

Fast Food: Quantitative survey and qualitative community of those who eat less burgers in fast food restaurants



Funded by the Beef Checkoff.



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Approach

Research Method

- On behalf of the Beef Checkoff, Ypulse conducted a quantitative online survey in Phase I to collect information on fast food burger consumption habits, drivers, and advice, followed by a qualitative pop-up community in Phase II to further explore perceptions of the industry and fast food burgers for recommendations.

Sampling & Fieldwork

PHASE I:

- In the quantitative survey, we collected data for up to 1242 participants in total, including 216 targeted completes for those who consume less burgers in fast food.
- Participants were recruited from Ypulse's proprietary SurveyU research community.
- The quantitative survey was fielded between June 6th – June 28th 2016.

PHASE II:

- In the qualitative pop-up community, we collected data for 50 participants, all of whom consume less burgers in fast food.
- Participants were recruited from the Phase I quantitative survey.
- The qualitative activity was fielded between August 1st – August 8th 2016.

Key Findings

Fast Food: Key Findings

Retaining current fast food burger consumers and recapturing those who have decreased consumption hinges on:

- ✓ Using top adjectives for beef like ‘fresh’ to **signal taste and quality**
- ✓ Better communicating information about the **beef used** in fast food burgers
- ✓ Positioning burgers as a **healthier, complete meal** by making options more nutritious

POINTS TO NOTE:

Significant differences between groups of consumers are noted throughout.

For those consumers indicating they are eating less burgers, most are moving away from the fast food category or switching to chicken as a substitute.

Disappointment in **taste, freshness and quality** are pushing them to trade up to better burgers in **local** restaurants and **fast casual**.

Production concerns were minor among consumers eating less fast food burgers – It was most notable among those trading up to ‘better burgers’ though mentions were still nominal.

Fast Food: Key Findings cont.

Educating consumers on what is, and more importantly is not, in their meat is a large barrier with consumers.

Though eating healthy is increasingly important to Millennials, that is not the intention of fast food. Making a fast food burger healthier would involve overhauling how it's made from the very beginning.

Millennials may eat fast food because it is convenient, but that doesn't mean they want their food pre-made. Most are willing to pay a bit more and wait a bit longer—but not by much—for fresh food made with beef and other ingredients they can trust.

Perceptions of Fast Food

PHOTO EXERCISE: FAST FOOD

When thinking of 'fast food' Millennials picture burgers more than any other food product. They often imagine burgers to be paired with fries and a drink. Otherwise, they think of the larger scope of foods that are considered 'fast food,' branding in the industry, obesity, and traveling on-the-go.

"Sometimes I vary it up, get a chicken sandwich, but typically I think of a burger."



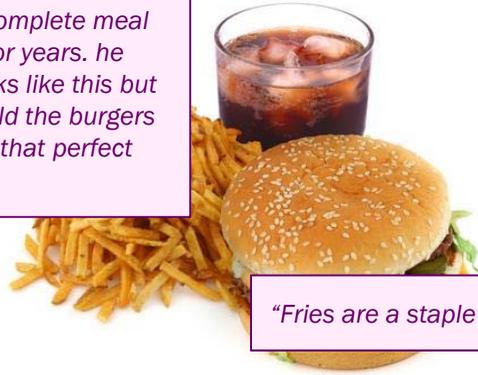
"I am always use to having it especially growing up when I wanted fast food."



"It's the meal I get when I'm on the run."



"It's [been] a complete meal for on the go for years. he food never looks like this but in an ideal world the burgers and fries have that perfect look."



"Fries are a staple of fast food."

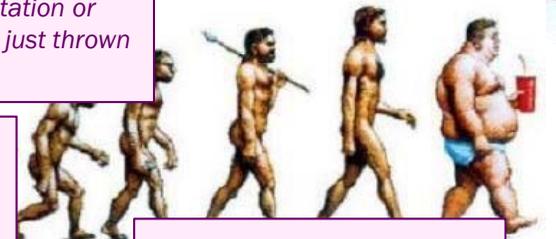
"Burgers. Cheap. Glamorous. Unrealistic advertising. I think a burger epitomizes classic fast food."



"I know fast food makes some people happy. It is something friends can eat without having to spend a lot of money."



"I think of how much beef the fast food industry is responsible for consuming."



"Negative connotation often associated with obese Americans."



