

YouGov



Conquering QSR report 2024

Who's winning mealtimes, and why?

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We surveyed 5,000+ Americans about QSRs, how they buy, and most importantly, why.

This study identifies **fast food frequenters**, who order from QSRs 15+ times per month, segmenting their trending purchase factors, motivations, and ordering preferences against the average QSR customer.

Additionally, this report highlights the reasons QSR customers purchase at different mealtimes, and which QSR brands do best when.

All 5,000+ respondents in the report are aged 18-64 and purchased from a QSR restaurant at least once in the month preceding the survey. Results are weighted against the average population.



Recent QSR diners gave opinions on all of the following brands

This data and subsequent demographic analyses show restaurants that America's QSR buyers have purchased from in the last month.

Later sections of the report look specifically at the LAST restaurant that buyers have purchased from.

Americans who ordered from a quick serve / fast food restaurant in the last month at least once;
March 2024 (n> 5,300)

Which quick serve/fast food restaurants have you ordered from in the past month? Please select all that apply.

Rank	Restaurant	% of QSR customers who visited in last month
1	McDonald's	56%
2	Burger King	32%
3	Taco Bell	29%
4	KFC	27%
5	Starbucks	27%
6	Pizza Hut	27%
7	Wendy's	25%
8	Chick-fil-A	24%
9	Subway	22%
10	Dunkin'	14%
11	Popeyes	12%
12	SONIC	11%
13	Arby's	10%
14	Jack in the Box	9%
15	Whataburger	9%
16	Five Guys	8%
17	Jersey Mikes	8%
18	In-N-Out	7%
19	Jimmy John's	6%
20	Del Taco	6%
21	Hardee's	6%
22	Church's	5%
23	Carl's Jr	5%

Menu

- 01** Demographics
- 02** Feeding factors
- 03** Mealtime motivators
- 04** Ordering options
- 05** Brand battlecards
- 06** Conquering QSR: Mealtime rankings

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1 Setting the table: Demographics



Who's eating most?

8.7%



of monthly QSR or fast food customers order 15+ times per month

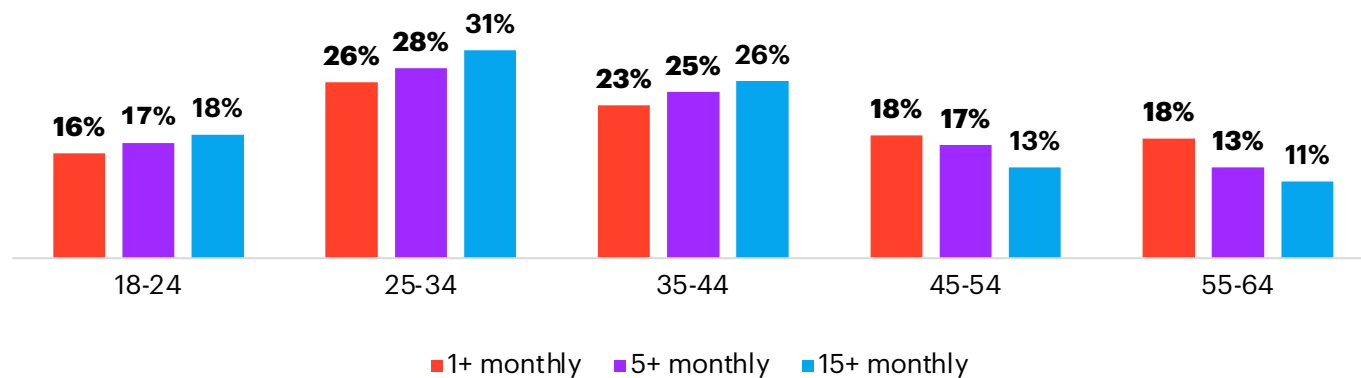
57%



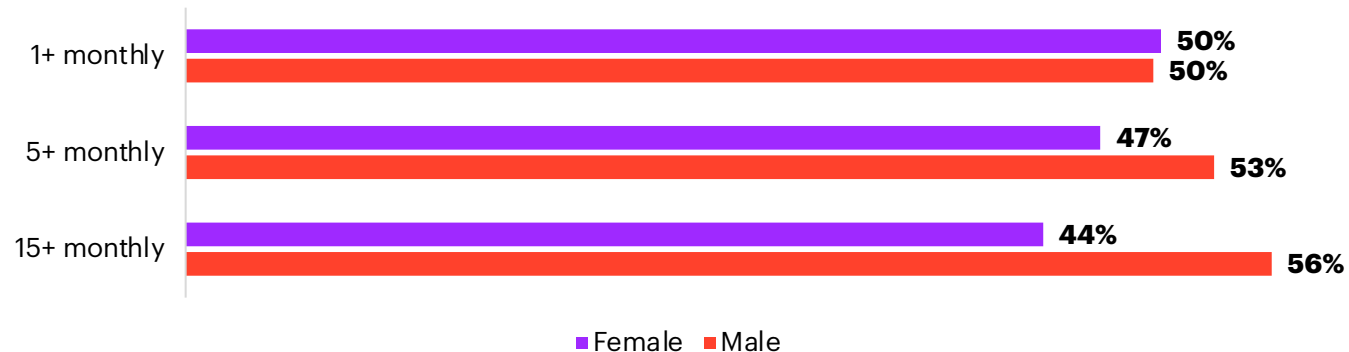
of Americans who eat fast food or from a QSR restaurant 15+ times per month are aged 25-44

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024 (1+ monthly: n> 5,300; 5+ monthly: n> 2,700; 15+ monthly: n> 400)

Age



Gender



Where do different age groups eat?

McDonald's is the consensus number one, though differences emerge in the following spots, with Americans aged 18-34 more likely to have visited KFC at least once per month, and Americans aged 55-65 more likely to have visited Wendy's at least once per month.

Most regularly ordered QSR restaurants by age group

Restaurant	% of QSR buyers who ordered in last month	18-24 Rank	25-34 Rank	35-44 Rank	45-54 Rank	55-64 Rank
McDonald's	55.6%	1	1	1	1	1
Burger King	32.2%	4	4	2	2	5
Taco Bell	28.5%	6	6	3	3	3
KFC	27.5%	2	2	6	9	8
Starbucks	27.3%	5	3	5	6	9
Pizza Hut	27.1%	3	5	4	7	12
Wendy's	24.9%	9	8	7	4	2
Chick-fil-A	24.1%	8	7	8	5	4
Subway	22.4%	7	9	9	8	6
Dunkin'	13.6%	10	10	11	12	13

Americans who purchased from a quick serve / fast food restaurant in the last month; March 2024

(Age 18-24: n> 750; Age 25-34: n> 1,300; Age 35-44: n> 1,200; Age 45-54: n> 975; Age 55-64: n> 1,000)

Where do men and women prefer to eat?

Since men are more likely than women to eat at QSRs 15+ times per month, they have higher differences overall in gender comparisons, with the differences for Burger King (+6.3 percentage-points) and Whataburger (+4.9 pp) exceeding Starbucks (+4.5pp for women).

Americans aged 18-64 who purchased from a quick serve / fast food restaurant in the last month; March 2024 (Men: n> 2,600; Women: n> 2,600).

Most regularly ordered QSR restaurants by gender

QSRs preferred by Men	Men	Women	Difference
Burger King	35.6%	29.3%	6.3
Whataburger	11.1%	6.2%	4.9
KFC	29.9%	25.4%	4.5
In-N-Out	9.1%	5.2%	3.9
McDonald's	57.3%	54.0%	3.3

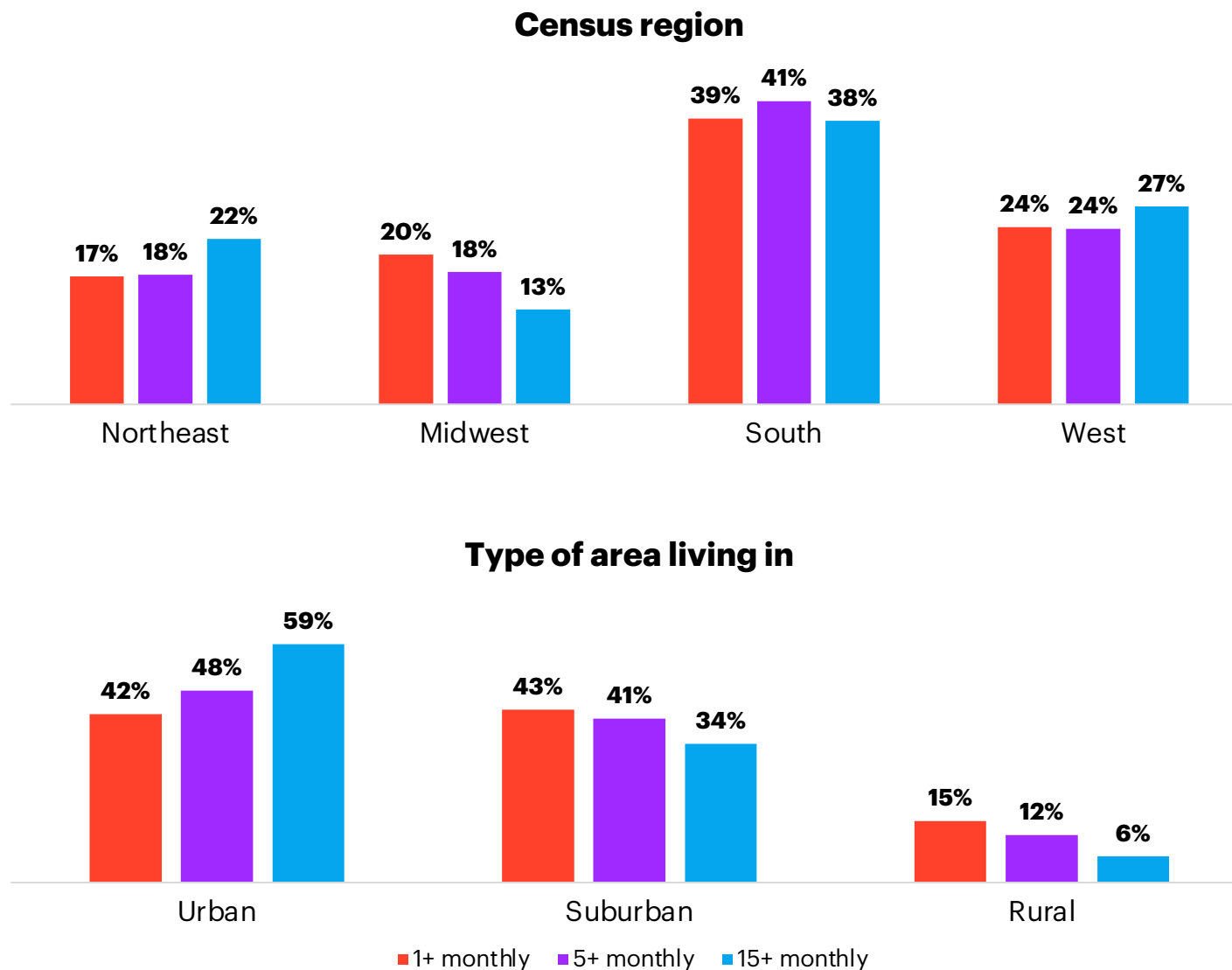
QSRs preferred by Women	Women	Men	Difference
Starbucks	29.6%	25.1%	4.5
Chick-fil-A	24.8%	23.6%	1.2
Jersey Mikes	7.9%	7.3%	0.6
Taco Bell	28.5%	28.0%	0.5
Subway	22.8%	22.3%	0.5

Where do frequent QSR diners live?

