



**FOR IMMEDIATE RELEASE**

## **McDonald's Dominates in the Breakfast Wars**

***Dunkin Donuts, Starbucks and Burger King also leading national breakfast brands***

NEW YORK (August 11, 2010) - America's major fast food brands are battling for their share of the highly contested breakfast market. Consumer research firm Scarborough Research released an analysis of breakfast diners and the fast food establishments they patronize and found that, nationally, 37 percent of adults have eaten breakfast at a fast food restaurant in the past month. The analysis also uncovered that in the battle for the most important meal of the day, McDonald's holds the top spot. Among fast food (or quick service) breakfast diners, 46 percent of adults dined at the Golden Arches for breakfast in the past month. Dunkin Donuts (19 percent), Starbucks (19 percent) and Burger King (12 percent) round out the top four national fast food chains for breakfast diners.

### **Breakfast Diner Demographics**

People who enjoy fast food breakfast are 16 percent more likely than the average adult to be a member of Generation Y (ages 18-29). Adults who live in households with annual incomes of \$100K+ and those who have a college education or advanced degree are more likely to dine at fast food restaurants for breakfast than consumers from lower or less-affluent income brackets. Fast food restaurant diners are 13 percent more likely to be African-American and 11 percent more likely to be Hispanic.

### **Top Local Markets for Breakfast Diners**

Taking it to the local level, Greensboro, NC, is the top local market for fast food restaurant breakfast diners. More than half (56 percent) of Greensboro adults have eaten breakfast at a quick service restaurant during the past month. Other leading cities for fast food breakfast diners include Boston (55 percent), Raleigh, NC (51 percent), Charlotte, NC (49 percent), Greenville, SC (49 percent), and Providence, RI (49 percent). (*see end of press release for full local market ranking*).

Some of these leading local markets – such as Greensboro, Raleigh, Charlotte and Greenville – have higher than average quick service restaurant usage overall. Others – such as Boston and Providence – have certain demographic attributes that mirror those of the fast food restaurant diner, such as a higher-than-average representation of single adults.

“The breakfast wars are raging, and fast food brands have evolved their product offerings to better compete for share of stomach,” said Alisa Joseph, vice president of advertiser marketing services, Scarborough Research. “These major restaurant chains have always understood the importance of localism and continue to adapt their marketing, menu options and promotional efforts to suit the distinctions of the locals.”

### **The Breakfast Battle Online**

Quick service breakfast diners are heavy Internet users. In addition to being 18 percent more likely than the average adult to spend 20+ hours online per week, they are more likely than the average adult to engage in a wide variety of internet behaviors, including:

- Social networking and other social behaviors such as:
  - Fantasy sports (35 percent more likely than total adults to have played fantasy sports online during the past month)
  - Social networking sites like Facebook (26 percent more likely)
  - Instant messaging (24 percent more likely)
  - Blogging (21 percent more likely)
- Obtaining news and information, such as:
  - Weather information (15 percent more likely)
  - Sports scores (23 percent more likely)
  - News (16 percent more likely)
- Downloading material, such as:
  - Music (25 percent more likely)
  - Video games (21 percent more likely)
  - Coupons (22 percent more likely)
  - Movies (28 percent more likely)

Fast food breakfast diners are 22 percent more likely than the average adult to have downloaded an online coupon, and 29 percent more likely to typically receive coupons via email or text message. They are also more likely to use coupons for groceries or other services overall.

“Whether targeting a student working on a research project or a professional catching-up on email, some fast food chains have added Wi-Fi to their restaurants to create a café environment so patrons can relax, stay awhile, and enjoy additional menu items,” said Ms. Joseph. “Brands have an opportunity to leverage the Wi-Fi with the digital couponing activity to target these consumers as they dine.”

