



Analysis of Chain Restaurant Fans


An Insight Report Presentation | Using DeepProfilei Micro-Segmentation
March 2014

Technology & Social Media Scales: Chipotle Mexican Grill | Moe's Southwest Grill | Qdoba Mexican Grill

Sports Fandom Scales: Five Guys Burgers & Fries | In-n-Out Burger | Fuddruckers

Health & Wellness Scales: McDonald's | KFC | Wendy's | Taco Bell | Burger King

CivicScience's DeepProfile® Project #1 Goal



To compare the key technology and social media usage traits of people who are fans of **Chipotle, Moe's Southwest Grill** and **Qdoba Mexican Grill**.



Note: This report was not commissioned or requested by any third-party. This is CivicScience's own analysis.

Question of Interest

CivicScience uses the following question format when analyzing restaurant favorability:

How much do you like to eat at X?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

How much do you like to eat at Chipotle?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

VS.

How much do you like to eat at Moe's Southwest Grill?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

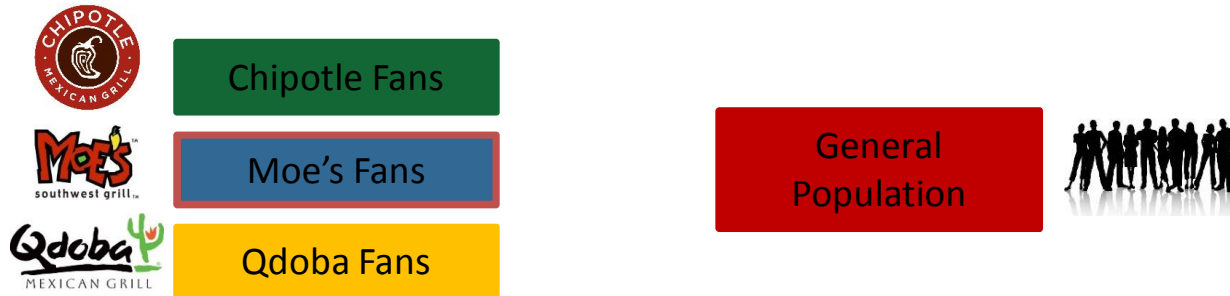
VS.

How much do you like to eat at Qdoba Mexican Grill?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

DeepProfile Scales: Micro-Segmentation

In the following slides, we examine how Chipotle fans, Moe's Southwest Grill fans and Qdoba Mexican Grill fans responded to a number of questions that contribute to two (of 12) scales we've developed – Social Media and Tech Savvy – that aim to highlight **how population segments compare to each other according to key consumer metrics.**