"Working in corporate America sometimes after working a full time shift you're so tired that fast food becomes the only option."



"I think that a drive thru a classic sign of a fast food joint, because it means you get the food instantly."



MEWHEN RUNNING TO GET FOOD



There are many things specific to fast food burgers like the taste, convenience, and even nostalgia that Millennials love.

WHAT MILLENNIALS LOVE ABOUT FAST FOOD BURGERS:

Meat and cheese: the ideal combination

Special sauce: don't have this at home

Delicious bite: seasoned, grilled, and juicy

Greasy: signals that they are indulging

Add-ons: bacon, pickles, ketchup, mustard, etc.

Healthy-ish: adding vegetables or patty sans bun

Not too thick: thinner burger patties than upscale restaurants

Consistent: know it will taste the same time, not overcooked

Convenient: quick and made by someone else

Satisfying: fills them up and a guilty pleasure

Affordable: Cheap items on the dollar menu

Nostalgic: remember being exciting for it as a kid

*"It's fast, tasty, and filling. It hits the spot when I'm in the mood for it."
– Anawat C, M, 26*

*"I like that I can have lettuce and tomatoes and make it feel a little healthier."
– Krystal M, F, 27*

*"It needs to be fast and filling. I'm not expecting gourmet, just something to keep me from getting hangry."
– Ben P, M, 28*



*"It tastes fantastic and is extremely easy/quick to eat. Super versatile... so no one place has 'done it' for every person's preferences."
– Justin K, M, 26*

*"I like that they are thinner than sit down restaurants. I don't like pink burgers so fast food is always cooked to my liking."
– Lindsey M, F, 29*

In terms of quality, Millennials do not trust the production of fast food meat.

The look, smell, taste, price, and feeling after eating influence their quality perceptions.

For example, the beef looks different than if they were to buy it raw and cook it themselves. The bun is often considered lower quality for its appearance (white, flat) and sweeter taste (additional sugars). Even the lettuce is subject to low quality concerns for not looking fresh (wilted).

Millennials feel that since the beef in fast food is mass produced and so inexpensive, it contains artificial flavors and ingredients and is always frozen, not fresh.

THEY COMPARE THE BEEF IN FAST FOOD TO:

1. Food in higher quality restaurants (fast casual, local)
2. Burgers they could make at home
3. Other fast food products (hot dogs, chicken nuggets)

“The meat used in fast food burgers are certainly not of the highest quality. I can easily compare fast food burger quality to more upscale burger which use a softer and more satisfying patty.”
– Anawat C, M, 26

“Granted, I am paying about \$2 for something that needed to be raised, slaughtered, shipped, processed, seasoned, reheated, and placed on a bun with other ingredients, so I am fully aware that quality is not what I am paying for.” – Justin K, M, 26

“Most fast food burgers have a distinct taste in which the meat clearly taste “fake” and aftereffects are also an indication you are paying for low quality meat. I usually compare the quality to something I could whip up at my own home.” - Edwix T, M, 21

“They are different in color and texture from other burgers. They have binders and preservatives so that fast food places can keep them longer. I would compare it to a restaurant burger that is thicker and more fresh.” – Anna G, F, 25

“Grease, and oil and cheap meat. The frozen meat lessens the taste and quality on defrosting.”
– Beverly H, F, 23

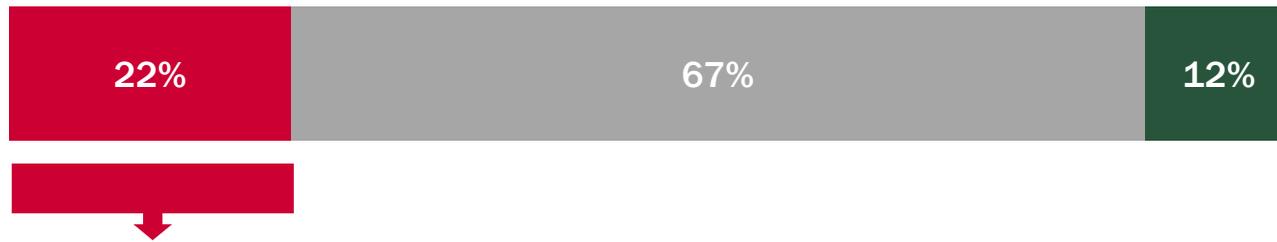
“I would compare burger quality in fast food sometimes to something broken that’s glued back together.”
– Ben P, M, 28

The Health Conscious Movement

About 1 in 5 Millennial consumers are eating less burgers at fast food restaurants. They are mostly moving towards chicken.