While the South census region has the highest overall population, Americans based in the Northeast and West are more likely to make QSR / fast food orders a regular part of their lifestyle.

Americans living in urban areas also tend to make QSR / fast food purchases more frequently.

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024
(1+ monthly: n> 5,000; 5+ monthly: n> 2,700; 15+ monthly: n> 400)



Who else is eating?

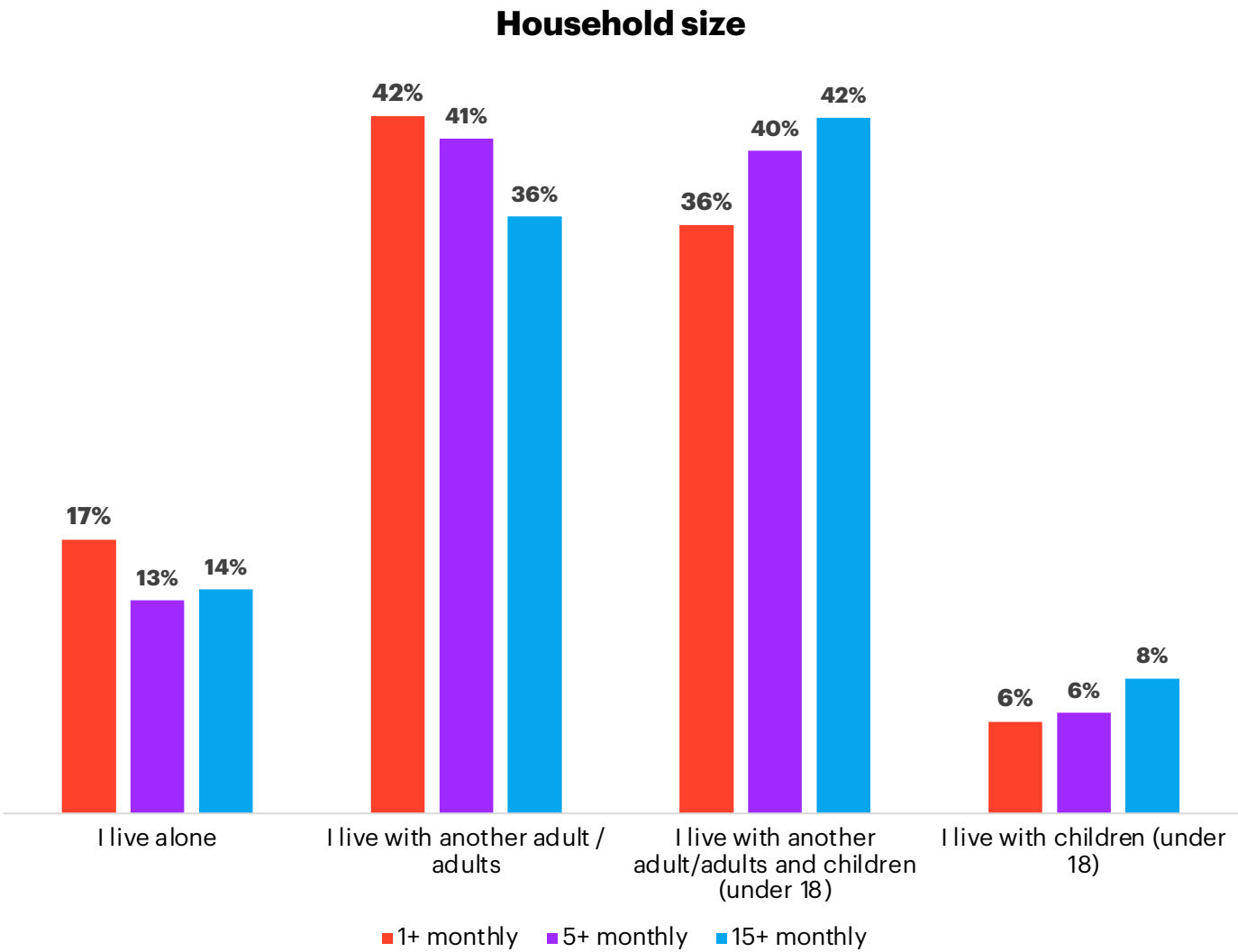
78%

% of fast food frequenters (15+ monthly orders) live with another adult or adults.

50%

% of fast food frequenters have children under 18.

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024 (1+ monthly: n> 5,000; 5+ monthly: n> 2,700; 15+ monthly: n> 400)

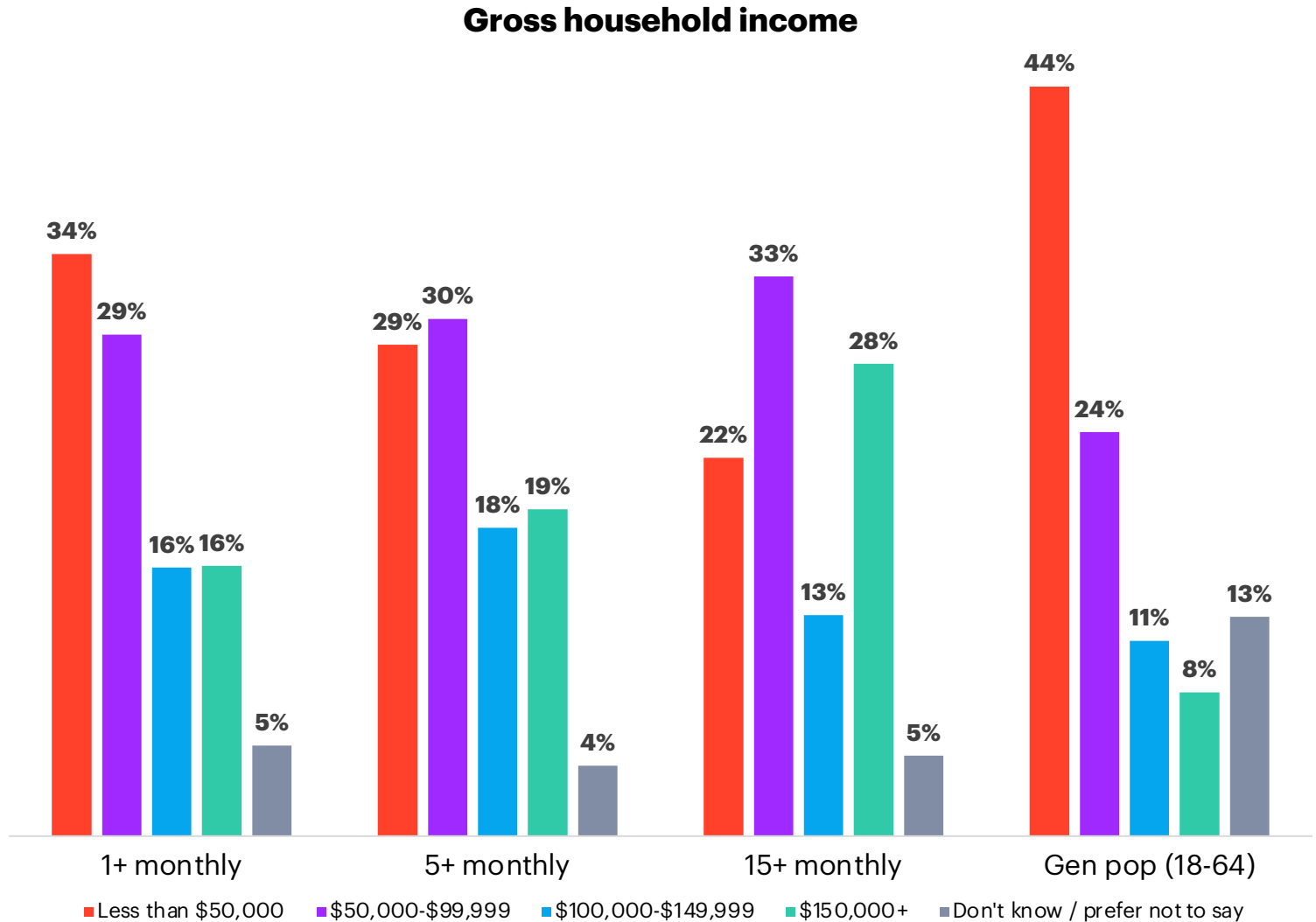


High-income earners, high-volume eaters

Frequent QSR and fast food customers have higher incomes than the average American.

28% of Americans aged 18-64 who buy 15+ times monthly have a gross household income exceeding \$150,000, compared to 8% of general population aged 18-64.

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024
(1+ monthly: n> 5,000; 5+ monthly: n> 2,700; 15+ monthly: n> 400)



2 Feeding factors

Which of the following apply to your last purchase restaurant, whether or not it influenced your purchase on this occasion?
Please select all that apply.



What are QSR buyers looking for at different mealtimes?

The top five feeding factors for QSR customers’ last purchase were:

Tasty (49%), Fast (47%), Convenient (45%), Affordable (35%), and High Quality (31%)

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month at least once; March 2024 (n > 3,600)

Most important feeding factors by mealtime

Mealtime	Feeding factor	% of customers at mealtime who considered attribute
Breakfast	Convenient	46%
Mid-morning snack	Tasty	45%
Lunch	Tasty	48%
Mid-afternoon snack	Tasty	49%
Dinner	Tasty	52%
After-dinner snack	Fast	47%
Late night snack/meal	Fast	57%

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Who's leading for each of these top feeding factors?

Americans who considered convenience, taste, and speed for their last purchase went to these restaurants.

Convenient

Rank	Restaurant	% who considered attribute purchased last
1	McDonald's	23.9%
2	Burger King	8.7%
3	Chick-fil-A ▲	7.9%
4	Taco Bell ▲	7.8%
5	Starbucks	7.1%
6	Wendy's ▲	6.7%
7	Pizza Hut ▼	5.9%
8	Subway	5.3%
9	KFC ▼	5.0%
10	Dunkin' ▲	2.8%

Tasty

Rank	Restaurant	% who considered attribute purchased last
1	McDonald's	21.5%
2	Burger King	8.7%
3	KFC	8.4%
4	Chick-fil-A	7.6%
5	Taco Bell ▲	7.6%
6	Pizza Hut ▼	6.5%
7	Starbucks	6.4%
8	Wendy's	6.0%
9	Subway	4.9%
10	Dunkin' ▲	3.1%

Fast

Rank	Restaurant	% who considered attribute purchased last
1	McDonald's	21.7%
2	Burger King	8.9%
3	KFC ▲	8.3%
4	Taco Bell ▲	7.3%
5	Chick-fil-A	7.3%
6	Pizza Hut ▲	6.9%
7	Starbucks ▼	6.2%
8	Subway	5.6%
9	Wendy's ▼	5.5%
10	Popeyes ▲	3.1%

Americans aged 18-64 who considered each feeding factor for their last QSR purchase; March 2024
(Convenient: n> 1,600; Tasty: n> 1,800; Fast: n> 1,700) ▲ ▼ = +10% difference from average.

What do QSR buyers want for breakfast?

