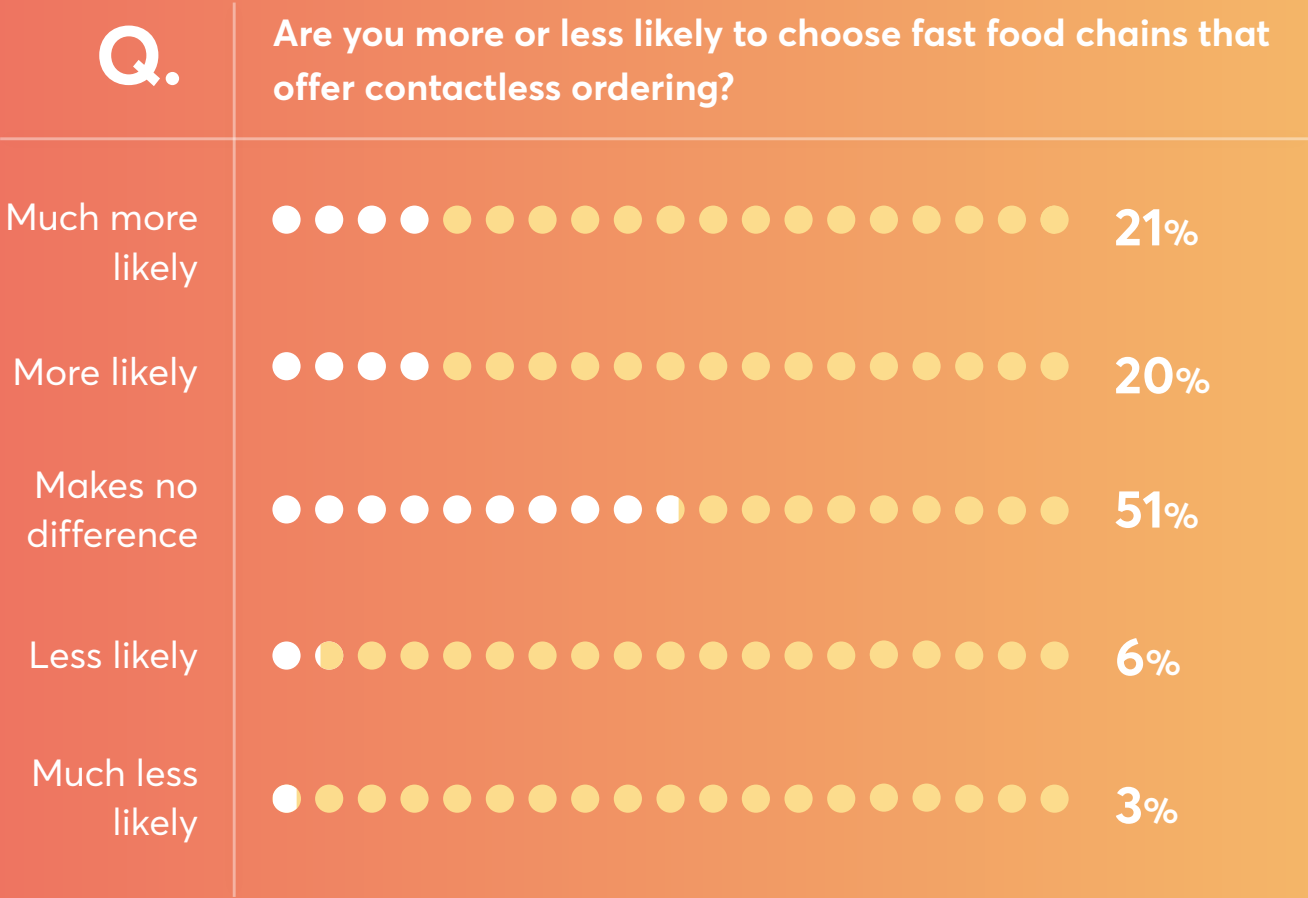
When deciding which fast-food chain to visit, 54% of people say that the type of food is the most important factor. However, location and promotional offers are increasingly important, according to 41% and 39% of Americans, respectively.

*according to Custom Market Insights

Which of the following factors are most important when deciding which fast-food chain to visit?



On top of that, **41% of Americans** are more likely to choose fast food chains that offer contactless ordering (**47% men and 34% women**). They would prefer a contactless experience because it's much faster than ordering at the counter, according to **42%** of them. However, consumers in the **Mid-Atlantic** stood out as the outlier, with just **17%** being more likely to order because of it.



