



Limited-Service, Unlimited Possibilities

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## **What Women Want** <sup>[1]</sup>

Female consumers offer enormous purchasing power, making them a critical piece to the future of quick service.

Meet Jane. At 38-and-a-half years old, Jane is a married mother of two and the breadwinner in her family. Statistically, she represents the average age and has the average number of children born to an American woman, according to the Central Intelligence Agency World Factbook. She's among a growing female population that serves as the primary source of income for households with children under 18—a population that has grown from 11 percent in 1960 to 40 percent today, according to Pew Research's Breadwinner Moms report based on the most recent census.

Most importantly, Jane is a member of one of the most powerful economic forces in the world. As a woman, she's part of a demographic that makes up 51 percent of the U.S. population, has \$7 trillion in purchasing power, and accounts for 85 percent of consumer spending, according to several economic sources.

She's just the type of consumer quick-serve and fast-casual establishments need to attract to build long-term consumer loyalty.

"Women are the CEO of the household. They often act as the chief purchasing officer. They purchase on behalf of themselves, but also their husbands and kids," says Mary Van Note, partner of Ginger Consulting LLC, a Minneapolis-based branding firm that's served names in the industry such as Starbucks, McDonald's, Taco Bell, and Sonic Drive-In.

"It ultimately comes back to the multitasking prowess of women. They do everything—women tend not to focus on just one thing, like the home or their career," says Beth Perro-Jarvis, the other half of the Ginger Consulting duo. "We're not claiming men focus on one thing, but women do tend to be multitaskers. They tend to take on multiple responsibilities."

The quick-serve industry, which has seen a boom in healthy dining trends coinciding with the increase of women's purchasing power, does seem to be listening to what women want. The rise in popularity of healthful menu items; fresh, quality ingredients; and the customizable model that offers nearly endless options reflect the typical values of the female consumer.

"Because women tend to be the caregivers in a family, they care about health," says Margot Dorfman, founder and CEO of the U.S. Women's Chamber of Commerce, a platform that aims to

connect female business owners and drive female-friendly economic policy. “If you take a look at the woman’s role in a family unit, women tend to control purchasing decisions in the home, and they want healthy things for their children. That translates to many industries, but especially dining and foodservice.”

Women are more likely to frequent bakery sandwich concepts, coffee and tea brands, and frozen sweets shops, according to The NPD Group, a market research firm. The firm’s flagship information service, CREST, which monitors how consumers use restaurants and foodservice, also reveals that women are more likely to visit soup and salad concepts.

“Women are more likely to order turkey sandwiches or turkey clubs; Chinese, Asian, or Indian food; salads and side salads; and fruit and non-fried vegetables,” says Bonnie Riggs, a restaurant industry analyst with NPD.

Quiznos, the toasted sub concept, ranks highly with female consumers seeking healthy options, according to consumer brand metrics compiled by foodservice research and consulting firm Technomic. It ranks fifth in Technomic’s top five brands for women seeking healthy options, which lists sandwich competitor Subway as the No. 1 choice.

“About half of our consumers are female, and we have about 25 percent who would be considered younger,” says Susan Lintonsmith, Quiznos’ CMO.

She says a large part of what attracts those female consumers to the brand is the variety offered at Quiznos. The 30-year-old concept offers plenty of meaty and cheesy toasted sandwiches, but it balances those with options that have less than 400 calories and are lower in fat. The Turkey Lite sub and the Honey Bourbon are two very popular choices among health-conscious consumers, Lintonsmith says. The brand also offers a lineup of wraps, flatbread sandwiches, salads, and soups, and it debuted a Choose 2 option, a strategy that was originally popularized by bakery brand Panera.

“Obviously, the way that our sub shop is set up is for customization,” Lintonsmith says, adding that the assembly-line operation is appealing to the female consumer. “We want to meet individuals’ taste preferences and dietary needs.”