While more Americans are looking for something convenient in the morning, a restaurant considered to be Friendly and Healthy will do better at breakfast than other parts of the day.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was breakfast; March 2024 (n> 375).
▲ ▼ = +10% difference from average.

Most important feeding factors

Rank	Purchase attribute	Breakfast	Any mealtime	Difference
1	Convenient	46%	45%	1%
2	Fast	45%	47%	-2%
3	Tasty ▼	43%	49%	-6%
4	Affordable	36%	35%	1%
5	Friendly ▲	31%	26%	5%
6	Consistent	29%	29%	-
7	High quality ▼	27%	31%	-4%
8	Trustworthy	26%	24%	2%
9	Healthy ▲	24%	20%	4%
10	Guilty pleasure	22%	20%	2%

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What do QSR buyers want for a mid-morning snack?

Tasty and Fast are the top purchase attributes for mid-morning snacks, but high quality significantly overperforms at this mealtime than other parts of the day.

Restaurants perceived as Healthy and Authentic also tend to do better at this time of day.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was a mid-morning snack; March 2024 (n> 200). ▲ ▼ = +10% difference from average.

Most important feeding factors

Rank	Purchase attribute	Mid-morning snack	Any mealtime	Difference
1	Tasty	45%	49%	-4%
2	Fast	43%	47%	-4%
3	High quality ▲	40%	31%	9%
4	Convenient ▼	33%	45%	-12%
5	Affordable ▼	28%	35%	-7%
6	Consistent	28%	29%	-1%
7	Friendly	25%	26%	-1%
8	Trustworthy	25%	24%	1%
9	Healthy ▲	25%	20%	5%
10	Authentic ▲	23%	18%	5%

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What do QSR buyers want for lunch?

With the largest sample size of any mealtime (37% of all respondents’ last purchase), lunch has little deviation from the overall list of important purchase attributes, though convenience overtakes speed in the 2nd spot.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was lunch; March 2024 (n> 1,300).
▲ ▼ = +10% difference from average.

Most important feeding factors

Rank	Purchase attribute	Lunch	Any mealtime	Difference
1	Tasty	48%	49%	-1%
2	Convenient	47%	45%	2%
3	Fast	45%	47%	-2%
4	Affordable	35%	35%	0%
5	High quality	32%	31%	1%
6	Consistent	29%	29%	0%
7	Friendly	28%	26%	2%
8	Favorite	26%	25%	1%
9	Trustworthy	25%	24%	1%
10	Healthy	21%	20%	1%

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What do QSR buyers want for a mid-afternoon snack?

While Tasty and Fast remain table stakes, mid-afternoon snackers appear more likely to look for food they deem high quality, trustworthy, and modern.

Affordability also factors into their decisions more at this mealtime.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was lunch; March 2024 (n> 400).
▲ ▼ = +10% difference from average.

Most important feeding factors

Rank	Purchase attribute	Mid-afternoon snack	Any mealtime	Difference
1	Tasty	49%	49%	-
2	Fast	47%	47%	-
3	Convenient	42%	45%	-3%
4	Affordable	38%	35%	3%
5	High quality ▲	35%	31%	4%
6	Trustworthy ▲	30%	24%	6%
7	Consistent	29%	29%	-
8	Friendly	27%	26%	1%
9	Favorite	27%	25%	2%
10	Modern ▲	24%	18%	6%

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Talk to a researcher

What do QSR buyers want for dinner?

The top purchase factors get a boost at dinnertime, with Tasty, Fast, Convenient, and Affordable all factoring in slightly more to dinner purchases than other mealtimes.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was dinner; March 2024 (n> 1,100).
▲ ▼ = +10% difference from average.

Most important feeding factors

Rank	Purchase attribute	Dinner	Any mealtime	Difference
1	Tasty	52%	49%	3%
2	Fast	50%	47%	3%
3	Convenient	47%	45%	2%
4	Affordable	36%	35%	1%
5	Consistent	29%	29%	-
6	High quality ▼	28%	31%	-3%
7	Favorite	24%	25%	-1%
8	Friendly ▼	21%	26%	-5%
9	Trustworthy ▼	20%	24%	-4%
10	Guilty pleasure	20%	20%	-

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What do QSR buyers want for an after-dinner snack?

A much smaller opportunity than dinner, the after-dinner snack attracts customers looking for high quality and their favorites.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was an after-dinner snack; March 2024 (n=89).
▲ ▼ = +10% difference from average.

Most important feeding factors

Rank	Purchase attribute	After-dinner snack	Any mealtime	Difference
1	Tasty	47%	49%	-2%
2	Fast	47%	47%	-
3	High quality ▲	36%	31%	5%
4	Favorite ▲	34%	25%	9%
5	Affordable	33%	35%	-2%
6	Convenient ▼	32%	45%	-13%
7	Consistent	32%	29%	3%
8	Friendly	32%	26%	6%
9	Modern ▲	32%	18%	14%
10	Trustworthy	28%	24%	4%

Request more data

Talk to a researcher

What do QSR buyers want for a late night snack or meal?

Also a much smaller opportunity than other mealtimes, feeding factors *Fast* (+10pp) and *Friendly* (+13pp) jump significantly for late night.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was a late night snack or meal; March 2024 (n=82). ▲ ▼ = +10% difference from average.

Most important feeding factors

Rank	Purchase attribute	Late night snack or meal	Any mealtime	Difference
1	Fast ▲	57%	47%	10
2	Tasty	53%	49%	4
3	Friendly ▲	39%	26%	13
4	Affordable	35%	35%	0
5	Convenient ▼	34%	45%	-11
6	High quality ▼	24%	31%	-7
7	Guilty pleasure	20%	20%	0
8	Consistent ▼	19%	29%	-10
9	Wide variety ▲	19%	16%	3
10	Favorite ▼	18%	25%	-7

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Talk to a researcher

What’s trending with fast food frequenters?

Americans who buy from QSR or fast food restaurants 15+ times per month are significantly more likely than the average customer to seek out high-quality and innovative brands that fit their lifestyle.

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024
(1+: n> 3,600; 15+: n> 325). ▲ ▼ = +10% difference from average.

Trending feeding factors for fast food frequenters

Rank	Purchase attribute	1+ monthly	15+ monthly	Difference
1	Fits my lifestyle	16%	26%	10%
2	High quality	31%	39%	8%
3	Innovative	13%	20%	7%
4	Affordable	35%	41%	6%
5	Trustworthy	24%	30%	6%
6	Authentic	18%	24%	6%
7	Sustainable	13%	18%	5%
8	Convenient	45%	50%	5%
9	Fun	15%	20%	5%
10	Favorite	25%	29%	4%

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Talk to a researcher

Who leads each of these trending feeding factors?

Americans who considered lifestyle, quality, and innovation for their last purchase went to these restaurants.

Fits my lifestyle

Rank	Restaurant	% who considered attribute purchased last
1	McDonald's	22.2%
2	Starbucks ▲	10.1%
3	Pizza Hut ▲	9.8%
4	KFC ▲	9.1%
5	Burger King ▲	7.9%
6	Taco Bell ▲	6.7%
7	Chick-fil-A ▼	6.1%
8	Subway	5.8%
9	Wendy's ▼	4.8%
10	Dunkin' ▲	4.0%

High quality

Rank	Restaurant	% who considered attribute purchased last
1	McDonald's	22.8%
2	KFC ▲	10.6%
3	Chick-fil-A ▲	9.8%
4	Pizza Hut ▲	9.2%
5	Burger King ▲	8.6%
6	Starbucks ▲	7.7%
7	Taco Bell ▼	5.7%
8	Wendy's ▼	4.4%
9	Subway ▼	3.2%
10	In-N-Out ▼	1.9%

Innovative

Rank	Restaurant	% who considered attribute purchased last
1	McDonald's ▲	25.9%
2	Pizza Hut ▲	12.4%
3	KFC ▲	10.8%
4	Starbucks ▲	10.4%
5	Burger King ▲	9.9%
6	Subway ▼	4.7%
7	Chick-fil-A ▼	4.0%
8	Wendy's ▼	3.9%
9	Dunkin' ▼	3.9%
10	Taco Bell ▲	3.8%

Americans aged 18-64 who considered each feeding factor for their last QSR purchase; March 2024
(Lifestyle: n> 575; Quality: n> 1,100; Innovative: n> 450) ▲ ▼ = +10% difference from average.

3 Mealtime motivators

Why did you order from your last purchase restaurant on this occasion? **Please select all that apply.**



Why are QSR customers buying when?

The top five reasons QSR customers’ gave for their most recent purchase were:

Satisfying a craving (35%), affordability (34%), quality (28%), great deals (25%), and treating themselves (25%)

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month at least once; March 2024 (n > 3,600)

Most important purchase motivators by mealtime

Mealtime	Purchase reasons	% of customers at mealtime who gave this reason
Breakfast	Affordable	32%
Mid-morning snack	Affordable	35%
Lunch	Craving	33%
Mid-afternoon snack	Craving	34%
Dinner	Craving	41%
After-dinner snack	Craving	36%
Late night snack/meal	Affordable	47%

Request more data

Talk to a researcher

Who’s leading for these top mealtime motivators?

Americans motivated by cravings and affordability for their last purchase went to these restaurants.

Satisfy a craving

Rank	Restaurant	% who gave this reason purchased last
1	McDonald’s	21.1%
2	Burger King	8.6%
3	Chick-fil-A ▲	8.1%
4	Taco Bell ▲	8.1%
5	KFC	7.4%
6	Starbucks	6.9%
7	Pizza Hut ▼	6.3%
8	Subway	5.2%
9	Wendy’s	5.1%
10	Popeyes ▲	3.0%

Affordable

Rank	Restaurant	% who gave this reason purchased last
1	McDonald’s ▲	27.6%
2	Burger King ▲	11.6%
3	KFC	8.1%
4	Taco Bell ▲	7.9%
5	Pizza Hut	7.4%
6	Subway	5.8%
7	Wendy’s	5.2%
8	Chick-fil-A ▼	4.7%
9	Starbucks ▼	4.6%
10	SONIC	2.2%

Americans aged 18-64 who considered each attribute for their last QSR purchase; March 2024
(Craving: n> 1,850; Affordable: n> 1,800) ▲ ▼ = +10% difference from average

Why do QSR buyers buy breakfast?

Affordability and satisfying a craving are most important to breakfast buyers, but they’re notably less important than other mealtimes. Instead, consistency shows a significant increase during this mealtime.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was breakfast; March 2024 (n> 550).
▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	Breakfast	Any mealtime	Difference
1	Affordable	32%	34%	-2%
2	Satisfy a craving ▼	31%	35%	-4%
3	Quality	28%	28%	-
4	Consistency ▲	26%	23%	3%
5	It’s a treat	26%	25%	1%
6	Great deals	26%	25%	1%
7	Top of mind	24%	23%	1%
8	Comforting	24%	23%	1%
9	Filling ▼	18%	21%	-3%
10	Healthy	16%	14%	2%

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Talk to a researcher

Why do QSR buyers buy a mid-morning snack?

