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Foodservice Landscape in the U.S.: Chain Limited-Service Restaurants

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Abstracts

Driven by incremental improvement in macroeconomic drivers, a brighter consumer outlook, aggressive operator menu innovation and LTO experimentation, quick-service (including fast casual) and snack and beverage restaurant sales are on track for moderate growth. But among consumers, price sensitivity is still top of mind: 68% of limited-service restaurant (LSR) users say low price would influence their decision to go to a fast food restaurant and 24% citing it as “most important.” Operators, also constrained by highly competitive grocery aisle pricing, will have limited pricing power even while they will continue to face guest traffic challenges into 2014. In an environment in which stealing share remains the key to growth, menu innovation and keeping up with broader consumer trends remains essential.

This study analyses the industry and consumer trends shaping this highly competitive environment, focusing on the quick-service, fast casual, and snack and beverage restaurant segments.

Key content includes:

Studying the degree to which 26 different factors influence consumers’ decisions to go to a “fast food restaurant”” and which are the most important factors in that decision, with accompanying demographic analysis and industry responses/examples.

Limited-service restaurant menu trending, focusing on menu item penetration by restaurant segment, including depth of menu items, limited-timed offers, mini-size menu items, top proteins, preparation methods, and beverages.

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Guest traffic analysis for quick-service restaurants and snack and beverage restaurants, with daypart and chain vs. independent share, including 2008-2013 QSR guest traffic trending for the segment's key consumer groups, and a strong focus on HH income trending by restaurant brand, including leading LSR beef/burger, chicken, pizza, and fast casual chains.

How technology trends are shaping the limited-service restaurant industry, with a focus on increasingly mobile consumers and emerging mobile payment technologies.

Health and wellness trending, including calorie count trends and impact; healthy menu claim trends; clean food trends; kids' menu health; and healthful restaurant concepts to watch. We also present analysis of two consumer groups with divergent views regarding the importance of nutritional value, regular exercise, healthy diet and weight management. We gauge their restaurant, health and diet preferences, and the relationship to their restaurant brand choices.

Studying the impact of macro-economic drivers on limited-service restaurant industry growth, including an economic forecast through 2014, with supporting macroeconomic analysis; the effect of HH income and employment trends on limited-service restaurants; and the effect of consumer and commodity price trends on limited-service restaurants; with price trends and forecasts.

A market size and forecast through 2015 for full-service restaurants, limited-service restaurants, cafeteria/buffets and snack/beverage establishments; same-store sales analysis of major brands by limited-service segment; and consumer restaurant spend trending, by segment.

The report also provides analysis of leading restaurant brands operating in four limited-service restaurant segments: snack and beverage, quick service, fast casual and cafeteria/buffet. For each brand, we assess competitive differentiation; growth strategy; menu development and trending; consumer food lifestyle consumer segmentation analysis; guest traffic trending, by demographic; and sales performance and outlook. Brands analyzed, by segment, include:

Baskin-Robbins, Dunkin' Donuts, Jamba Juice, Starbucks

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Burger King, Chick-fil-A, KFC, McDonald's, Pizza Hut, Sonic, Wendy's

Chipotle Mexican Grill and Qdoba

Old Country Buffet

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About

Consumer limited-service restaurant spending trends

This section analyses the food and restaurant spending patterns of consumers from 2007 through 2011, using data from the U.S. Bureau of Labor Statistics' Consumer Expenditure Survey.

We note that survey figures for consumer expenditures are lower than personal consumption expenditures (PCE) reported by the U.S. Bureau of Economic Analysis. PCE is the primary measure of consumer spending on goods and services in the U.S. economy and it accounts for about two-thirds of domestic final spending.

As such, we believe the aggregate spending amounts provided by the Consumer Expenditures Survey should not be used to create direct market estimates. However, we view changes in spending patterns over time and percentage share of expenditures as valuable tools, especially as they can be linked to demographic groups.

Below, we analyze spending trends for the following categories: food at home; food away from home (which includes restaurant delivery, takeout and dine-in; vending; employer/school cafeterias; and out-of-town trips); restaurants (including full-service and limited-service restaurants); and daypart analysis (breakfast, lunch, dinner and snacking).

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