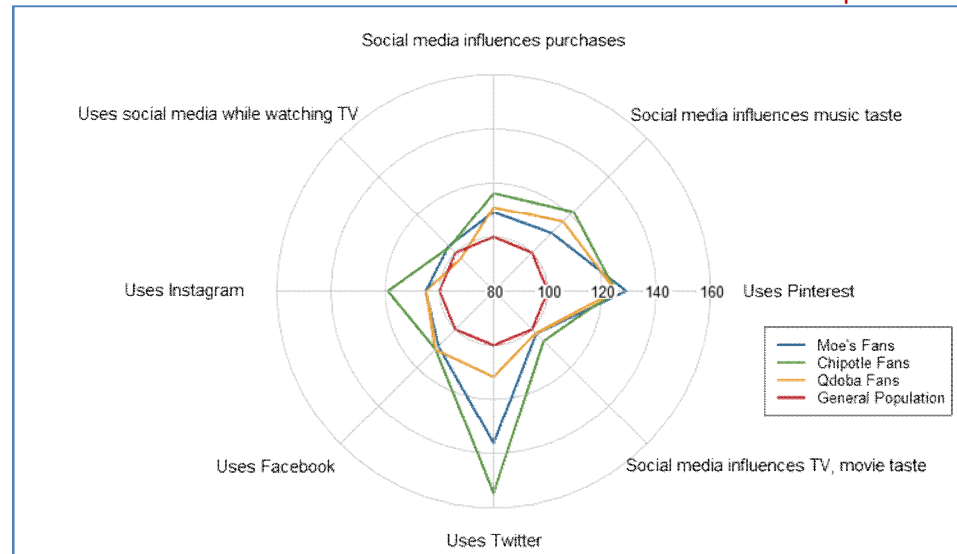
Scale: Social Media

- “ The Social Media scale aims to identify the extent to which population segments are active on different social media sites and how much social media influences their behaviors, purchases and activities.
- “ On average, Chipotle fans are more active on social media than Moe’s and Qdoba fans. All of the Mexican restaurants have a higher Social Media score than the general population.

Aggregate



Individual Attributes



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Scale: Social Media (continued)

Individual Attributes

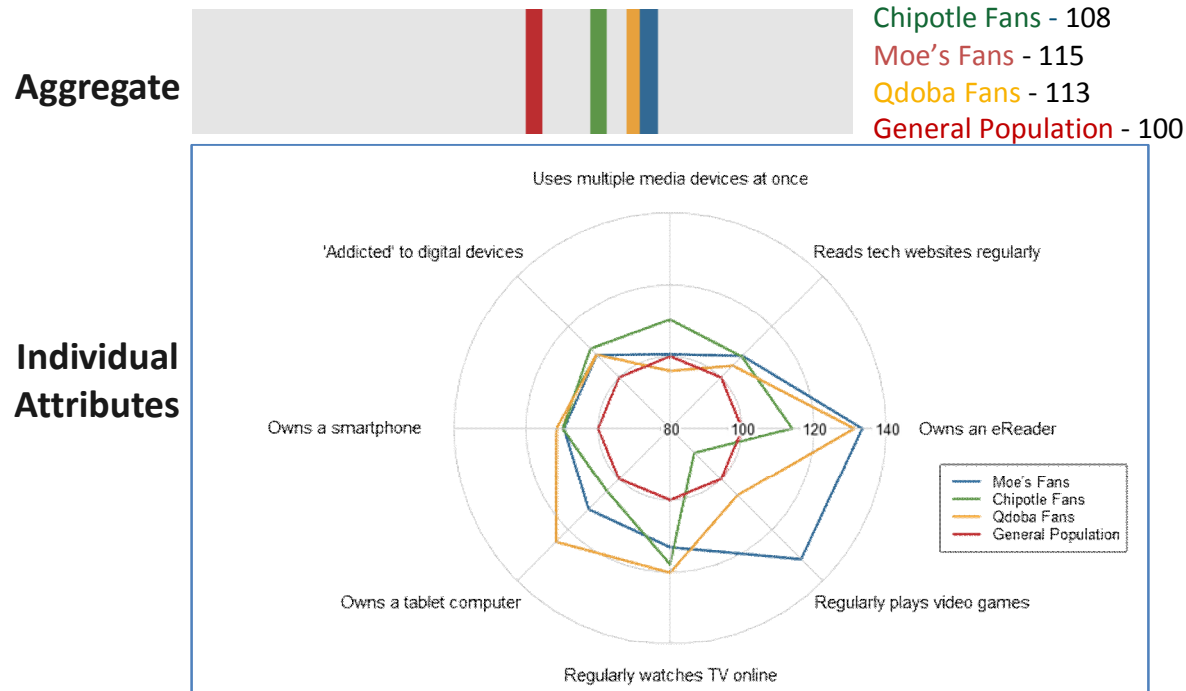
Attribute	Chipotle Fans	Moe's Fans	Qdoba Fans
Uses Pinterest	16%	17%	16%
Uses Facebook	72%	71%	72%
Uses Twitter	37%	33%	27%
Uses social media while watching TV	21%	21%	20%
Social media influences TV, movie taste	38%	37%	37%
Social media influences music taste	34%	31%	33%
Social media influences purchases	42%	39%	40%

“ Chipotle fans are more likely to use Twitter and slightly more likely to say social media influences their music tastes, purchases, and TV/movie tastes.