Integrations with online payment platforms (e.g. Apple Pay, PayPal, etc.) are important for 36% of consumers.

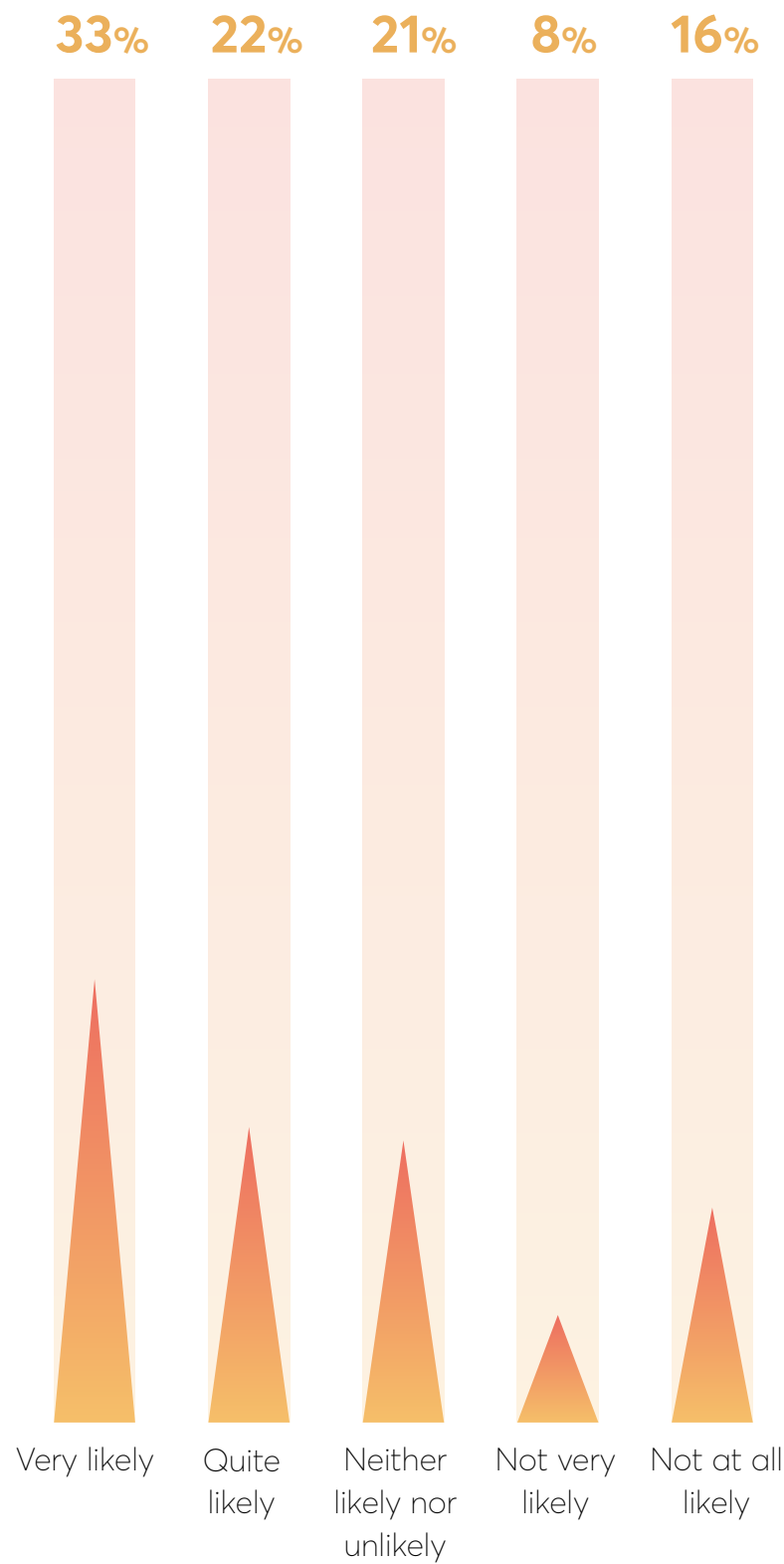
In comparison, delivery from services like Doordash and Grubhub is important for nearly a third of them (32%). Finally, an 'order now' button straight from Google search is considered important by one in every five consumers nationwide.



As people continue to look for ways to save money here and there, over half of QSR consumers **(55%)** are likely to download a restaurant app for rewards.