Change in Burger Consumption (n=970)

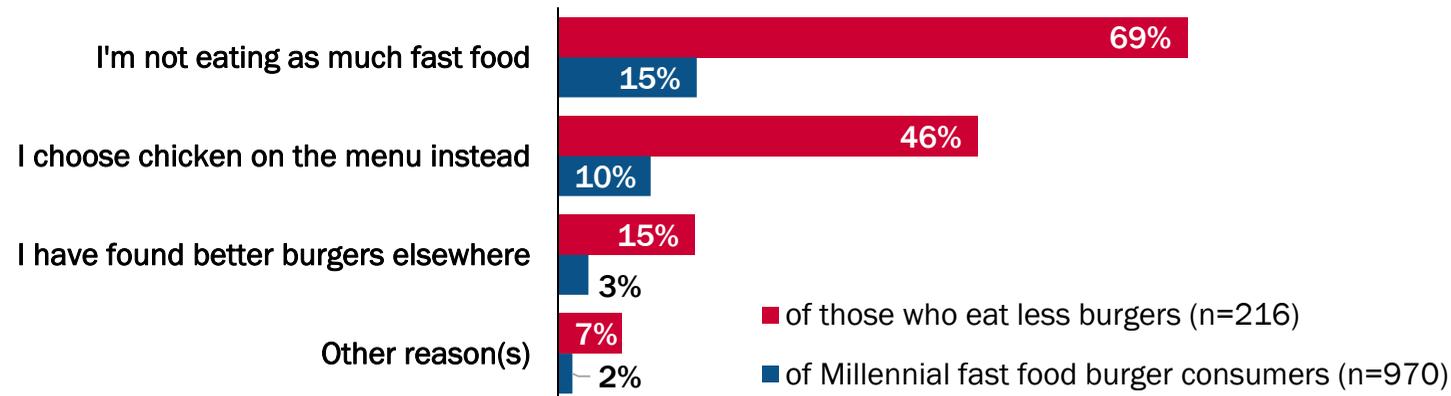
■ Less Often ■ Same Rate ■ More Often



POINTS TO NOTE:

This change in burger consumption is measured among Millennials ages 18-34 who eat at the top fast food restaurants more than twice a year and order burgers at least once in a while. Incidence for eating burgers less often among the general Millennial population and the US population in total would decrease further.

Reasons for Eating Less Burgers (n=216)



POINTS TO NOTE:

Those in Urban areas trend higher for having found better burgers elsewhere [26% vs 10% Suburban and 7% Rural].

Those in the Northeast are more likely than other regions to substitute chicken for burgers [66% versus 50% Midwest, 40% South, and 38% West].



Q130. How has your consumption of burgers at fast food restaurants changed in the last year?
Q135. For what reasons are you eating burgers at fast food restaurants less often?