“ Moe's fans are slightly more likely to Pinterest.

Scale: Tech Savvy

- “ The Tech Savvy scale aims to identify the extent to which population segments use their digital devices and are informed and aware of the latest technology available.
- “ Moe’s fans are a bit more tech savvy than Chipotle and Qdoba fans. All fans are more tech savvy than the general population.



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Scale: Tech Savvy (continued)

Individual Attributes

Attribute	Chipotle Fans	Moe's Fans	Qdoba Fans
Owns an eReader	31%	36%	36%
Owns a smartphone	59%	59%	60%
Owns a tablet computer	40%	42%	47%
Uses multiple media devices at once	38%	35%	33%
'Addicted' to digital devices	58%	57%	57%
Reads tech websites regularly	40%	40%	39%
Regularly watches TV online	35%	34%	36%
Regularly plays video games	22%	33%	26%


- “ Chipotle fans are more likely to use multiple media devices at once and they are slightly more likely to consider themselves “addicted” to their digital devices.
- “ Moe’s fans are the most likely to regularly play video games.
- “ Qdoba fans are more likely to own a smartphone, and slightly more likely to own a tablet and regularly watch TV online.

DeepProfile Scales Summary

Scale	Chipotle Fans	Moe's Fans	Qdoba Fans	General Population
Social Media	120%	113%	110%	100%
Tech Savvy	108%	115%	113%	100%

- “ When compared to the general population, all three fast casual Mexican chains score higher on the Social Media scale and the Tech Savvy scale.
- “ Overall, Moe’s fans and Qdoba fans are more similar when it comes to their social media usage and tech savviness.
- “ Chipotle fans have the highest social media score when compared to Moe’s and Qdoba fans.
- “ Moe’s fans have the highest tech savvy score when compared to Chipotle and Qdoba fans.

CivicScience's DeepProfile® Project #2 Goal



To compare the key sports fandom traits of people who are fans of **Five Guys Burgers and Fries**, **In-N-Out Burger** and **Fuddruckers**.



Note: This report was not commissioned or requested by any third-party. This is CivicScience's own analysis.

Question of Interest

CivicScience uses the following question format when analyzing restaurant favorability:

How much do you like to eat at X?

- “ Never heard of it
- “ I love it
- “ I like it
- “ I don't really have a strong opinion
- “ I don't like it

How much do you like to eat at Five Guys Burgers and Fries?

- “ Never heard of it
- “ I love it
- “ I like it
- “ I don't really have a strong opinion
- “ I don't like it

VS.

How much do you like to eat at Fuddruckers?

- “ Never heard of it
- “ I love it
- “ I like it
- “ I don't really have a strong opinion
- “ I don't like it

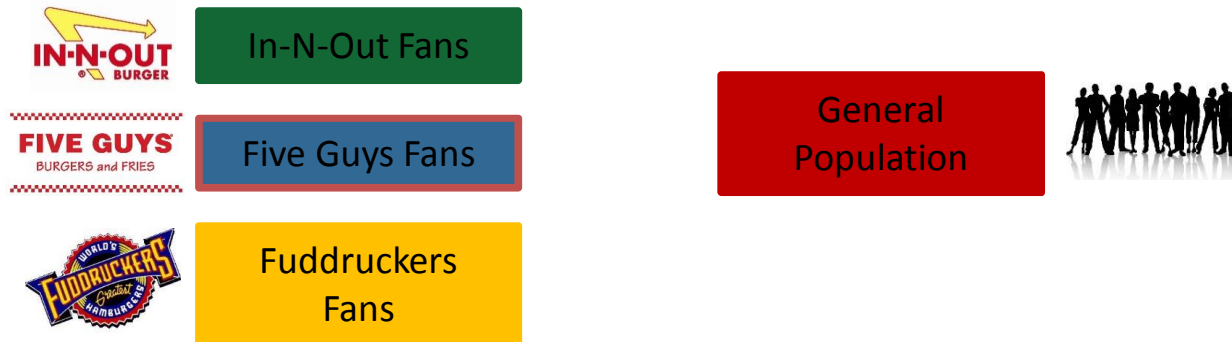
VS.

