



Industry Report – QSR

This report dives into the quick-service restaurant industry, looking at current and emerging market trends and shifts in consumer behaviors and preferences directly impacting this industry.

2022

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Summary findings



Market Trends

Concern over inflation is high, which is increasing price sensitivity among U.S. adults. Nearly all fast food patrons have noticed price increases on menu items. Over half have stopped themselves from purchasing items due to the heightened prices. While menu options and quality are still most valued when it comes to dining, as the average American's wallet is being pinched, the importance of price is rising when it comes to dining.

Price is not the only concern. The extraordinary increase in gas has many Americans shifting their driving and spending patterns. Nearly two out of five say they have been driving less and the mass majority have been cutting back on other expenditures, like travel and restaurants. The rise in gas prices is particularly important to the fast food industry due to the close correlation between drive time and fast food consumption. If one goes down, so does the other. On a positive note, summer travel season is approaching and many still plan to travel by car and make stops at fast food/fast casual restaurants along the way.

Diner Traits & Preferences

The pandemic had a dramatic impact on how consumers dined. Currently, dining in is trending up a bit while takeout and delivery are on a slight decline, possibly due to increases in delivery charges.

The average American dines at fast food and local restaurants more than any other type. While income, age, and race play a significant role in both fast food/fast casual consumption, there are demographic and behavioral differences between the two. Regionality is important to fast food dining as well, with a high concentration of frequent diners in the South and Midwest.

Emerging Trends

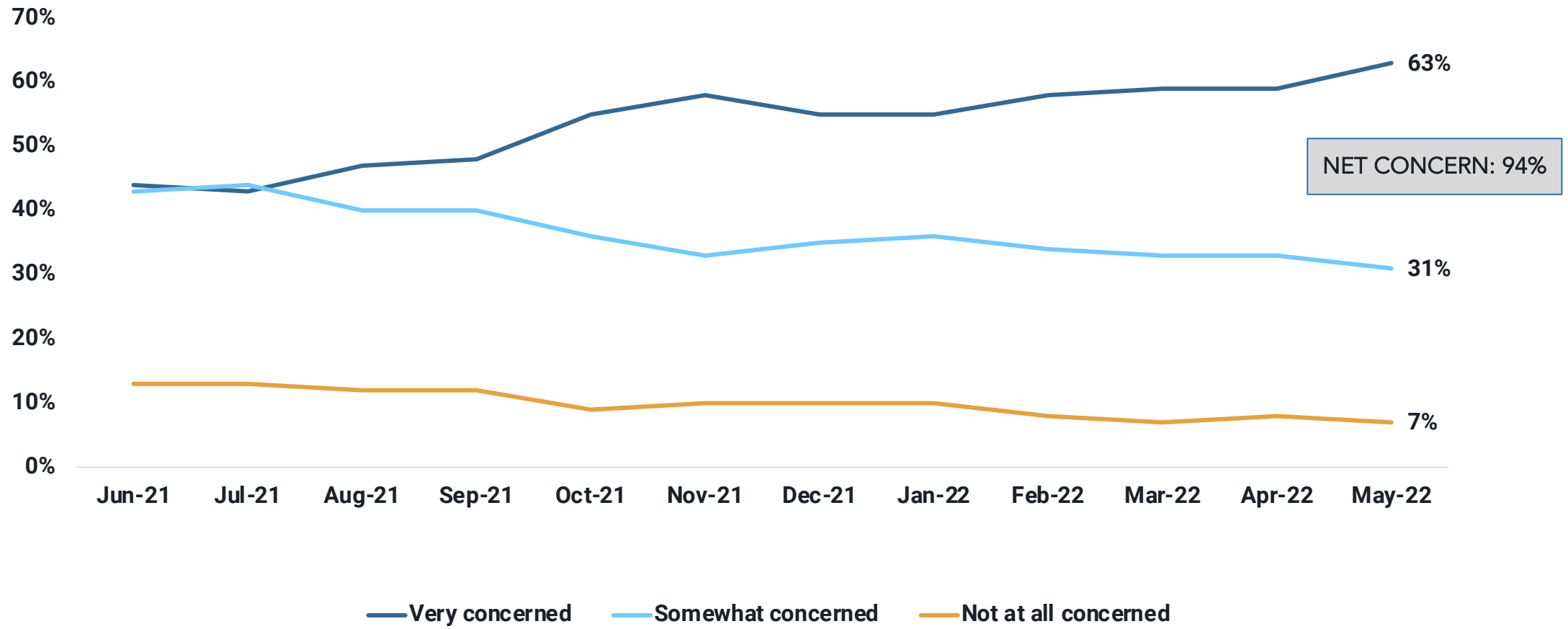
While ordering takeout and delivery overall seems flat to down, online delivery services like Grubhub are still growing in popularity, most likely driven by young consumers, who are continuing to order takeout. Weekly quick-service diners are much more likely than the average adult to use these types of services.

As inflation soars and Americans are becoming much more price sensitive, regular coupon usage is on the rise, which creates opportunities for the fast food/fast casual restaurant industry. Unsurprisingly, as price sensitive increases, so does interest in value menu items.



Market Trends

Inflation is at an all-time high and just about all Americans are concerned.

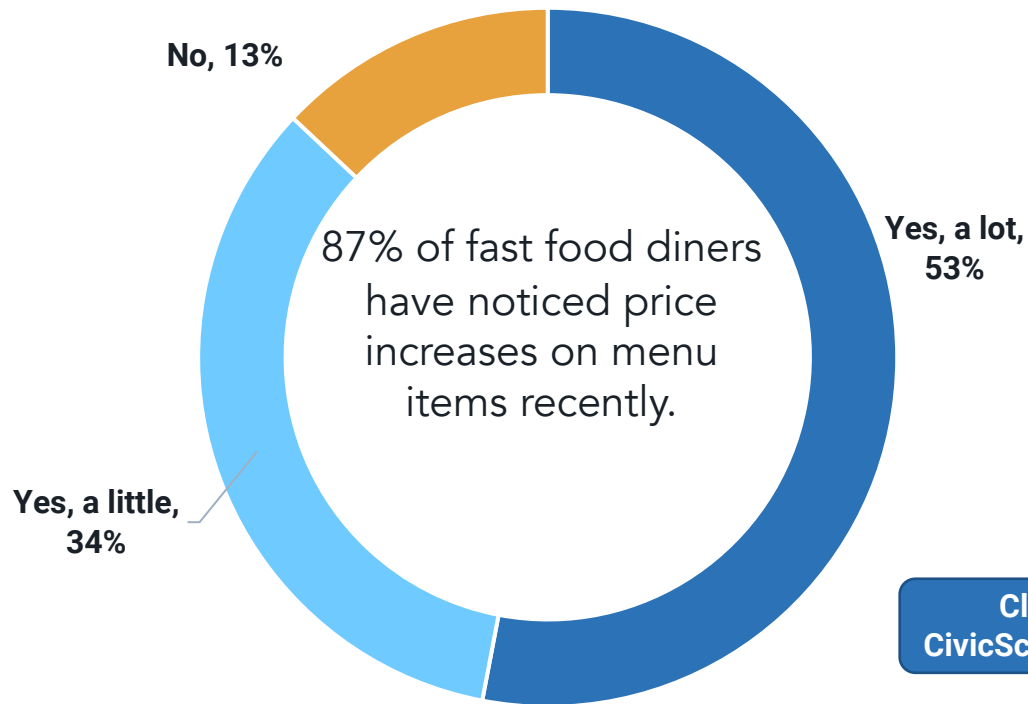


186,631 responses from 05/12/2021 to 04/30/2022 weighted by U.S. Adults

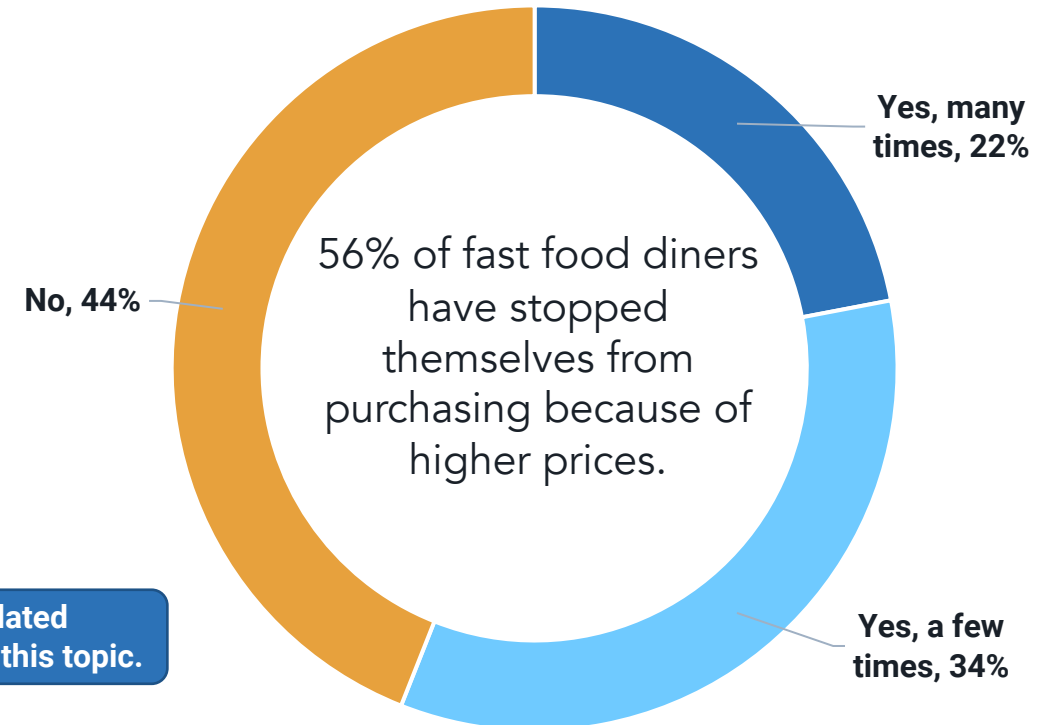
Nearly 9 out of ten fast food patrons have noticed an increase in menu items, influencing many to pass on purchasing.



Q. Have you noticed price increases on menu items at fast food restaurants as of recently?



Q. In the last month, have you stopped yourself from eating at a fast food restaurant because of their menu prices being higher than usual?



[Click here](#) for a related CivicScience article on this topic.