Special discounts are the favorite delivery app reward for **62% of Americans**, followed by freebies for new customers and exclusive meals, according to **35% of respondents**.

How likely are you to download apps from restaurants that offer rewards for utilizing these apps?



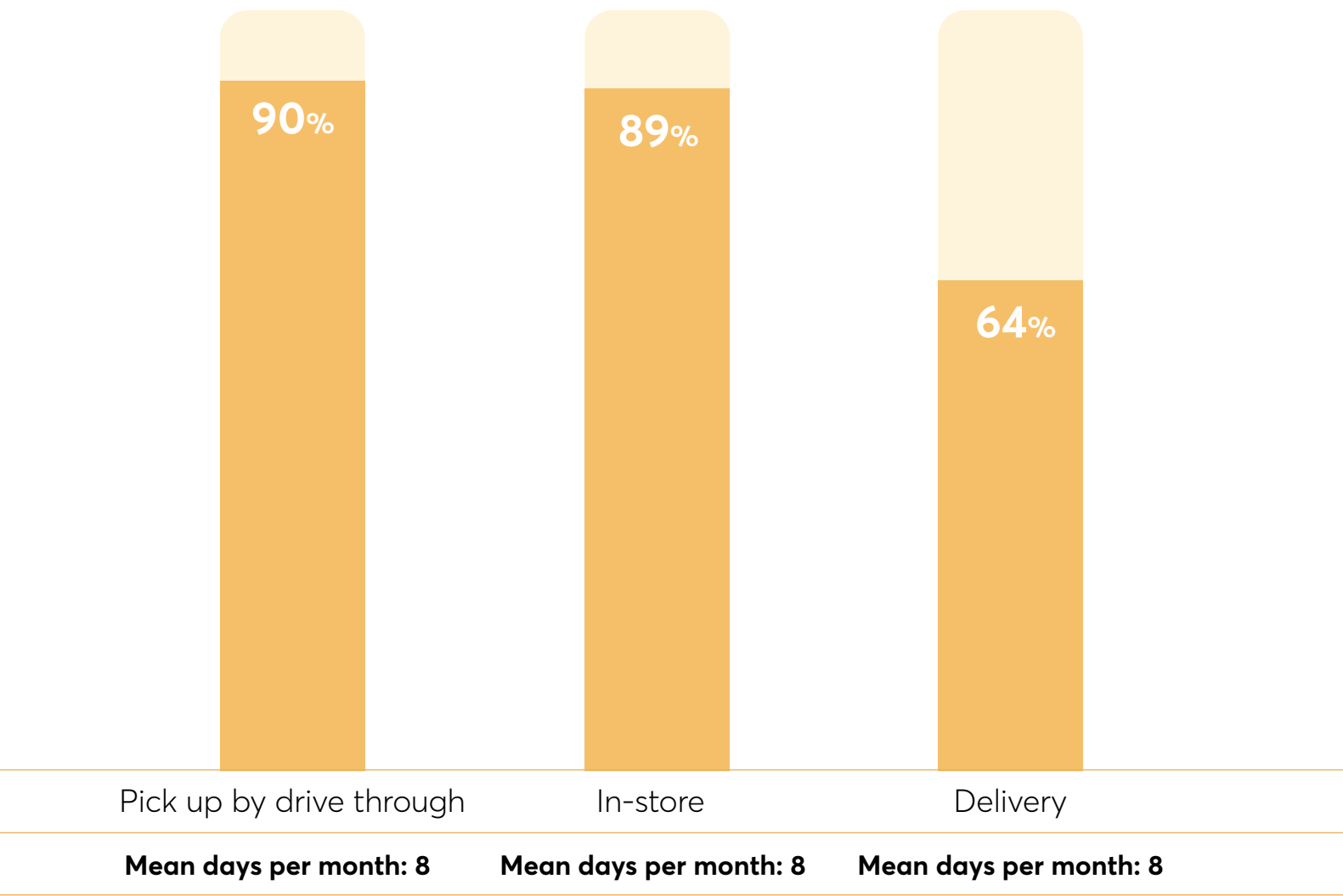
What kind of delivery app rewards are you most interested in?



Is it even the same country?

On average, consumers use each of these methods twice a week, with pick-up by drive-through being the most popular:

On average, how often do you use the following to eat fast food?



There are some meaningful regional differences across the USA. While, on average, **36%** of Americans **never order through delivery**, **72%** of people living in the **Northeast use a delivery service** at least **once a month** and **half** of consumers based in the **Mid-Atlantic** also use them.