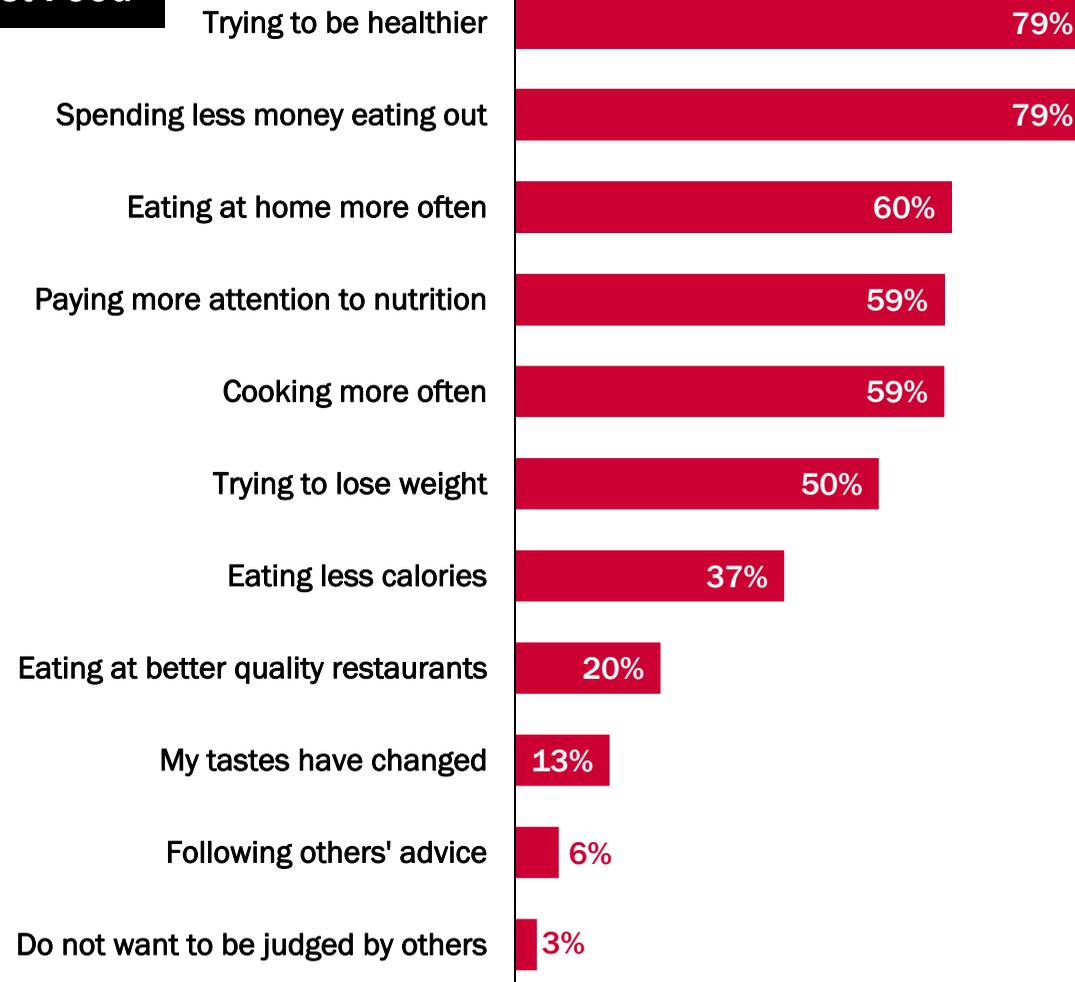
Among those who are eating less burgers, those who have cut back on fast food are doing so for health and budget reasons.

Reasons for Less Fast Food

(n=150)

This sample (n=150) describes 69% of Millennials who are eating less burgers in fast food (n=216).

This sample (n=150) represents 15% of Millennial fast food burger consumers (n=970).



POINTS TO NOTE:

Females are eating at home more often than Males [71% vs 49%] while Males are paying more attention to nutrition [68% vs 51%] and, surprisingly, more Males are trying to lose weight than Females [58% vs 42%].

Younger Millennials ages 18-24 are more likely to say they're following someone's advice [12% vs 2%] while Older Millennials ages 25-34 are more likely to be spending less money out [85% to 70%] and cooking more often [67% to 48%].

"I never really liked fast food so I only ever ate it before if I didn't have any time for any other option. Now that I am married my husband and I cook every night to save money."
- Female, 27

"I want to lose weight and fast food doesn't make me feel very good after I eat it. I want it before I eat it, but I usually regret it afterwards."
- Male, 28



Q165. For what reasons have you upgraded to better burgers? These burgers are...

Q155. Since you're eating burgers less often in fast food restaurants, where have you found better burgers?

Younger Millennials are somewhat more consistent with eating healthier, though all ages agree that fast food is sometimes the easiest option.

The speed and convenience of fast food can override their health goals.



“I am trying to lead a more healthier life, but it is too easy and quick to grab unhealthy food items.” – Derek C, M, 31

“Unfortunately, I am currently a full-time college student and that takes its toll. I cannot live the healthy, minimalist lifestyle I want to just yet. I work out and try to pick the healthier options at dining halls as I rarely have time to cook. Sometimes I just do not have time to prepare something fresh and healthy. Especially not when it's 3 in the morning and I've been studying. That's when I have to break out the ramen and sacrifice some blood pressure.” – Shefe G, F, 18

*“When choosing fast food, health is not usually a concern. It's more about convenience for me.”
– Jessica S, F, 31*