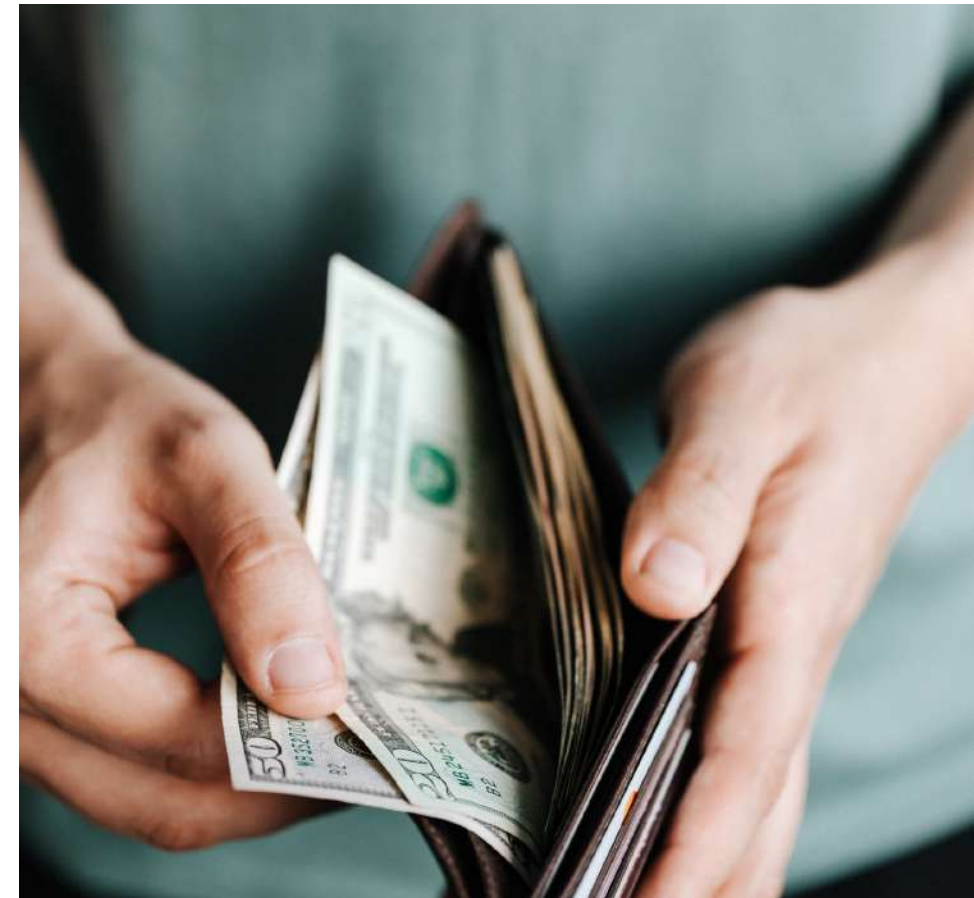
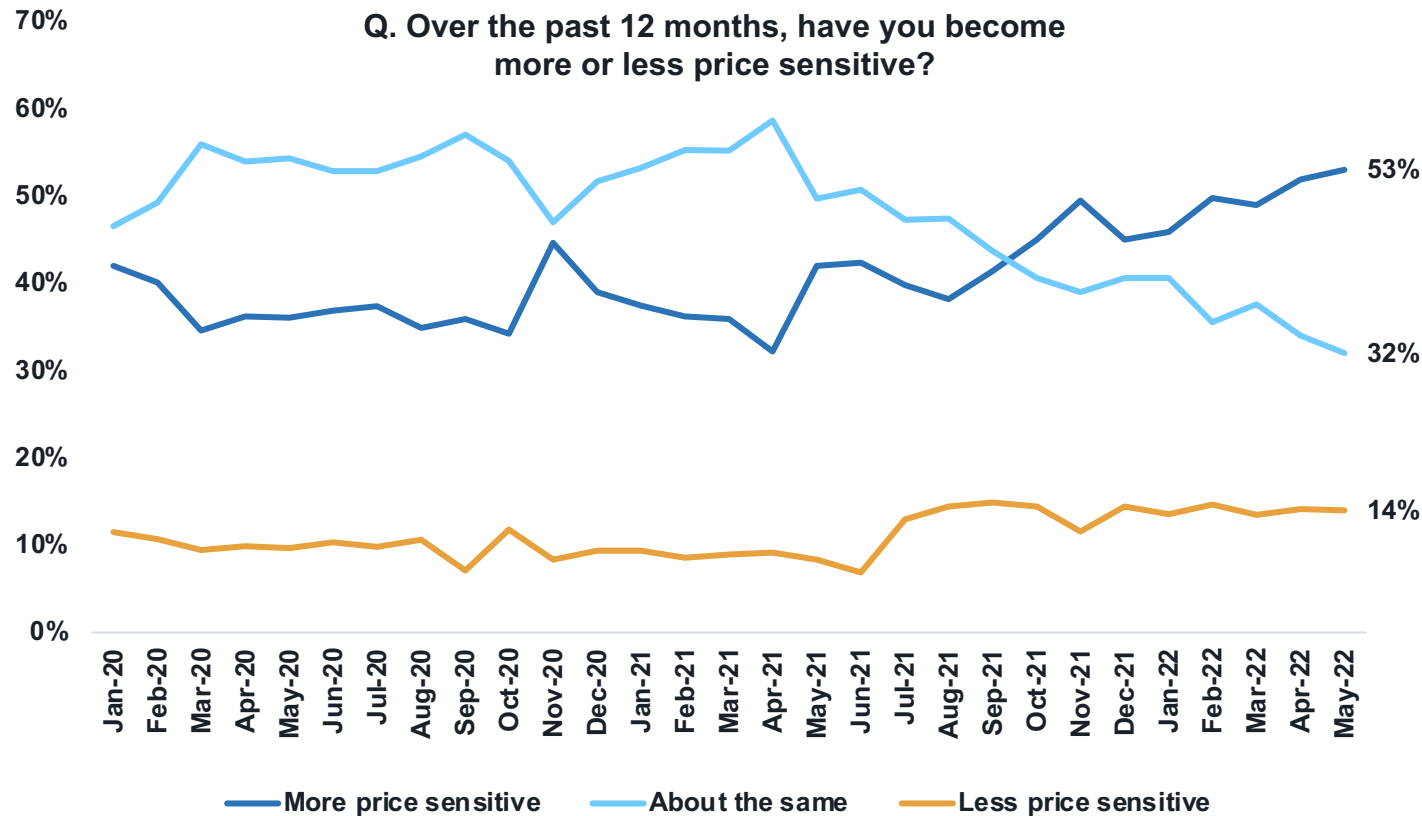
5,268 responses from 05/01/2022 to 05/31/2022, weighted by U.S. adults

4,820 responses from 05/01/2022 to 05/31/2022, weighted by U.S. adults



Price sensitivity is at an all-time high since January 2020.

With concern on inflation and gas prices being so high, it is not surprising that consumers are becoming much more price sensitive.



62,151 responses from 06/01/2021 to 05/31/2022, weighted by U.S. adults



Menu options and quality are the most important factors when dining out.

Q. What do you value most when dining out?

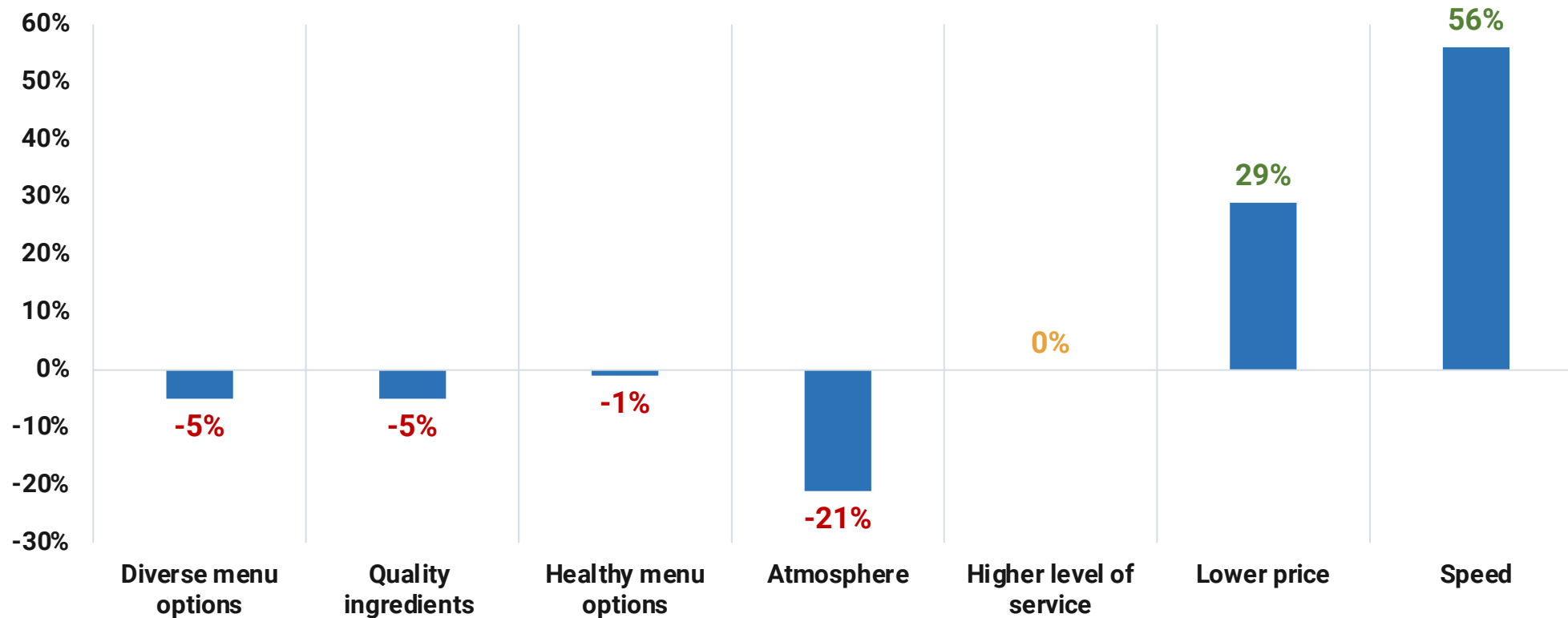


19,666 responses from 05/01/2022 to 05/31/2022



But price is growing in importance as the average American's wallet is being pinched.

Q. What do you value most when dining out?
Year-over-year % Change

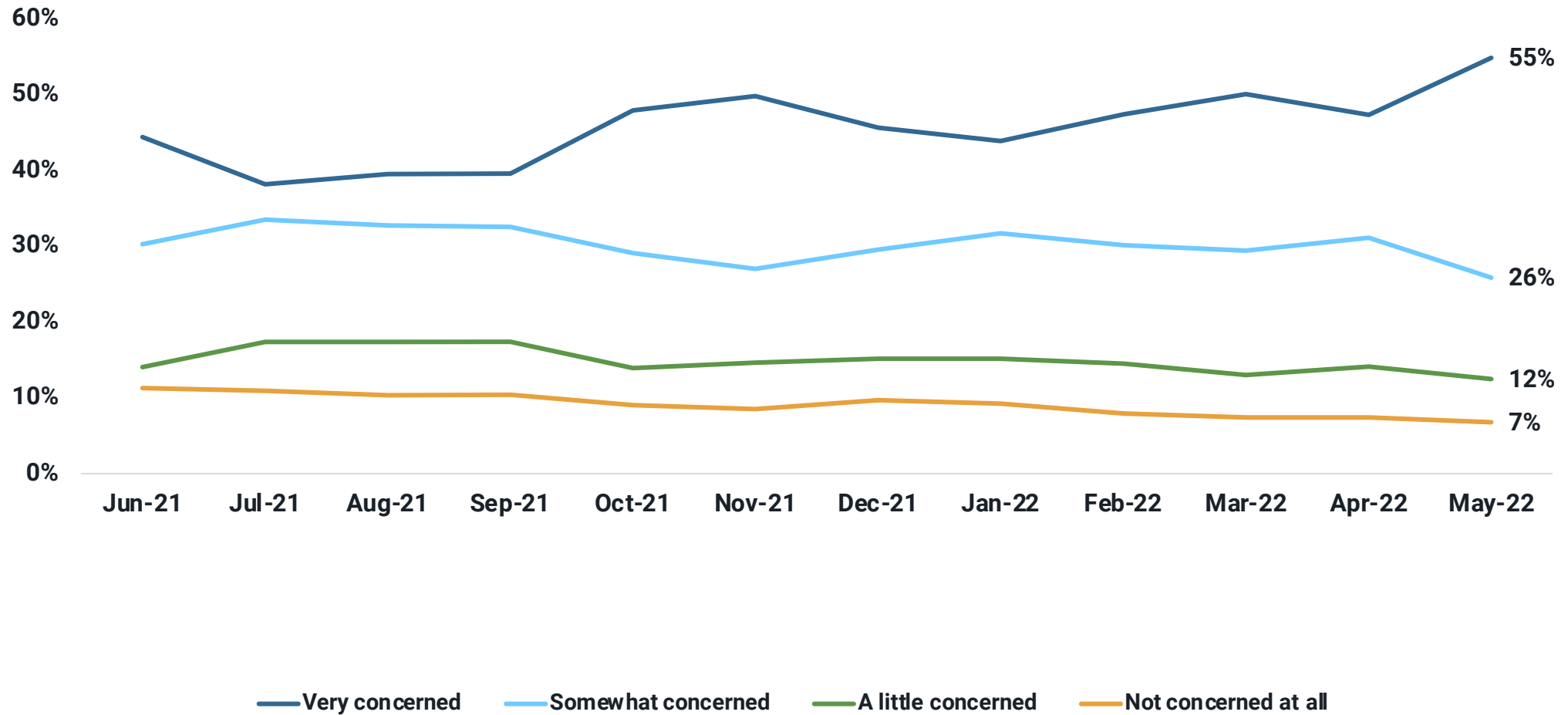


252,494 responses from 05/01/2021 to 05/31/2022, weighted by U.S. adults



High gas and energy prices are also causing concern.

Q. How concerned are you right now about gas and energy prices?



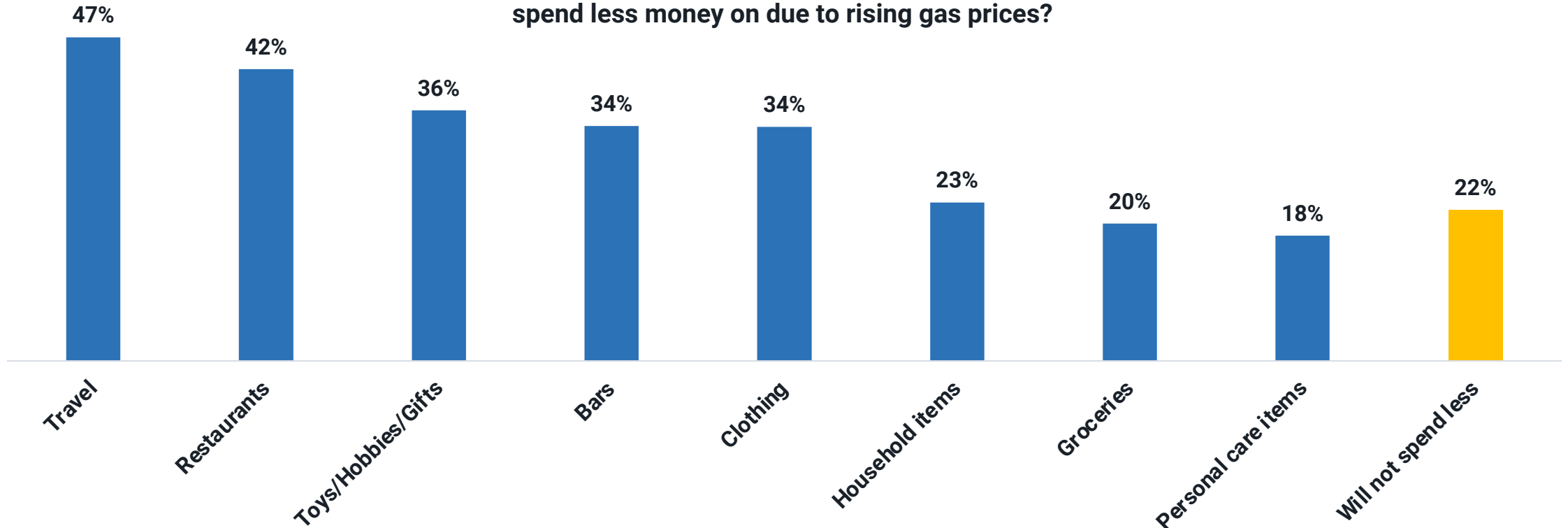
144,394 responses from 06/01/2021 to 05/31/2022, weighted by U.S. adults



Nearly four out of five U.S. adults are spending less on other things due to rising gas prices.

