KING-CASEY

Insights & Trends in Foodservice Merchandising & Design

REPORT

The Wizardry of TURF Analysis

A Statistical Tool that Delivers Multiple Menu-Related Benefits

TURF (an acronym for *Total Unduplicated Reach and Frequency*) is a notable statistical research instrument developed in the 1950s as a tool for ad agencies evaluating different media options. Today TURF can be used to deliver significant and multiple benefits to restaurant chains.

How Does TURF Work?

The TURF algorithm evaluates all the possible menu alternatives and combinations by considering consumers' answers to multiple-choice questions. Through tradeoff decisions, it aims to find the optimal combination of menu items that will appeal to the greatest percentage of customers and drive the highest overall sales. In simple terms, TURF provides two types of information:

- The shortest lists of menu items needed to satisfy the majority of consumers, and...
- The average number of menu items on that list that customers would like to order

Within the context of these lists, TURF demonstrates the potential changes to consumer satisfaction by making substitutions to the optimum solutions. TURF can show what other menu items might be substituted with minimal downside to customer satisfaction. And, to the extent that management has any new or former menu items under consideration for the future, TURF will identify the relative opportunity for those items and the items that could/should be replaced.

For some users, TURF provides a road map of risks and rewards – demonstrating the potential number of customers lost if a particular item was discontinued. And it can indicate the potential for increasing repeat visits if a specific item was introduced.

Using TURF for Menu Simplification

Over time, many brands increase their list of menu items but fail to remove existing menu items. Menu communications (menuboards, hand-held menus, kiosks, web, and digital) become cluttered and increasingly difficult for customers to navigate. In addition, operations, inventory, and staffing becomes increasingly complicated. TURF analysis can help by identifying the shortest list of menu items needed to satisfy the majority of customers. And it can reveal the average number of items each customer would find on that list they would like to order. TURF's mathematical analysis eliminates a risky "seat-of-your-pants" approach for identifying which menu items can be eliminated without negatively impacting sales and customer loyalty.

For example, a fast-casual restaurant had 37 core items on its menu. A TURF analysis revealed that the menu could be reduced to 25 menu items (a 33% reduction) and still give 91% of customers their 1st or 2nd choice of menu items. Moreover, those guests would have reasons to return -- on average, they would find 2.2 of their preferred choices on the menu.

Ensuring Customer Satisfaction

TURF also protects potential adverse changes to customer satisfaction by making substitutions to the optimum solutions. For example, TURF can show what other menu items could be substituted with minimal downside to customer satisfaction.

Optimizing Your Menu By Items, or by Categories

A TURF analysis can be run for the entire menu in aggregate or for individual menu categories -- e.g., separately identifying the best salad choices, the best entrees, the best list of soups, the best desserts, etc.

THE COLLECTIVE BENEFITS OF TURF

- **Streamlining Your Menu** through the retirement of specific products that have little interest to customers

- **Generating Incremental Reach** by identifying and ranking menu items, TURF will determine the percentage of customers that can be motivated to purchase a specific combination of menu items

- **Increasing Revenue and Profits** by appropriately adding questions about price/value. The analysis can then provide direction for fine-tuning pricing by identifying revenue driver menu items (items that are price elastic and can withstand price increases)

- **Driving Customer Loyalty** by determining the items with the greatest customer affinity

- **Increasing Customer Throughput** by making it easier and faster for customers to order (through the reduction and simplification of menu items)

- **Reducing Operational Complexity** due to a streamlined menu

- **Reducing Service Time** through the elimination of labor-intensive menu items

- **Expanding Menu Offerings** by using TURF to assess new product ideas to determine those ideas resulting in the most substantial customer base

- **Improving Menu Communications** by utilizing the data to optimize menu layout and design, and the merchandising of menu categories and items

OR 11x25 — MENU STUDY #130-170 -- TURF ANALYSIS

Optimality=94.6% (211.0/223.0) — *** BASED ON TOP 2 RANKED INDIVIDUAL ITEMS -- 229 RESPONDENTS

	Reach Frequency	211.0	211.0	211.0	210.0	210.0	210.0	210.0	210.0	210.0	210.0	210.0	210.0	209.0	209.0	209.0	209.0	209.0
	Reach Percentage	91.3	91.3	91.3	90.9	90.9	90.9	90.9	90.9	90.9	90.9	90.9	90.9	90.5	90.5	90.5	90.5	90.5
%X's	Reach Index	1.45	1.35	1.39	1.49	1.43	1.45	1.39	1.44	1.39	1.34	1.42	1.36	1.51	1.50	1.48	1.44	1.43
100.0	BREAKFAST BURRITO	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
100.0	SAUSAGE AND CHEESE SANDWICH	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
100.0	BACON RICOTTA SANDWICH	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
100.0	EVERYTHING BAGEL	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
100.0	GLAZED DONUT HOLES	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
100.0	MAPLE DOUGHNUT	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
98.0	BLCKB'RY RASPB'RY TOAST PASTRY	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
76.0	BANANA BREAD	x			x	x	x		x					x	x	x	x	x
64.0	HAM & SWISS CROISSANT	x	x	x	x	x	x			x	x	x	x	x	x	x	x	x
64.0	COFFEE CAKE	x	x	x	x				x	x	x	x	x	x				
52.0	CHOCOLATE DOUGHNUT				x	x	x	x			x				x	x	x	x
44.0	LEMON POPPYSEED SCONE		x	x			x		x	x	x							
32.0	EVERYTHING SPINACH CROISSANT								x								x	
32.0	BLUEBERRY SCONE	x	x				x					x	x					
20.0	ALMOND CROISSANT										x		x					x
16.0	JALAPENO CHEDDAR BAGEL				x							x		x	x			
4.0	ALMOND POPPYSEED BREAD																	x

TURF is a proven "statistical" approach for making objective decisions as you set out to optimize your restaurant's menu and menu communications.

KING-CASEY IS THE FIRM THAT THE WORLD'S LEADING RESTAURANT AND FOODSERVICE BRANDS COME TO WHEN THEY WANT RESULTS

King-Casey provides practical, analytics-driven insights and research-validated solutions for restaurant and foodservice brands. We are renowned as the leader in providing comprehensive, turn-key Menu Optimization Services that increase sales, profitability and the customer experience.

Collectively, our services provide advanced solutions that enable our clients to unlock the full potential of their menu, and achieve significant, measurable business results. No other firm provides such comprehensive menu optimization analytics and solutions.

Our Suite of Services Include

• Consumer insights
• Attitude and usage research
• TURF research and analysis (optimal item assortment)
• Menu performance analysis
• Menu operations analysis
• Menu reengineering
• Pricing and Revenue Management
• Menu strategy
• Menu communications and design (web, mobile app, kiosks, menuboards)
• Menu design testing and roll-out
• Total store communications (path-to-purchase)

The Benefits Are Immediate and Meaningful

• Increased sales and profitability
• Improved customer experience
• Totally integrated solutions
• No loss or dilution of insights and data due to their transfer from one consulting resource to the next
• Cost and timing savings resulting from combining the full suite of services under one umbrella

Want to Know More?

Please call Tom Cook, Principal, King-Casey at (203) 571-1776. Or email Tom at: tcook@king-casey.com.
Take the first step in optimizing your menu and increasing your business performance.

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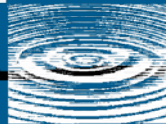
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