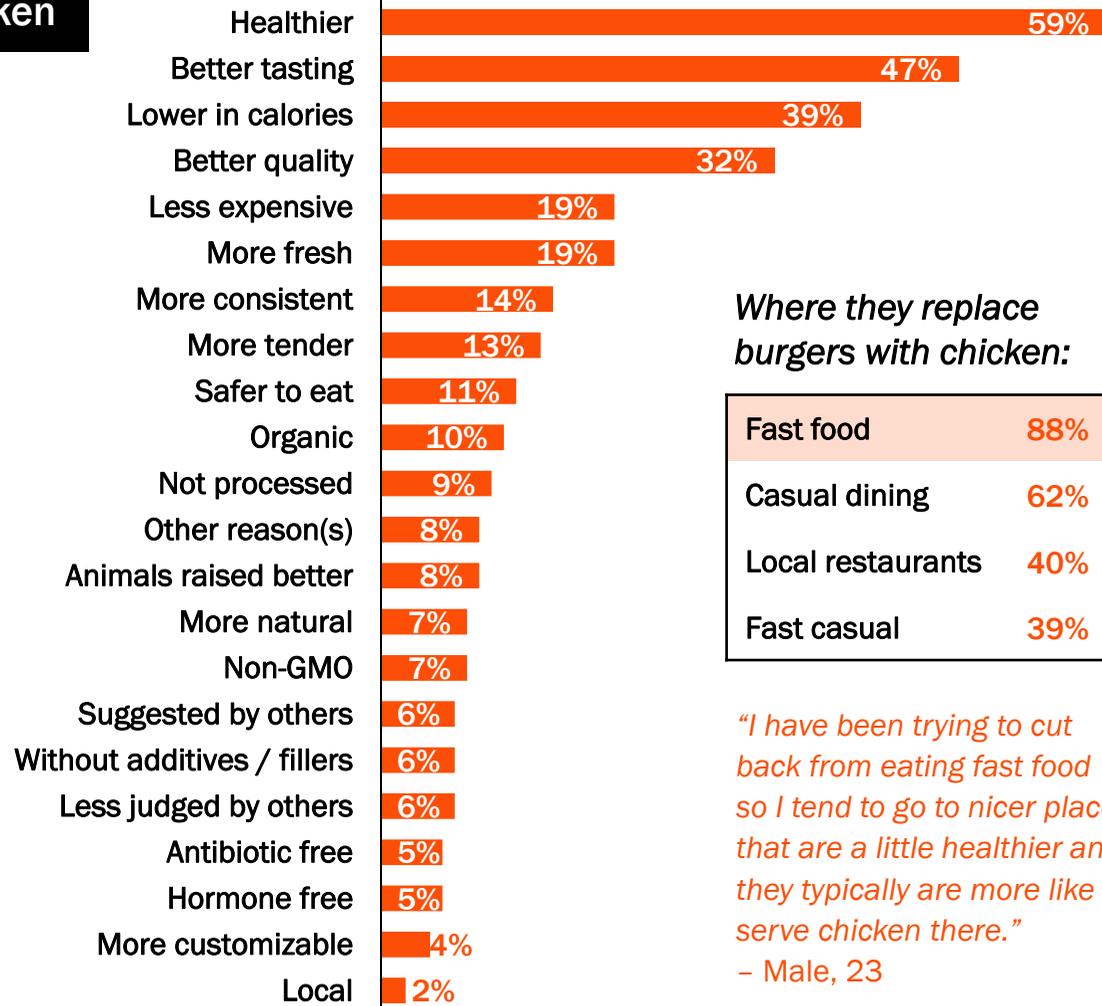
Chicken is considered a healthier choice than beef on the fast food menu by those who are replacing burgers.

Reasons for Choosing Chicken

(n=100)

This sample (n=100) describes 46% of Millennials who are eating less burgers in fast food (n=216).

This sample (n=100) represents 10% of Millennial fast food burger consumers (n=970).



Where they replace burgers with chicken:

Fast food	88%
Casual dining	62%
Local restaurants	40%
Fast casual	39%

"I have been trying to cut back from eating fast food so I tend to go to nicer places that are a little healthier and they typically are more like to serve chicken there."

- Male, 23

Chicken is considered a leaner protein that is less fatty and less greasy than beef. Fast food chicken sandwich options also contain less calories than a burger, and sometimes they do not feel well after eating a burger.

"The sandwiches are a lot healthier in my opinion when compared to the giant burgers fast food restaurants are putting out."

