**Fast Food Brand Designs**

**QS3Q2: Regardless of which brand you may prefer, which of the following packaging designs makes the food look more appetizing?**

| | Total (A) | Male (B) | Female (C) | 18-34 (D) | 35-44 (E) | 45-54 (F) | 55-64 (G) | 65+ (H) | 18-34 (I) | 35-44 (J) | 45-54 (K) | 55-64 (L) | 65+ (M) | 18-34 (N) | 35-44 (O) | 45-54 (P) | 55-64 (Q) | 65+ (R) | Northeast (S) | South (T) | Midwest (U) | West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Gender | | | | Age | | | | Male Age | | | | | Female Age | | | | | Region | |
| Total | N=1059 | N=503 | N=537 | N=311 | N=174 | N=167 | N=176 | N=230 | N=156 | N=86 * | N=80 * | N=84 * | N=105 | N=155 | N=88 * | N=86 * | N=92 * | N=125 | N=184 | N=404 | N=218 | N=253 |
| Total (Unweighted) | N=1059 | N=456 | N=584 | N=322 | N=177 | N=186 | N=165 | N=209 | N=141 | N=84 * | N=79 * | N=56 * | N=106 | N=181 | N=93 * | N=107 | N=109 | N=103 | N=223 | N=454 | N=213 | N=169 |
| McDonald's | 44% | 39% | 48% B | 52% FGH | 43% | 40% | 39% | 39% | 44% m | 41% | 42% | 34% | 31% | 60% oPQr | 46% | 38% | 44% | 46% | 46% | 47% | 41% | 39% |
| Burger King | 56% | 61% C | 52% | 48% | 57% | 60% D | 61% D | 61% D | 56% | 59% | 58% | 66% | 69% i | 40% | 54% | 62% N | 56% N | 54% n | 54% | 53% | 59% | 61% |

\* Table Base: U.S. RESPONDENTS

**QS3Q3: Regardless of which brand you may prefer, which of the following packaging designs do you prefer?**

| | Total (A) | Male (B) | Female (C) | 18-34 (D) | 35-44 (E) | 45-54 (F) | 55-64 (G) | 65+ (H) | 18-34 (I) | 35-44 (J) | 45-54 (K) | 55-64 (L) | 65+ (M) | 18-34 (N) | 35-44 (O) | 45-54 (P) | 55-64 (Q) | 65+ (R) | Northeast (S) | South (T) | Midwest (U) | West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Gender | | | | Age | | | | Male Age | | | | | Female Age | | | | | Region | |
| Total | N=1059 | N=503 | N=537 | N=311 | N=174 | N=167 | N=176 | N=230 | N=156 | N=86 * | N=80 * | N=84 * | N=105 | N=155 | N=88 * | N=86 * | N=92 * | N=125 | N=184 | N=404 | N=218 | N=253 |
| Total (Unweighted) | N=1059 | N=456 | N=584 | N=322 | N=177 | N=186 | N=165 | N=209 | N=141 | N=84 * | N=79 * | N=84 * | N=106 | N=181 | N=88 * | N=107 | N=109 | N=103 | N=223 | N=454 | N=213 | N=169 |
| McDonald's | 46% | 43% | 49% | 50% | 44% | 46% | 44% | 43% | 44% | 39% | 52% | 41% | 39% | 56% P | 50% | 40% | 48% | 46% | 46% | 51% u | 41% | 43% |
| Burger King | 54% | 57% | 51% | 50% | 56% | 54% | 56% | 57% | 56% | 61% | 48% | 59% | 61% | 44% | 50% | 60% N | 52% | 54% | 54% | 49% | 59% t | 57% |