People living in the **West** are more likely to eat in-store than the USA average. While **58%** of Americans, overall, **dine in-store just a couple of times** per month, **53%** of people in the **West eat in-store at least once a week**.

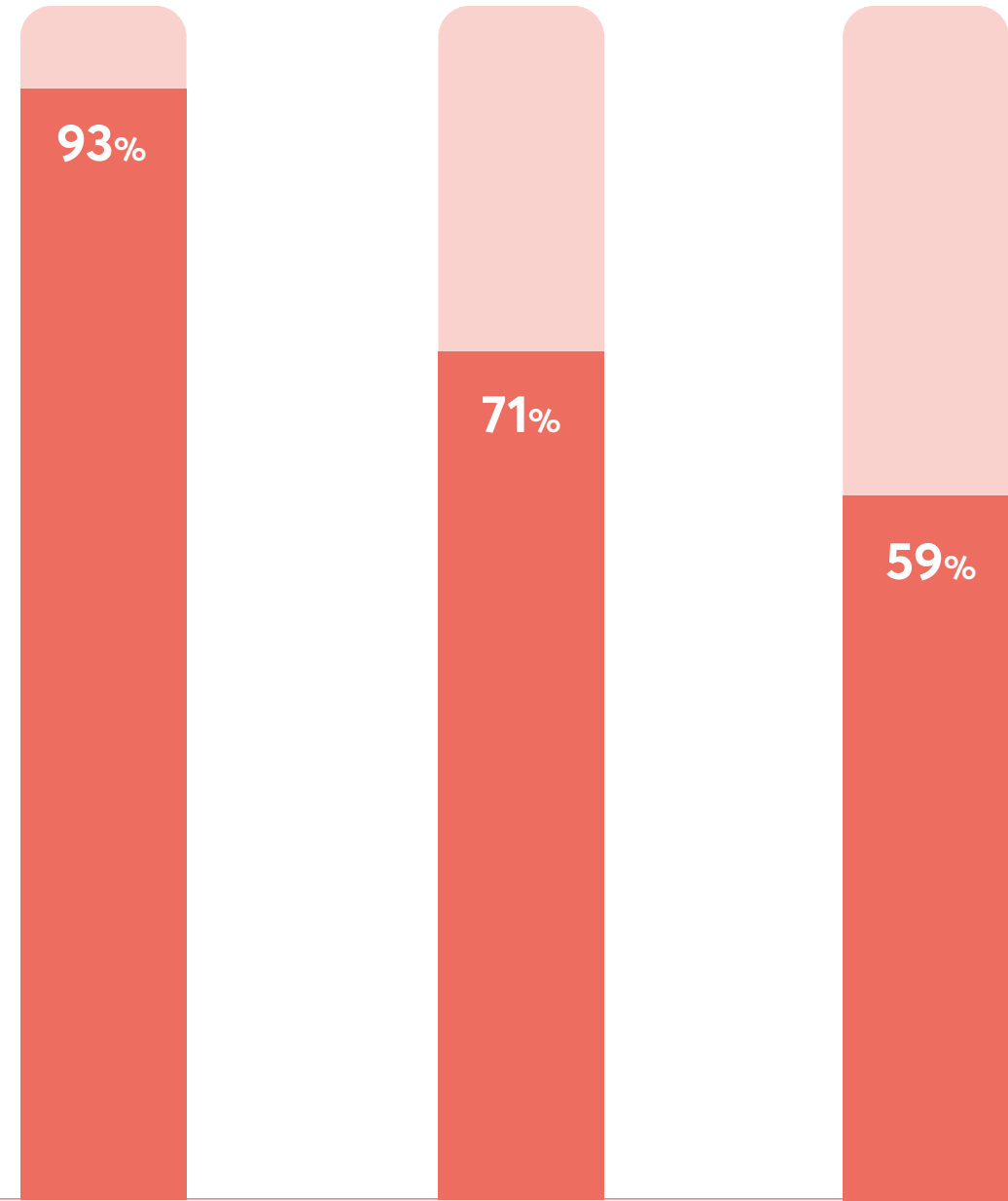


While **90%** of Americans pick up their fast food **orders by drive-through** at least **once a month**, **53%** of people living in the **Southwest use drive-through services at least once a week**, with **30%** doing so at least **three times a week**.