Travel and restaurant spending is often where consumers cut back first, while household necessities are least impacted.

Q. Which, if any, of the following categories do you think you will spend less money on due to rising gas prices?

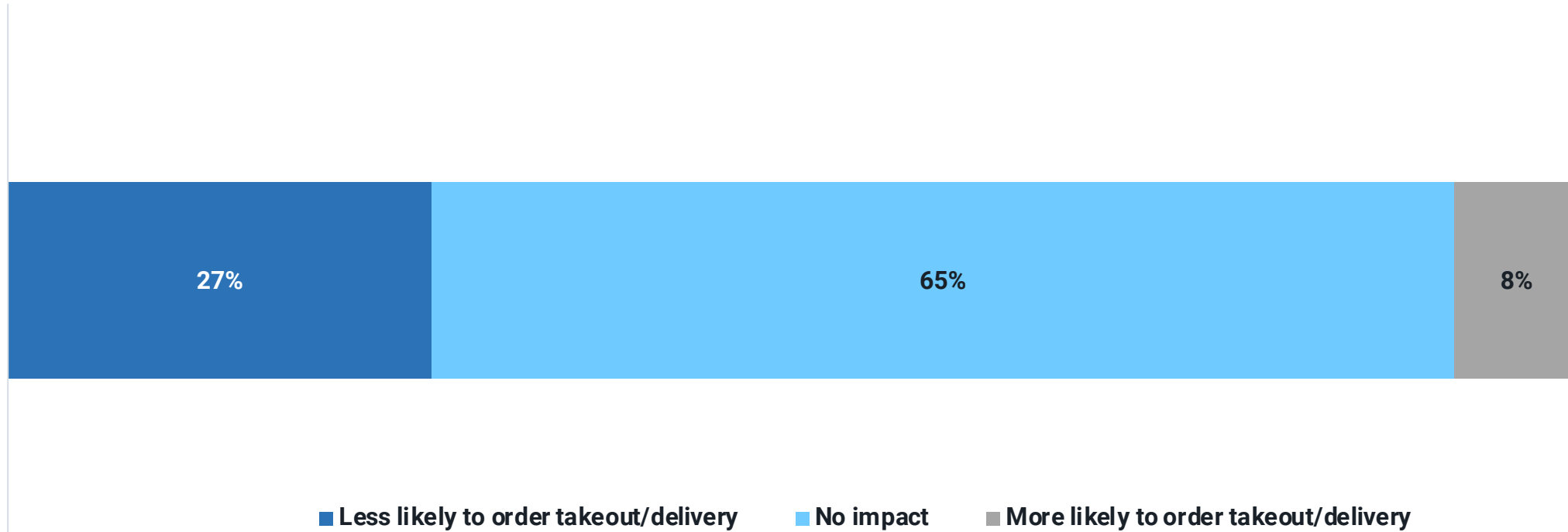


6,572 responses from 05/01/2022 to 05/31/2022 weighted by U.S. Adults

Increases in delivery charges due to rising gas prices are leaving some less likely to place an order entirely.



Q. How do rising gas prices impact your decision about whether to order meals for takeout or delivery?

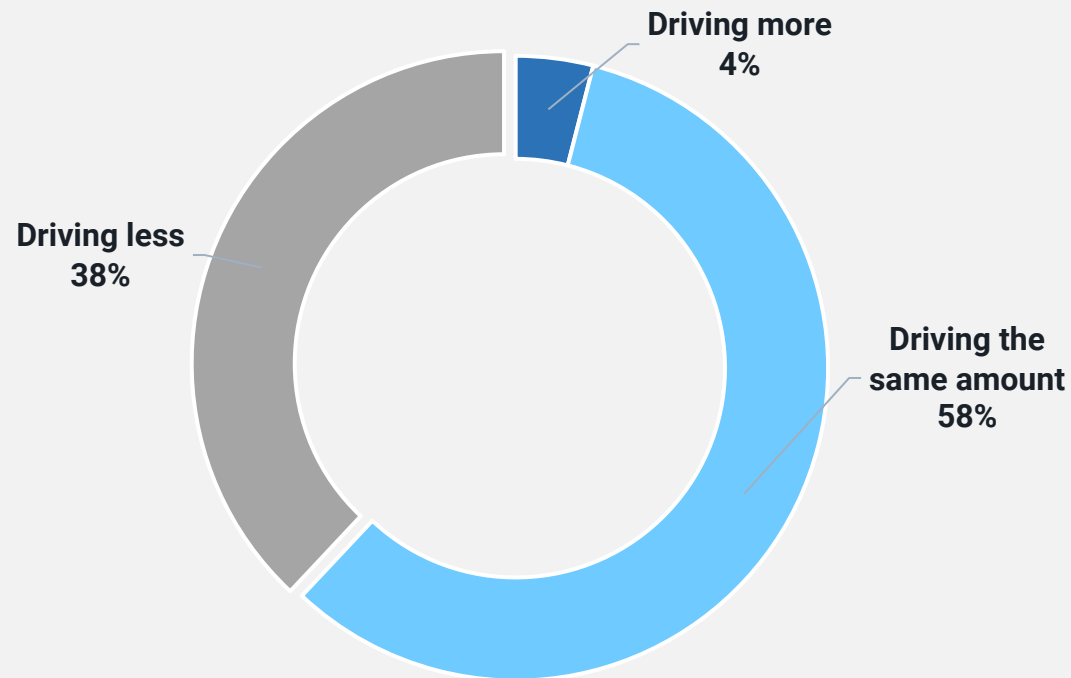


3,149 responses from 03/24/2022 to 06/08/2022, weighted by U.S. adults

Nearly two out of five U.S. adults are driving less due to rising gas prices.



Q. How have rising gas prices affected the amount of driving you have been doing recently?

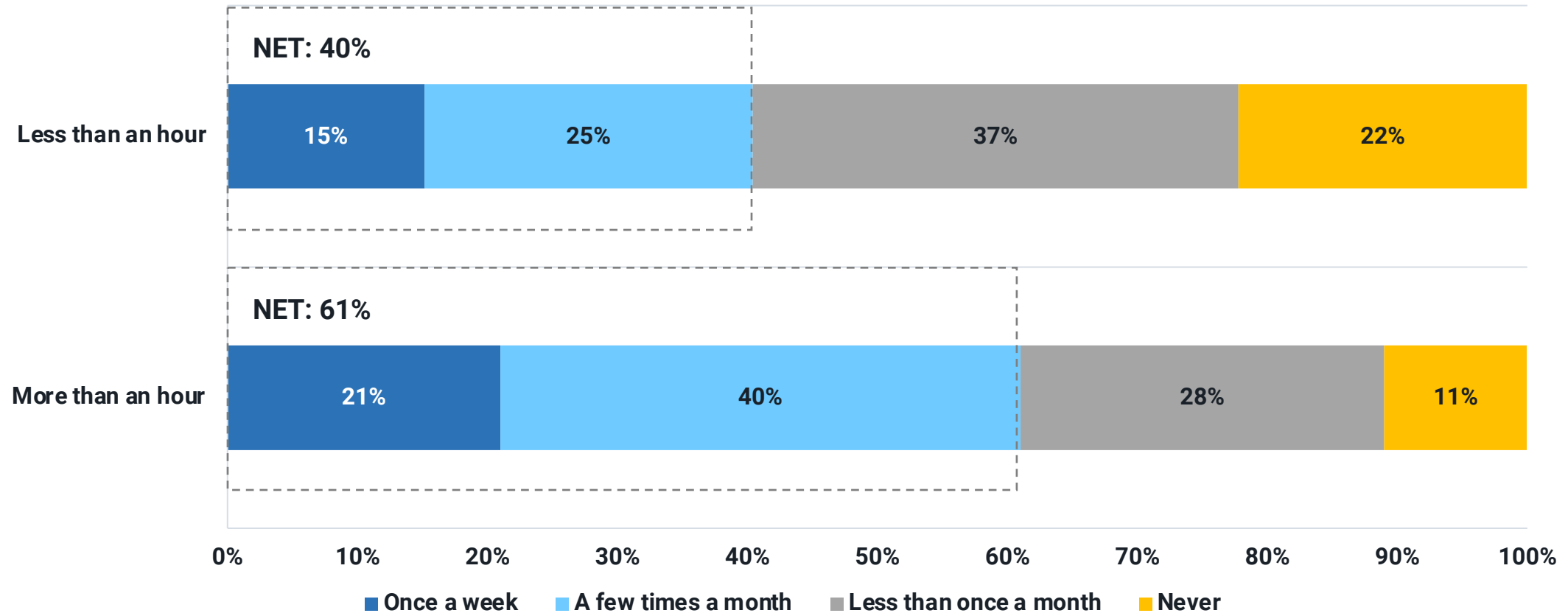


3,015 responses from 03/14/2022 to 06/09/2022, weighted by U.S. adults



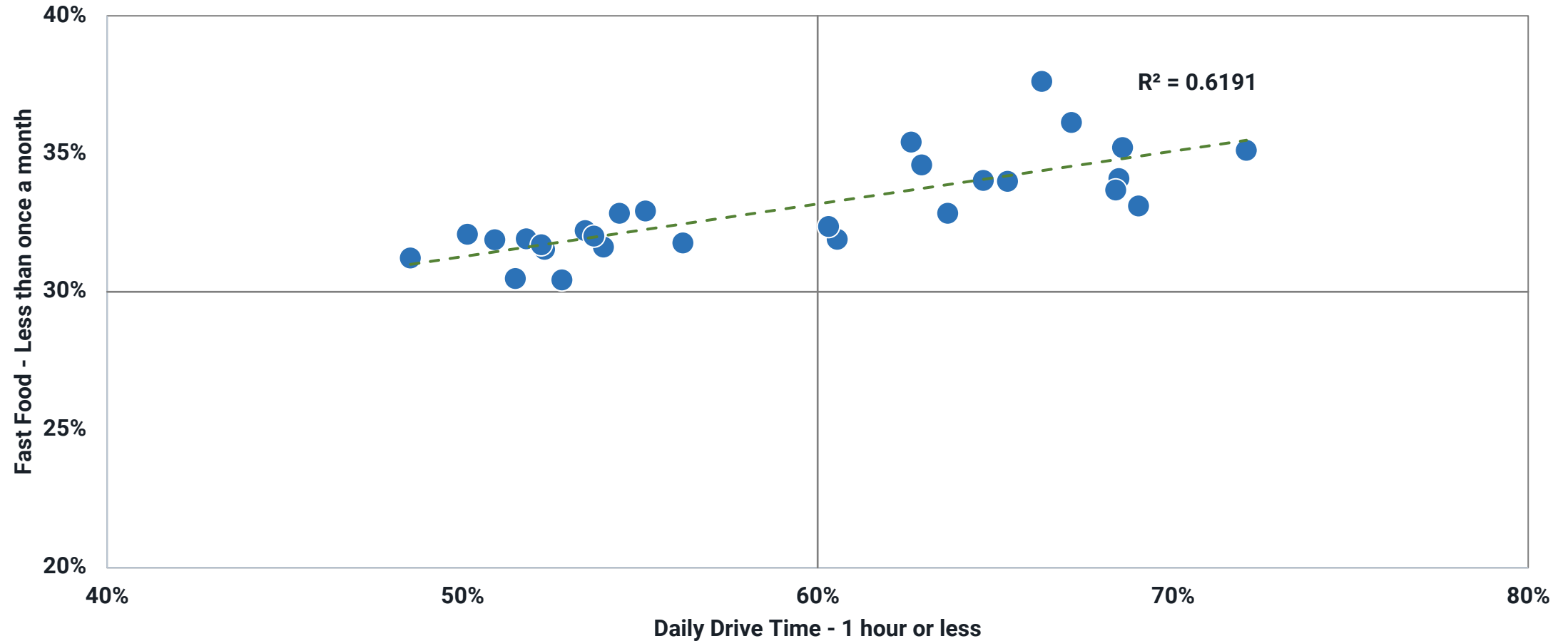
Consumers that spend more time in a car every day are far more likely to be frequent fast food diners.

How many hours per day do you spend in the car? compared with
How often do you eat at fast food/quick service restaurants?