### **Active Lifestyles**

People who eat breakfast at fast food restaurants have active lifestyles. They are 14 percent more likely than the average adult to belong to a health or fitness club. Additionally, they enjoy a wide variety of athletic activities, such as:

- Soccer: Fast food restaurant breakfast diners are 25 percent more likely than the average adult to have played soccer during the past year
- Basketball (18 percent more likely)
- Tennis (18 percent more likely)
- Jogging/running (17 percent more likely)
- Golf (16 percent more likely)

SOURCE: Scarborough Research, Scarborough USA+ Study, Release 2 2009

**Scarborough Local Market Ranking:**  
**Top Local Markets for Adults who ate Breakfast at a Quick Service Restaurant**  
**During the Past 30 Days**  
**(DMA®, %)**

Greensboro/High Point/Winston-Salem, NC 56%	Tulsa, OK 36%
Boston, MA 55%	Denver, CO 36%
Raleigh/Durham, NC 51%	Jacksonville, FL 36%
Charlotte, NC 49%	Albany/Schenectady/Troy, NY 36%
Greenville/Spartanburg/Asheville/Anderson, SC 49%	Columbus, OH 36%
Providence/New Bedford, RI 49%	Dayton, OH 36%
Chattanooga, TN 48%	Oklahoma City, OK 36%
Roanoke/Lynchburg, VA 47%	Fort Myers/Naples, FL 36%
Knoxville, TN 46%	Bakersfield, CA 36%
Charleston/Huntington, WV 45%	Cincinnati, OH 36%
Little Rock/Pine Bluff, AR 45%	St. Louis, MO 36%
Atlanta, GA 45%	Tampa/St.Petersburg, FL 35%
Lexington, KY 44%	San Francisco/Oakland/San Jose, CA 35%
Chicago, IL 44%	Rochester, NY 35%
Birmingham, AL 44%	West Palm Beach/Fort Pierce, FL 35%
Hartford/New Haven, CT 43%	San Antonio, TX 35%
San Diego, CA 43%	Albuquerque/Santa Fe, NM 35%
Buffalo, NY 42%	Wilkes-Barre/Scranton, PA 35%
Dallas/Fort Worth, TX 41%	Sacramento/Stockton/Modesto, CA 35%
Baltimore, MD 41%	Syracuse, NY 34%
Washington, D.C. 41%	Cleveland/Akron, OH 34%
Nashville, TN 41%	El Paso, TX 33%
Louisville, KY 41%	Kansas City, MO 32%
Indianapolis, IN 40%	Detroit, MI 31%
Miami/Ft.Lauderdale, FL 40%	Flint/Saginaw/Bay City, MI 31%
New Orleans, LA 39%	Colorado Springs/Pueblo, CO 30%
Harlingen/Weslaco/Brownsville/McAllen, TX 39%	Pittsburgh, PA 30%
Houston, TX 39%	Minneapolis/St. Paul, MN 30%
Richmond/Petersburg, VA 39%	Portland, OR 29%
Philadelphia, PA 38%	Milwaukee, WI 29%
New York, NY 38%	Wichita/Hutchinson, KS 29%
Mobile, AL/Pensacola, FL 38%	Grand Rapids/Kalamazoo/Battle Creek, MI 28%
Fresno/Visalia, CA 38%	Seattle/Tacoma, WA 27%
Memphis, TN 38%	Toledo, OH 26%
Los Angeles, CA 38%	Spokane, WA 25%
Austin, TX 38%	Tucson, AZ 25%
Phoenix, AZ 37%	Harrisburg/Lancaster/Lebanon/York, PA 25%
Norfolk/Portsmouth/Newport News, VA 37%	Green Bay/Appleton, WI 24%
Orlando/Daytona Beach/Melbourne, FL 37%	Des Moines/Ames, IA 22%
Las Vegas, NV 37%	Salt Lake City, UT 19%
Honolulu, HI 37%	

**About Scarborough Research**

Scarborough Research ([www.scarborough.com](http://www.scarborough.com), [info@scarborough.com](mailto:info@scarborough.com)) measures the lifestyle and shopping patterns, media behaviors and demographics of American consumers, and is considered the authority on local market research. Scarborough's core syndicated consumer insight studies in 77 Top-Tier Markets, its Multi-Market Study and its national USA+ Study are Media Rating Council (MRC) accredited. Other products and services include Scarborough Mid-Tier Local Market Studies, Hispanic Studies and Custom Research Solutions. Scarborough measures 2,000 consumer categories and serves a broad client base that includes marketers, advertising agencies, print and electronic media (broadcast and cable television, radio stations), sports teams and leagues and out-of-home media companies. Surveying more than 210,000 adults annually, Scarborough is a joint venture between Arbitron Inc. ([www.arbitron.com](http://www.arbitron.com)) and The Nielsen Company ([www.nielsen.com/](http://www.nielsen.com/)).

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