Affordability and cravings again influence into mid-morning snack purchases, though a brand’s quality has a much greater impact during this mealtime.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was a mid-morning snack; March 2024 (n> 300). ▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	Mid-morning snack	Any mealtime	Difference
1	Affordable	35%	34%	1%
2	Satisfy a craving ▼	31%	35%	-4%
3	Consistency	29%	28%	1%
4	Quality ▲	29%	23%	6%
5	Top of mind	27%	25%	2%
6	Great deals	27%	25%	2%
7	It’s a treat	25%	23%	2%
8	Comforting ▼	20%	23%	-3%
9	Different than usual ▼	19%	21%	-2%
10	Good for kids ▲	19%	14%	5%

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Talk to a researcher

Why do QSR buyers buy lunch?

With the largest sample size of any mealtime, lunch has little deviation from the overall list of important mealtime motivators, though satisfying a craving overtakes affordability in the 2nd spot.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was lunch; March 2024 (n> 1,900).
▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	Lunch	Any mealtime	Difference
1	Satisfy a craving	33%	34%	-1%
2	Affordable	33%	35%	-2%
3	Quality	31%	28%	3%
4	Consistency	24%	23%	1%
5	Great deals	24%	25%	-1%
6	Top of mind	23%	25%	-2%
7	It's a treat	23%	23%	-
8	Comforting	22%	23%	-1%
9	Filling	21%	21%	-
10	Different than usual ▲	18%	14%	4%

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Why do QSR buyers buy a mid-afternoon snack?

Affordability lessens in importance for mid-afternoon snackers, who instead satisfy cravings and treat themselves.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was lunch; March 2024 (n> 650).
▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	Mid-afternoon snack	Any mealtime	Difference
1	Satisfy a craving	34%	34%	0
2	Affordable ▼	31%	35%	-4
3	It's a treat ▲	30%	23%	7
4	Great deals	26%	25%	1
5	Quality	26%	28%	-2
6	Top of mind	25%	25%	0
7	Comforting	25%	23%	2
8	Consistency	22%	23%	-1
9	Filling	19%	21%	-2
10	Different than usual ▲	17%	14%	3

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Why do QSR buyers buy dinner?

Dinner buyers are most cost-conscious, with 39% citing affordability as a contributing factor to their most recent purchase. More, however, ultimately chose their recent QSR dinner spot because of a craving.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was dinner; March 2024 (n> 1,500).
▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	Dinner	Any mealtime	Difference
1	Satisfy a craving ▲	41%	34%	7%
2	Affordable ▲	39%	35%	4%
3	Quality	28%	28%	-
4	Great deals	25%	23%	2%
5	It's a treat	24%	25%	-1%
6	Filling	23%	25%	-2%
7	Comforting	23%	23%	-
8	Consistency	22%	23%	-1%
9	Top of mind	21%	21%	-
10	Different than usual ▲	16%	14%	2%

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Why do QSR buyers buy an after-dinner snack?

After-dinner snackers continue to satisfy cravings, but are significantly less concerned about affordability.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was an after-dinner snack; March 2024 (n> 125). ▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	After-dinner snack	Any mealtime	Difference
1	Satisfy a craving	36%	34%	2%
2	Affordable ▼	29%	35%	-6%
3	It's a treat	28%	28%	-
4	Comforting ▲	28%	23%	5%
5	Quality	27%	25%	2%
6	Great deals	24%	25%	-1%
7	Top of mind	21%	23%	-2%
8	Consistency ▼	19%	23%	-4%
9	Different than usual ▼	18%	21%	-3%
10	Healthy ▲	15%	14%	1%

Request more data

Talk to a researcher

Why do QSR buyers buy a late night snack or meal?

Late night eaters are more concerned about affordability than those from any other mealtime. Notably “great deals” appears in the 4th position, its highest percentage of any mealtime.

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was a late night snack or meal; March 2024 (n> 100). ▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	Late night snack or meal	Any mealtime	Difference
1	Affordable ▲	47%	34%	13%
2	Satisfy a craving ▲	39%	35%	4%
3	Comforting ▲	33%	28%	5%
4	Great deals ▲	28%	23%	5%
5	It's a treat	24%	25%	-1%
6	Consistency	23%	25%	-2%
7	Top of mind	22%	23%	-1%
8	Filling ▼	19%	23%	-4%
9	Quality ▼	16%	21%	-5%
10	Good for kids ▲	15%	14%	1%

Why do fast food frequenters feast?

Americans who buy from QSR or fast food restaurants 15+ times per month are significantly more likely than the average customer to purchase from brands that are top of mind and make them feel comfortable.

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024
(1+: n> 3,600; 15+: n> 325). ▲ ▼ = +10% difference from average.

Most popular purchase motivators

Rank	Purchase reason	1+ monthly	15+ monthly	Difference
1	Top of mind	23%	33%	10%
2	Comforting	28%	38%	10%
3	Consistency	25%	33%	8%
4	Quality	21%	28%	7%
5	Different than usual	17%	22%	5%
6	Satisfy a craving	35%	40%	5%
7	Healthy	10%	15%	5%
8	Great deals	23%	27%	4%
9	Recently heard/saw ad	15%	19%	4%
10	Good for kids	14%	17%	3%

Request more data

Talk to a researcher

Who leads these trending mealtime motivators?

Americans motivated by memorability, comfort, and consistency for their last purchase went to these restaurants.

Top of mind

Rank	Restaurant	% who gave this reason purchased last
1	McDonald's	21.9%
2	KFC ▲	10.0%
3	Burger King	9.1%
4	Pizza Hut ▲	8.9%
5	Starbucks ▲	8.6%
6	Chick-fil-A	7.0%
7	Taco Bell ▼	6.1%
8	Wendy's ▼	4.9%
9	Subway ▼	4.3%
10	Dunkin' ▲	2.7%

Comforting

Rank	Restaurant	% who gave this reason purchased last
1	McDonald's	24.8%
2	KFC ▲	10.0%
3	Pizza Hut	7.7%
4	Chick-fil-A	7.7%
5	Burger King ▼	7.6%
6	Starbucks	7.3%
7	Taco Bell ▼	6.1%
8	Wendy's	5.3%
9	Subway ▼	3.4%
10	Dunkin'	2.6%

Consistency

Rank	Restaurant	% who gave this reason purchased last
1	McDonald's ▼	19.9%
2	Chick-fil-A ▲	10.6%
3	Starbucks ▲	8.7%
4	KFC	8.6%
5	Burger King ▼	7.1%
6	Subway ▲	6.1%
7	Pizza Hut ▼	6.1%
8	Taco Bell ▼	5.8%
9	Wendy's ▼	4.8%
10	Dunkin' ▲	2.8%

Americans aged 18-64 who considered each attribute for their last QSR purchase; March 2024
(Top of mind: n> 1,100; Comforting: n> 1,200; Consistency: n> 1,200) ▲▼ = +10% difference from average.

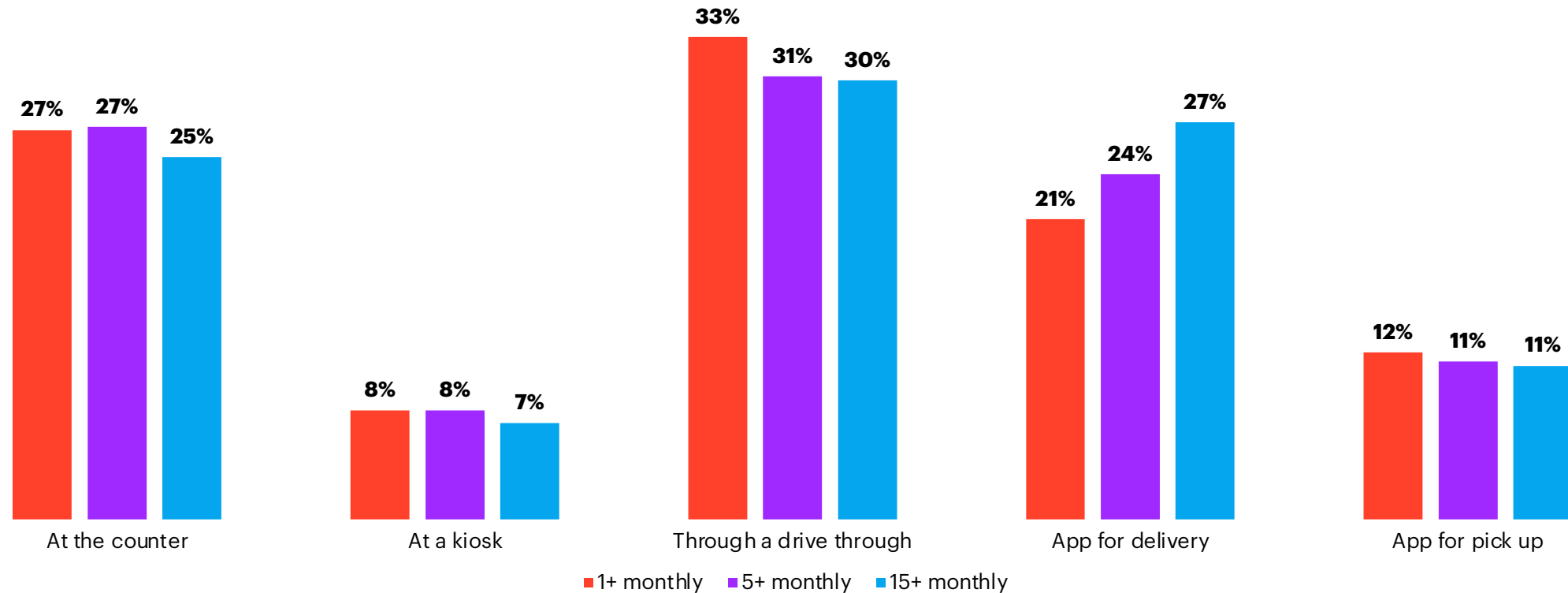
4 Ordering options

How did you order in your last purchase?



Fast food frequenters ordering delivery more

How QSR customers made their last purchase

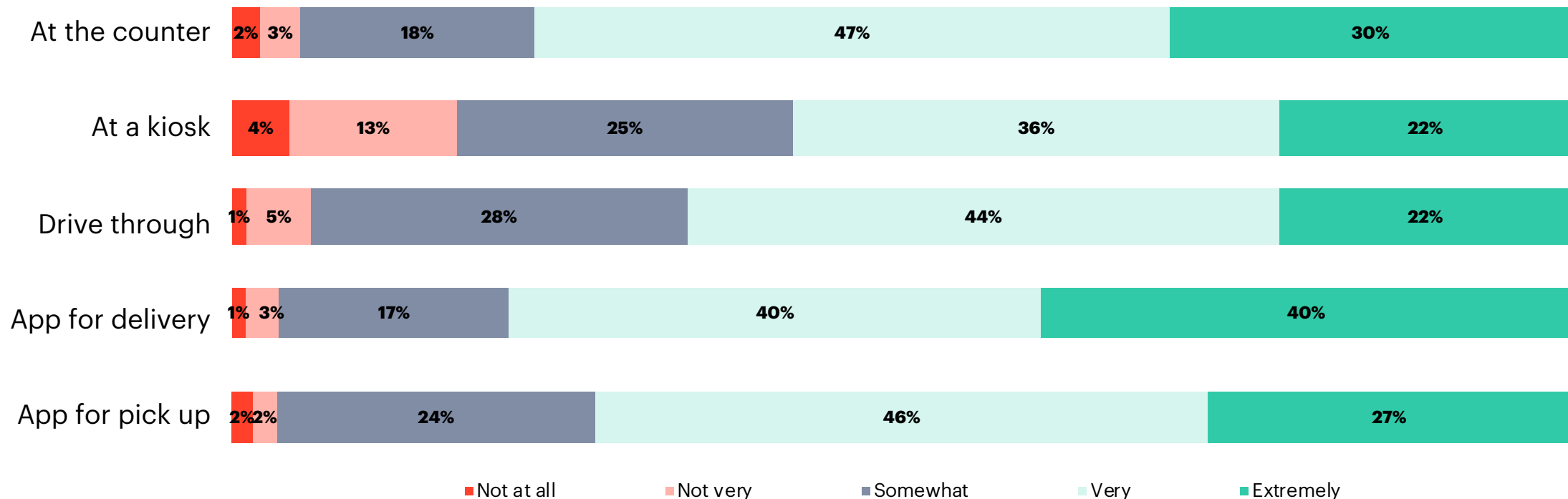


Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024
(1+ monthly: n> 5,000; 5+ monthly: n> 2,700; 15+ monthly: n> 400)

[Request more data](#)[Talk to a researcher](#)

Delivery orders most satisfying; kiosk orders least

Satisfaction with recent QSR / fast food purchase by order type



Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024

(At the counter: n> 1,400; At a kiosk: n> 375; Drive through: n> 1,700; App for delivery: n> 1,100; App for pickup: n> 600)

How are different QSR buyers ordering?