3,593 responses from 05/01/2022 to 05/31/2022, weighted by U.S. adults

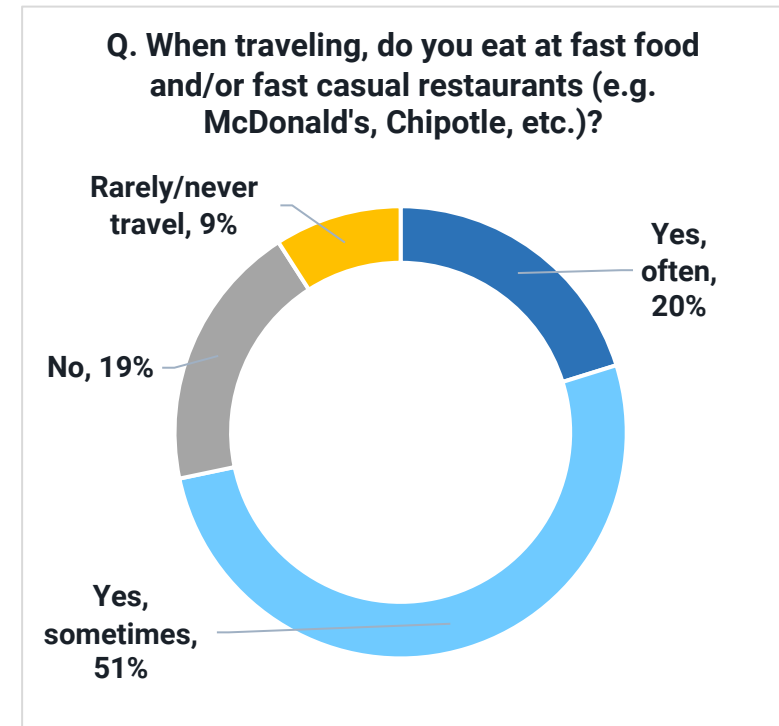
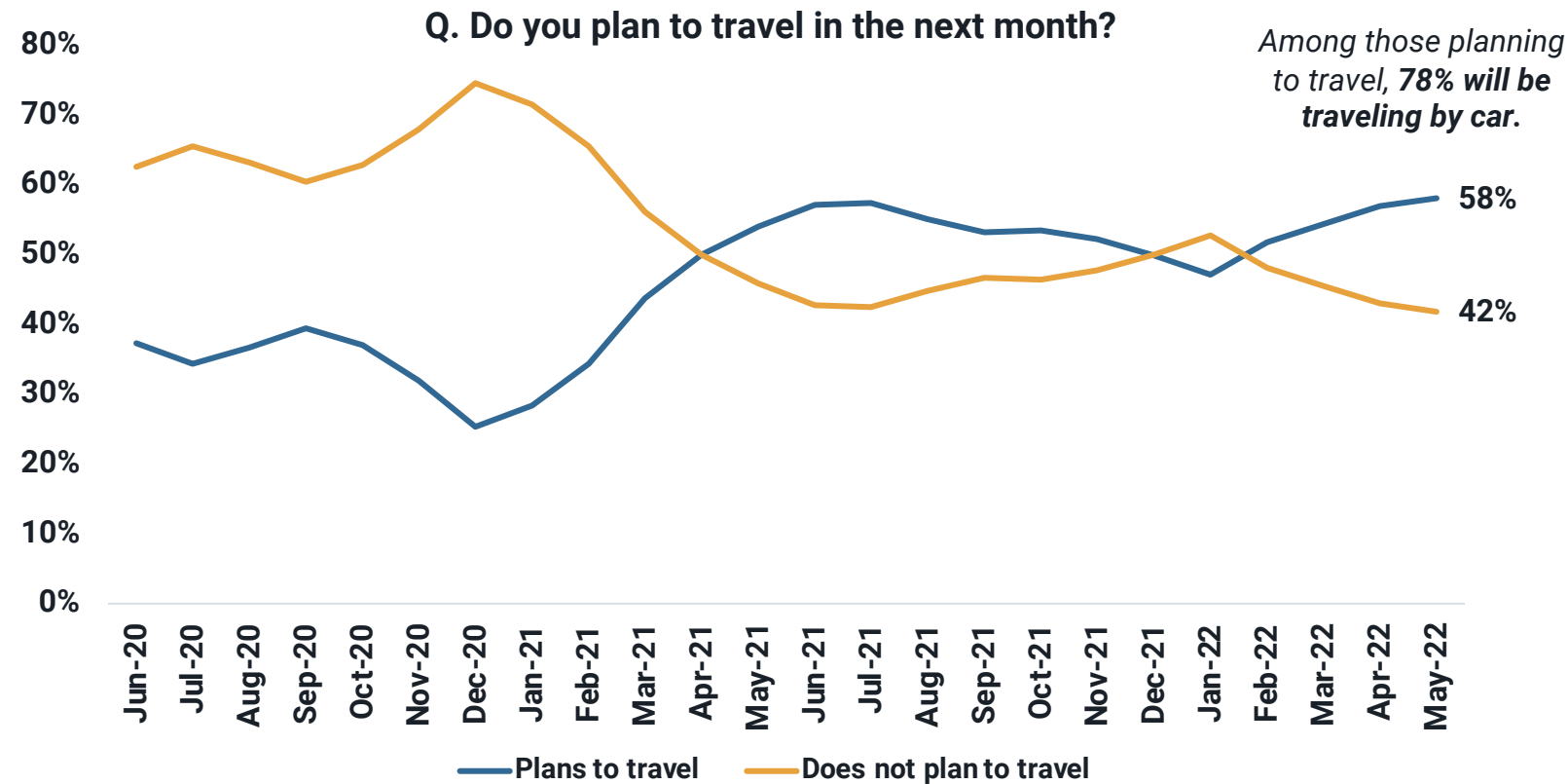
Less hours in the car could have an impact on the fast food industry, as drive time and consumption are closely correlated.





Yet, travel plans are at a post-pandemic high, so it appears that driving will be foreseeable for the next few months.

Despite consumers saying they will make spending cuts in travel first in response to rising gas/energy prices, it doesn't appear that they are canceling travel plans altogether.



557,586 responses from 06/30/2020 to 05/31/2022, weighted by U.S. adults

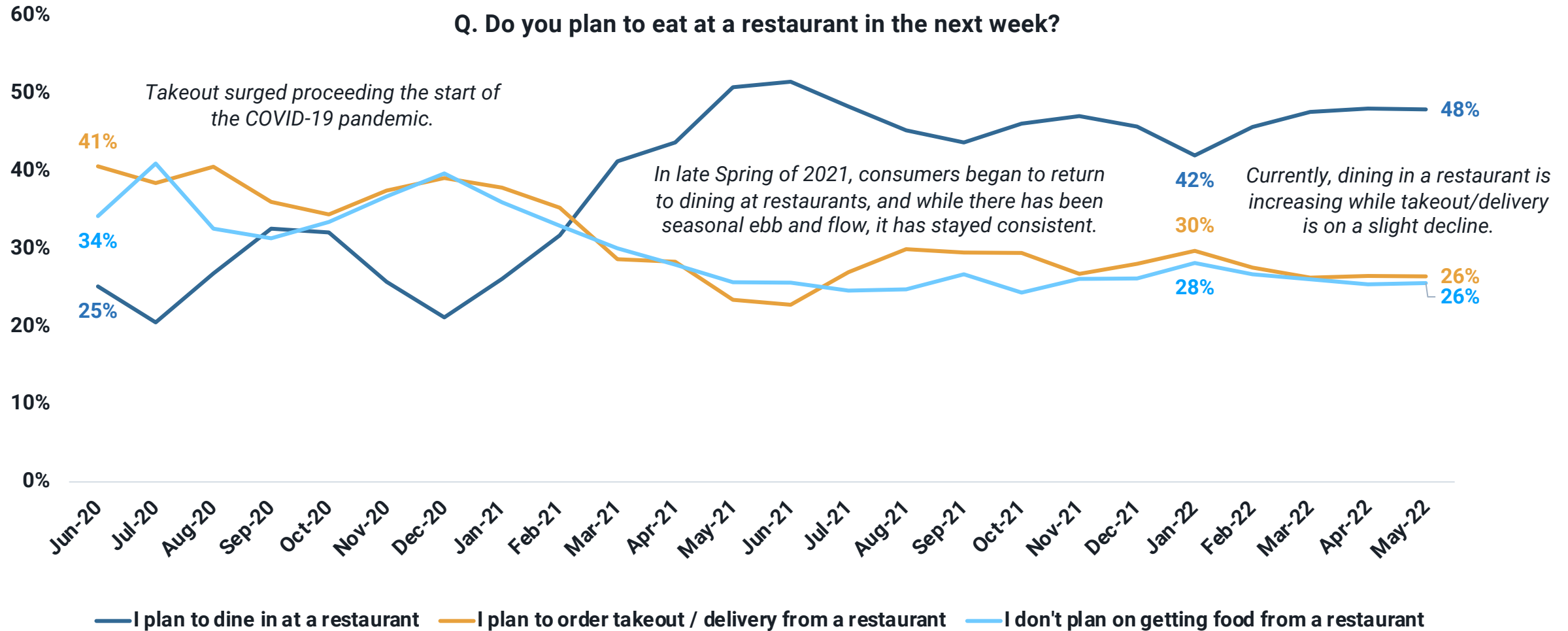
1,841 responses from 06/08/2022 to 06/08/2022



Diner Traits & Preferences



The pandemic had a significant impact on consumer behavior towards restaurants and dining.

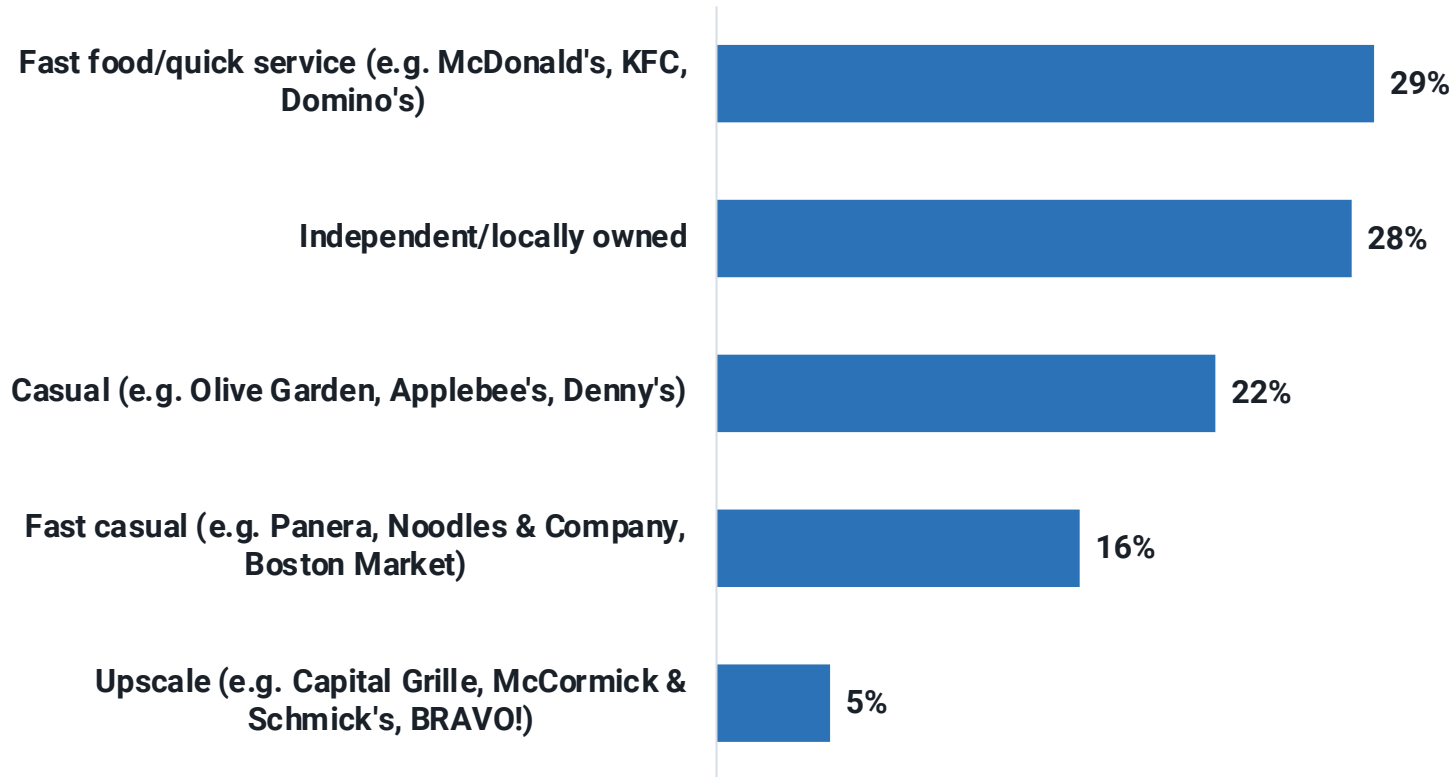


456,717 responses from 06/26/2020 to 05/31/2022, weighted by U.S. adults.

The average American dines at fast food and local restaurants more than any other type.



Q. At what type of restaurant do you eat most?



12,758 responses from 05/01/2022 to 05/31/2022



There are some key differences in traits between those that dine most at fast food establishments and fast casual.

