

Guest Success

- Gaining Visit Share & Market Position
- Sustaining competitive advantage

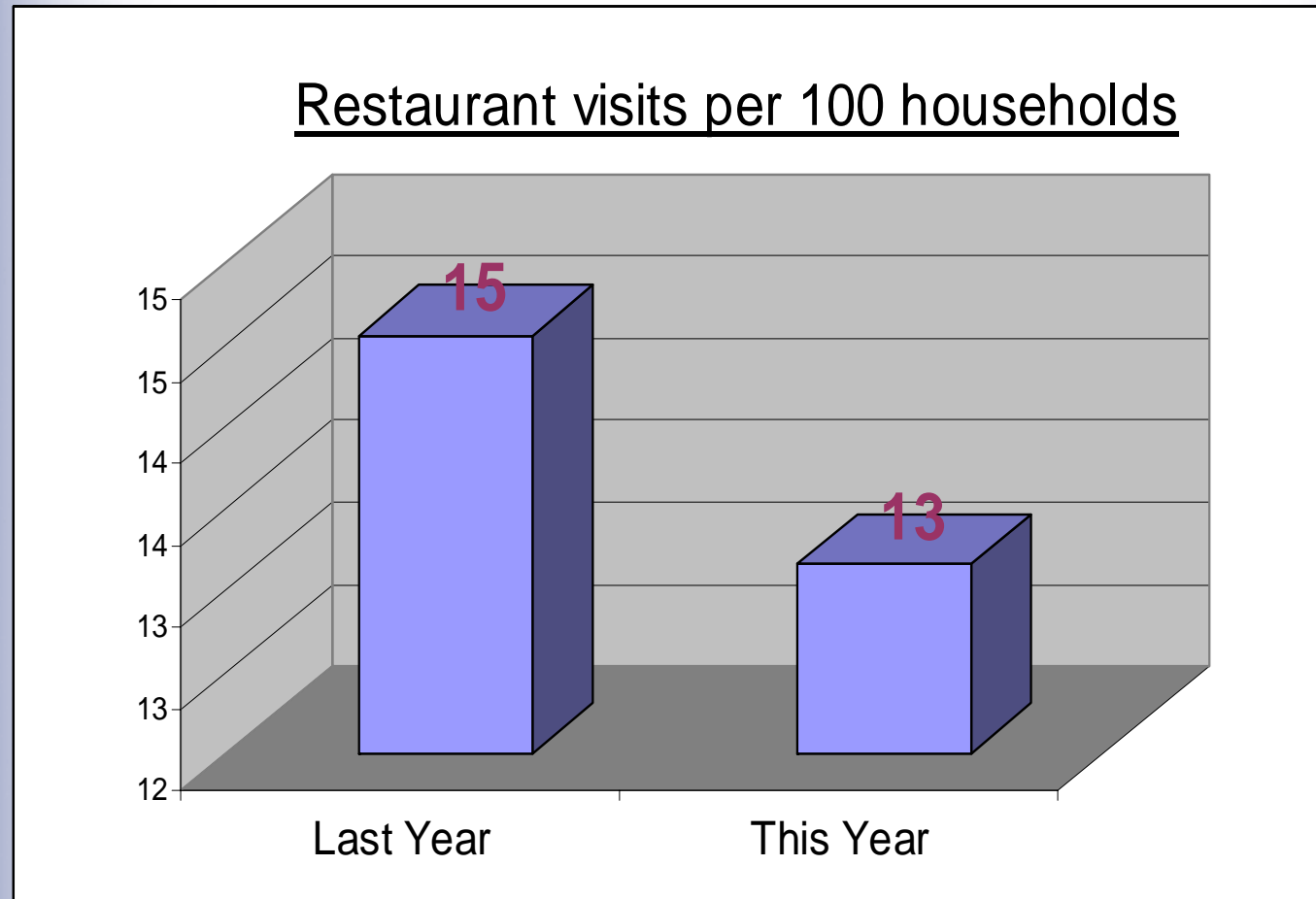
Guest Evaluation Framework

- There can only be 100% of visits – your share of that number is the best indicator for long-term success
- There are only a few ways your visit share & market position can change:
 1. The overall market is expanding or contracting.
 2. You are adding new locations at a faster or slower rate than your competitors
 3. Your existing locations are growing guest counts faster or slower than your competitors.
- Rapid short-term growth can actually undermine long-term goals
- How do you 'balance' and sustain the right mix of marketing and operational efforts to achieve long-term guest success?