On average, over a third **(35%) of Americans** order fast food through restaurant apps **at least once a week**. However, these are less popular in the **Mid-Atlantic**, with **42% of consumers** never using them to order. In comparison, **27%** of people living in the **West** and **24% of consumers** living in the **Northeast** order via restaurant apps **at least three times a week**.

Looking at other shopping methods, on average, consumers order from a delivery app nine times a month:

On average, how often do you order using the following?



Order at the restaurant Order through restaurant app Order through a delivery app

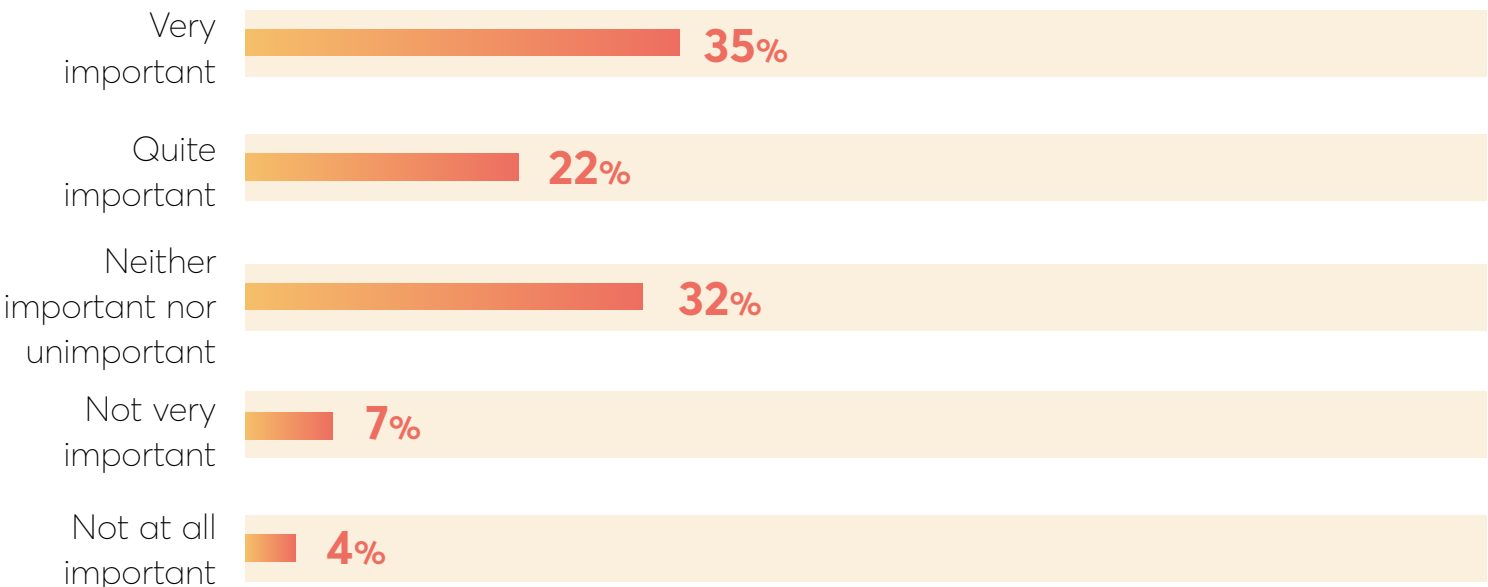
Mean days per month: 8 Mean days per month: 7 Mean days per month: 9

The pursuit of healthier options within the fast-food industry

In recent years, quick service restaurants have started to evolve their offerings beyond “junk” food by including healthier options in their menus.

More than half (57%) of Americans say it’s important to have healthy food options on a QSR menu (more likely for men). But, again, the household size plays an important role here. While **healthier options are considered very important** for 27% of people living on their own, the same is considered very important **for over half (60%) of households of 4 people.**

How important is having healthy food options available to you on a QSR (Quick Service Restaurant, e.g McDonald’s, Burger King, etc.) menu?



