

Employees & the QSR Industry

The Real Drivers of Brand Experience



Since March 2020, we've viewed frontline workers through a new lens. The public's opinion on healthcare workers? Absolute heroes. But what about those on the frontline of quick-service restaurants? Many of these individuals, unable to perform their jobs remotely during the COVID-19 pandemic, suddenly found themselves on an unexpected frontline. As operators quickly adapted to reopen under local regulations and safety protocols, these employees pivoted and helped keep any semblance of what we once knew of a thriving economy alive. Their work allowed us to sip and snack on familiar favorites and skip cooking every meal of the day at home. In our eyes, they were essential.

We asked consumers about the impact of frontline QSR workers. And we learned they are the most important driver of brand experience.

57%

of consumers stated that **restaurant employees have the most control over the experience**, twice the level of control perceived held by the brand itself.

The pandemic grace period is ending – is your brand ready to deliver a superior experience?

When the pandemic began, consumers adjusted their brand expectations. There was an unspoken understanding that this was an unprecedented event, and that the consumer experience might temporarily suffer while brands and their employees adjusted to new procedures. However, the end of that grace period is seemingly looming.

Once things like regular office commutes resume, will consumers have the patience to wait an extra 10 minutes in the drive-thru line?

What’s making and breaking consumers’ perception of the current brand experience? **Employees.** Based on consumers’ most recent QSR visit, the six service attributes most strongly correlated with the overall QSR experience were all employee-related.



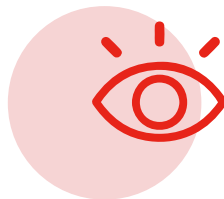
**Employee
Mood/Attitude**



**Making You Feel
Cared For as a Guest**



**Employee
Friendliness**



**Employee
Attentiveness**



**Employee
Competence**

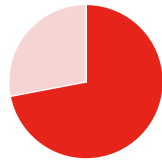


**Employee
Hygiene**

For context, these attributes were more strongly correlated than classic experience drivers such as facility cleanliness and order wait time.

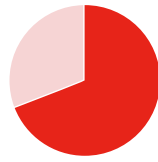
What consumers are saying: Invest in your employees – they’re essential, right?

Consumers weigh in on what would cause a negative experience:



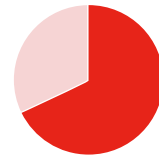
72%

There are not enough employees/staffing



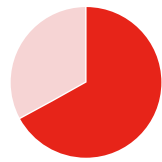
69%

Employees are not paid enough



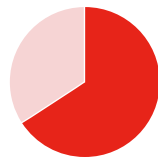
68%

Employees struggle with fulfilling both in-store and mobile orders



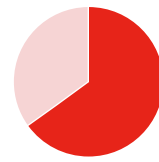
67%

Increased wait time



66%

Employees are not given sufficient training



65%

Order accuracy is hit or miss

Recent category consumers agreed that employee-related factors would be among the most likely causes of a negative QSR experience. When asked what a QSR brand could do to improve overall service, **about half cited “increasing the number of employees during peak traffic hours” (52%), and “increasing wages/pay for employees” (48%).** One in five consumers – and significantly more Gen Z and Millennials – believe **increased wages would have the most impact.**

It's not surprising that employees are considered paramount to a consumer's brand experience. From a business perspective, **employees have gone from being a labor cost to serving as a brand asset.** Knowing that, how much of your existing marketing budget should you reallocate to the employee experience?

Especially in the QSR space, brands are experiencing a critical labor shortage. Adoption of technology to serve customers, which accelerated out of necessity, has become an **integral** part of the customer journey. Technology will continue to be a key piece – but consumers have made it clear that the **human** aspect is needed to succeed.

Just 18% of consumers said that incorporating technology to reduce reliance on employees would be one of the top three things brands can do to impact service. While few Gen Z or Millennial consumers ranked technology in their top three solutions, they were significantly less likely than Baby Boomers to rank it last.

Where do consumers see a place for technology?

Considering the main moments of the QSR journey, **payment** is the only moment where preference stands ready to lean away from staff. **In all other moments, most consumers still prefer interacting with staff**, although a generational view shows us more preference for technology in younger generations. That alone is not a surprise, but it's worth noting that even Gen Z hasn't reached a majority preference. Just **one-third** of Gen Z prefers tech for navigating the menu or customizing their order, while another **one-fourth** express no preference, leaving just under **50%** who prefer engaging with staff in these moments.

Navigating the menu



Customizing my order



Paying for my order



Receiving my order



Are you solely focused on throughput and as a result, turning a blind eye to the new brand experience drivers?

The impact of employees on brand experience is changing the way we think about the QSR channel. Are wait times no longer the most impactful part of the consumer journey?

Chick-fil-A sees its focus on human interaction pay off as it consistently performed above the brands in our study on key service attributes. **At least 30% of recent Chick-fil-A customers rated the brand “Excellent” on each of the key service attributes.**

Culver's is also a strong example of a brand successfully managing the employee-related experience drivers. Respondents in our survey most often rated **Culver's** “Excellent” in the following experience areas: employee friendliness (38%), employee hygiene (38%), employee competence (35%), and making you feel cared about as a guest (30%).

About this study

Big Red Rooster kicked off 2021 with a thought leadership series to understand evolved consumer behaviors and expectations, especially as they relate to the role of real estate in a brand's marketing mix. Our Q2 study was conducted in partnership with ENGINE Insights and included a CARAVAN® survey with 1,003 demographically representative U.S. adults 18 years of age and older.

Brands included in this study represented multiple sectors of QSR and included: Chick-fil-A, Chipotle, Culver's, Jack in the Box, Krispy Kreme, McDonald's, Papa John's, Starbucks, and Taco Bell.

How are your employees driving your brand experience?

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