

## QSR MAP

Every weekend Roy Morgan Single Source interviews over 1,000 people aged 14+ from both metro and country areas, interviewing them face-to-face and leaving behind a detailed self-completion survey.

All this information from over 50,000 people per annum, interviewed face-to-face, and around 25,000 self completion surveys, provides clients with a total understanding of customers in the marketplace. The QSR Marketing & Advertising Planner (MAP), an integral part of Roy Morgan's Single Source, can help develop their planning, marketing and communications.

A segment within QSR, Takeaway Food Retailing, is the fifth largest retail industry generating sales of some \$7 billion in 2000-2001. This segment of QSR however is, in recent years, under threat due to increased sales going to cafes and restaurants.

Changes in population structure and size, movements in disposable income, changes in the level of economic growth and competition from substitutes have a direct impact on Takeaway Retailing.

Due to the high degree of competition within the segments of QSR and the proliferation of relatively low cost restaurants, this industry needs to monitor these threats.

QSR MAP is supported by a team of specialists who have a thorough knowledge of the market in which you operate, to help you understand and profile your QSR consumers.



# Discover the secret ingredients of building your QSR business.

### ANSWERS AT YOUR FINGERTIPS

What share of the overall population, and what share of demographic segments do my customers represent?

How does the size of the QSR market correlate with household disposable income levels?

What are my customers' opinions of my chain in terms of product, service, facilities and value for money?  
How do they compare with my competitors' customers?

How do my customers (and non-customers) respond to promotional activity and special offers?

What is the shopping behavior of my customers in supermarkets and convenience stores?

How many of my customers go to cafes, hotels, or restaurants (licensed or BYO) for a meal or a snack?

Who are my loyal customers, what else do they spend money on and how are they different from the rest?

### Discover your edge.

Every other question asked by Roy Morgan is potentially available to QSR MAP subscribers as the need arises.

The questions could encompass shopping habits, other food and beverage preferences, credit card usage, telecommunications, holiday activities and specific media consumption.

It is this breadth and depth of information that can help you discover your competitive edge.





“There’s nothing like understanding how your market *feels* about what you’re offering.”



### Key Applications

Market penetration/share  
Trends  
Store loyalty/repertoire  
Sponsorships and alliances  
Customer profiles  
Market/line extension  
Communications – mass or direct

### Key Features

Continuous consumer survey  
National coverage  
Large sample (n = 25,000 pa)  
Linkage to other consumer behaviour and attitudes

## Four levels of access.

### 1. Core market information:

- Market penetration nationally or regionally, by quarter (a quarterly MAT, or monthly when needed) for the last five years.
- Market Share of visits.
- All major chains measured plus Asian, fish and chips, convenience store, specialty pizza shops etc.
- Detailed Customer profile/segmentation by demographics, geography, attitudes to fast food, Roy Morgan Values Segments\* etc.
- Media habits customers.

### 2. Segment performance:

- Purchase by time of day/meal, snack/weekend, weekday/eat in, take-away, home delivery/party composition.

### 3. Store imagery:

*Don't know this outlet  
Has a special taste  
Use top quality ingredients  
Serve fresh hot food  
Nutritious food  
Good value for money  
Friendly courteous staff  
Fast efficient service  
Premises are clean, well cared for  
Saw advertised on TV in the last week or so  
Have low prices  
Have food I like*



*\* Developed in conjunction with Colin Benjamin of the Horizons Network*

### 4. Total consumption repertoire:

- Comprehensive measurement of all food consumed, including beverages, snacks and confectionery, meats, bakery and fruit and vegetables. Includes food preferences such as soups, bagels, health food, vegetarian, salads, etc.

### Outlets measured.

KFC	Taco Bell
Homestead Chicken	Fasta Pasta
Red Rooster	Lone Star Steakhouse
Nandos	Keg
Chicken Treat	Rustlers
Barbecue Chicken Shop	Golden Spur
McDonald's	Valentines
Hungry Jacks	Hog's Breath
Burger King	Black Stump
Other hamburger places	Subway
Pizza Hut	Sizzler
Pizza Haven	Asian: Chinese/Indian/Thai
Dominos	Thai
Eagle Boys Pizza	Fish & Chip Shops
Other pizza places	Convenience Stores



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*Discover your edge.*