\* Table Base: U.S. RESPONDENTS

**QS3Q4: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | Male (B) | Female (C) | 18-34 (D) | 35-44 (E) | 45-54 (F) | 55-64 (G) | 65+ (H) | 18-34 (I) | 35-44 (J) | 45-54 (K) | 55-64 (L) | 65+ (M) | 18-34 (N) | 35-44 (O) | 45-54 (P) | 55-64 (Q) | 65+ (R) | Northeast (S) | South (T) | Midwest (U) | West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Gender | | | | Age | | | | Male Age | | | | | Female Age | | | | | Region | |
| Total | N=488 | N=217 | N=260 | N=156 | N=78 * | N=77 * | N=78 * | N=99 * | N=68 * | N=33 * | N=42 * | N=34 * | N=41 * | N=88 * | N=44 * | N=35 * | N=44 * | N=58 * | N=84 * | N=205 | N=91 * | N=109 |
| Total (Unweighted) | N=486 | N=201 | N=275 | N=173 | N=77 * | N=81 * | N=69 * | N=86 * | N=69 * | N=35 * | N=37 * | N=23 ** | N=40 * | N=104 | N=42 * | N=44 * | N=46 * | N=46 * | N=96 * | N=223 | N=94 * | N=73 * |
| More likely (Net) | 41% | 45% | 38% | 51% GH | 62% GH | 50% GH | 20% | 19% | 57% LM | 62% LM | 60% LM | 15% | 24% | 46% QR | 63% pQR | 39% R | 23% | 15% | 38% | 41% | 39% | 45% |
| Much more likely | 22% | 24% | 20% | 27% GH | 37% GH | 26% GH | 9% | 7% | 29% LM | 40% LM | 37% LM | 2% | 9% | 26% R | 35% PqR | 12% | 15% | 6% | 25% | 20% | 21% | 23% |
| Somewhat more likely | 20% | 21% | 18% | 23% gh | 25% gh | 24% g | 11% | 12% | 28% | 22% | 22% | 14% | 15% | 20% | 28% q | 27% q | 9% | 10% | 14% | 22% | 18% | 22% |
| Neither more likely nor less likely | 46% | 45% | 47% | 32% | 26% | 41% | 68% DEF | 71% DEF | 28% | 33% | 31% | 79% IJK | 67% IJK | 35% | 21% | 53% O | 74% NOp | 50% | 46% | 48% | 42% |
| Less likely (Net) | 9% | 6% | 10% | 16% FGH | 12% H | 5% | 4% | 1% | 12% | 5% | 4% | 0% | 3% | 19% pR | 16% R | 5% | 8% | 0% | 4% | 10% | 9% | 9% s |
| Somewhat less likely | 5% | 4% | 6% | 10% fh | 5% | 2% | 2% | 1% | 8% | 2% | 2% | 0% | 3% | 11% pr | 6% | 1% | 4% | 0% | 6% s | 6% s | 6% s |
| Much less likely | 4% | 2% | 5% | 6% h | 7% h | 3% | 2% | 0% | 4% | 3% | 2% | 0% | 0% | 7% | 10% | 4% | 3% | 0% | 4% | 4% | 3% |
| N/A - I do not buy fast-food | 4% | 4% | 5% | 1% | 0% | 4% | 8% DE | 8% DE | 3% | 0% | 5% | 6% | 5% | 0% | 0% | 3% | 10% No | 10% No | 8% | 3% | 3% | 4% |

\* Table Base: PREFER MCDONALD'S NEW DESIGN

**QS3Q5: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | Male (B) | Female (C) | 18-34 (D) | 35-44 (E) | 45-54 (F) | 55-64 (G) | 65+ (H) | 18-34 (I) | 35-44 (J) | 45-54 (K) | 55-64 (L) | 65+ (M) | 18-34 (N) | 35-44 (O) | 45-54 (P) | 55-64 (Q) | 65+ (R) | Northeast (S) | South (T) | Midwest (U) | West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Gender | | | | Age | | | | Male Age | | | | | Female Age | | | | | Region | |
| Total | N=488 | N=217 | N=260 | N=156 | N=78 * | N=77 * | N=78 * | N=99 * | N=68 * | N=33 * | N=42 * | N=34 * | N=41 * | N=88 * | N=44 * | N=35 * | N=44 * | N=58 * | N=84 * | N=205 | N=91 * | N=109 |
| Total (Unweighted) | N=486 | N=201 | N=275 | N=173 | N=77 * | N=81 * | N=69 * | N=86 * | N=69 * | N=35 * | N=37 * | N=23 ** | N=40 * | N=104 | N=42 * | N=44 * | N=46 * | N=46 * | N=96 * | N=223 | N=94 * | N=73 * |
| More likely (Net) | 21% | 23% | 19% | 31% GH | 36% GH | 28% GH | 2% | 4% | 34% LM | 35% LM | 37% LM | 0% | 4% | 29% QR | 38% pQR | 16% q | 3% | 4% | 23% | 20% | 22% | 22% |
| Much more likely | 6% | 8% | 5% | 8% g | 12% GH | 11% | 0% | 2% | 9% | 13% | 15% m | 0% | 2% | 7% | 11% q | 6% | 0% | 2% | 11% | 5% | 7% | 5% |
| Somewhat more likely | 15% | 16% | 14% | 23% GH | 25% GH | 17% GH | 2% | 2% | 25% IM | 22% IM | 22% IM | 0% | 2% | 22% q | 27% pQR | 11% | 3% | 2% | 12% | 15% | 15% | 17% |
| Neither more likely nor less likely | 56% | 57% | 56% | 45% | 40% | 52% | 71% DEF | 80% DEF | 43% | 46% | 48% | 80% Uk | 79% IJK | 46% | 36% | 56% | 64% O | 81% NOp | 55% | 58% | 56% | 55% |
| Less likely (Net) | 18% | 16% | 20% | 23% H | 23% H | 17% | 19% | 8% | 21% | 10% | 14% | 12% | 12% | 25% R | 26% R | 24% R | 22% r | 5% | 14% | 19% | 19% | 19% |
| Somewhat less likely | 10% | 9% | 11% | 11% | 15% | 10% | 9% | 6% | 7% | 16% | 8% | 3% | 10% | 13% | 14% | 13% | 3% | 3% | 8% | 12% | 14% | 5% |
| Much less likely | 8% | 7% | 9% | 13% H | 8% | 6% | 10% h | 1% | 14% m | 4% | 2% | 11% | 2% | 12% | 12% | 11% | 10% | 1% | 6% | 7% | 5% | 14% u |
| N/A - I do not buy fast-food | 4% | 4% | 5% | 1% | 0% | 4% | 8% DE | 8% DE | 3% | 0% | 5% | 6% | 5% | 0% | 0% | 3% | 10% No | 10% No | 8% | 3% | 3% | 4% |

