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# Impact of COVID-19: QSR Marketing

with Matt Kaplan, Julie Berger  
& Jeremy Huber

# Welcome!

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- **Logistics:** 30 minutes, questions at the end, you will get a recording and a copy of the slides
- **Brands reviewed:** Chili's, Chick-Fil-A, Chipotle, Burger King, Popeye's, McDonald's, Sonic, Subway, Taco Bell, Wendy's, Pizza Hut, Papa John's, Little Caesars, Domino's, Starbucks, Panera, Dunkin'
- **Purpose:** To better understand consumer behavior and the role of mobile for QSR brands in these unprecedented times

# What We'll Discuss Today

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- Speakers and Data Source
- Understanding the Preferences of QSR Mobile Customers Today
- Third-Party Food Delivery Trends
- First-Party QSR App Trends
- Why Should QSR Brands Have Their Own Apps?
- Who is Seeing Success?
- Who are Downloading First-Party QSR Apps?
- Predicting What's Next
- Questions

# Speakers

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**Matt Kaplan**

Content Marketing  
Manager at InMobi



**Julie Berger**

Senior Sales Manager at  
InMobi



**Jeremy Huber**

Head of Intelligence Solutions,  
N.A. at InMobi

# InMobi Intelligence Solutions: Data Overview

Observed: Who, What, When and Where



## 1st-Party Carrier Data

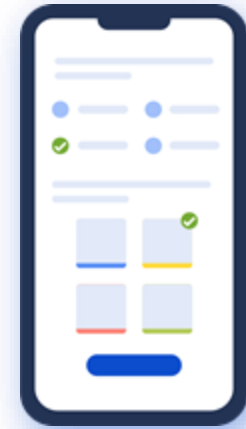
32 Million Person Panel  
24/7 Mobile Behaviors  
Mobile Website Visits  
App Install, Usage, Uninstalls  
Location Signals (600+ daily pings)  
*Currently U.S. Only*



## App SDK Data

GPS Location Signals  
App and Device Usage  
O/O apps + SDK

Stated: Why



## Stated Data (Survey)

from 1.3 billion users globally  
across 30,000+ partner apps.  
*270MM in the U.S - 5,000 partner apps*



Experian-verified data  
deterministic demographic and  
psychographic segments

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# Understanding the Preferences of QSR Customers Today – Eating Out



Among the more **than 1,500 Americans we surveyed** in early May, **31%** said they have reduced their visits to restaurants or stopped eating out altogether.



The share of survey respondents who said they have reduced their visits to restaurants or stopped eating out altogether went from **37%** in March to **34%** in April to **31%** in May.



This may mean that **many Americans are itching to get back to their routines**, including getting meals cooked from their favorite restaurants.

# Understanding the Preferences of QSR Customers Today - Takeout



The share of survey respondents who say they are **increasing** ordering food for takeout and delivery went from **7%** in March to **10%** in April to **17%** in May



The share of survey respondents who say they have **reduced** or **stopped** ordering food for takeout and delivery went from **20%** in April to **17%** in May.