How much do you like to eat at In-N-Out Burger?

- “ Never heard of it
- “ I love it
- “ I like it
- “ I don't really have a strong opinion
- “ I don't like it

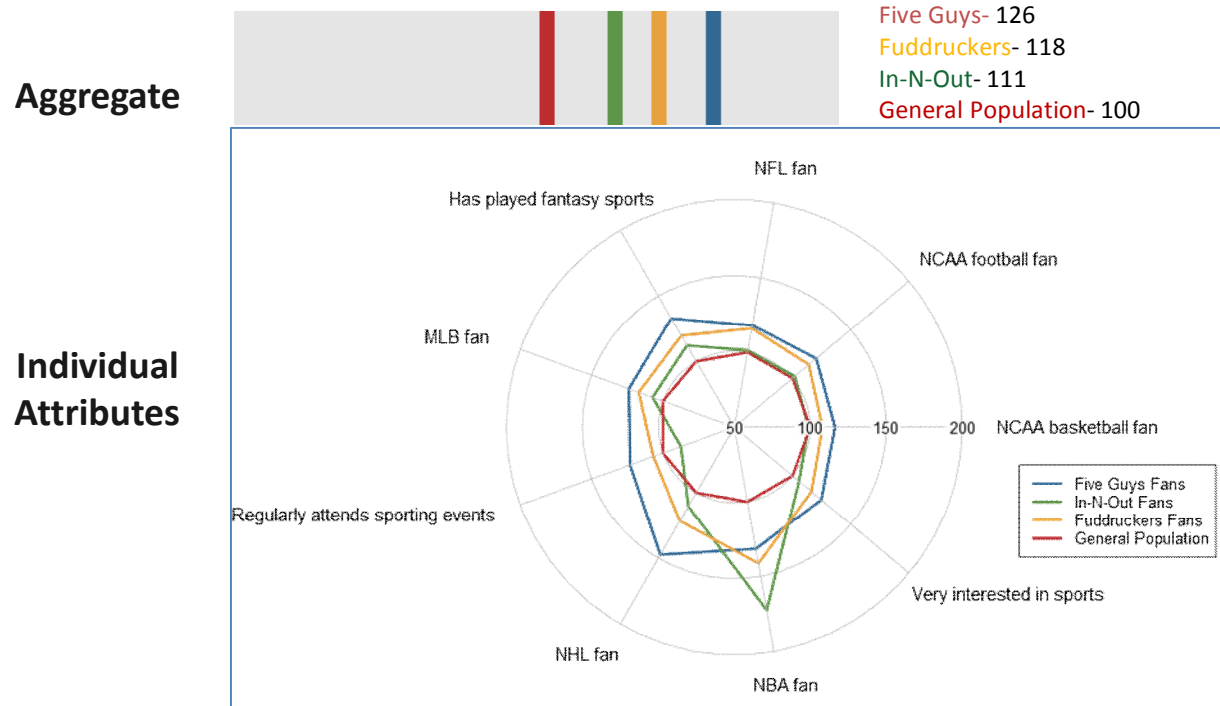
DeepProfile Scales: Micro-Segmentation

In the following slides, we examine how Five Guys fans, Fuddruckers fans and In-N-Out fans responded to a number of questions that contribute to one scale we've developed – the Sports Fan Scale (more scales are available upon request) – that aim to highlight **how population segments compare to each other according to key consumer metrics.**



Scale: Sports Fans

- “ The Sports Fan scale aims to identify the extent to which population segments are interested in different types of sports.
- “ On average, Five Guys fans, Fuddruckers fans and In-N-Out fans all have a higher score on the sports fan scale than the general population. Five Guys fans are the largest sports fans.