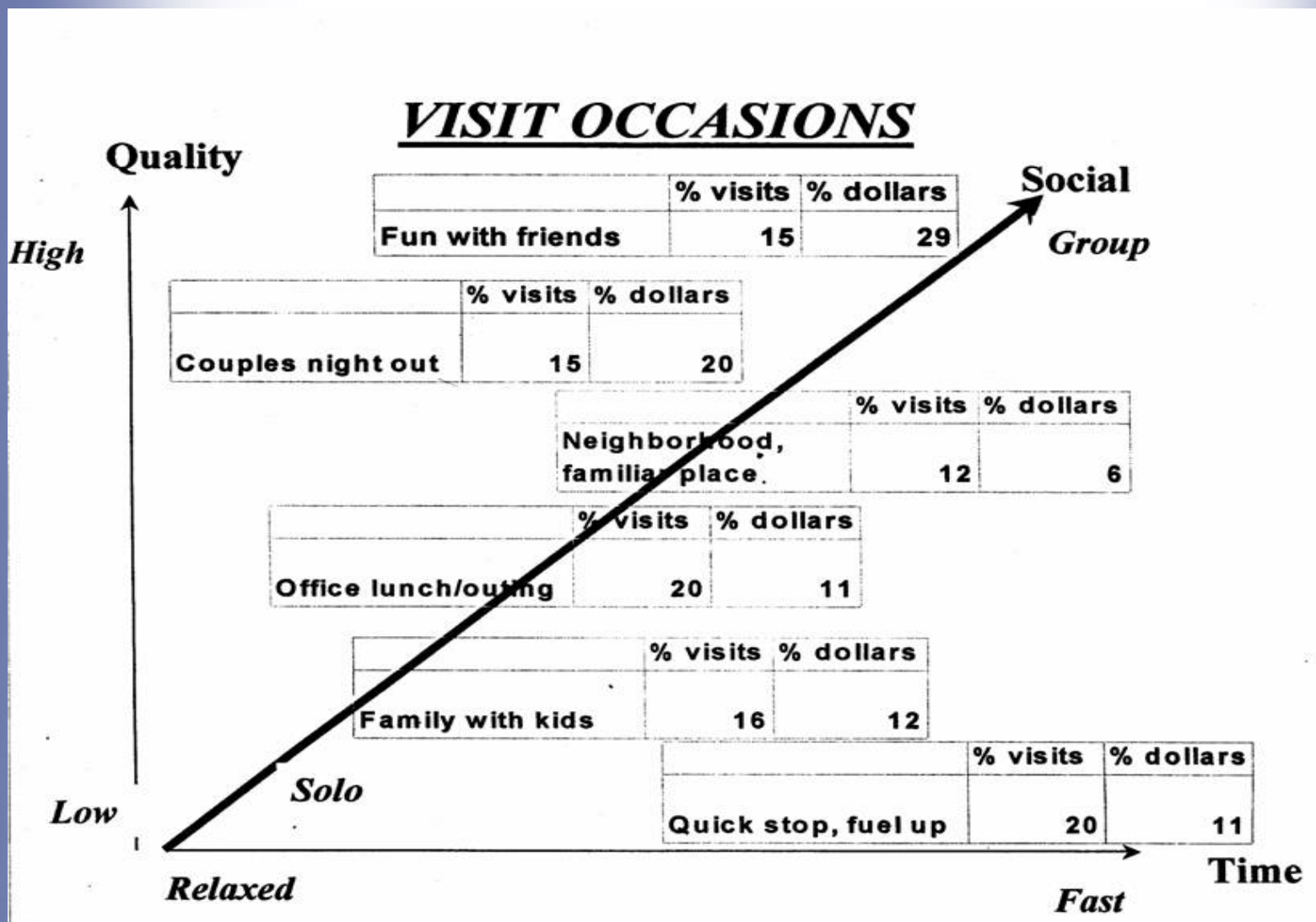
'Two tier' Internet research tool can provide the metrics and insights required to manage long- term guest visit growth

1. A broad market perspective can measure the growth or decline in overall category usage.
2. A targeted sample can capture the behavior of 'best' guests and the drivers of short-term visit changes.
3. We can also track *leading indicators* of long-term visit share changes versus competitors.
4. Your own internal data can be mapped to the research to evaluate program effectiveness.