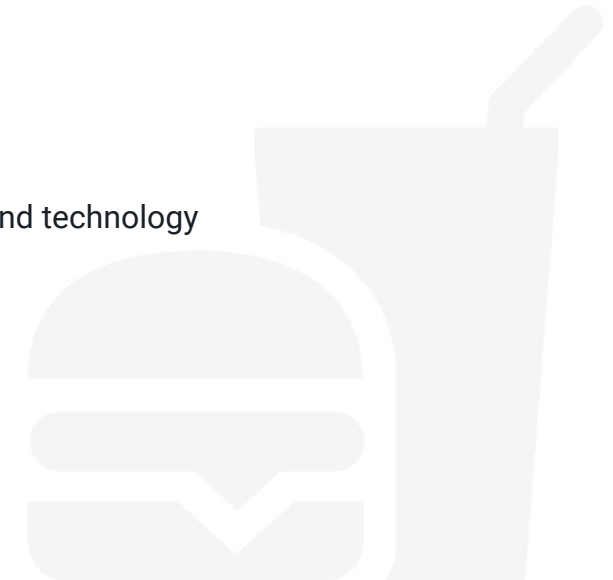
		Fast Food Diners	Fast Casual Diners	Total U.S. Adults
Age	18 - 34	47%	51%	30%
	35 - 54	29%	31%	33%
	55 or older	24%	16%	37%
Income Level	Low Income	54%	44%	38%
	Middle Income	27%	29%	32%
	High Income	19%	26%	30%
Education Level	High school or less	32%	22%	18%
	Some college, no degree	28%	29%	27%
	Bachelor's or associate degree	28%	32%	36%
	Graduate or professional degree	12%	17%	19%
Race	White	62%	51%	70%
	Hispanic	10%	13%	9%
	Black	17%	21%	10%
	Other	8%	13%	9%
	Asian	3%	3%	2%
Residential Area	City	28%	20%	28%
	Suburbs	37%	45%	43%
	Rural Area	30%	28%	25%

Fast Food Diners:

- Price-conscious
- Active Facebook users
- City dwellers
- Tell others about new brands and technology
- Earn under \$50K
- Netflix users

Fast Casual Diners:

- Attend sporting events
- Charitable donors
- Concerned about environmental issues
- Closely monitor their retirement savings
- Follow health and fitness trends
- Follow food and cooking trends
- Alcoholic beverage drinkers

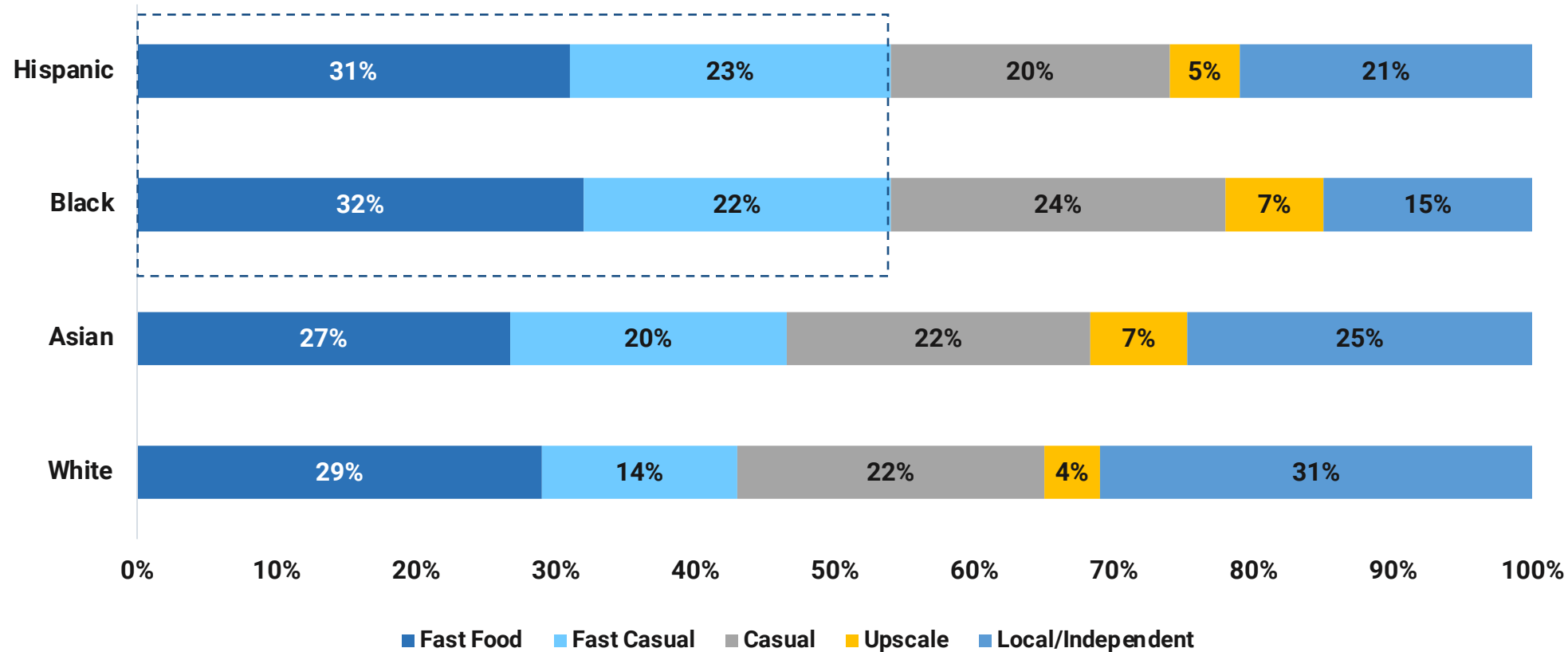


Highlighted cell indicates an index over 120 when fast food and fast casual are compared to each other.



Over half of Black and Hispanic Americans dine most at fast food and fast casual restaurants.

Which best describes your race? compared with
At what type of restaurant do you eat most?



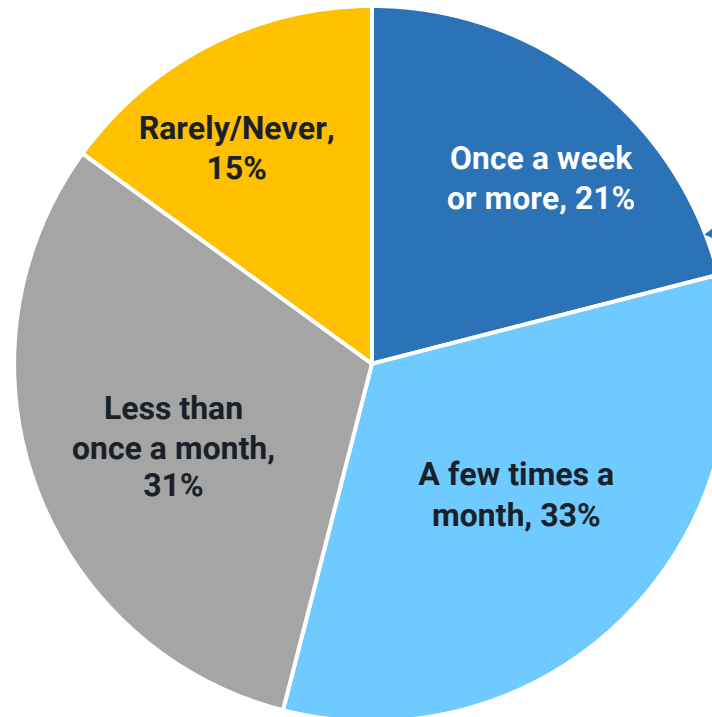
Regarding dining, speed and price are more important to Black and Hispanic Americans than the average U.S. adult, ...which likely factors into their fast food and fast casual restaurant preference.. [DATA NOT SHOWN.]

41,742 responses from 01/01/2022 to 05/31/2022, weighted by U.S. Adults



Over half of U.S. adults dine at a fast food restaurant a few times a month or more.

Q. How often do you eat at fast food/quick service restaurants?



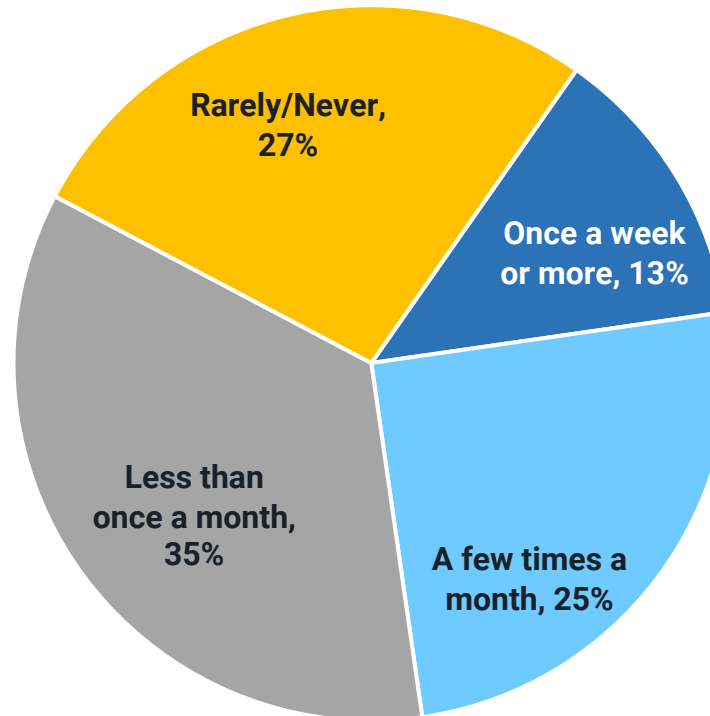
- AMONG THOSE THAT ANSWERED ONCE A WEEK OR MORE:
- Netflix users
 - Influenced by social media
 - Early adopters
 - Active Twitter users
 - Sports fans
 - Most likely to go to a local news channel for breaking news

20,307 responses from 05/01/2022 to 05/31/2022, weighted by U.S. adults



Two out of five adults dine at a fast casual restaurant a few times a month or more.

Q. How often do you eat at fast casual restaurants (e.g. Panera, Boston Market)?



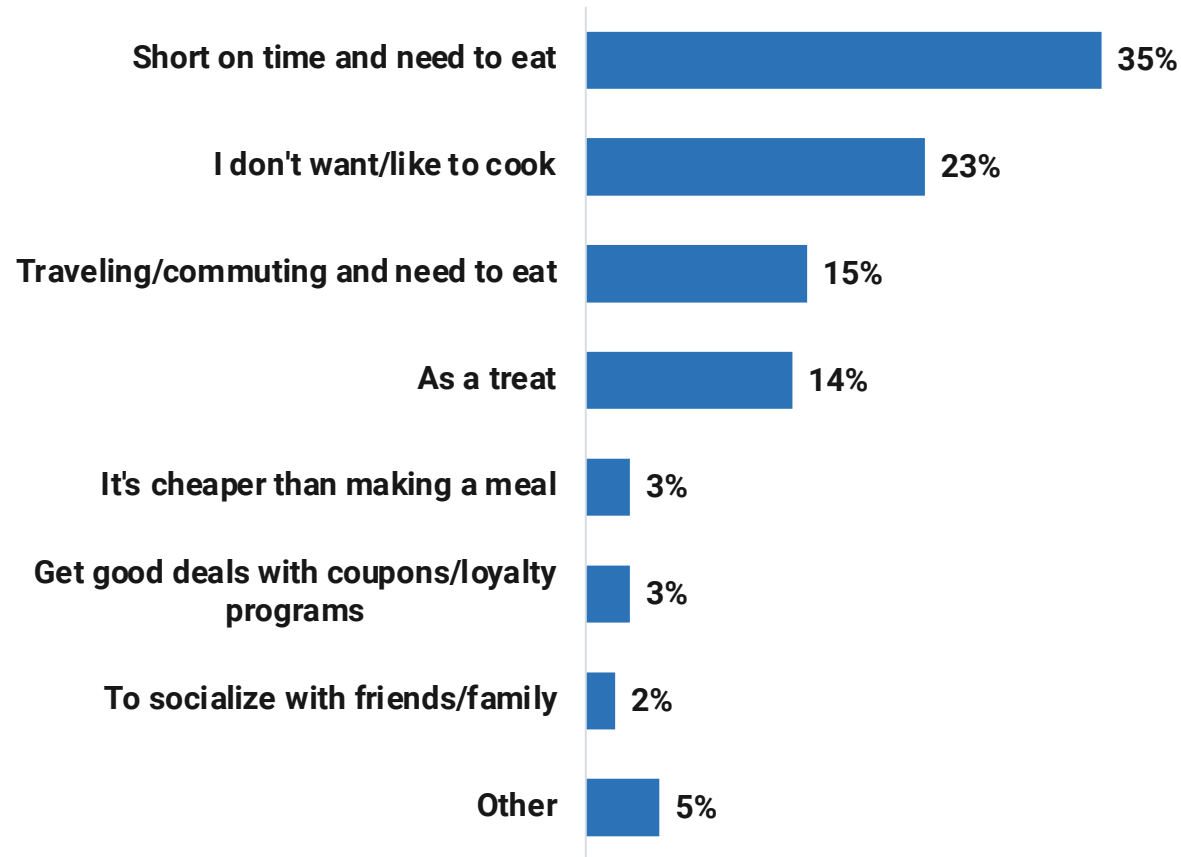
- AMONG THOSE THAT ANSWERED ONCE A WEEK OR MORE:**
- Movie goers
 - Influenced by social media
 - Upscale diners
 - Active Instagram users
 - Follow music trends
 - Over half subscribe to Amazon Prime Video

20,324 responses from 05/01/2022 to 05/31/2022, weighted by U.S. adults



Time is the main reason consumers order fast food, followed by not wanting or liking to cook.