- Female, 19



Q150. For what reasons are you choosing chicken instead of a burger when eating fast food? Chicken is...
Q140. Where are you choosing chicken on the menu instead of burgers?

Bridging the Gap

Those who are trading up to better burgers do so for taste, freshness and quality reasons.

Reasons for Trading Up

(n=32)

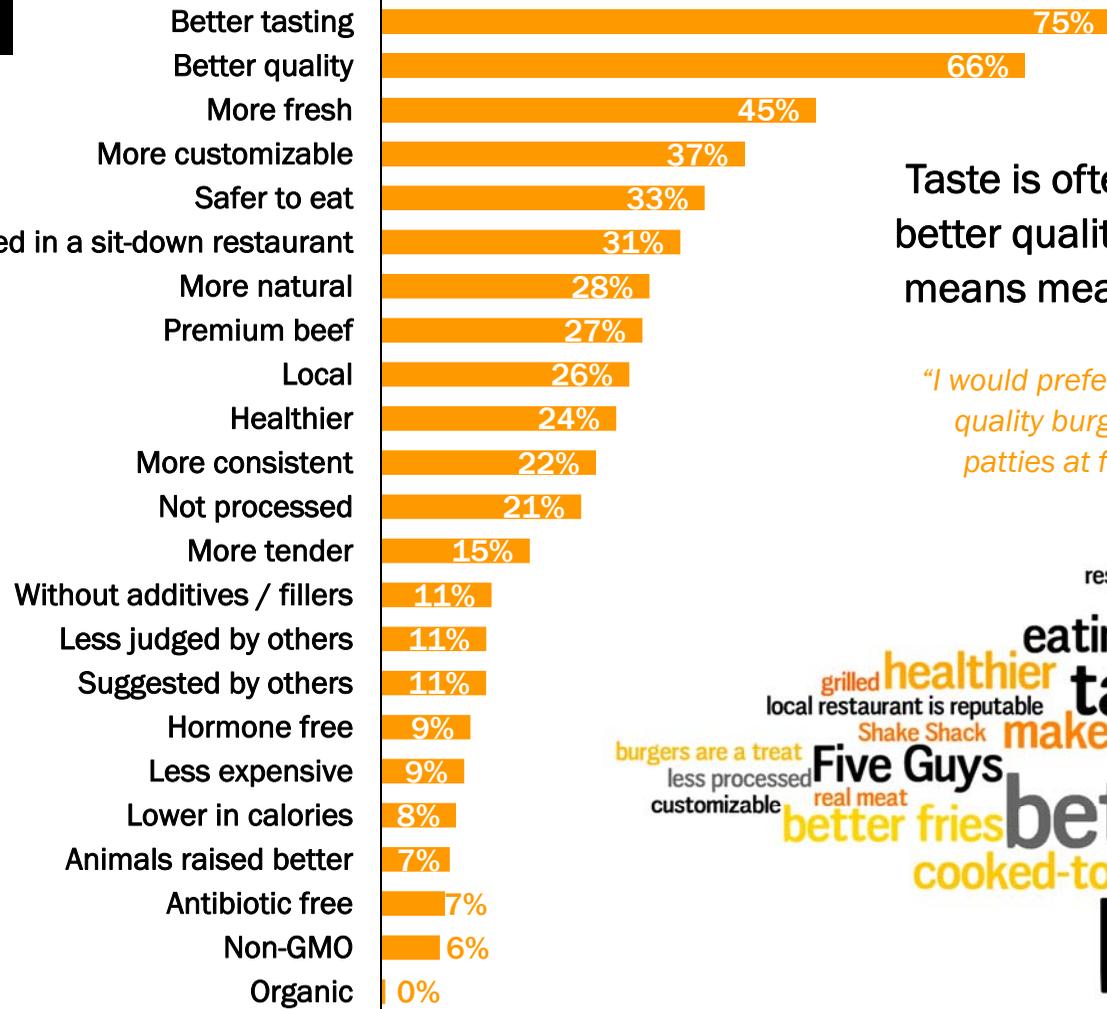
This sample (n=32) describes 15% of Millennials who are eating less burgers in fast food (n=216).

This sample (n=32) represents 3% of Millennial fast food burger consumers (n=970).

Where they have found better burgers:

Local restaurants	70%
Fast casual	53%
Casual dining	26%

"Local joints have been in town for many years and are reputable in the community."
- Male, 19



Among these consumers, fast food restaurants have a negative connotation.