Delivery apps most prevalent among office workers and late night eaters.

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024
(1+ monthly: n> 5,000; 5+ monthly: n> 2,700; 15+ monthly: n> 400)

Top order type by mealtime

Mealtime	Order type	% of customers at mealtime who purchased this way
Breakfast	Drive through	33%
Mid-morning snack	At the counter	33%
Lunch	Drive through	32%
Mid-afternoon snack	Drive through	34%
Dinner	Drive through	36%
After-dinner snack	App for delivery	30%
Late night snack/meal	App for delivery	30%

Top order type by eating location

Eating location	Order type	% of consumers who purchased this way
At home	Drive through	32%
In the office/work	App for delivery	29%
In the car	Drive through	59%
At school	At the counter	34%
In the restaurant	At the counter	36%

How are different QSR buyers ordering?

Delivery apps most prevalent among new parents and orders for friends and coworkers.

Americans aged 18-64 who ordered from a quick serve / fast food restaurant in the last month; March 2024
(1+ monthly: n> 5,000; 5+ monthly: n> 2,700; 15+ monthly: n> 400)

Top order type by person(s) ordered for

Purchase party	Order type	% of customers who purchased this way
Myself	Drive through	33%
Significant other	At the counter	34%
Children under 5	App for delivery	31%
Children 6-12	Drive through	32%
Children 13-17	Drive through	31%
Friends	App for delivery	34%
Coworkers	App for delivery	31%
Other family	Drive through	34%

Request more data

Talk to a researcher

Who's leading in each of these top order types?

Americans who ordered via drive through, counter or delivery apps for their last purchase went to these restaurants.

Drive through

Rank	Restaurant	% ordered this way purchased from last
1	McDonald's ▲	25.4%
2	Chick-fil-A ▲	9.2%
3	Burger King	9.1%
4	Taco Bell ▲	8.9%
5	Wendy's	6.7%
6	KFC ▼	6.2%
7	Starbucks ▼	5.2%
8	Pizza Hut ▼	3.9%
9	Dunkin'	2.7%
10	Subway ▼	2.7%

At the counter

Rank	Restaurant	% ordered this way purchased from last
1	McDonald's ▼	18.9%
2	Subway ▲	9.9%
3	Burger King	8.7%
4	KFC	8.1%
5	Starbucks ▲	8.1%
6	Chick-fil-A	6.6%
7	Wendy's	5.9%
8	Taco Bell ▼	5.7%
9	Pizza Hut ▼	5.7%
10	Popeyes ▲	2.9%

App for delivery

Rank	Restaurant	% ordered this way purchased from last
1	McDonald's	25.0%
2	Pizza Hut ▲	14.5%
3	KFC ▲	12.6%
4	Burger King ▲	10.6%
5	Starbucks ▼	5.8%
6	Taco Bell ▼	4.9%
7	Wendy's ▼	4.6%
8	Subway ▼	4.0%
9	Chick-fil-A ▼	3.1%
10	Five Guys ▲	2.2%

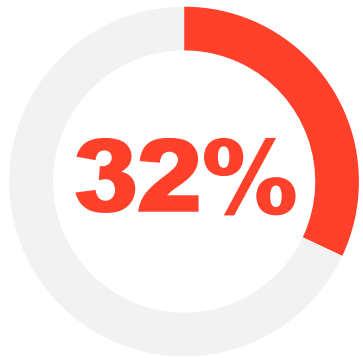
Americans aged 18-64 who considered each attribute for their last QSR purchase; March 2024;
 (Drive through: n> 1,700; Counter: n> 1,400; Delivery app: n> 1,100) ▲ ▼ = +10% difference from average.

5 Brand battlecards

Which quick serve/fast food restaurant did you order in your last purchase? (n> 100)



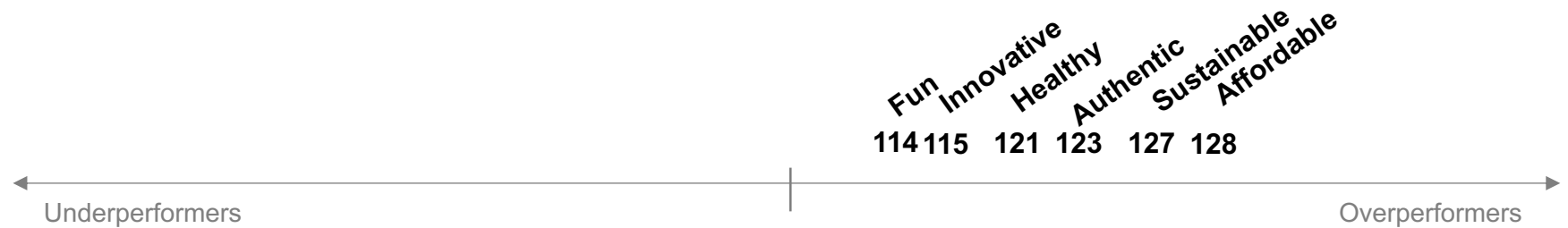
Brand battlecard: Burger King



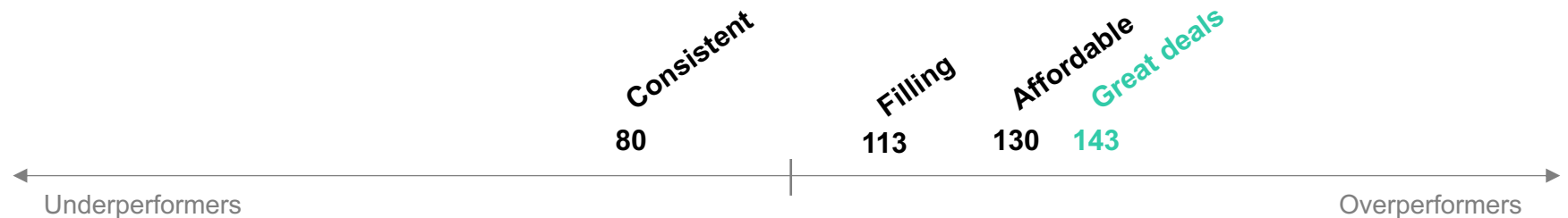
Visited by 32% in the past month

[Request more data](#)

Feeding factors



Mealtimes motivators



Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtimes motivators listed for those whose last QSR purchase was Burger King; March 2024 (n>310). Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtimes motivators.

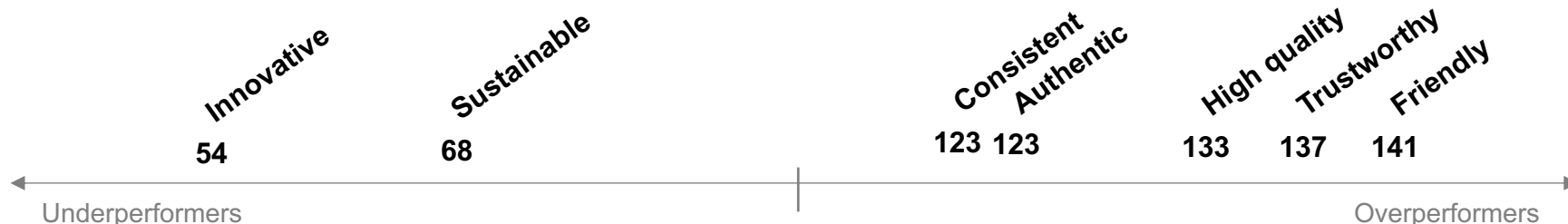
Brand battlecard: Chick-fil-A



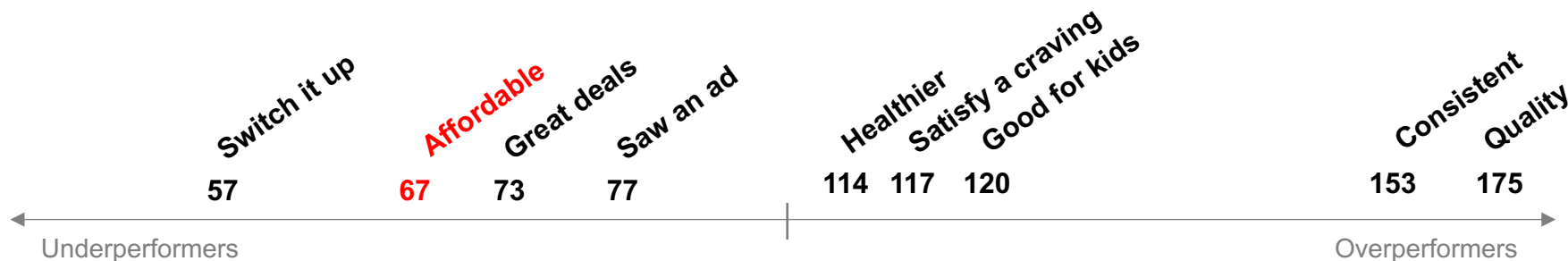
Visited by 24% in the past month

[Request more data](#)

Feeding factors



Mealtimes motivators



Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtimes motivators listed for those whose last QSR purchase was Chick-fil-A; March 2024 (n> 270)

Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtimes motivators.

