

tell us what you really think: consumers dish on their favorite restaurants



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What do consumers really think of today's most popular restaurant brands? That's the question every operator, chef and marketer wants to understand. The best way to know for sure? Gather honest feedback from as many consumers as possible. So that's what we did. And the results were very informative. A comprehensive new report titled *Consumer Picks* is the result of a collaborative research effort from WD Partners' Insights group and *Nation's Restaurant News*. This highly anticipated report provides comprehensive data and performance rankings of the industry's strongest brands, including emerging favorites Bonefish Grill, Cheddar's Casual Café and Potbelly Sandwich Shop.

The study measured customer attitudes toward 139 restaurant brands, culled from 6,800 online survey responses. We divided the survey into three industry segments: **limited service** (92 chains), **casual and fine dining** (35 chains) and **family dining** (12 brands). Then we asked participants to rate their experiences in nine key areas: food quality, value, cleanliness, service, menu variety, reputation, atmosphere, likelihood to recommend and likelihood to return.

The survey is truly representative of the U.S. population, nationally balanced for ethnicity, gender, age, and economic status. We drew from the most qualified panelists, disqualifying those who work in the restaurant industry or in marketing or advertising. And we removed responses for inconsistent answers, excessive repeated responses, and inordinate haste in completing the questionnaire. The result is an honest, and often surprising, assessment of what customers value in a variety of dining experiences.

You can read the full 13-page report in the September 5th issue of *Nation's Restaurant News* – complete with all rankings, charts, and interesting demographic thin slicing of the result. Want to see the brands Boomers prefer in the limited service category? It's in there. Same for the Top 10 chains ranked by likelihood of customer return, the importance of each category (food quality, service, value, etc.) and much more. It's a terrific read, one we're very proud of.

To whet your appetite, I'd like to highlight just a few important conclusions based on the highest performing brands in the survey. But as I say to our clients, try to look beyond the rankings alone – explore the issues that underlie them. Don't just rationalize a position. Try to understand it.



a unique identity – and core philosophy – is key

It's about staking a claim in something and amplifying what you do best. Yes, **Ben and Jerry's Scoop Shop** is certainly known for making ice cream with premium ingredients. But they're also valued for being social and environmental stewards, and this really resonates with today's conscientious consumer. Combine that with unique recipes that customers are likely to recommend, and you have a brand with strong differentiation and loyalty. Another example is the refreshing singular focus of **In-N-Out Burger**. They offer a streamlined choice of burgers, fries, shakes and soft drinks, they don't try to be everything to everybody, and they don't worry about expanding their menu. While **Five Guys Burger** and Fries also did well in our survey, it fared less well in its "likelihood to return" ratings and hasn't yet earned the cult-like loyalty of In-N-Out's customers.

delivering on your promise, and exceeding customer expectations, really do matter

To really shine, a restaurant brand has to deliver across all attributes – earning high marks for food quality, cleanliness and service in particular. When it happens, customers reward the brands with positive word-of-mouth reinforcement and recommendations to others. **Cheddar's Casual Café** was a surprisingly dominant brand in our survey. Despite its relatively small size and regional presence (Southern and Midwestern states), it dominated the value category thanks to generous portion sizes and attractive menu prices. And leaving consumers pleasantly surprised has never been more important. Customers appreciate that the prices at **Papa Murphy's Take 'N' Bake Pizza** are at or below those charged by conventional cook-to-order chains. But what they love even more is that they can get a pizza made with highend ingredients like artichoke hearts and sundried tomatoes for that low price. (Not to mention that they can pull this pizza hot from their own oven at the height of freshness.) It's a best of-all-worlds proposition that makes Papa Murphy's a true standout – and earned it our survey's top overall score.



value only goes so far

Despite the nation's current economic woes, value isn't a restaurant's most important attribute. In fact, in every category, consumers said that cleanliness and food quality were more important to them. Consider the fact that two of the chains with overall top-three ratings for value – **CiCi's Pizza** and **Little Caesars** – ranked in the bottom half in overall scores. We chose not to include convenience as an attribute, so ubiquitous brands like McDonald's and Subway, lost much of their advantage over smaller chains. Instead, we focused on attributes that told us how customers feel about a brand: likelihood to recommend and likelihood to return. Interestingly, while McDonald's didn't receive high overall scores in their category, it did rate high in likelihood to return – a reflection of the company's ever-present market dominance.

AND THE WINNERS ARE... >>

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TOP 3

LIMITED SERVICE RESTAURANTS

1

Papa Murphy's Take 'N' Bake Pizza

Best-in-class for food quality, cleanliness, an across-the-board favorite with almost every generation, particularly Baby Boomers. Its relatively unique take on product quality, freshness and convenience provides strong differentiation.

2

In-N-Out Burger

Attracting a cult-like following, it snagged #1 in every category except menu variety.

3

Ben & Jerry's Scoop Shop

Of all limited service restaurants, the ice cream brand received the highest marks for food quality.

TOP 3

CASUAL & FINE DINING RESTAURANTS

1

Ruth's Chris Steak House

Best-in-class for food quality, cleanliness, service and atmosphere.

2

Bonefish Grill

The top-scoring chain among both men and millennials. Performed very high in food quality, service, likelihood to recommend and, surprisingly, value.

3

P.F. Chang's China Bistro

A favorite among Gen-Xers, receiving high marks for its wide variety of dishes.

TOP 3

FAMILY DINING RESTAURANTS

1

Cracker Barrel Old Country Store

A runaway leader in almost every category except value, where it ran a close second to Denny's. The halo effect of its retail operation not only differentiates it, but creates a positive experience when customers experience wait times.

2

Bob Evans Restaurants

Currently revamping its image, the Ohio favorite ranked close to Cracker Barrel in service and menu variety, but scored lower in value. A good example of an established brand adjusting its relevance for modern tastes.

3

Marie Callender's Restaurant & Bakery

Took top honors for food quality, cleanliness and atmosphere, but just missed ranking in the top 3 for value, variety, likelihood to recommend and likelihood to return.

READ THE FULL REPORT

We're proud to have been a key player in collecting unbiased information missing in the restaurant industry – and it's information we intend to update annually. For more information on our Consumer Picks analysis, visit www.nrn.com/consumer-picks.

For a custom run of the data or to discuss how WD can help conduct customized research for your brand – contact me at dennis.lombardi@wdpartners.com