Taste is often associated with being healthier and made with better quality ingredients, while having a better quality burger means meat that is fresh and not frozen and less processed.

"I would prefer to have higher quality burgers than frozen patties at fast food joints."
- Male, 19

"After eating a good quality burger at a local restaurant, it's hard to justify ordering a burger of lesser quality at a fast food place."
- Male, 22



"Some tend to be cooked better. For instance, in most restaurants you can ask for them to be cooked they way you like it."
- Female, 27



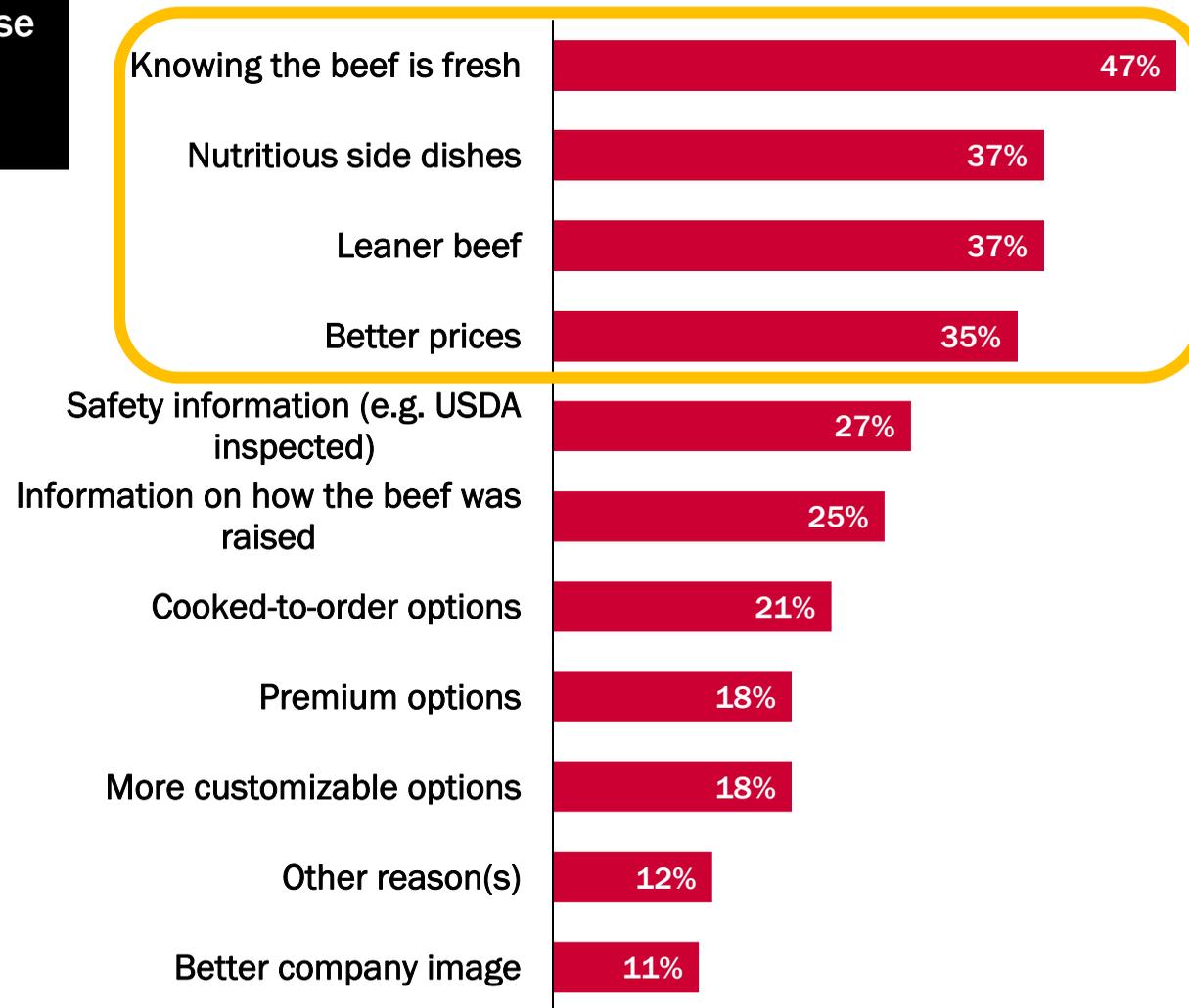
Q165. For what reasons have you upgraded to better burgers? These burgers are...
Q155. Since you're eating burgers less often in fast food restaurants, where have you found better burgers?