Brand battlecard: Dunkin'



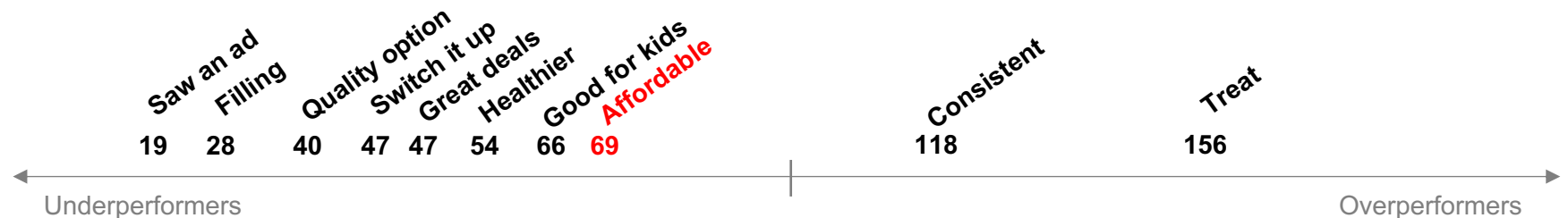
Visited by 14% in the past month

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Feeding factors

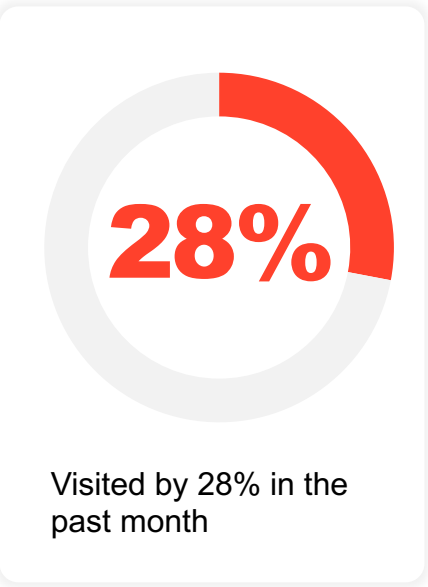


Mealtime motivators

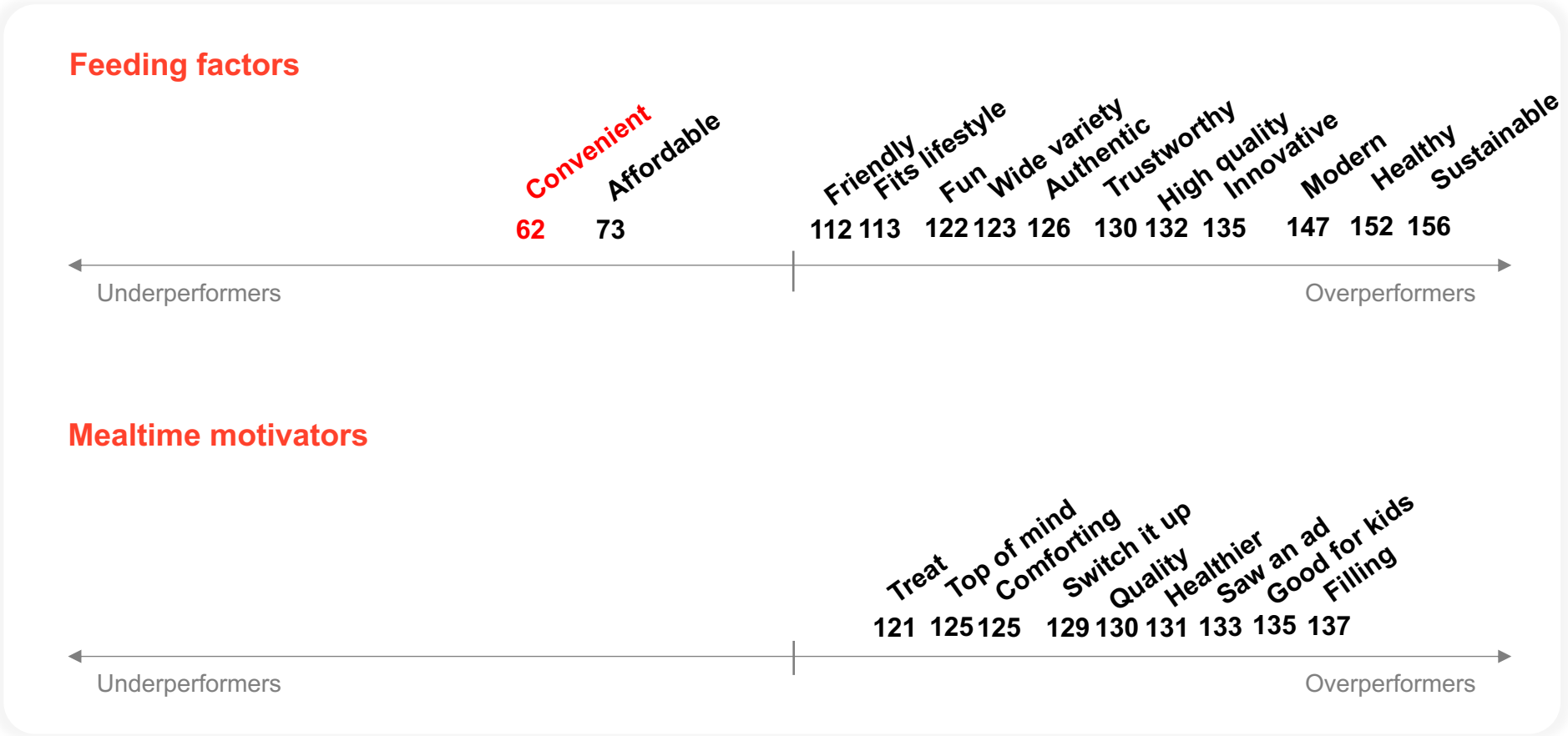


Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtime motivators listed for those whose last QSR purchase was Dunkin'; March 2024 (n> 100)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtime motivators.

Brand battlecard: KFC



Request more data



Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtime motivators listed for those whose last QSR purchase was KFC; March 2024 (n> 290)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtime motivators.

Brand battlecard: McDonald's



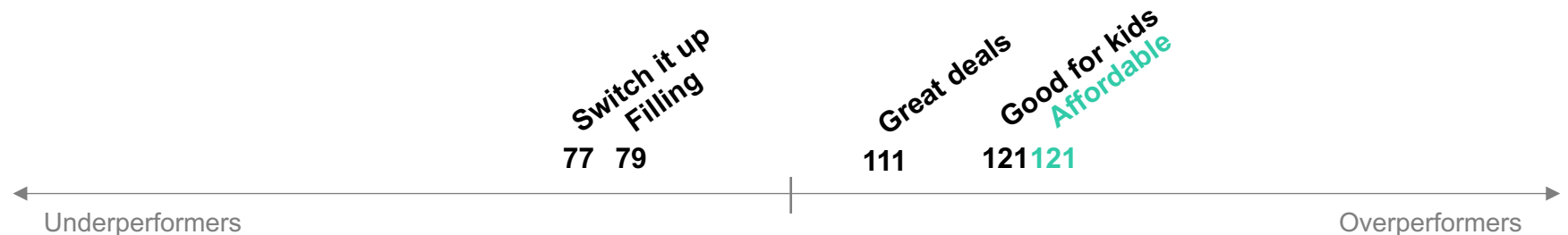
Visited by 56% in the past month

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Feeding factors

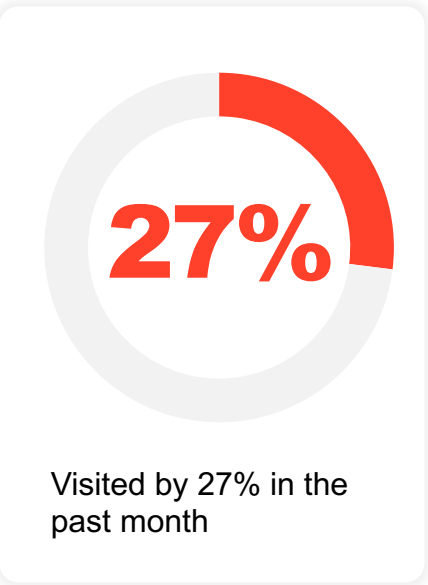


Mealtimes motivators

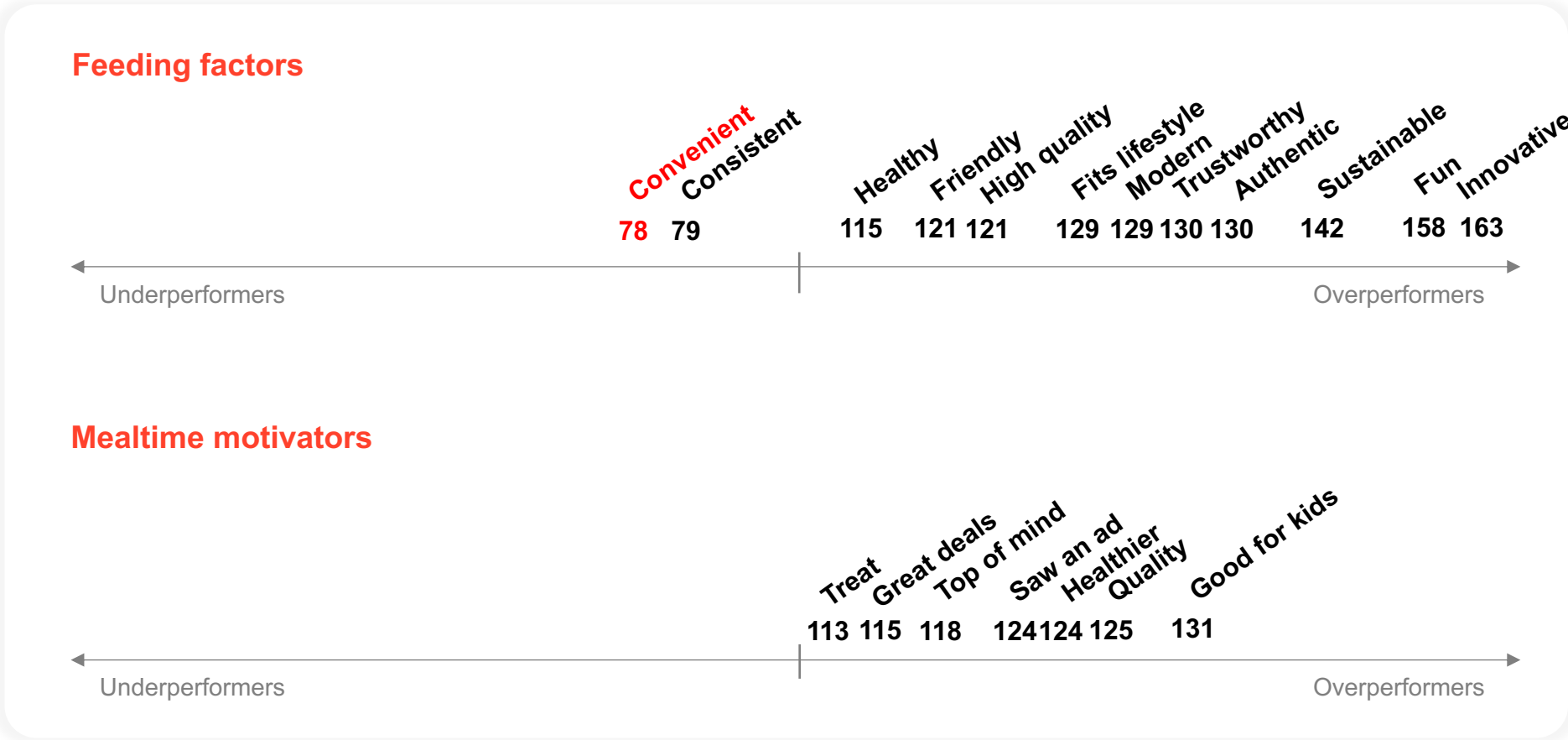


Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtimes motivators listed for those whose last QSR purchase was McDonald's; March 2024 (n> 800)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtimes motivators.