“Women seek to have their product customized, and that’s happening a lot more in the quick-serve space,” says Laura Jakobsen, senior vice president of marketing and design at Pinkberry. “I think that’s certainly a female-driven trend. We’re seeing that in our category, but also in things like pizza.”

Jakobsen says Pinkberry’s assembly-line model is a draw for its female consumers, who account for about 60 percent of the brand’s business. These women also tend to bring in significant others, husbands, or kids, making them even more influential customers, she says.

Frozen yogurt offers probiotic cultures and a source of protein, giving the segment a healthy halo, and the assembly-line model is a natural fit. Numerous chains, including Red Mango, sweetFrog, and Menchie’s, have capitalized on the trend. But what differentiates Pinkberry is its commitment to a curated selection of healthy toppings, Jakobsen says. Pinkberry ranks third in Technomic’s list of healthy, female-friendly brands, and is the only fro-yo concept on the list.

“Everyone has a different definition of healthy, and I would say Pinkberry really stresses quality to increase that health factor,” Jakobsen says. “We’re not an organic brand, we’re not an all-natural brand, we’re not a gluten-free brand, but we have all those options in our stores.”

The salad segment is a no-brainer when it comes to female appeal considering its healthy options. Houston-based Salata capitalizes on the salad-bar concept, stressing its customizable options and a menu that has no set offerings. Guests choose from a wide variety of greens, vegetables, proteins, and proprietary dressings at an \$8 fixed price. Unlike most salad bars, Salata also offers seafood like shrimp, salmon, and imitation crab.

Berge Simonian, founder of the brand, says that when the concept first launched in 2005, women made up about 65 percent of its customer base. “Contrary to what you might think, our ratio has probably skewed the other way, with about 60 percent women and 40 percent men,” he says. “Healthy eating has no age or gender now; everybody wants to eat healthy. But women were a significant part of that initial trend.”

Simonian says that when Salata conducted consumer surveys in 2006 and 2007, the brand found that females especially responded well to the variety and to the quality of ingredients, particularly the seafood.

Quality has been an important consideration for Quiznos, too. “We try to provide fresh, quality ingredients that we put together in our chef-created dishes,” Lintonsmith says. “We do that because we’re all aware how much women control globally and in the U.S., and that’s what they often seek in quick service.”

But for all the economic clout and purchasing power the nation’s women wield, not very many of them feel understood by the businesses they buy from. In fact, a report published on the Sheconomy blog, a guide to female-driven marketing, reveals that 59 percent of women feel misunderstood as consumers by food marketers, and a whopping 91 percent say advertisers in general don’t understand them.

“The old way of marketing has been a trend of big-box stores that change their verbiage to aim at women so that women will buy from them,” Dorfman says. “What we believe needs to happen is a growth of understanding of women’s needs and a respect for our values. Rather than someone telling us what we like, we want to be able to make informed decisions from the information that’s put out there.”

Value-based marketing, she says, is critical to attracting the female consumer, and not many quick serves have done a particularly good job of doing it.

Ginger Consulting’s Van Note says many brands in the industry still rely on low price points as the cornerstone of marketing strategies. Even those brands with female-friendly menus or healthful options are not advertising those options effectively, she says.

“In Taco Bell, for example, the Fresco menu is highlighted in stores, and it has some healthier options, but I’ve never seen that advertised anywhere,” Van Note says, citing the Mexican brand’s healthful menu. “What we’re hearing a lot about from women, especially in regards to food and dining out, is that they want options that are just more wholesome. They don’t

necessarily need it to be low-fat or low-calorie, but they want it to feel wholesome and real.”

Salata, which has many locations in office buildings, appeals to consumers not on a gender basis, but on the perception of an ideal customer who will appreciate what the brand is all about. Simonian says the salad-bar concept often holds a soft opening, allowing the nearby work crowd to stop in for free food. It’s a tactic that keeps them coming back, he says, because they’re often sold on the fresh variety.