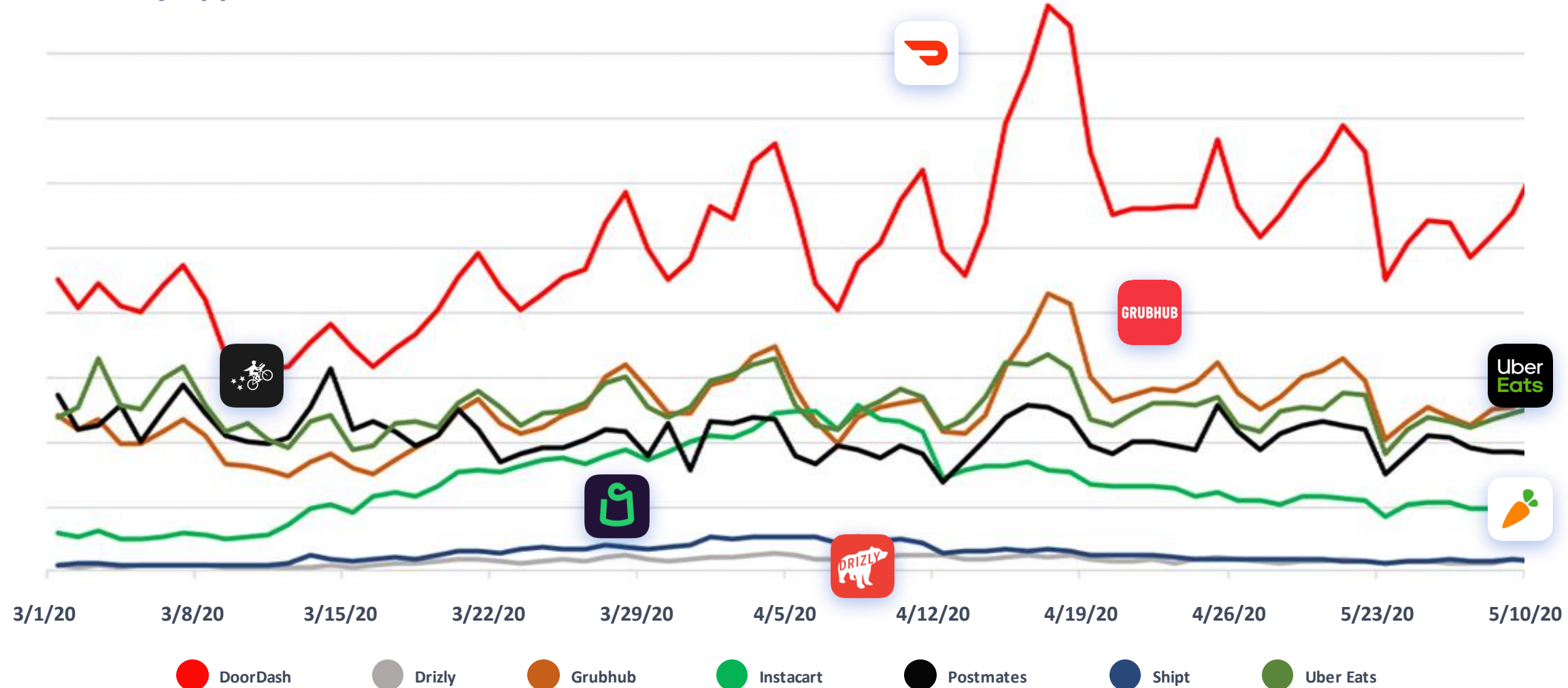


With many Americans sheltering in place for three to four months now, **takeout and delivery** is becoming more central to how adults in the U.S. are eating.