Brand battlecard: Pizza Hut

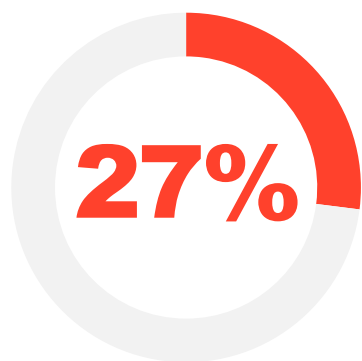


Request more data



Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtimes motivators listed for those whose last QSR purchase was Pizza Hut; March 2024 (n> 280)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtimes motivators.

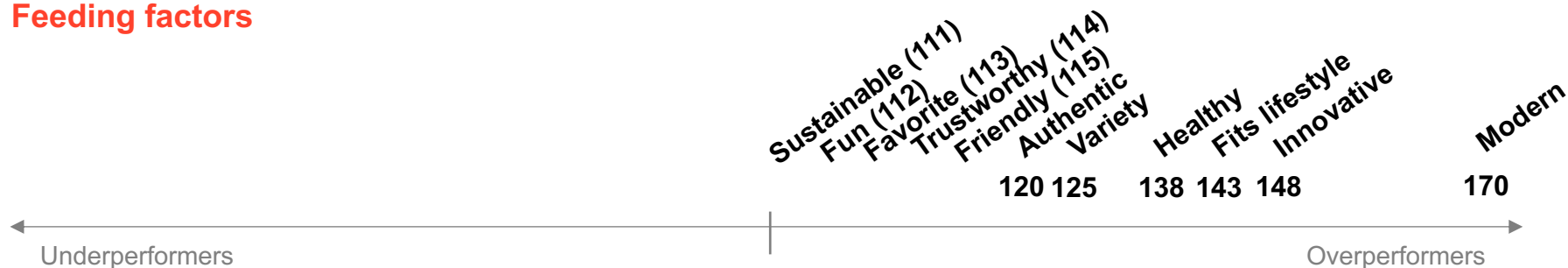
Brand battlecard: Starbucks



Visited by 27% in the past month

[Request more data](#)

Feeding factors

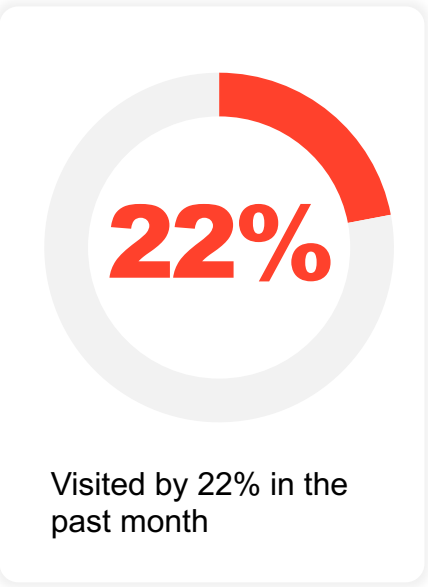


Mealtime motivators

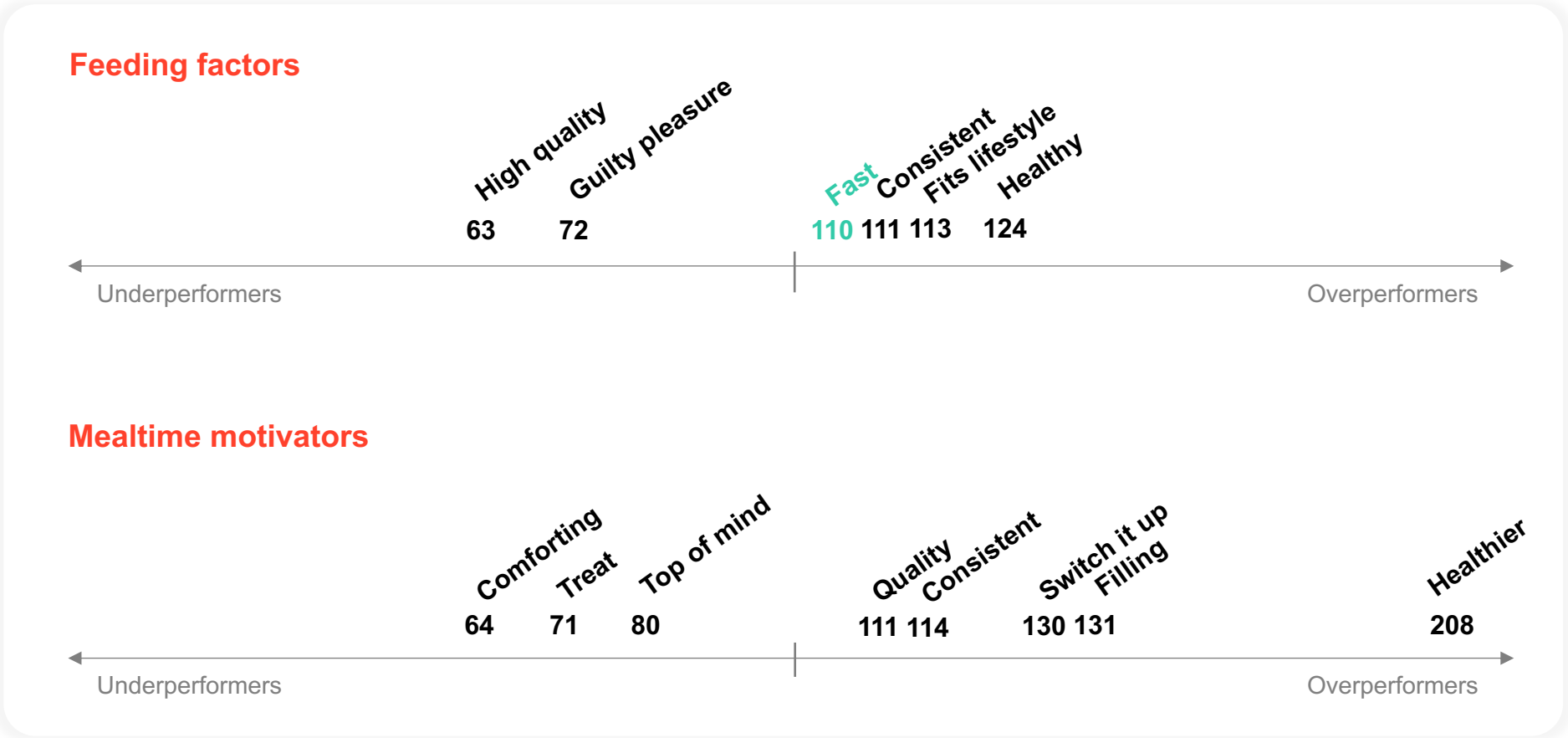


Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtime motivators listed for those whose last QSR purchase was Starbucks; March 2024 (n> 260)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtime motivators.

Brand battlecard: Subway



[Request more data](#)



Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtime motivators listed for those whose last QSR purchase was Subway; March 2024 (n> 180)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtime motivators.

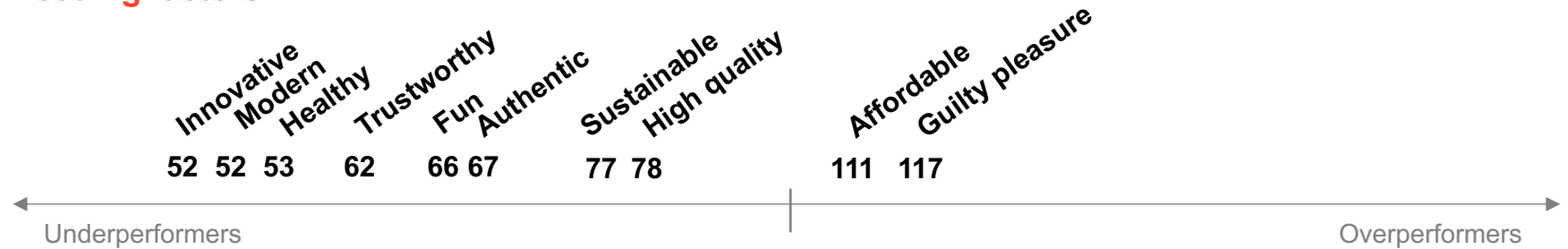
Brand battlecard: Taco Bell



Visited by 29% in the past month

[Request more data](#)

Feeding factors

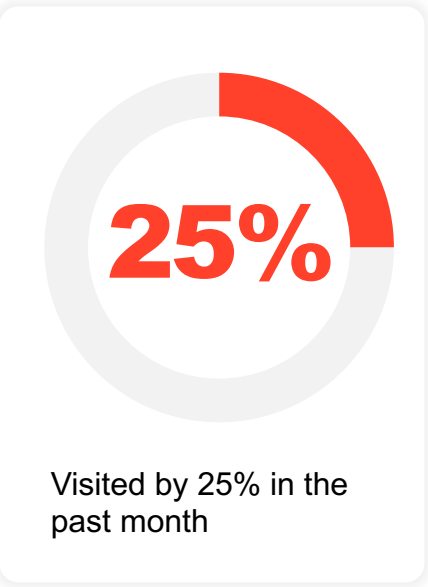


Mealtimes motivators

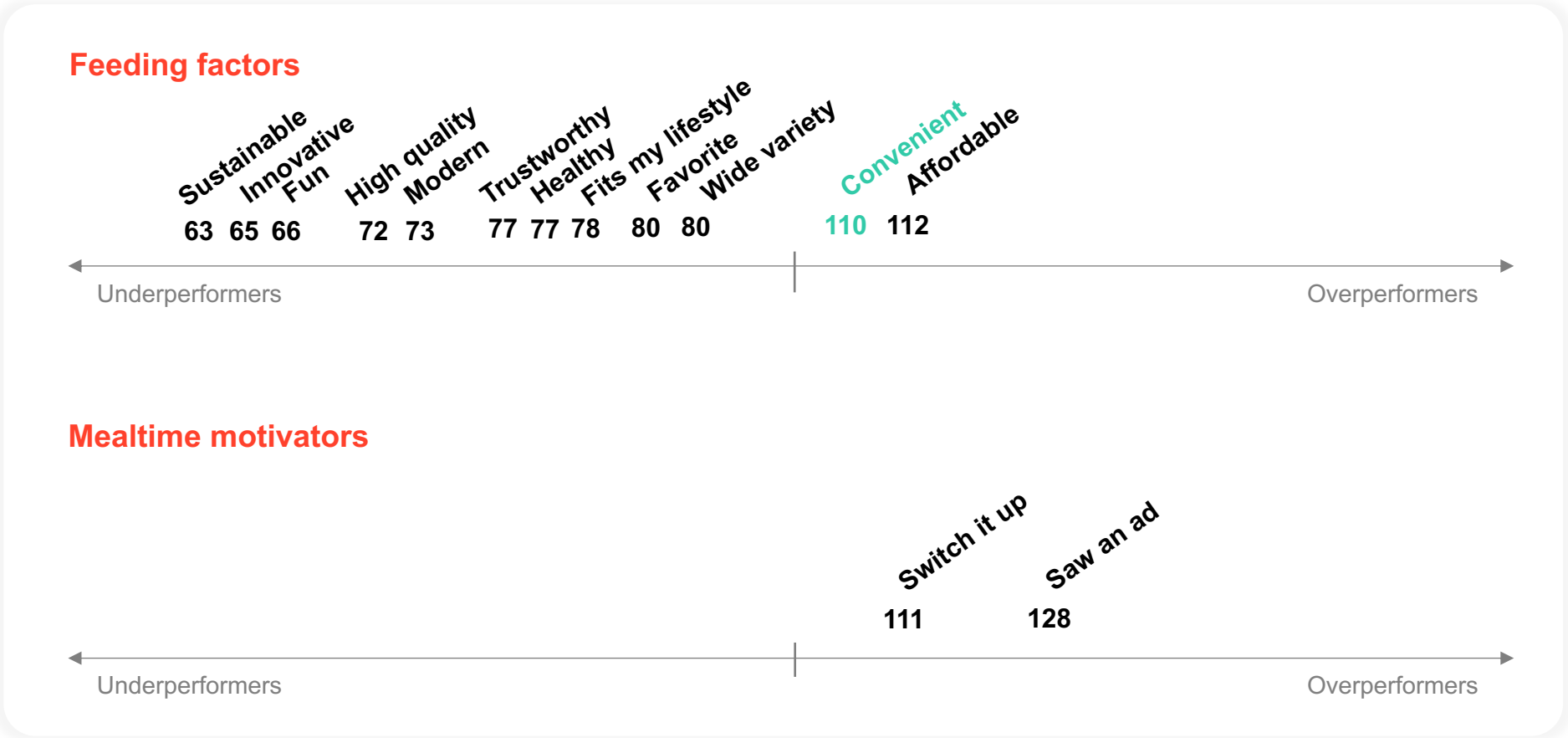


Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtime motivators listed for those whose last QSR purchase was Taco Bell; March 2024 (n> 270)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtime motivators.