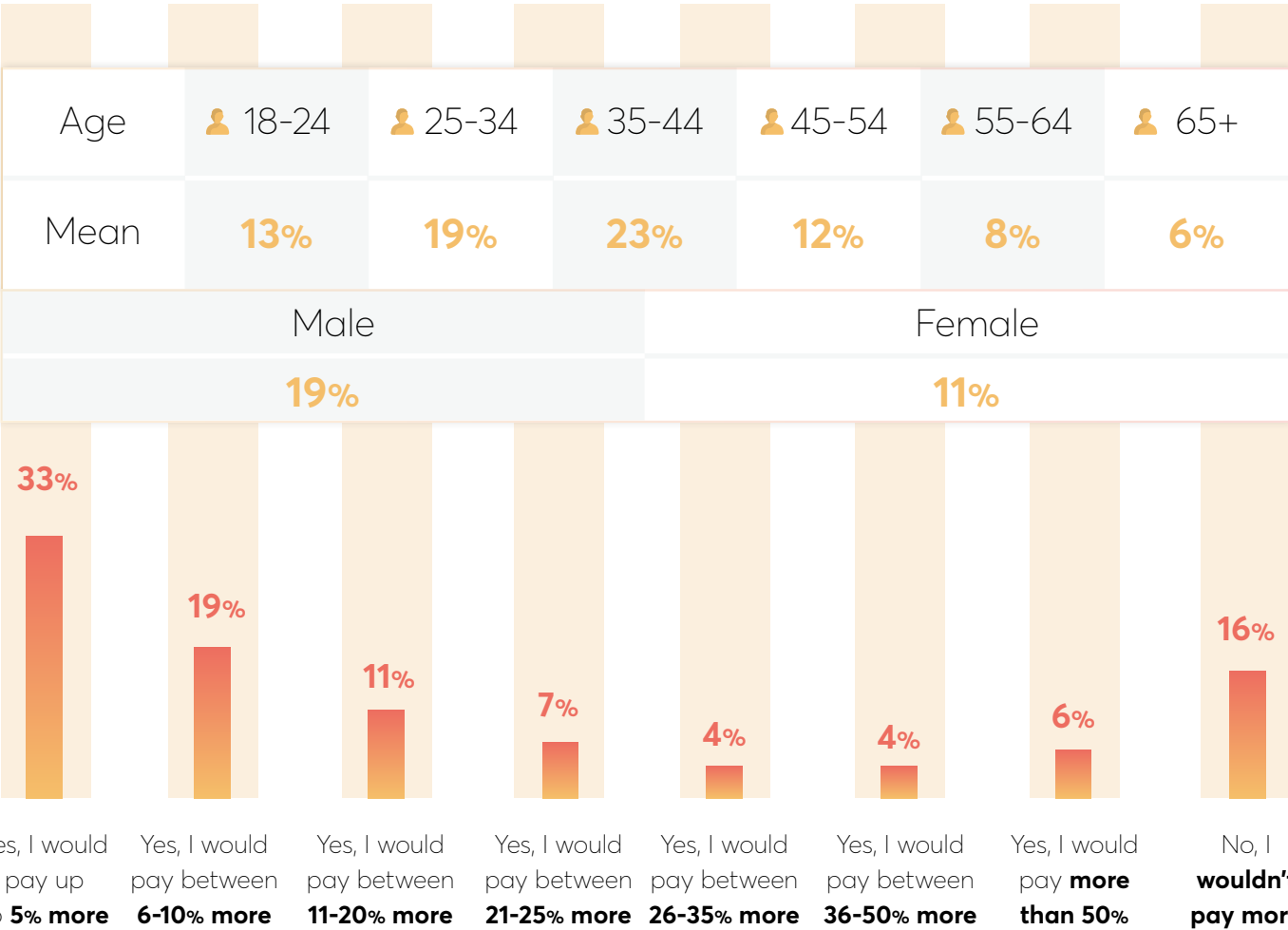
18-24	59%
25-34	69%
35-44	74%
45-54	53%
55-64	45%
65+	43%



Most Americans (84%) would pay, on average, up to 15% more to get a healthier option in a fast food restaurant. People between the ages of **35-44 are willing to pay** even more than the average, **up to 23% more**.