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Scale: Sports Fans (continued)

Individual Attributes

Attribute	Five Guys Fans	Fuddruckers Fans	In-N-Out Fans
NCAA basketball fan	29%	27%	25%
NCAA football fan	36%	34%	31%
NFL fan	51%	50%	44%
Has played fantasy sports	25%	23%	21%
MLB fan	36%	34%	31%
Regularly attends sporting events	64%	56%	46%
NHL fan	25%	21%	19%
NBA fan	22%	23%	28%
Very interested in sports	40%	37%	34%

“ Five Guys fans are the most likely to regularly attend sporting events, consider themselves NHL fans, and more likely to say they are very interested in sports.

“ Five Guys fans are slightly more likely than others to be NCAA basketball fans, NCAA football fans, NFL fans, and slightly more likely to play fantasy sports.


“ In-N-Out fans are more likely than the other groups to be NBA fans.

Additional Scale Data for Project #2 Brands

The information below is pulled from other scales we offer, such as the Charitable Giving Scale, Discriminating Shopper Scale, Social Media Scale, etc. Please contact us for more details: contact@civicscience.com

- In-N-Out fans are the most likely to donate to environmental charities and art/culture charities.
- Fuddruckers fans are the most likely to donate to religious charities.
- Five Guys fans are the most likely to be on Twitter.
- In-N-Out fans are the most likely to showroom and always consult online reviews before making purchases.
- Fuddruckers fans are the most likely to always vote and attend local government meetings.
- Five Guys fans are the least likely to be price-conscious when it comes to electronics.
- In-N-Out fans are the most likely to say social media influences their purchases.

CivicScience & DeepProfile | Project #3 Goal



To compare key health and wellness behaviors of people who are fans of **KFC**, **Taco Bell**, **Wendy's**, **Burger King** and **McDonald's**.



Question of Interest

How much do you like to eat at KFC?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

How much do you like to eat at McDonald's?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

VS.

How much do you like to eat at Taco Bell?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

How much do you like to eat at Burger King?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

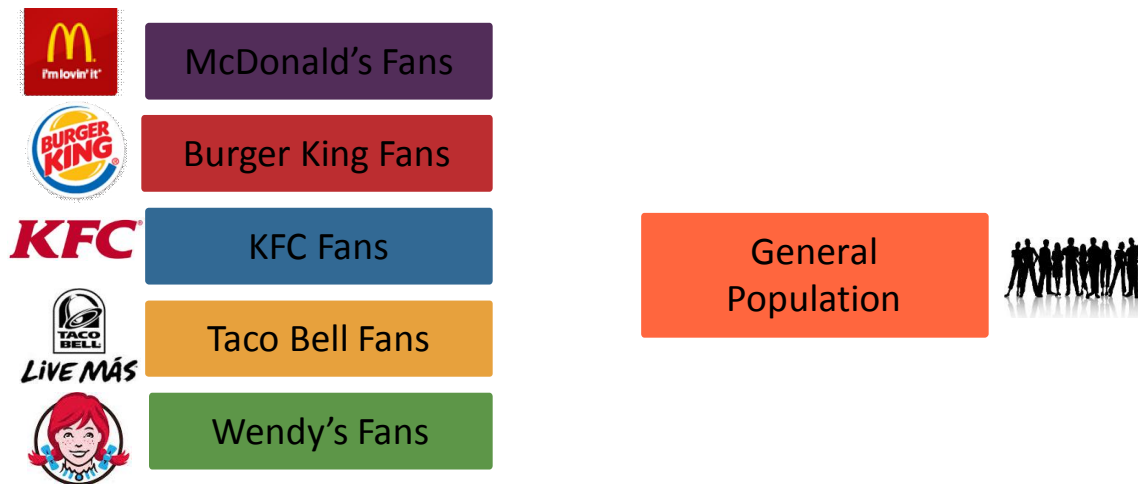
VS.