Low base sizes

Fresh and lean meat, along with nutritious side dishes, are the top motivators to communicate to those who eat less fast food burgers.

Motivators to Increase Fast Food Burger Consumption

(n=216)



POINTS TO NOTE:

Males index higher on being influenced by better prices [43% to 29%] while Females are more influenced than Males on cooked-to-order options [28% vs 12%].

More Younger Millennials are motivated than Older Millennials by knowing the beef is fresh [59% to 38%], safe [38% to 20%] and if the company had a better image [18% to 7%].

Though indicators around the beef can help drive interest in a product there is still natural skepticism based on beliefs in the establishment they are visiting.

Q: Imagine seeing an advertisement for a fast food burger using one of the following words or phrases to describe it. Would any of these words make you more interested to try the burger?

- 20 **Fresh**
- 17 **100% Beef**
- 17 **Never frozen**
- 16 **No fillers / additives**
- 15 **Local**
- 13 **Lean**
- 10 **High quality**
- 9 **Leanness levels** (80/20, 90/10)
- 7 **Low-calorie**
- 5 **Specific cut** (Chuck, Sirloin, Round)

count of n=50

They would like to believe the claims, but there is still a lot of stigma when it comes to communication from fast food companies.

Nevertheless, they would rather go somewhere that makes the effort to assert these claims rather than somewhere that doesn't.

"I still wouldn't believe it. I would have to see he process myself to see how everything works." – Brandi F, F, 24

"Many fast food restaurants say "Fresh, High Quality, Never Frozen" and we all know its not true." – Anna G, F, 22

"Beef should be beef. Not going to pay for that. Everyone says that it's fresh. Who exactly made your burger the "high quality" burger? Was it yourself? [Local is] The best advertisement. Would pay about 75% more for this...Stop adding shit to burgers. Saying [no fillers / additives] only reminds the customer that what they have been eating was filled with that shit." – Sara V, F, 23

"Fillers/additives generally aren't even considered edible food on their own, so it shouldn't be in the burger to begin with and I shouldn't have to pay more for a burger without them." – Joey K, M, 22

HEALTHY VS. FAST FOOD

In their words...

*“I think I would most likely choose the **healthier option depending on the price** that is being asked for. In my opinion, when someone makes the decision to go to a fast food restaurant, they've **already accepted** that they are probably **not going to eat something healthy**. Whether it's due to **lack of time to cook** or speed of the need to eat something or **hunger level**, fast food is usually a **last resort** choice. Another factor is the price of the burger, granted if you are going to a fast food restaurant you **expect to pay less** for your burger than one you'd get at Fast Casual and you'd expect the **quality to go hand in hand** to that.”*

– Rachel Z, F, 27

Making a fast food burger healthier wouldn't necessarily make it better: Millennials want the best ingredients possible for the price point and speed of preparation.

Many would want the option of choosing their healthier fast food burger (probably ordering every other time), but not at the expense of price and convenience.

In their favorites, they know what tastes good, it does not take long to cook, and is sometimes a treat to themselves.

Made-to-order burgers require more time, which they often do not have when going to fast food restaurants.

Millennials are more inclined to eat healthy burgers at a sit-down restaurant as opposed to fast food, envisioning their healthy burger on fast casual or casual menus.

“If price was not relevant, I would certainly eat the burger I designed rather than the usual burger. It may take two extra minutes to make, but the health benefits and the freshness would be well worth the wait. My burger would be sold at a fast casual restaurant so you know nothing is sitting in a warming tray and can see your food made while you wait.”
– Kale N, M, 26

“I could see it at fast food but maybe not eating it to-go. If it was advertised as a burger for young, health conscious and quality conscious people, it might work.” – Ben P, M, 28

“The taste and the price are the biggest factors. If it tastes good and the price is right plus its healthy... I'm all for it! I'd probably get it from a local restaurant because there will be more variety probably and the cost will probably be more worth it.” – Rashad E, M, 24

“The price is a big factor, so as long as it's competitive to In-and-Out, healthier option fast-food would be good. I would be most likely to order a healthy burger at a casual dining place since I know they have more time to prepare good ingredients.” – Beverly H, F, 23

Thank You!

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