“We target mindset first in our advertising—we look for people who we call the ‘healthy optimist.’ They’re making good choices for themselves and they live with joie de vivre,” Pinkberry’s Jakobsen says.

At Quiznos, the advertising focus isn’t meant to appeal to women specifically, Lintonsmith says, but the brand’s low-calorie options are featured often in print and digital ads. In the store, Quiznos, like many other brands, highlights menu items with less than 400 calories. Online, those menu items are identified with a badge, and customers can also filter options based on that low-calorie menu. But there is no specific target aimed at the typical female consumer; instead, the healthy halo is allowed to speak for itself.

Lintonsmith says Quiznos’ high percentage of consumers who are moms and visit stores to dine with families is proof the brand knows what it’s doing with its appeal to the female demographic. Moms, she says, tend to frequent units that are in suburban environments during weekday evenings and during weekends across all dayparts.

And while dinner is a natural occasion to appeal to busy, on-the-go moms, the snack daypart serves as a particularly popular opportunity to young women.

“When it comes to beverages, women are very heavy users of specialty coffee, yogurt drinks, smoothies, iced tea, and water,” NDP’s Riggs says.

Van Note says the popularity of beverages among women stems from the trend of drinks serving as meal replacements. Brands like Starbucks and Dunkin’ Donuts capitalize on that growing trend, and the former even runs a Frappuccino Happy Hour promotion during late spring to offer a discounted price on its signature drink in the hours between lunch and dinner. Smoothie brands like Jamba Juice, which ranks second on Technomic’s list of top brands among female consumers, also target consumers in a similar manner and during similar times of the day.

“With snack and meal replacements, women may actually consume the same amount of calories, but they feel emotionally good about the choice,” Van Note says.

These female-driven trends aren’t limited to health-centric brands, either—they have created a ripple effect in the industry. National quick serves that have been in the business since long before healthy dining became a critical mainstream concern are tweaking menus to stay competitive with the brands that emerged in stride with the movement. Perro-Jarvis cites the ever-growing offerings at McDonald’s as a key example. The industry behemoth is adapting to the times with side salads, a kids’ menu that offers fruit, and smaller portion sizes, she says.

The increase in sourcing transparency within the industry is something Perro-Jarvis says also

stems from female consumers' values. "Women want to see where their food is coming from," she says. "Chipotle's obviously done a great job of that. They're showing you their sourcing, and it definitely plays into that wholesome look."

Chipotle's aggressive advertising of its sourcing, reinforced in late 2013 with the video short "The Scarecrow," is starting to set an industry standard and piquing the curiosity of a growing number of consumers. The Mexican fast casual is also credited with the assembly-line model popular with women—a model that is steadily on its way to being ubiquitous, especially among fast casuals.

That's true of many of these woman-driven trends: They're not going away any time soon, and neither is the power of the female consumer largely behind them.

"Women have gained tremendous economic clout over the last decade," Dorfman says. "We really do represent the largest economic force in the world, and that's not only through our jobs and out business, but also through the purse strings we control in our families, passing the wealth from generation to generation."

Though many in the quick-serve industry look to Millennials to gauge future trends, women are the consumers who shape the market, Perro-Jarvis says.

"Working in marketing, there are a lot of really cool teen panels allowing marketers to get a handle on what the next generation is thinking and wanting and feeling and spending their money on," she says. "There seems to be a real lack of equally cool panels for household CEOs, which really do the majority of spending."

Perro-Jarvis and Van Note organize a panel of female consumers they call their Alpha Panel, which serves as the basis of their annual "What Women Want" report. Their research shows the present power of the female can also translate to future generations.

"Generally, female teens that grow up in mom's household will unconsciously adopt the purchasing preference of the mom," Van Note says. "Once they set up their own household though, they readdress those perceptions of products, and they may make a different choice at that point. But a mom can shape that choice tremendously."

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