How much do you like to eat at Wendy's?

- " Never heard of it
- " I love it
- " I like it
- " I don't really have a strong opinion
- " I don't like it

DeepProfile Scales: Micro-Segmentation

In the following slides, we examine how fans of KFC, Taco Bell, Wendy's, Burger King and McDonald's responded to a number of questions that contribute to one of eleven scales we've developed – the Health & Wellness Scale (more scales are available upon request) – that aim to highlight **how population segments compare to each other according to key health indicators.**



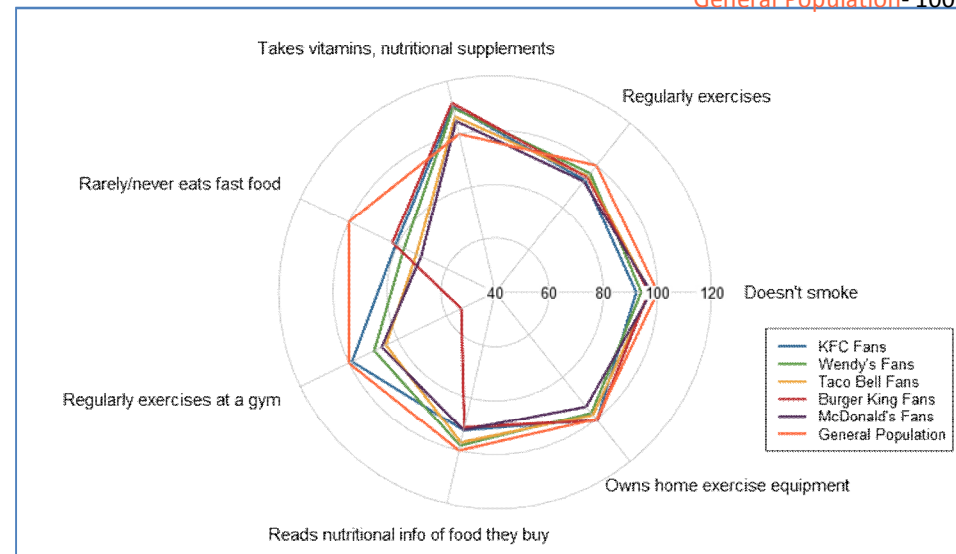
Health & Wellness

The Health & Wellness scale aims to identify the extent to which population segments monitor and maintain their health and wellbeing. On average, KFC, Wendy's, Taco Bell, Burger King and McDonald's fans all score lower on the Health & Wellness scale than the general population. However, KFC fans have a slightly higher Health & Wellness score compared to the other QSR restaurant fans.

Aggregate



Individual Attributes



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Health & Wellness

Individual Attributes


Attribute	KFC Fans	Wendy's Fans	Taco Bell Fans	Burger King Fans	McDonald's Fans
Regularly exercises	56%	58%	57%	57%	56%
Regularly exercises at a gym	23%	21%	20%	12%	20%
Owns home exercise equipment	43%	41%	42%	43%	40%
Takes vitamins or nutritional supplements	64%	64%	62%	65%	61%
Rarely/never eats fast food	34%	32%	30%	34%	29%
Reads nutritional info of food they buy	54%	58%	57%	53%	54%
Doesn't smoke	73%	75%	77%	77%	78%

- “ Wendy’s Fans are slightly more likely to regularly exercise, while KFC fans are slightly more likely to regularly exercise **at a gym**.
- “ KFC and Burger King fans eat fast food the least.
- “ Wendy’s fans are slightly more likely to read nutritional information of food they buy.
- “ McDonald’s fans are slightly less likely to smoke.