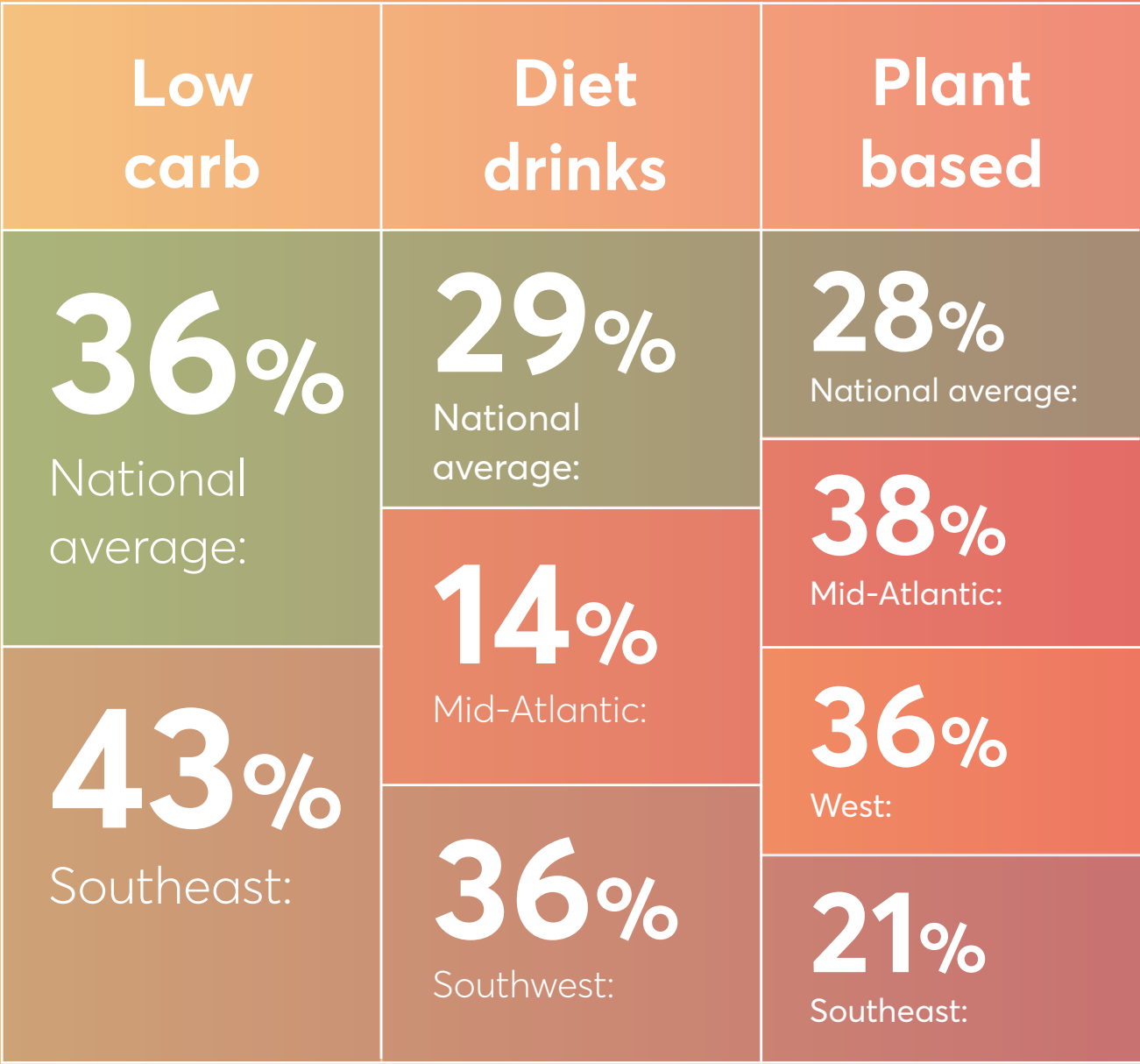
Nearly **10%** of consumers living in the **West** and **14%** of **households of four** people would **pay more than 50%** for a healthy option.

Would you be willing to pay more for a healthy option (e.g. low carb options, salads, etc) at a fast food chain? If so, how much more?



Salads are the favorite healthier option for 57% of Americans, followed by low-carb options (36%).

Diet drinks and plant-based options are also important, according to 29% of consumers. However, **it's worth noting the regional differences across the country:**



Useful tips to go, please!

As people become more mindful of spending, finding ways to save money is on QSR consumers' minds. However, **not everyone is looking for the same thing**, and while some consumers value awards and benefits, some are more interested – and even willing to pay more – to get healthier options when visiting fast food chains.

Grasping why people visit different QSR stores and how they order each time across the USA is key for a successful campaign. **The regional behaviors are so different that, sometimes, it's hard to believe we're still talking about the same country. Understanding these nuances across regions is crucial to your entire campaign, from creative to targeting and optimization strategies.** By anticipating what matters to shoppers, whether that's quality, cost, convenience, or indulgence, you can influence their fast-food habits and win their loyalty.