# Third-Party Food Delivery Trends

Delivery App Installs – 3/1/20 – 5/14/20

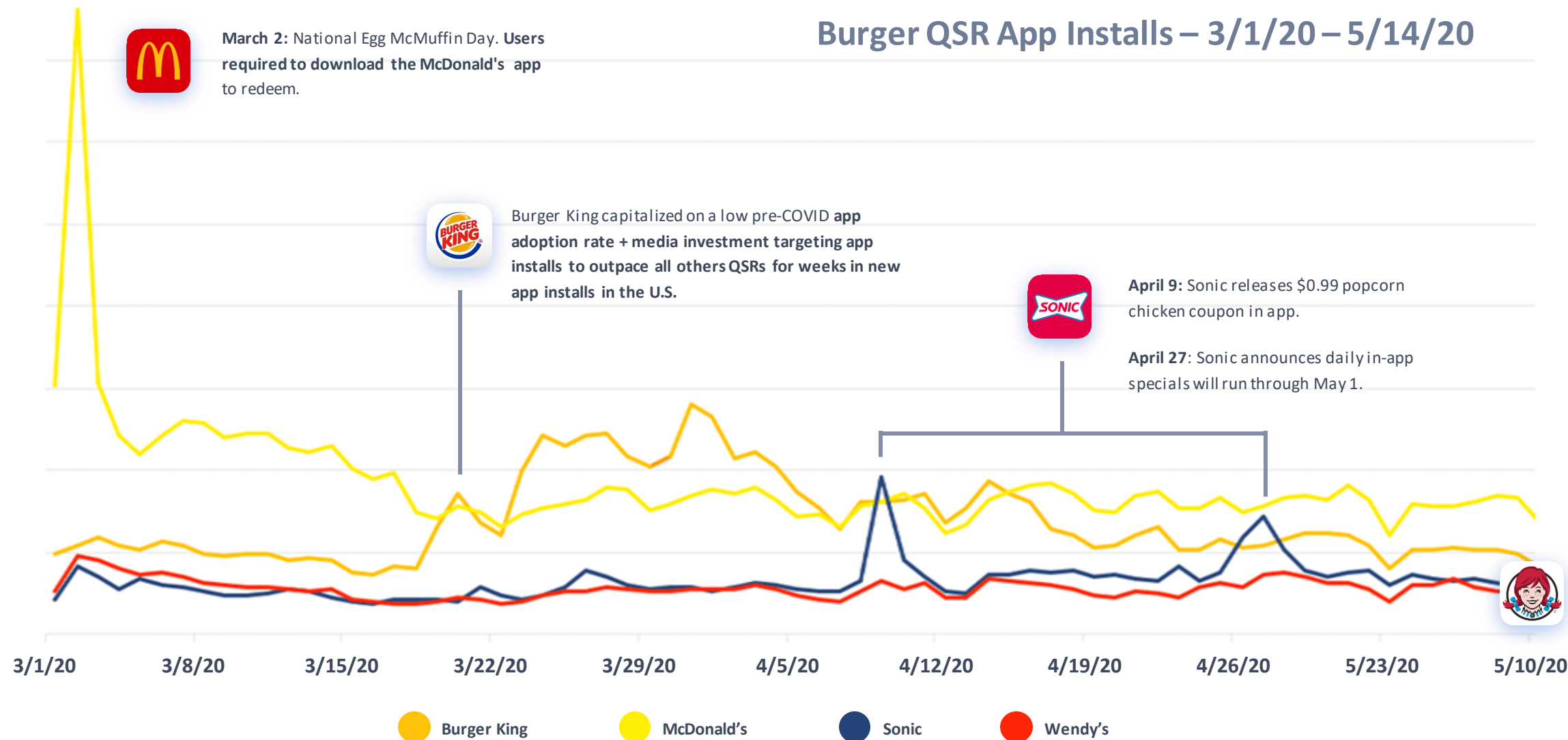


Source: <sup>1</sup>InMobi Pinsight