Brand battlecard: Wendy's



[Request more data](#)



Americans aged 18-64 who purchased QSR in the last month. Feeding factors and mealtime motivators listed for those whose last QSR purchase was Wendy's; March 2024 (n> 225)
Attributes listed underindex (<80) or overindex (>110) against other QSR brands measured; those on par with average are left out. Attributes in color are most popular feeding factors or mealtime motivators.

6 Conquering QSR: Mealtime rankings

Was your last purchase for...?



Where does America get breakfast?

McDonald’s wins breakfast, though Starbucks and Dunkin’ overperform compared to other mealtimes. Hardee’s also cracks the top 10.

Explore brand tracking

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was breakfast; March 2024 (n> 550).
▲ ▼ = +10% difference from average.

11% of QSR buyers last purchase was **breakfast**.
Where did they go?

Rank	Restaurant	Breakfast	Any mealtime	Difference
1	McDonald’s	22.9%	22.8%	0.1
2	Starbucks ▲	15.9%	6.8%	9.1
3	Burger King	9.1%	8.9%	0.2
4	Dunkin’ ▲	7.0%	2.4%	4.6
5	KFC ▼	5.8%	8.0%	-2.2
6	Pizza Hut ▼	5.1%	7.5%	-2.4
7	Wendy’s ▼	4.5%	5.5%	-1.0
8	Chick-fil-A ▼	4.5%	7.0%	-2.5
9	Subway ▼	3.4%	5.4%	-2.0
10	Hardee’s ▲	2.7%	1.1%	1.6

Where does America get a mid-morning snack?

Starbucks supplants McDonald’s for the mid-morning snack, with Dunkin’ also overperforming during this timeslot.

Jack in the Box cracks the top 10 during this mealtime.

Explore brand tracking

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was a mid-morning snack; March 2024 (n> 300). ▲ ▼ = +10% difference from average.

6% of QSR buyers last purchase was a mid-morning snack. Where did they go?

Rank	Restaurant	Mid-morning snack	Any mealtime	Difference
1	Starbucks ▲	18.8%	6.8%	12.0
2	McDonald’s ▼	17.3%	22.8%	-5.5
3	Dunkin’ ▲	10.5%	2.4%	8.1
4	Burger King	8.5%	8.9%	-0.4
5	KFC	8.0%	8.0%	-
6	Pizza Hut ▼	7.7%	7.5%	0.2
7	Taco Bell ▼	3.4%	6.8%	-3.4
8	Subway	2.9%	5.4%	-2.5
9	Jack in the Box ▲	2.5%	1.5%	1.0
10	Wendy’s ▼	2.3%	5.5%	-3.2

Where does America get lunch?

McDonald’s sits comfortable in the #1 position, with Chick-fil-A and KFC jumping up to positions #2 and #3.

Subway and Wendy’s also overperform during the high-traffic lunch meal.

Explore brand tracking

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was lunch; March 2024 (n> 1,900).
▲ ▼ = +10% difference from average.

37% of QSR buyers last purchase was lunch. Where did they go?

Rank	Restaurant	Lunch	Any mealtime	Difference
1	McDonald’s	23.8%	22.8%	1.0
2	Chick-fil-A ▲	9.3%	7.0%	2.3
3	KFC ▲	8.9%	8.0%	0.9
4	Pizza Hut	7.6%	7.5%	0.1
5	Burger King ▼	7.4%	8.9%	-1.5
6	Subway ▲	7.1%	5.4%	1.7
7	Taco Bell	6.5%	6.8%	-0.3
8	Wendy’s ▲	6.2%	5.5%	0.7
9	Starbucks ▼	3.9%	6.8%	-2.9
10	Popeyes	2.4%	2.3%	0.1

Where does America get a mid-afternoon snack?

McDonald’s remains at #1 for the mid-afternoon snack, with Starbucks reemerging to the #2 position, this time without Dunkin’ right behind.

Instead, Burger King and KFC overperform this mealtime.

Explore brand tracking

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was a mid-afternoon snack; March 2024 (n> 650). ▲ ▼ = +10% difference from average.

13% of QSR buyers last purchase was a mid-afternoon snack. Where did they go?

Rank	Restaurant	Mid-afternoon snack	Any mealtime	Difference
1	McDonald’s	21.6%	22.8%	-1.2
2	Starbucks ▲	12.7%	6.8%	5.9
3	Burger King ▲	10.1%	8.9%	1.2
4	KFC ▲	9.3%	8.0%	1.3
5	Pizza Hut	7.0%	7.5%	-0.5
6	Taco Bell	6.9%	6.8%	0.1
7	Chick-fil-A ▼	5.5%	7.0%	-1.5
8	Subway ▼	3.6%	5.4%	-1.8
9	Wendy’s ▼	3.3%	5.5%	-2.2
10	SONIC ▲	3.2%	2.3%	0.9

Where does America get dinner?

McDonald’s remains the undisputed #1 for dinner, though Burger King and Taco Bell both significantly overperform other mealtimes for dinner diners.

Explore brand tracking

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was dinner; March 2024 (n> 1,500).
▲ ▼ = +10% difference from average.

30% of QSR buyers last purchase was dinner. Where did they go?

Rank	Restaurant	Dinner	Any mealtime	Difference
1	McDonald’s	23.7%	22.8%	0.9
2	Burger King ▲	10.1%	8.9%	1.2
3	Taco Bell ▲	9.2%	6.8%	2.4
4	Pizza Hut	8.0%	7.5%	0.5
5	KFC	7.4%	8.0%	-0.6
6	Chick-fil-A	7.2%	7.0%	0.2
7	Wendy’s ▲	6.7%	5.5%	1.2
8	Subway	5.6%	5.4%	0.2
9	Popeyes ▲	2.9%	2.3%	0.6
10	Starbucks ▼	2.4%	6.8%	-4.4

Where does America get an after-dinner snack?

After-dinner snackers order from McDonald’s as well, though the category leader lags significantly behind its lead at other mealtimes.

Pizza Hut and Burger King come in striking distance with after-dinner snackers.

Explore brand tracking

Americans aged 18-64 whose last purchase from a quick serve / fast food restaurant was an after-dinner snack; March 2024 (n> 125). ▲ ▼ = +10% difference from average.

3% of QSR buyers last purchase was an after-dinner snack. Where did they go?

Rank	Restaurant	After-dinner snack	Any mealtime	Difference
1	McDonald’s ▼	15.9%	22.8%	-6.9
2	Pizza Hut ▲	12.8%	7.5%	5.3
3	Burger King ▲	9.9%	8.9%	1.0
4	KFC	7.8%	8.0%	-0.2
5	Starbucks ▲	7.6%	6.8%	0.8
6	Whataburger ▲	6.0%	1.7%	4.3
7	Arby’s ▲	5.1%	1.9%	3.2
8	Popeyes ▲	4.9%	2.3%	2.6
9	Subway ▼	4.6%	5.4%	-0.8
10	Wendy’s ▼	4.1%	5.5%	-1.4

Where does America get a late night snack or meal?

McDonald’s again places number one, though Taco Bell, Five Guys, and In-N-Out all overperform with late night eaters.

Explore brand tracking

Americans whose last purchase from a quick serve / fast food restaurant was a late night snack or meal; March 2024 (n> 100).
▲ ▼ = +10% difference from average.

2% of QSR buyers last purchase was a late night snack or meal. Where did they go?

Rank	Restaurant	Late night snack or meal	Any mealtime	Difference
1	McDonald’s	22.5%	22.8%	-0.3
2	Taco Bell ▲	12.7%	6.8%	5.9
3	Burger King	8.7%	8.9%	-0.2
4	Five Guys ▲	7.0%	1.6%	5.4
5	Pizza Hut ▼	6.6%	7.5%	-0.9
6	Starbucks	6.2%	6.8%	-0.6
7	In-N-Out ▲	4.5%	1.4%	3.1
8	KFC ▼	4.2%	8.0%	-3.8
9	Wendy’s ▼	3.7%	5.5%	-1.8
10	Jack in the Box ▲	3.5%	1.5%	2.0

Conquering QSR 2024: Takeaways

Demographics – Fast food frequenters

- **57%** of Americans who eat fast food or from a QSR restaurant 15+ times per month are aged 25-44
- **50%** have children under 18 (vs 42% of all QSR buyers)
- **28%** have a gross household income exceeding \$150,000 (vs 8% gen pop)

Feeding factors

- The top three feeding factors for QSR customers' last purchase were: **Tasty** (49%), **Fast** (47%), **Convenient** (45%)
- Fast food frequenters look for brands that **fit their lifestyle** (+10pp), are **high quality** (+8pp), and are **innovative** (+7pp)

Mealtime motivators

- The top three mealtime motivators for QSR customers' last purchase were: **Satisfying a craving** (35%), **affordability** (34%), **Quality** (28%)
- Fast food frequenters buy brands that are **top of mind** (+10pp), **comforting** (+10pp), and **consistent** (+8pp)

Conquering QSR 2024: Takeaways

Ordering options

- **27%** of fast food frequenters ordered their last meal via a **delivery app** (vs 21% of all QSR buyers)
- **97%** who last purchased through a delivery app were satisfied
- Delivery apps are used most by Americans **buying for friends** (34%) and **coworkers** (31%)

Brand battlecards

- Looking at the **top three lunch brands...**
- **Chick-fil-A** overindexes most for "friendly" and "quality"
- **KFC** overindexes most for "sustainable" and "filling"
- **McDonald's** overindexes most for "innovative" and "affordable"

Mealtime rankings

- **McDonald's** holds the top spot for all mealtimes except mid-morning snack, where **Starbucks** leads
- The biggest gap between McDonald's and 2nd place happens at **lunchtime**
- While still #1, McDonald's loses ground for the after-dinner snack, where **Pizza Hut** overperforms

Get to know your audience

With **YouGov Profiles**, you can dig deeper into the media consumption habits and attitudes of virtually any target audience including:

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