Additional Scale Data for Project #3 Brands

The information below compares the QSRs on some of the additional scales CivicScience offers in our DeepProfile solution:

- KFC and Taco Bell fans are more likely to **try new products before others**.
- Taco Bell fans are the most likely to be **price conscious**.
- McDonald's fans are the most likely to say they are **“addicted” to their digital devices**.
- Taco Bell fans are the most likely to **use Facebook**.
- Wendy's fans are more likely to **donate to different charities**.
- Wendy's fans are the most likely to be **NHL fans**.
- KFC fans are more likely to **showroom** (visits stores, but buys online).
- Burger King fans are the least likely to consult **online reviews**.
- Burger King fans are the most likely to be **engaged in politics**.



Contact us for an ~~MTO~~ MTO+DeepProfile Report,
InsightStore Subscription, and Custom Research
Questions for your brand:
contact@civicscience.com

Appendix Slides Follow

Current Restaurant Brands in the CivicScience InsightStore

The following is a partial list of the restaurant brands for which consumer insights are currently available in the CivicScience InsightStore. Our platform tracks the awareness and popularity of these brands in real-time, with history going back to 2010 in most cases. In addition, for each brand we can cross-tabulate data to thousands of other questions in our system to reveal the types of insights . and much more . that are included in this Insight Report. Please email contact@civicscience.com for more info.

Applebee's	Domino's Pizza	O'Charley's	Shoney's
Arby's	Dunkin Donuts	Olive Garden	Sizzler
Atlanta Bread Company	Einstein Bros. Bagels	On the Border	SONIC
Au Bon Pain	El Pollo Loco	Outback Steakhouse	Starbucks
Baja Fresh	Five Guys Burgers and Fries	P.F. Chang's China Bistro	Steak 'n Shake
Baskin Robbins	Fuddruckers	Pancho's	Subway
Bob Evans Restaurants	Hard Rock	Panera	T.G.I. Friday's
Boston Market	Hardee's/Carl's Jr.	Papa John's	Taco Bell
BRAVO! Cucina Italiana	Houlihan's	Peet's Coffee & Tea	Texas Roadhouse
Bruegger's	IHOP	Perkins Restaurant and Bakery	The Original Pancake House
Buca di Beppo	In-n-Out Burger	Pizza Hut	Tony Roma's
Buffalo Wild Wings	Jack in the Box	Ponderosa Steakhouse	Uno Chicago Grill
Burger King	Jamba Juice	Popeye's Chicken	Wendy's
California Pizza Kitchen	Jersey Mikes	Potbelly	Whataburger
Caribou Coffee	Jimmy John's	Qdoba Mexican Grill	White Castle
Champps Americana	Joe's Crab Shack	Quizno's	
Charley's Grilled Subs	KFC	Red Lobster	
Cheesecake Factory	Little Caesar's	Red Robin	
Chili's	Logan's Roadhouse	Romano's Macaroni Grill	
Chipotle Mexican Grill	Lone Star Steakhouse & Saloon	Rubio's	
Cosi	Long John Silver's	Ruby Tuesday	
Cracker Barrel Old Country Store	McDonald's	Salsarita's	
Culver's	Mimi's	Sbarro	
Del Taco	Moe's Southwest Grill	Schlotzsky's	
Denny's	Noodles & Company	Seattles Best Coffee	