Market Measurement: Broad measure of how usage is changing:

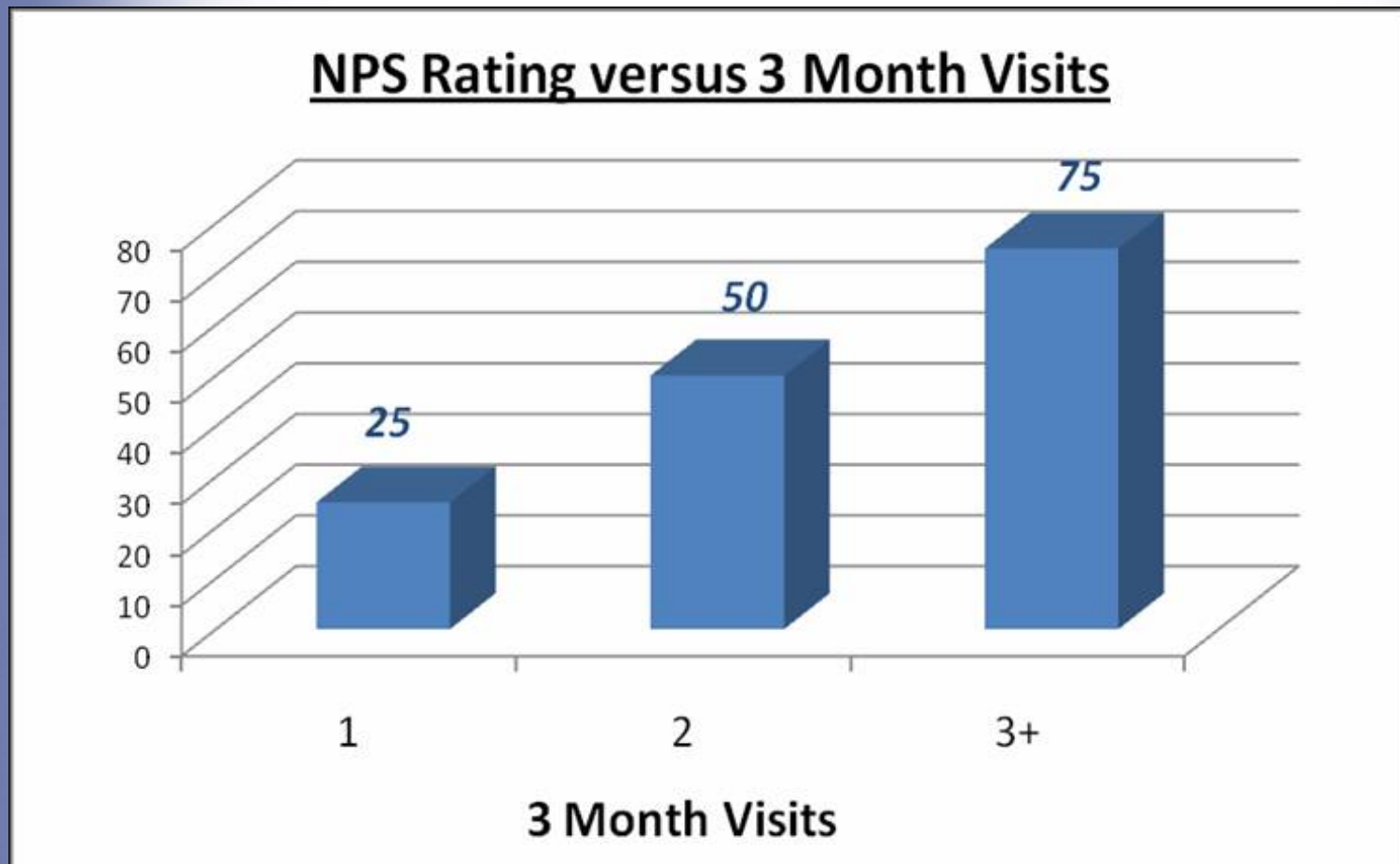


Market segments are occasion driven:



Restaurant Visits are performance driven:

Net Promoter Score = **Promoters** MINUS **Detractors**



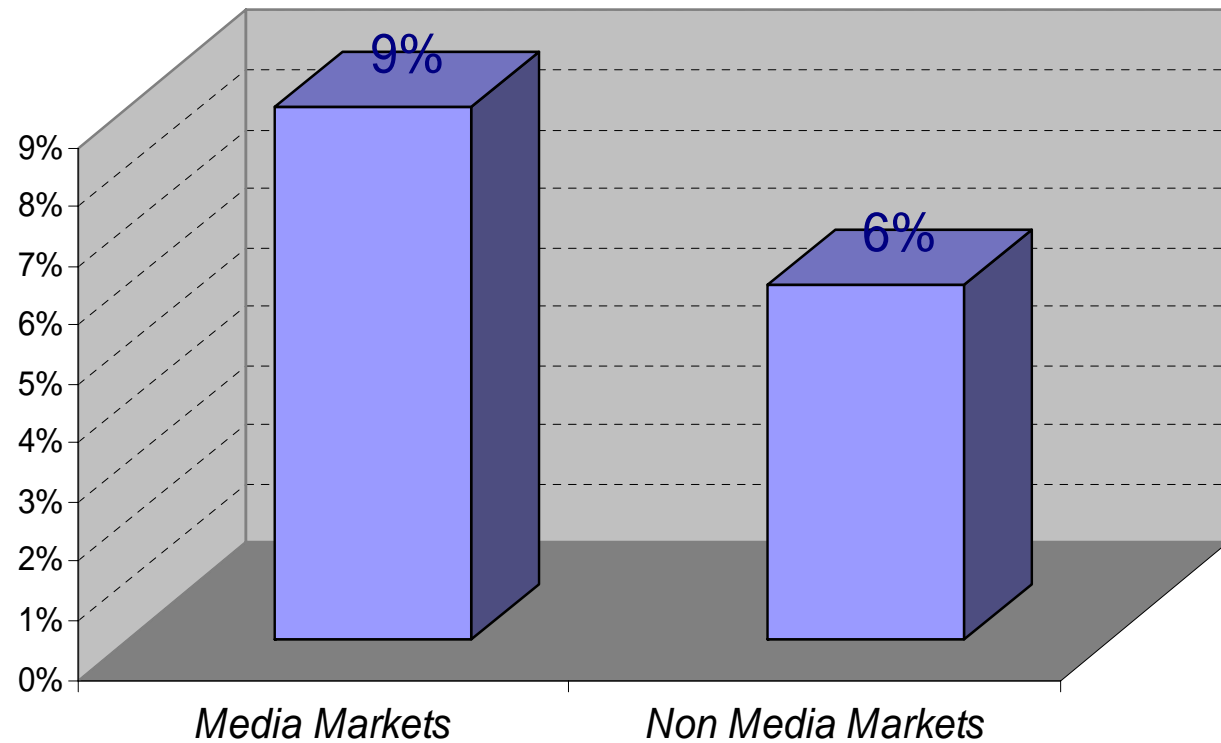
9 or 10 = **“Promoters”** – loyal enthusiasts, **positive** word of mouth advertising

7 or 8 = **“Passives”** – satisfied, not enthusiastic

6 or less = **“Detractors”** – not satisfied, **poor** ‘word of mouth’

Company marketing efforts can also be evaluated:

All Occasion Visit Share



A 'snapshot' of any business at a point in time is valuable but trends are even more important:

1. Aggressive unit growth will typically *decrease* guest performance at other locations for example.
2. High impact marketing activity will drive guest counts up but operations will not always be able to sustain high levels of guest ratings when this occurs.
3. Competitors are not standing still. New efforts by key competitors will impact your visit share and overall guest ratings for your company.

Improve Marketing Performance

- Independent Internet panel of over 4 million households provides the right sample – demographically and geographically.
- Proven survey instrument used for 5 years gives:
 - Market metrics
 - Chain by chain usage – segmented for each meal occasion
 - Operational and brand attribute ratings to understand ‘why’ as well as how the market is changing.