telco data, September -November 2019



# First-Party QSR App Trends

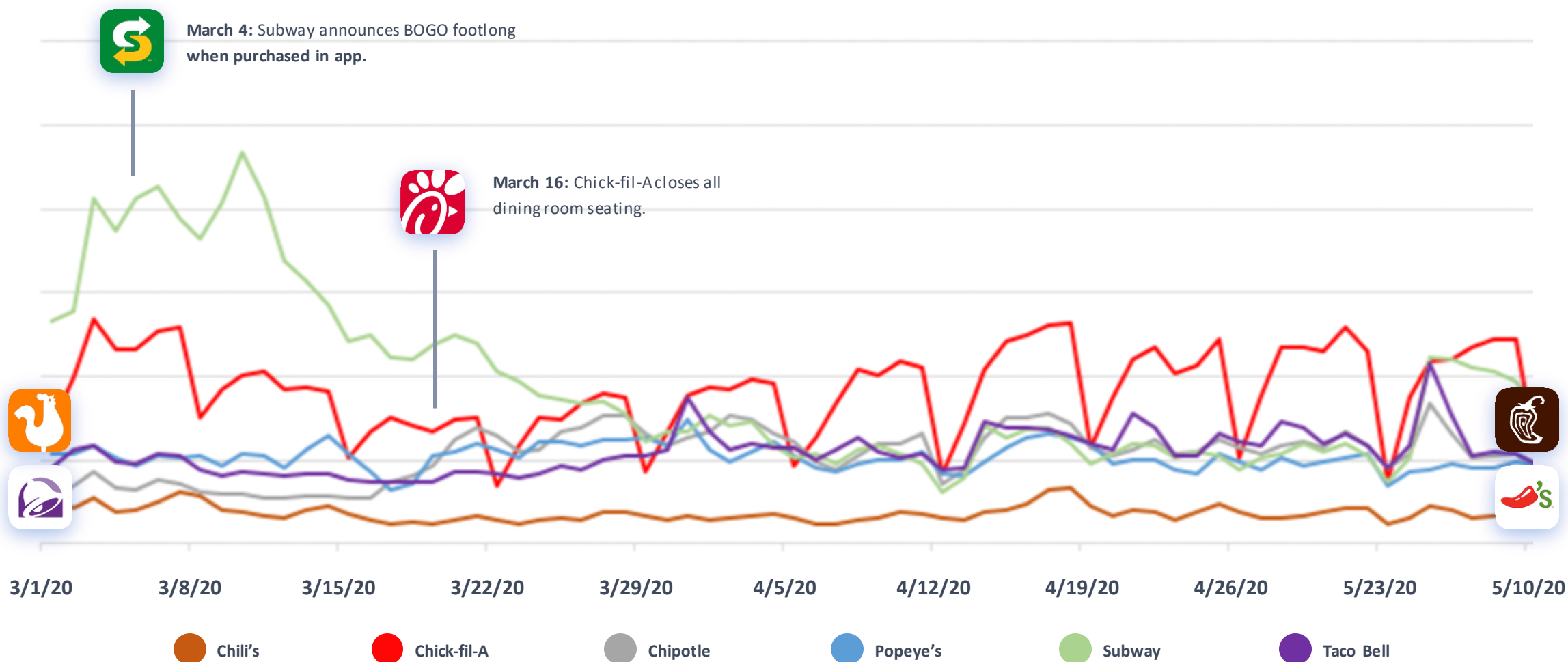
## Burger QSR App Installs – 3/1/20 – 5/14/20