Q. What is your main reason for ordering fast food?

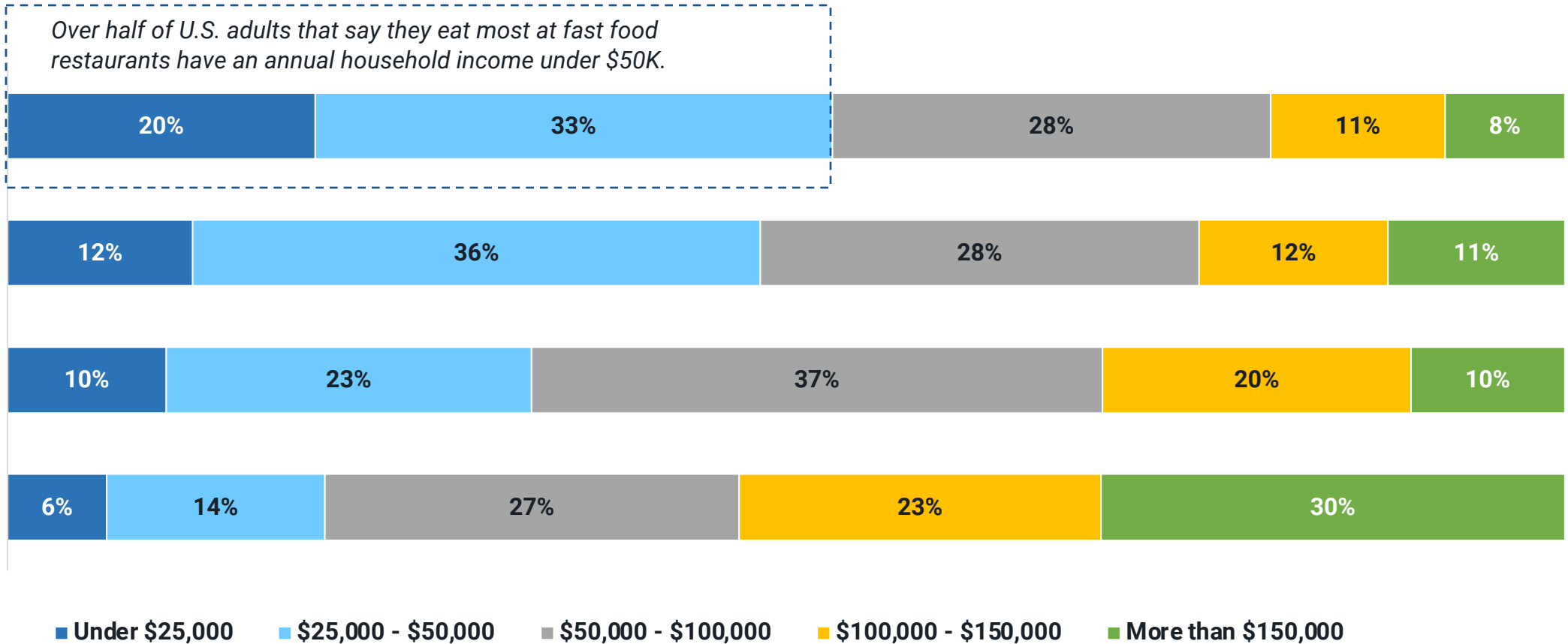


1,760 responses from 06/10/2022 to 06/10/2022, weighted to U.S. adults



Income is a significant factor when it comes to fast food and fast casual dining.

Q. At what type of restaurant do you eat most? compared with *What is your household income before taxes?*

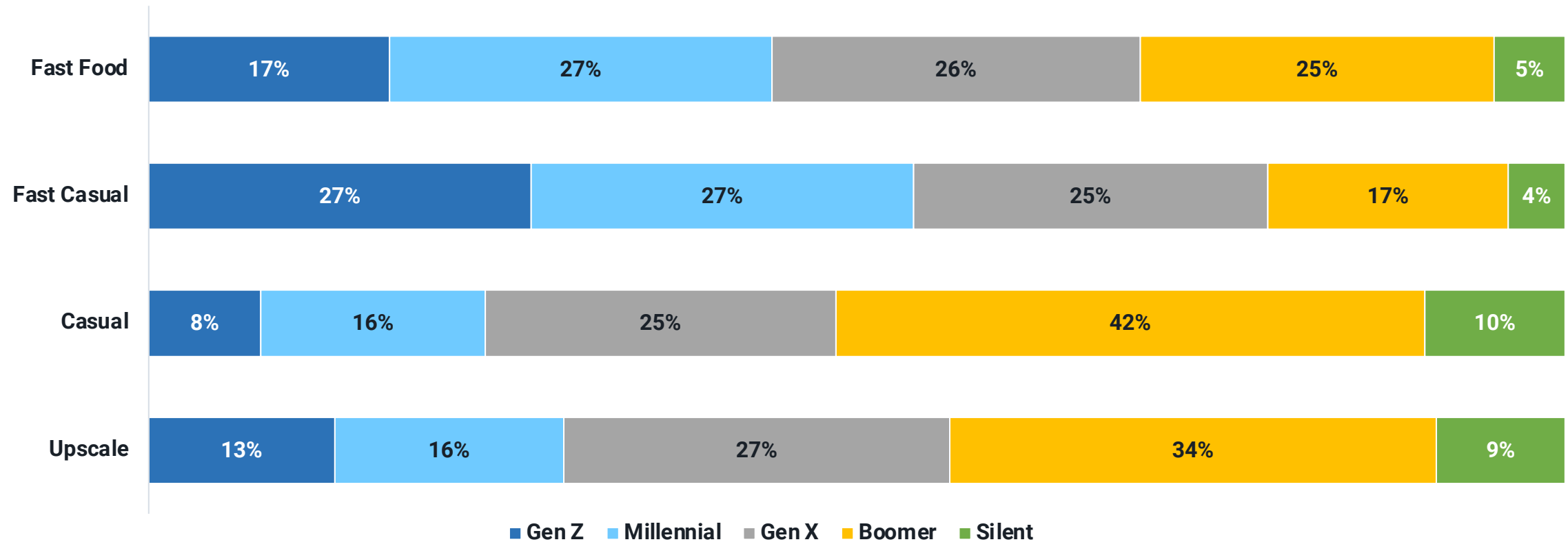


10,191 responses from 05/01/2022 to 05/31/2022

Age is also an important trait among frequent fast food and fast casual dining.



Q. At what type of restaurant do you eat most? compared with
Which of the following generations (based on your birth year) applies to you?



6,452 responses, weighted by U.S. adults



Gen X and Boomers are much less likely than younger consumers to sacrifice taste/quality for a good deal.

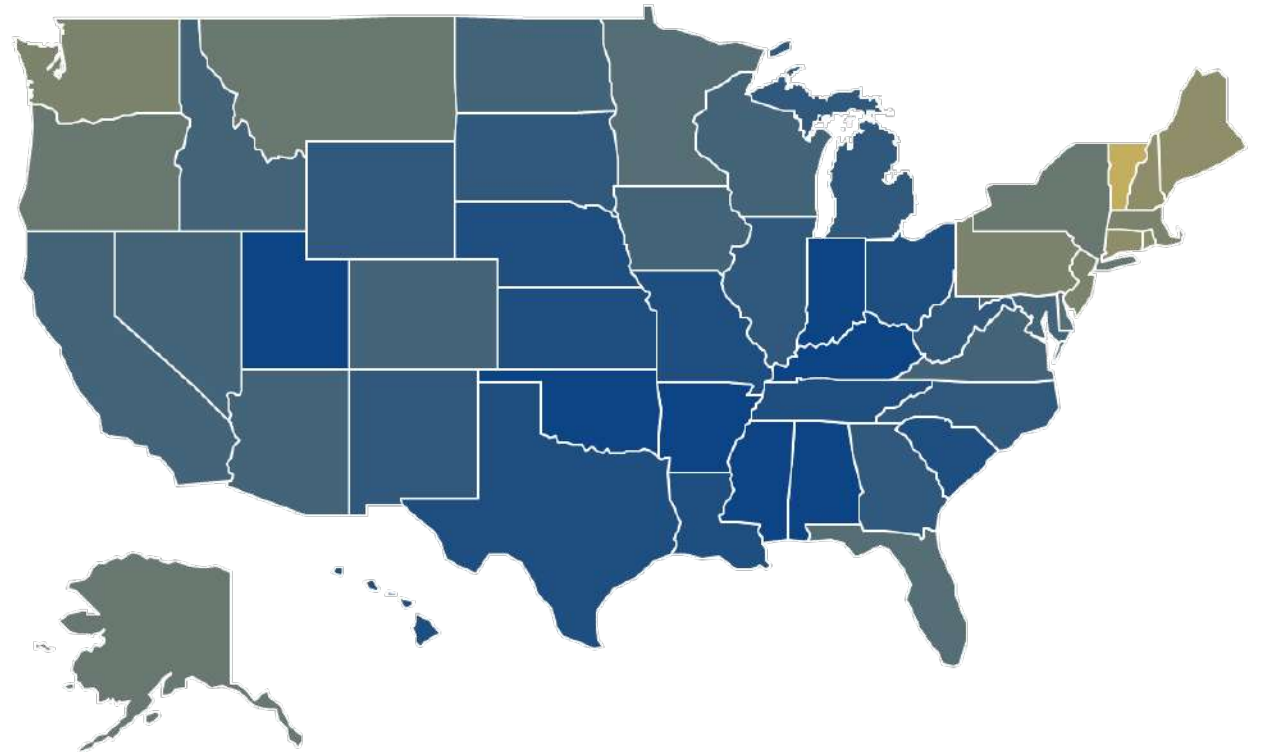
Q. To what extent do you agree or disagree with the following statements when it comes to food/beverage?

% Agree	Gen Z	Millennial	Gen X	Boomer	Total U.S. Adults
Speed of service is most important to me	56%	57%	54%	52%	56%
I would pay more for high quality ingredients	63%	65%	77%	77%	72%
I choose places based on their healthy options	59%	43%	37%	41%	44%
I often snack between meals	58%	56%	53%	52%	54%
Having breakfast is very important to me	55%	51%	50%	59%	55%
I'll sacrifice taste/quality for a better deal	43%	34%	13%	12%	27%



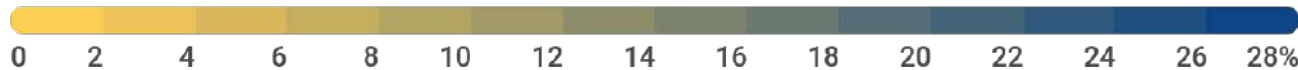
There is a high concentration of frequent fast food diners in the Southern & Midwest regions of the United States.

Q. How often do you eat at fast food/quick service restaurants?
 % Once a week or more



- HIGHEST-RANKED* STATES FOR WEEKLY FAST FOOD DINERS:
- Arkansas
 - Oklahoma
 - Alabama
 - Utah
 - Indiana
 - Kentucky
 - Mississippi
 - Kansas
 - Missouri
 - Nebraska
 - Tennessee
 - Texas

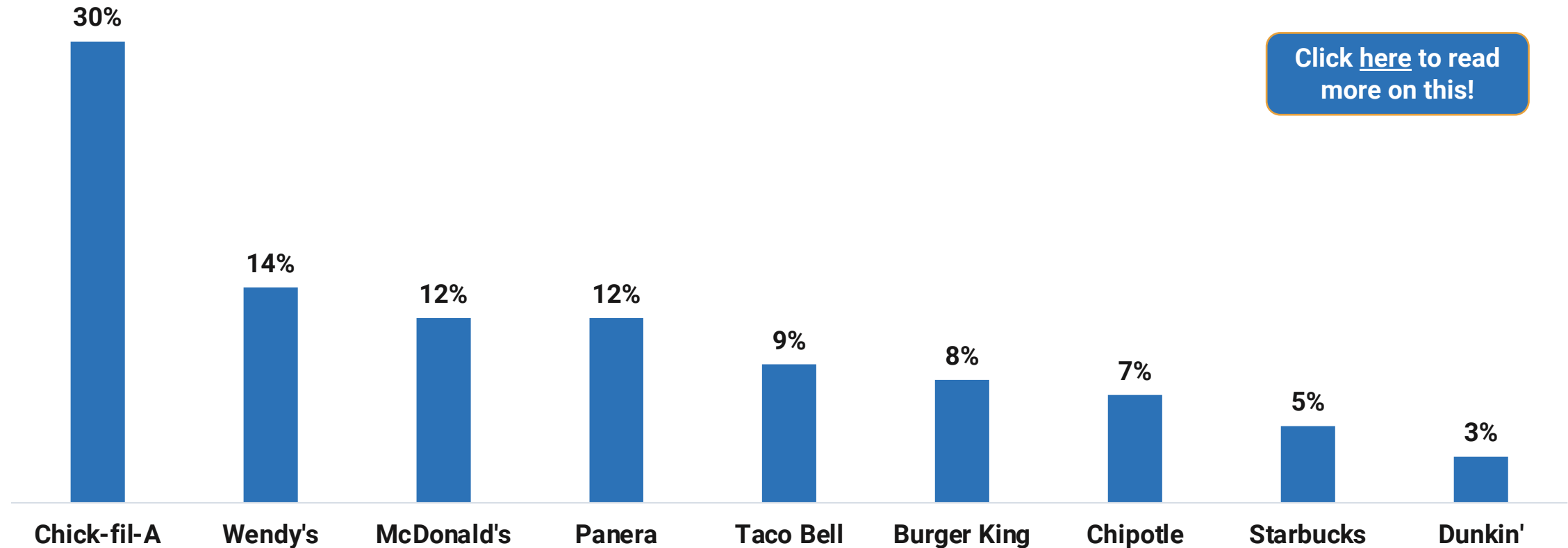
*25% or higher eat at a fast food restaurant once a week or more.



When it comes to consumer preference, Chick-fil-A is a clear leader in the QSR space.