\* Table Base: PREFER MCDONALD'S NEW DESIGN

**QS3Q6: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | Male (B) | Female (C) | 18-34 (D) | 35-44 (E) | 45-54 (F) | 55-64 (G) | 65+ (H) | 18-34 (I) | 35-44 (J) | 45-54 (K) | 55-64 (L) | 65+ (M) | 18-34 (N) | 35-44 (O) | 45-54 (P) | 55-64 (Q) | 65+ (R) | Northeast (S) | South (T) | Midwest (U) | West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Gender | | | | Age | | | | Male Age | | | | | Female Age | | | | | Region | |
| Total | N=571 | N=286 | N=276 | N=155 | N=97 * | N=90 * | N=98 * | N=132 | N=87 * | N=53 * | N=38 * | N=50 * | N=64 * | N=68 * | N=44 * | N=51 * | N=48 * | N=67 * | N=100 | N=199 | N=128 | N=145 |
| Total (Unweighted) | N=573 | N=255 | N=309 | N=149 | N=100 | N=105 | N=96 * | N=123 | N=72 * | N=49 * | N=42 * | N=50 * | N=66 * | N=77 * | N=51 * | N=63 * | N=63 * | N=57 * | N=127 | N=231 | N=119 | N=96 * |
| More likely (Net) | 48% | 54% C | 41% | 57% H | 66% fGH | 51% H | 44% H | 25% | 61% M | 73% LM | 62% M | 47% | 30% | 52% R | 57% R | 42% R | 41% r | 21% | 46% | 46% | 44% | 55% |
| Much more likely | 24% | 25% | 22% | 28% gH | 50% DFGH | 20% | 15% | 8% | 27% LM | 59% IKLM | 22% lm | 5% | 8% | 29% R | 40% pR | 19% | 26% R | 7% | 27% | 23% | 17% | 29% |
| Somewhat more likely | 24% | 30% C | 19% | 30% H | 15% | 30% Eh | 29% e | 17% | 34% J | 14% | 40% Jm | 42% Jm | 22% | 23% | 17% | 23% | 15% | 13% | 19% | 24% | 27% | 26% |
| Neither more likely nor less likely | 39% | 36% | 43% | 27% | 22% | 38% E | 50% DE | 58% DEF | 28% | 24% | 12% | 32% j | 53% IJ | 59% IJK | 32% | 34% | 44% | 46% | 57% No | 43% | 41% | 43% | 31% |
| Less likely (Net) | 6% | 5% | 7% | 11% GH | 8% gH | 7% h | 1% | 1% | 11% M | 8% m | 1% | 0% | 0% | 10% | 8% | 11% | 2% | 2% | 6% | 7% | 7% | 3% |
| Somewhat less likely | 4% | 3% | 5% | 8% GH | 4% h | 5% gH | 1% | 0% | 7% m | 4% | 0% | 0% | 0% | 8% q | 5% | 10% qr | 0% | 0% | 3% | 4% | 4% | 3% |
| Much less likely | 2% | 2% | 2% | 3% | 4% | 2% | 1% | 1% | 4% | 5% | 1% | 0% | 0% | 2% | 3% | 2% | 2% | 2% | 3% | 3% | 3% | 0% |
| N/A - I do not buy fast-food | 7% | 5% | 9% | 4% | 4% | 4% | 6% | 16% DEFg | 3% | 6% | 5% | 0% | 11% | 6% | 0% | 3% | 12% o | 20% NOp | 5% | 6% | 6% | 11% |