To maximize your chances of success in the fight for share of wallet, you should **rely on partners that can provide powerful audience insights, such as mobility, spending, and lifestyle data. Accuracy will ultimately help you build the right target audiences to restore granular performance without reliance on personal IDs.** Tailoring your messages and strategies to different types of shoppers will build top-of-mind awareness and ensure **you're always the first option** on the QSR consumers' menu.

Check out how you stack up to your competitors

We offer bespoke consultancy sessions for our QSR clients, sharing industry **competitor analysis** surfaced through **Audience Explorer**.

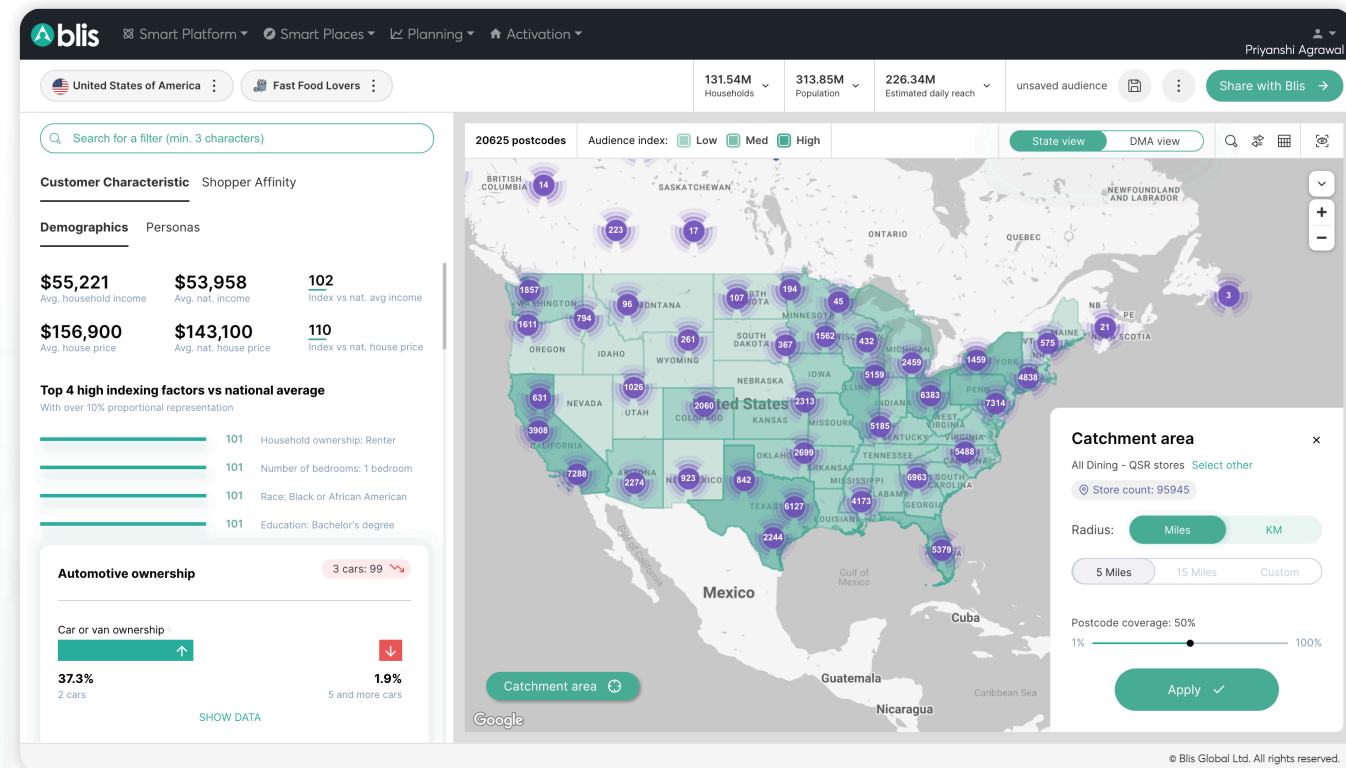
Our expert insights team will equip you with tips you can put to work straight away to help your brand **increase awareness, build loyalty and gain market share**.

Book your complimentary session by emailing

USSales@blis.com



About Blis



Through our integrated planning and activation platform, Audience Explorer, you can discover what makes your customers unique, build richer media plans and deliver better outcomes without relying on personal data.

Contact us to find out more.

Methodology

Blis commissioned an independent research study from Sapio Research. An online survey was conducted among a representative sample of 2000 USA consumers in February 2023.

Blis is a truly unique planning & buying platform.

We enable our customers to deliver **omnichannel** campaigns with a single, unified audience.