CivicScience DeepProfile Scales

- ❑ **Charitable Giving**- The Charitable Giving scale aims to identify the extent to which population segments donate to different charity groups, and how much time they spend volunteering.
- ❑ **Discriminating Shopper**- The Discriminating Shopper scale aims to identify the extent to which population segments do research before making purchases, and how easy or difficult they will be to win over.
- ❑ **Market Maven**- The Market Maven scale aims to identify the extent to which population segments adopt new products and brands, and share their opinions with others.
- ❑ **Political Engagement**- The Political Engagement scale aims to identify the extent to which population segments are involved in all levels of politics.
- ❑ **Price Sensitivity**- The Price Sensitivity scale aims to identify the extent to which population segments are price-conscious when shopping, both as a whole and across specific categories.
- ❑ **Social Media**- The Social Media scale aims to identify which social media platforms population segments use, and the extent to which they influence their preferences and behavior.
- ❑ **Sports Fan**- The Sports Fan scale aims to identify the extent to which population segments are interested in different types of sports.
- ❑ **Tech Savvy**- The Tech Savvy scale aims to identify the extent to which population segments use their digital devices and are informed and aware of the latest technology available.
- ❑ **TV Viewing**- The TV Viewing scale aims to identify the extent to which population segments watch various genres of TV and are influenced by what they see on TV.
- ❑ **Health & Wellness**- The Health & Wellness scale aims to identify the extent to which population segments monitor and maintain their health and wellbeing.
- ❑ **Environmental Consciousness**- The Environmental Consciousness scale aims to identify the extent to which population segments alter their lifestyle for the environment and shows overall concern about environmental issues.

CivicScience DeepProfile: How it works

For the segments we're interested in, we look at how those people responded to **thousands of other questions** in our database, building a contingency table for each pair of questions.

For this project we looked at thousands of questions related to:

- “ **Lifestyle**
- “ **Media consumption**
- “ **Entertainment**
- “ **Technology usage**
- “ **Health and wellness**
- “ **Politics and ideology**
- “ **Other general attributes**

We calculate each table's **Pearson's chi-squared** statistic, and then employ the **Benjamini-Hochberg false detection rate** procedure to screen out likely false positives (i.e., statistically-significant associations that may be due to random chance).

The tables that pass through our screening process are then ranked by their **Tschuprow's T coefficient**, which measures strength of association.

CivicScience Attribute Library

Demographics & Profile

- ~ Over 150 attributes
- ~ Age, Gender, Race
- ~ Education, Income
- ~ Parental, Marital Status
- ~ Morning / Night Person
- ~ Geography
- ~ Religion and Family

Entertainment

- ~ Over 200 Attributes
- ~ Movies and TV Shows
- ~ Event attendance
- ~ Pro & College Sports
- ~ Reading genres
- ~ Theater and Culture
- ~ Cultural Maven Indicators

Media Consumption

- ~ Over 50 Attributes
- ~ Print vs. Online
- ~ Newspaper & Magazine
- ~ TV & Cable Networks
- ~ Blog Readership
- ~ Radio and Music
- ~ Mobile & Streaming

Health and Wellness

- ~ Over 50 Attributes
- ~ Diet and Exercise
- ~ Weight and Fitness
- ~ Ailments and Treatments
- ~ Medical History
- ~ Beauty Products
- ~ Smoking/Drinking

Personal Finance

- ~ Over 50 Attributes
- ~ Spending/savings
- ~ Home ownership
- ~ Employment/Type
- ~ Insurance and Banking
- ~ Economic Outlook
- ~ Spending Outlook
- ~ Financial Health Indicators

Technology Usage

- ~ Over 100 Attributes
- ~ Phone and Carrier
- ~ Smartphone & OS
- ~ Tablets and PCs
- ~ Social Media Usage
- ~ Search, Web, Text
- ~ Gaming & Consoles
- ~ Adoption Curve Indicators

Politics & Ideology

- ~ Over 250 Attributes
- ~ Party Affiliation
- ~ Issue Positions
- ~ Political Behaviors
- ~ Civic Engagement
- ~ Candidate Preference

Shopping Habits

- ~ Over 150 Attributes
- ~ In-store vs. Online
- ~ Coupon usage
- ~ Spending by category
- ~ Payment (credit v. cash)
- ~ Dining
- ~ Organic / Environmental
- ~ Mobile & Tablet

... and many more.