\* Table Base: PREFER BURGER KING'S NEW DESIGN

**QS3Q7: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | Male (B) | Female (C) | 18-34 (D) | 35-44 (E) | 45-54 (F) | 55-64 (G) | 65+ (H) | 18-34 (I) | 35-44 (J) | 45-54 (K) | 55-64 (L) | 65+ (M) | 18-34 (N) | 35-44 (O) | 45-54 (P) | 55-64 (Q) | 65+ (R) | Northeast (S) | South (T) | Midwest (U) | West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Gender | | | | Age | | | | Male Age | | | | | Female Age | | | | | Region | |
| Total | N=571 | N=286 | N=276 | N=155 | N=97 * | N=90 * | N=98 * | N=132 | N=87 * | N=53 * | N=38 * | N=50 * | N=64 * | N=68 * | N=44 * | N=51 * | N=48 * | N=67 * | N=100 | N=199 | N=128 | N=145 |
| Total (Unweighted) | N=573 | N=255 | N=309 | N=149 | N=100 | N=105 | N=96 * | N=123 | N=72 * | N=49 * | N=42 * | N=50 * | N=66 * | N=77 * | N=51 * | N=63 * | N=63 * | N=57 * | N=127 | N=231 | N=119 | N=96 * |
| More likely (Net) | 26% | 27% | 25% | 26% H | 51% DFGH | 22% H | 28% H | 7% | 28% M | 60% IKLM | 15% m | 26% M | 4% | 22% | 41% nR | 26% r | 31% R | 11% | 29% | 24% | 25% | 26% |
| Much more likely | 9% | 7% | 12% b | 9% h | 23% H | 6% | 9% h | 2% | 7% | 19% M | 3% | 10% | 2% | 10% | 28% nPR | 9% | 19% R | 2% | 14% | 10% | 8% | 6% |
| Somewhat more likely | 16% | 20% C | 13% | 17% h | 28% dfH | 16% H | 19% H | 6% | 21% M | 40% iKM | 13% m | 26% M | 2% | 12% | 13% | 18% | 12% | 9% | 15% | 14% | 17% | 20% |
| Neither more likely nor less likely | 54% | 53% | 53% | 56% E | 37% | 50% | 58% E | 63% Ef | 57% J | 29% | 41% | 68% Jk | 67% Jk | 18% j | 56% | 46% | 56% | 55% | 58% | 55% | 58% | 50% |
| Less likely (Net) | 14% | 15% | 13% | 14% | 8% | 25% dEGh | 8% | 13% | 12% | 5% | 39% ULm | 6% | 18% j | 17% | 13% | 14% | 11% | 9% | 13% | 16% | 11% | 13% |
| Somewhat less likely | 7% | 7% | 6% | 9% | 6% | 13% Gh | 2% | 5% | 7% | 1% | 18% jl | 1% | 10% | 10% r | 11% r | 8% r | 3% | 0% | 8% | 8% | 8% | 4% |
| Much less likely | 7% | 7% | 6% | 5% | 2% | 12% dE | 6% | 8% | 4% | 3% | 21% lJ | 5% | 8% | 6% | 1% | 6% | 7% | 9% | 5% | 8% | 4% | 9% |
| N/A - I do not buy fast-food | 7% | 5% | 9% | 4% | 4% | 4% | 6% | 16% DEFg | 3% | 6% | 5% | 0% | 11% | 6% | 0% | 3% | 12% o | 20% NOp | 5% | 6% | 6% | 11% |

\* Table Base: PREFER BURGER KING'S NEW DESIGN

**Fast Food Brand Designs**

**Q53Q2: Regardless of which brand you may prefer, which of the following packaging designs makes the food look more appetizing?**