Q. Which of the following fast food / quick service restaurants do you personally think is the best?

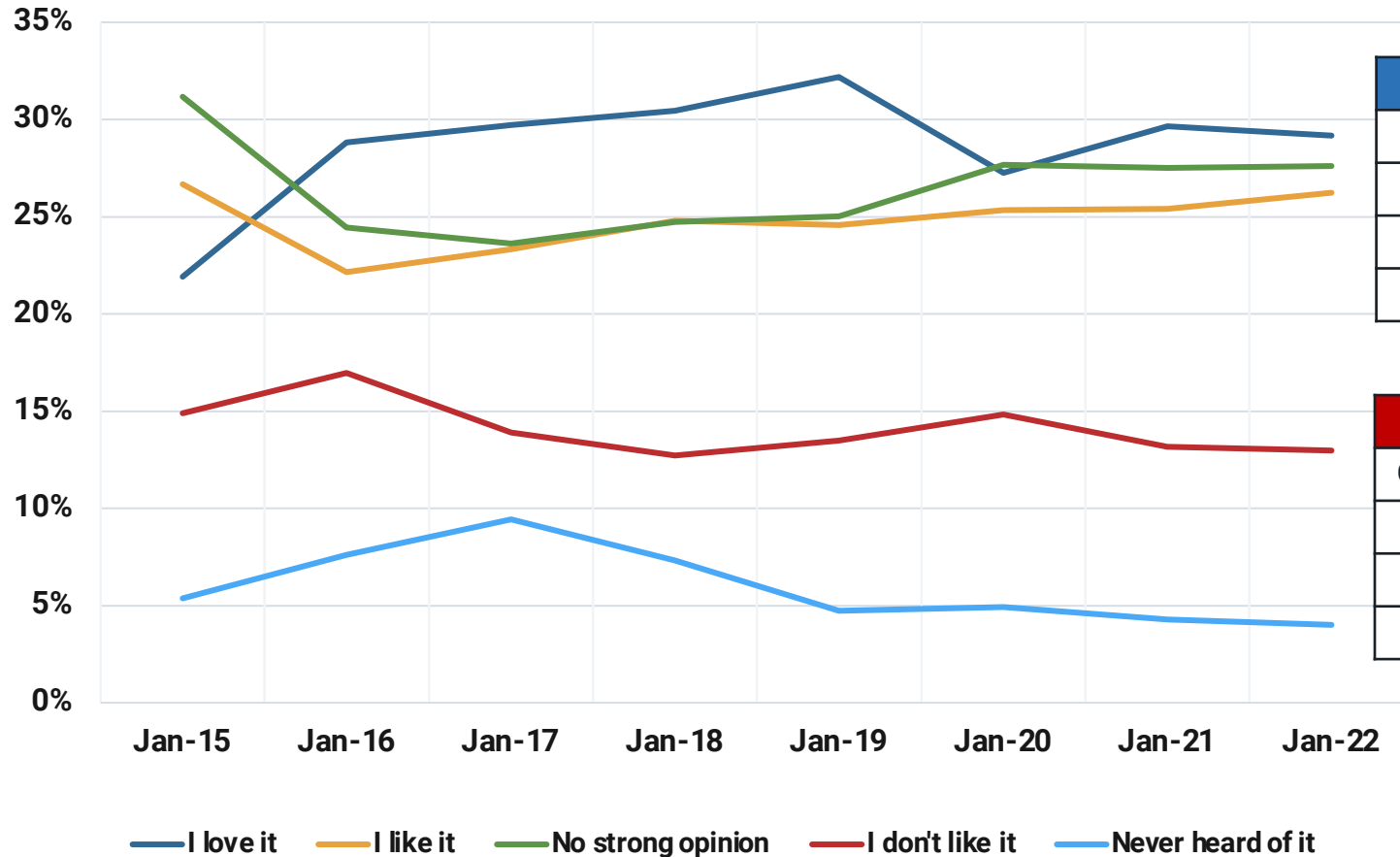


2,336 responses from 01/04/2022 to 01/11/2022, weighted by U.S. adults



What do we know about Chick-fil-A...and other brands.

Our always-on methodology can provide brand tracking, favorability, and awareness. As well as consumer demographics, psychographics, competitive intelligence, and much more.



"I love it"	"No strong opinion"
Age 18-34	Age 55+
Employed	Live in the U.S. West
Active Instagram users	Earn under \$50K per year
College football fans	Grandparents

"I don't like it"	"Never heard of it"
Concerned about environmental issues	Unemployed
Favor socially conscious businesses	Earn under \$50K per year
Organic food buyers	Live in the U.S. Northeast
People who recycle	Price-conscious shoppers

190,771 responses from 01/01/2022 to 06/14/2022

1,687,771 responses from 12/10/2015 to 06/10/2022

Just a few of the nearly 40 QSR brands that we track...



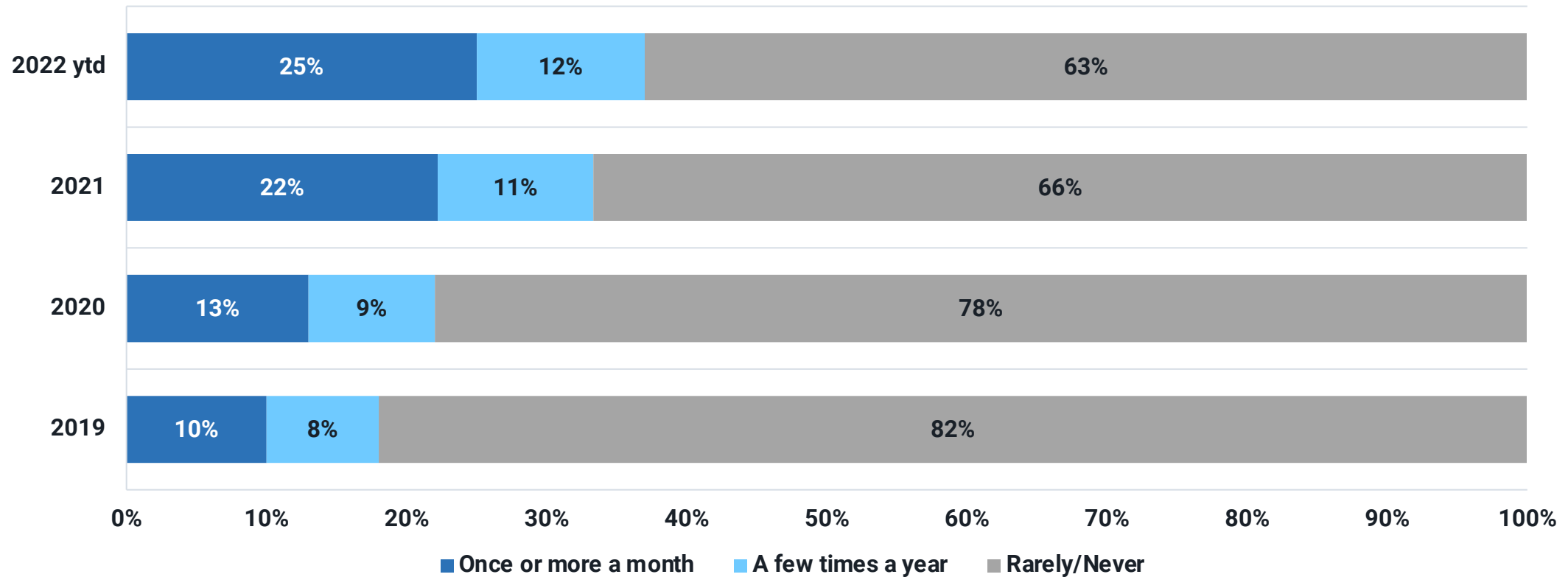


Emerging Trends



Despite increased fees, online food delivery services are still growing each year in popularity.

Q. How often do you use online food delivery services, such as Grubhub, to get food from restaurants that don't typically deliver?



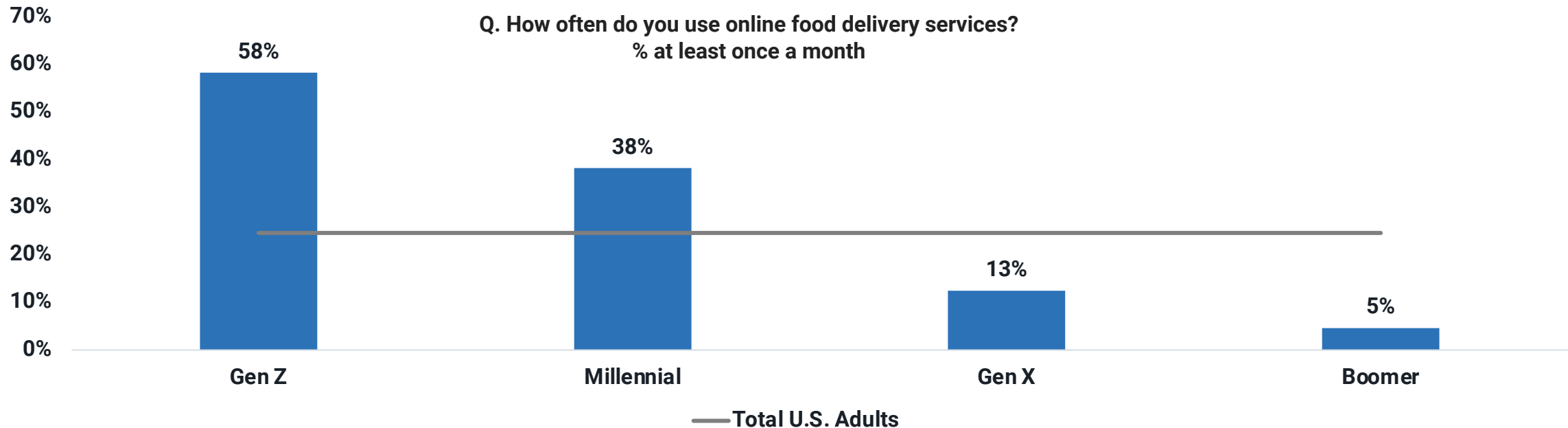
774,112 responses from 01/01/2019 to 06/10/2022



We know that young consumers are quickly adopting online delivery services, likely increasing their takeout orders.

Only 17% of Gen Z consumers don't plan on dining in or ordering takeout in the next week, lower than any of the other generations.

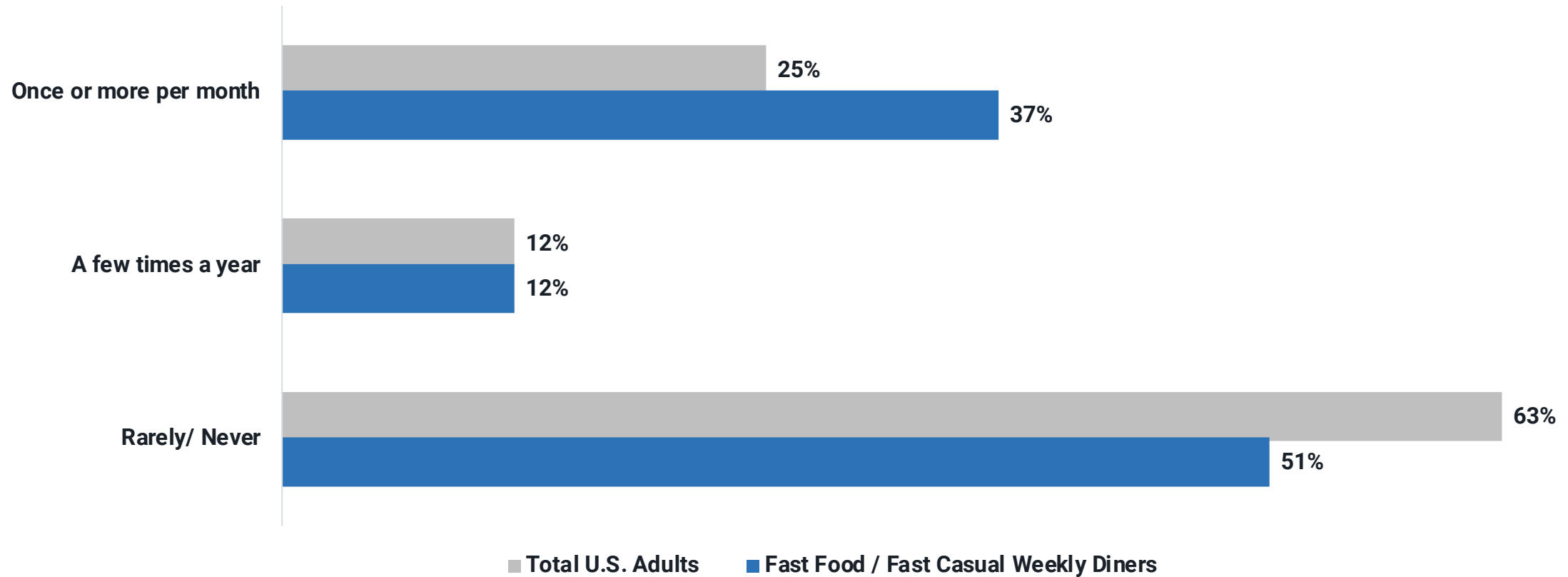
% Agree	Gen Z	Millennial	Gen X	Boomer	Total U.S. Adults
I plan to dine in at a restaurant	20%	25%	35%	26%	25%
I plan to order takeout / delivery	37%	32%	32%	30%	33%
Both	26%	18%	12%	9%	12%
None	17%	25%	22%	36%	29%





Frequent fast food/fast casual diners are much more likely to be online food delivery customers.

Q. How often do you use online food delivery services, such as Grubhub, to get food from restaurants that don't typically deliver?