Source: <sup>1</sup>InMobi Pinsight telco data, September -November 2019

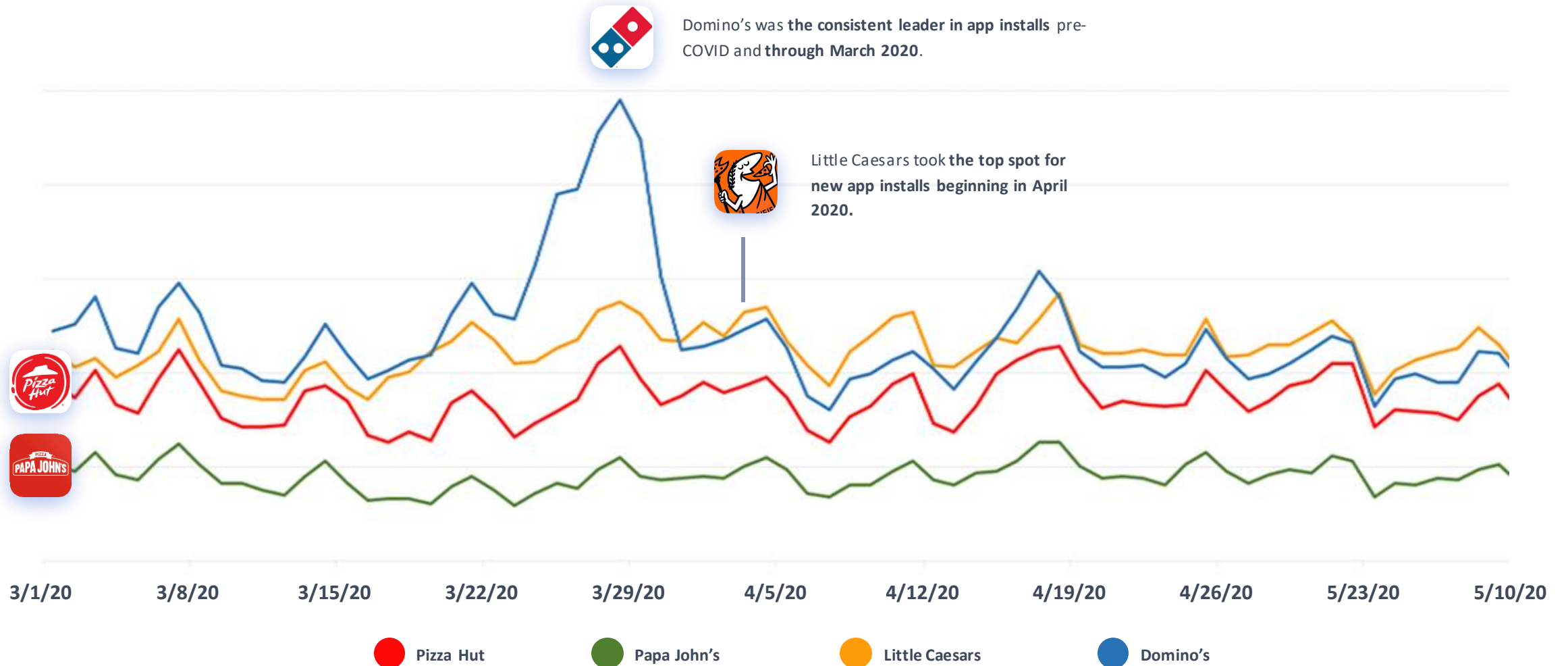
# First-Party QSR App Trends

QSR App Installs – 3/1/20 – 5/14/20



# First-Party QSR App Trends

Pizza App Installs – 3/1/20 – 5/14/20



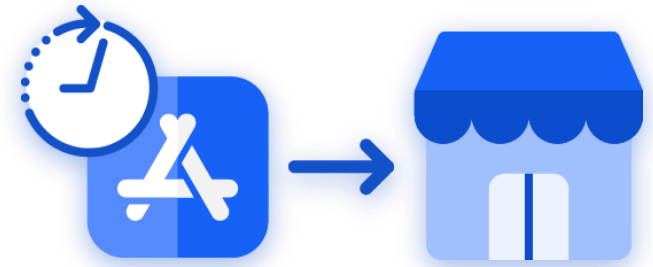
# Why Should QSR Brands Have Their Own Apps?



Better able to cultivate  
**customer loyalty**



**More insights**  
into customers



App owners are **more**  
**loyal and more likely to**  
**visit a brand's location**

# Who is Seeing Success? Burger King



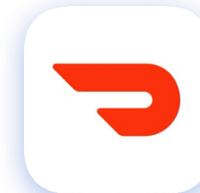
Between March 15 and March 22, **week-over-week** app installs were up **99%**.



They are okay running ads alongside content that mentions terms like “**COVID-19**” and “**coronavirus.**”



They have continued **advertising, highlighting** their **contactless delivery and pickup options via** **mobile ordering.**



**Promoted BK app, plus partnerships with** **Uber Eats, DoorDash and Postmates.**

- Stay Home with Whopper campaign
- 3 for \$3 Challenge
- QR Whopper

# Who is Seeing Success? Little Caesars



## Benefits of Little Caesars Business Model for Current Situation

Digital ordering was a  
core focus before March

No-contact options:  
Food prep, delivery, etc.