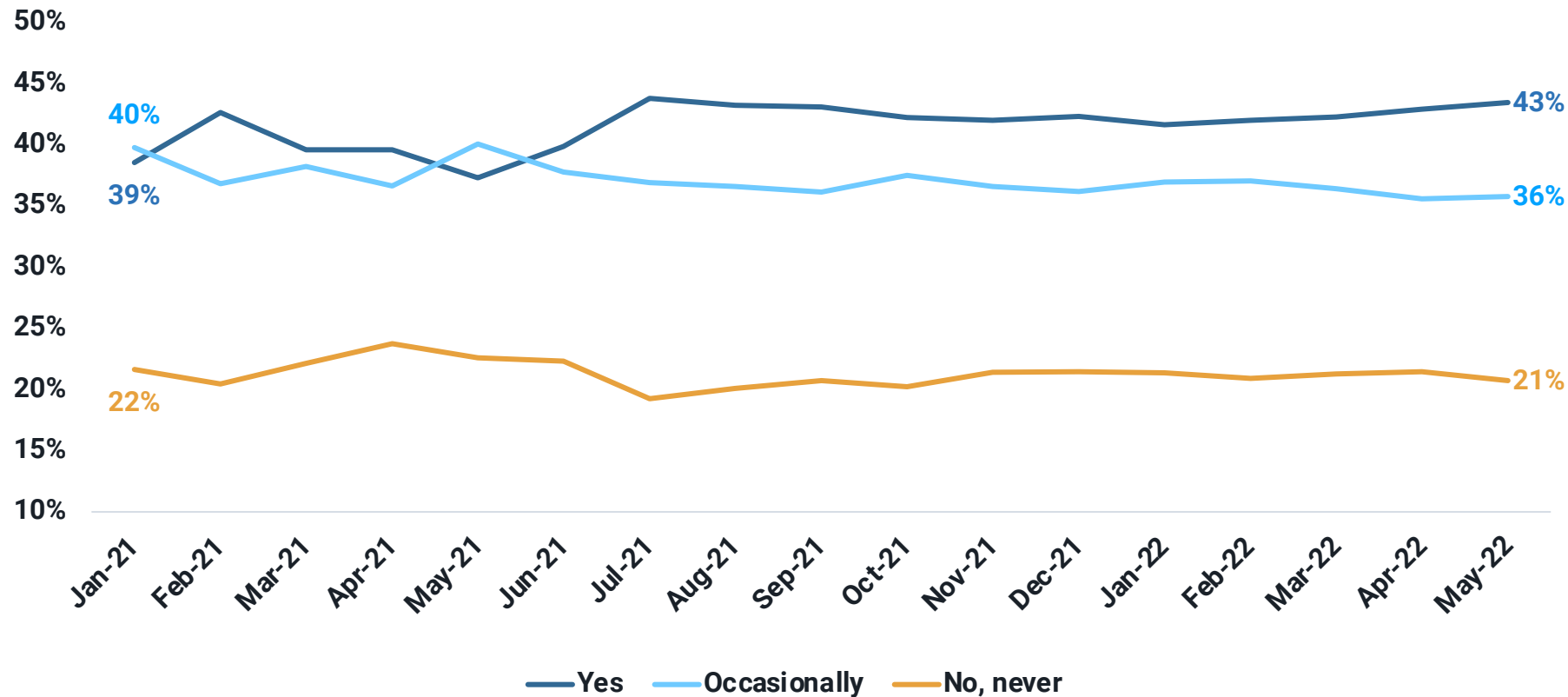


1,196 responses QSR/Fast Casual segment, from 05/01/2022 to 05/31/2022, weighted by U.S. adults

Regular coupon usage is on the rise, creating opportunities for fast food/fast casual restaurants to attract customers.



Q. When shopping for food/groceries, do you use coupons



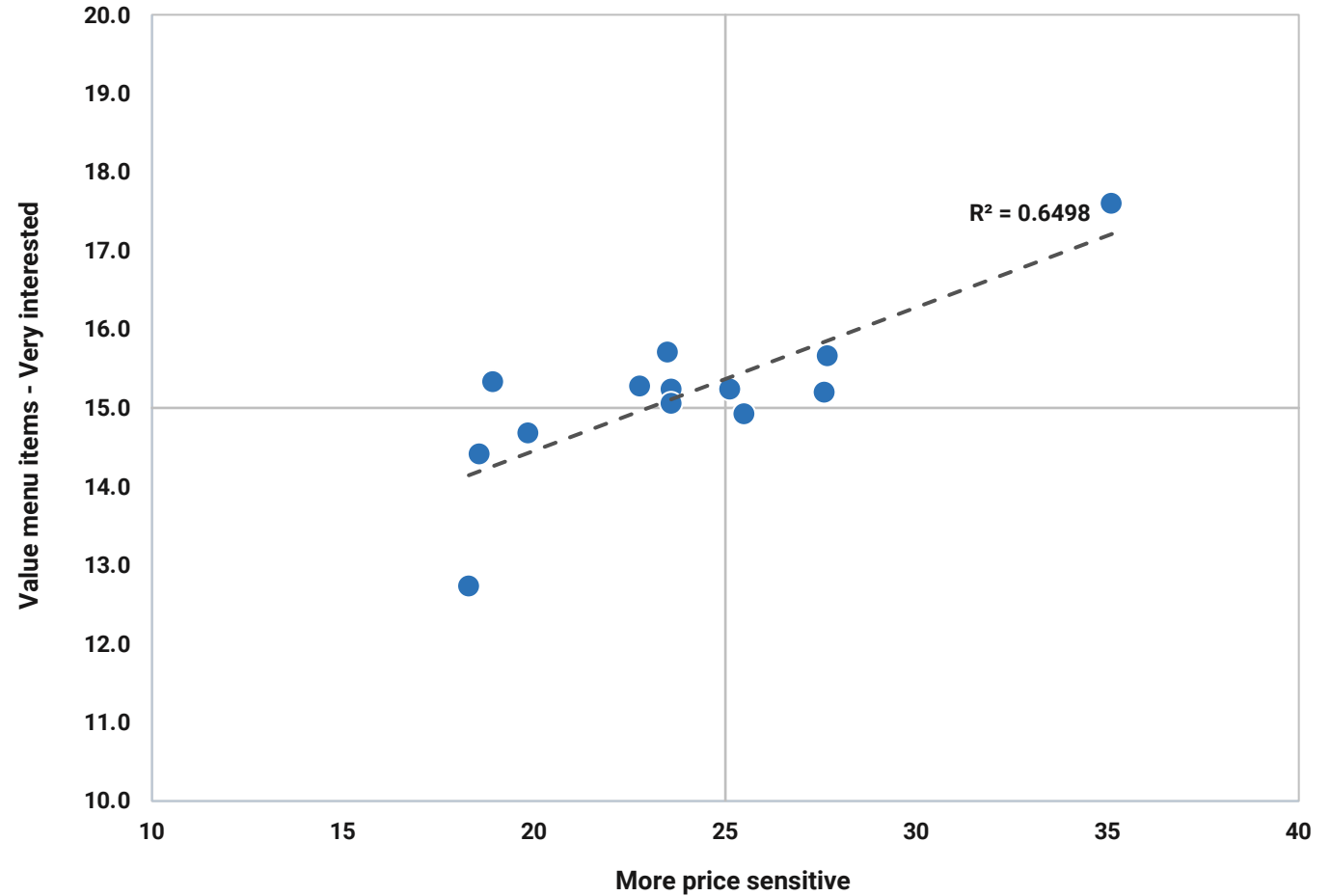
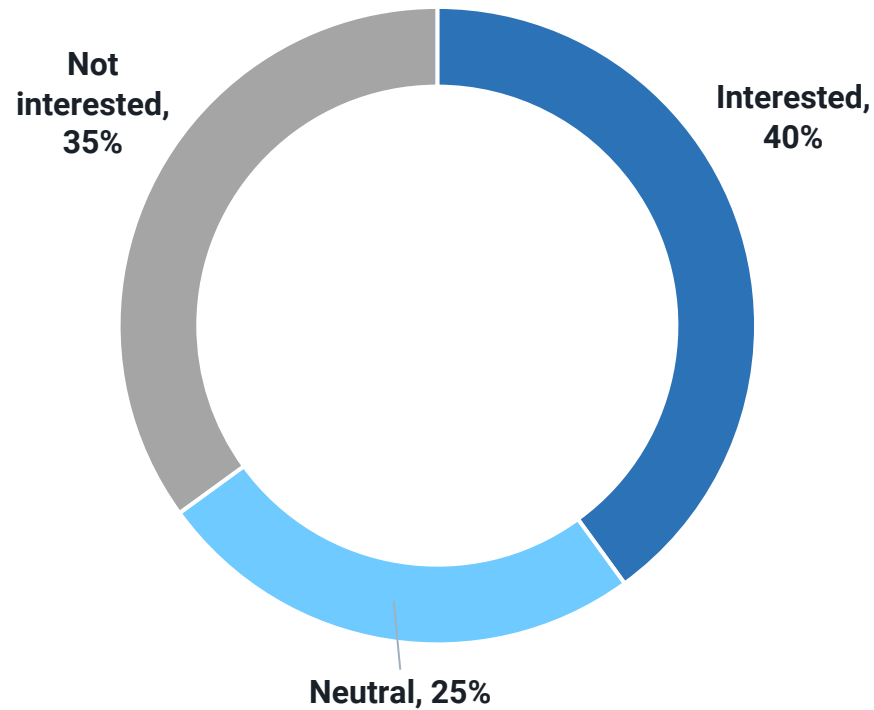
We all want to save a buck...
 Nearly eight out of ten consumers use coupons at least occasionally.

336,145 responses from 01/01/2021 to 05/31/2022



As price sensitivity grows among consumers, so does the interest in value menu items.

Q. How interested are you in eating value menu items from fast food/quick service restaurants?



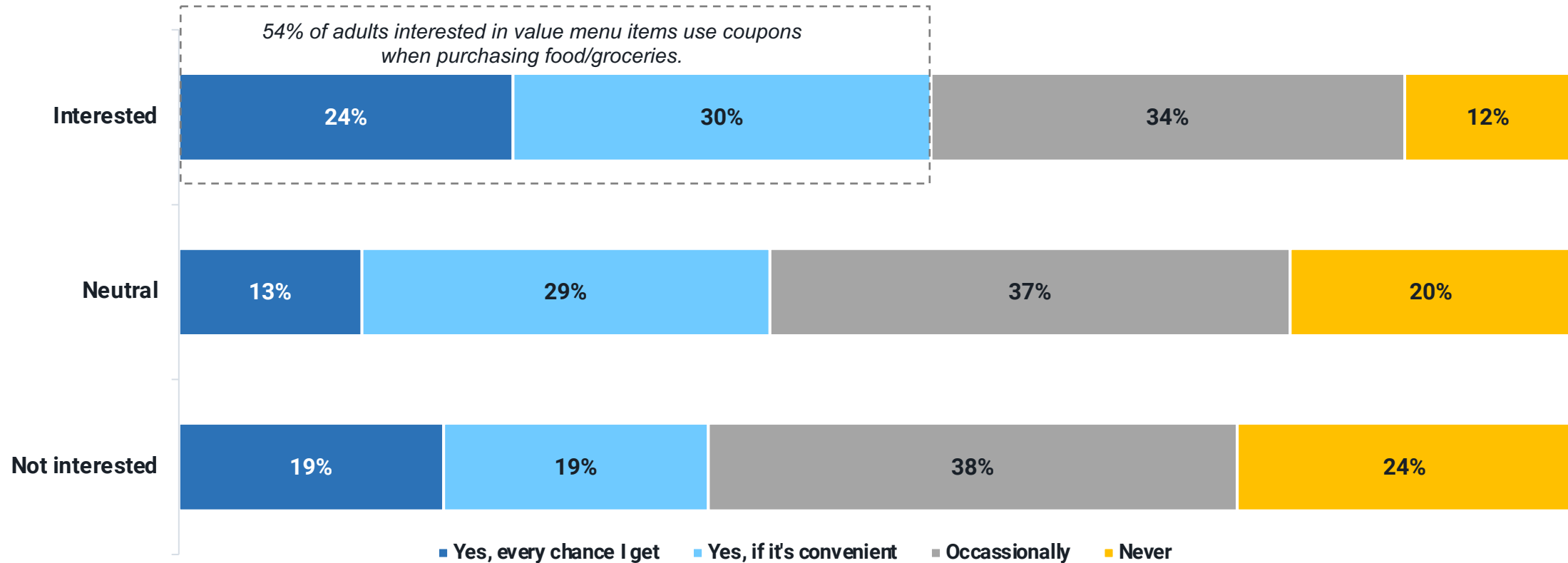
19,031 responses from 05/01/2022 to 05/31/2022



Those most interested in value menu items are also more likely to be coupon users.

How interested are you in eating value menu items from fast food/quick service restaurants? compared with *When shopping for food/groceries do you use coupons?*

54% of adults interested in value menu items use coupons when purchasing food/groceries.



5,310 respondents from 05/01/22 to 05/31/22, weighted by U.S. adults



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The CivicScience Intelligent Polling Platform and Methodology

We've pioneered a new method of "always-on" quantitative online research that can capture representative samples all day, every day.



OUR DATA SOURCING

We source our data through partnerships with hundreds of online and mobile content publishers. For them, the integration of our polls and quizzes improves on-site engagement time and provides audience detail unavailable elsewhere. We aggregate all the response data into our centralized platform.



OUR COLLECTION PROCESS

Our quizzes and polls are non-intrusively embedded in a website's content experience and serve a short set of diverse questions designed to keep respondents engaged. If they choose, respondents can continue to answer a seemingly endless series of fun quizzes and engagement questions as well as custom and syndicated research questions.



OUR RESPONDENTS

Our data is reliable and organic because our polls are 100% voluntary and respondents are kept anonymous, even to us. They enjoy voicing their opinions and seeing aggregate results presented back to them. Because we collect large response volumes on a national scale, we can deliver representative samples that can be segmented and analyzed in many ways.



OUR ANALYTICS

As respondents answer our questions, we store all their answers over time in an anonymous profile. We then use proprietary advanced technology to analyze the data in aggregate and in near real time, cross-tabulating questions to find statistically meaningful correlations for clients to navigate.