Pre-existing takeout strength, plus ideal  
price point for current economy



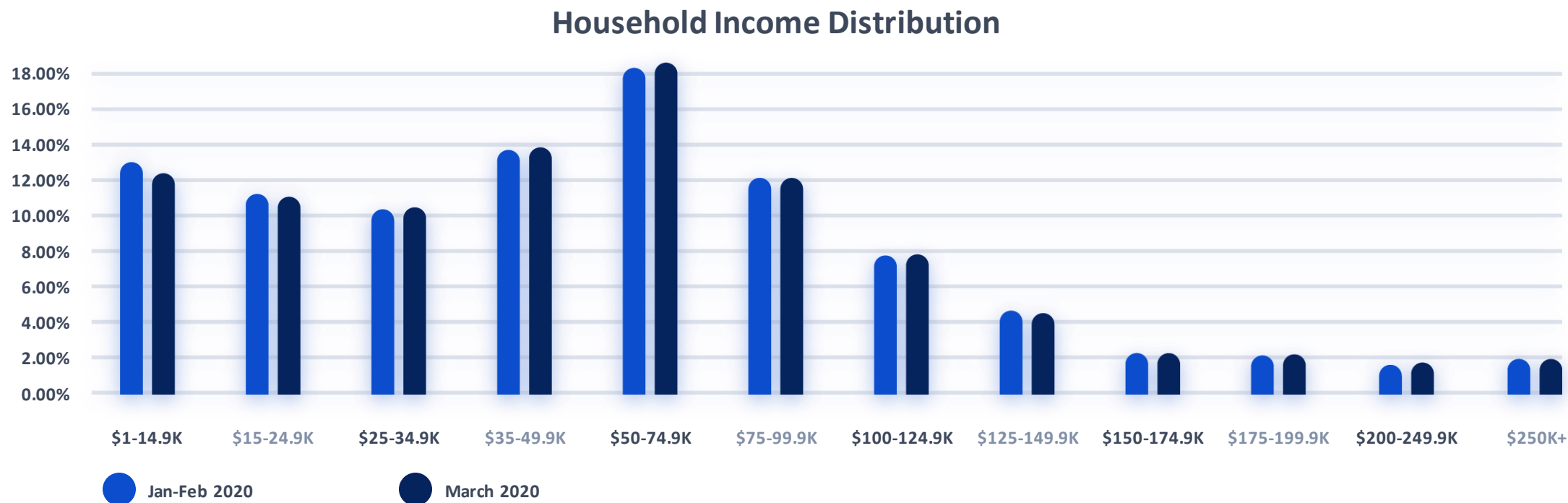
## Marketing and Advertising Efforts at Present

Continued advertising and marketing  
plans and efforts while making  
adjustments in light of current reality



# Who are Downloading First-Party QSR Apps?

Compared to app installers pre-COVID-19, post-COVID installers were more likely to be white, male, with income levels between \$35k-\$125k income ranges and between the ages of 26 and 55. This is largely a doubling down on QSR's core audience.



# Predicting What's Next

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Breakfast category will **be slowest to rebound**, so expect brands in this category to **spend to get consumers back on their old habits**.



Delivery and pickup, especially through digital channels, will be popular **even after the pandemic passes**. The spikes we're seeing are not transient.



Brands can engender loyalty **by having their own app**. After all, **time spent in apps is only going to keep going up**.

# Predicting What's Next

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Habits seen today **will be in place** after the pandemic too – for example, leading QSR brands expect to continue to **be able to reach their ideal audiences** through apps like mobile games.



Changing tone of marketing and messaging — **more focus on community, cleanliness, local habits.**

# Summary

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Every QSR brand should have its **own app**, as first-party QSR app owners are **more loyal customers** who **spend more with them**.



Now is an ideal time to **continue marketing, push app installs, communicate with consumers in app**, as these efforts will pay dividends both now and in the future.



Some habits seen today were in motion before the pandemic and **will likely stick around long afterwards**.

# Questions?

For all follow-up queries, email me directly at [matt.kaplan@inmobi.com](mailto:matt.kaplan@inmobi.com)

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