| | Total (A) | Gender Male (B) | Gender Female (C) | Age 18-34 (D) | Age 35-44 (E) | Age 45-54 (F) | Age 55-64 (G) | Age 65+ (H) | Male Age 18-34 (I) | Male Age 35-44 (J) | Male Age 45-54 (K) | Male Age 55-64 (L) | Male Age 65+ (M) | Female Age 18-34 (N) | Female Age 35-44 (O) | Female Age 45-54 (P) | Female Age 55-64 (Q) | Female Age 65+ (R) | Region Northeast (S) | Region South (T) | Region Midwest (U) | Region West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | 1,059 | 503 | 537 | 311 | 174 | 167 | 176 | 230 | 156 | 86 | 80 | 84 | 105 | 155 | 88 | 86 | 92 | 125 | 184 | 404 | 218 | 253 |
| Total (Unweighted) | 1,059 | 456 | 584 | 322 | 177 | 186 | 165 | 209 | 84 | 79 | 56 | 106 | 181 | 93 | 107 | 109 | 103 | 223 | 454 | 213 | 169 | |
| McDonald's | 464 | 194 | 258 | 163 | 75 | 67 | 69 | 90 | 69 | 35 | 34 | 28 | 33 | 93 | 41 | 33 | 40 | 57 | 84 | 191 | 89 | 100 |
| Burger King | 595 | 308 | 279 | 148 | 99 | 100 | 108 | 140 | 86 | 51 | 46 | 56 | 72 | 62 | 48 | 54 | 52 | 68 | 99 | 213 | 129 | 154 |

* Table Base: U.S. RESPONDENTS

**Q53Q3: Regardless of which brand you may prefer, which of the following packaging designs do you prefer?**

| | Total (A) | Gender Male (B) | Gender Female (C) | Age 18-34 (D) | Age 35-44 (E) | Age 45-54 (F) | Age 55-64 (G) | Age 65+ (H) | Male Age 18-34 (I) | Male Age 35-44 (J) | Male Age 45-54 (K) | Male Age 55-64 (L) | Male Age 65+ (M) | Female Age 18-34 (N) | Female Age 35-44 (O) | Female Age 45-54 (P) | Female Age 55-64 (Q) | Female Age 65+ (R) | Region Northeast (S) | Region South (T) | Region Midwest (U) | Region West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | 1,059 | 503 | 537 | 311 | 174 | 167 | 176 | 230 | 156 | 86 | 80 | 84 | 105 | 155 | 88 | 86 | 92 | 125 | 184 | 404 | 218 | 253 |
| Total (Unweighted) | 1,059 | 456 | 584 | 322 | 177 | 186 | 165 | 209 | 84 | 79 | 56 | 106 | 181 | 93 | 107 | 109 | 103 | 223 | 454 | 213 | 169 | |
| McDonald's | 488 | 217 | 260 | 156 | 78 | 77 | 78 | 99 | 68 | 33 | 42 | 34 | 41 | 88 | 44 | 35 | 44 | 58 | 84 | 205 | 91 | 109 |
| Burger King | 571 | 286 | 276 | 155 | 97 | 90 | 98 | 132 | 87 | 53 | 38 | 50 | 64 | 68 | 44 | 51 | 48 | 67 | 100 | 199 | 128 | 145 |

* Table Base: U.S. RESPONDENTS

**Q53Q4: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | Gender Male (B) | Gender Female (C) | Age 18-34 (D) | Age 35-44 (E) | Age 45-54 (F) | Age 55-64 (G) | Age 65+ (H) | Male Age 18-34 (I) | Male Age 35-44 (J) | Male Age 45-54 (K) | Male Age 55-64 (L) | Male Age 65+ (M) | Female Age 18-34 (N) | Female Age 35-44 (O) | Female Age 45-54 (P) | Female Age 55-64 (Q) | Female Age 65+ (R) | Region Northeast (S) | Region South (T) | Region Midwest (U) | Region West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | 488 | 217 | 260 | 156 | 78 | 77 | 78 | 99 | 68 | 33 | 42 | 34 | 41 | 88 | 44 | 35 | 44 | 58 | 84 | 205 | 91 | 109 |
| Total (Unweighted) | 486 | 201 | 275 | 173 | 77 | 81 | 69 | 86 | 69 | 35 | 37 | 23 | 40 | 104 | 42 | 44 | 46 | 46 | 96 | 223 | 94 | 73 |
| More likely (Net) | 201 | 98 | 98 | 79 | 48 | 39 | 16 | 19 | 39 | 21 | 25 | 5 | 10 | 40 | 28 | 14 | 10 | 9 | 32 | 84 | 35 | 49 |
| Much more likely | 105 | 52 | 51 | 43 | 29 | 20 | 7 | 7 | 20 | 13 | 16 | 1 | 4 | 23 | 15 | 4 | 6 | 3 | 21 | 40 | 19 | 26 |
| Somewhat more likely | 95 | 46 | 47 | 37 | 20 | 19 | 9 | 12 | 19 | 7 | 9 | 5 | 6 | 17 | 12 | 9 | 4 | 6 | 11 | 44 | 16 | 24 |
| Neither more likely nor less likely | 225 | 97 | 123 | 50 | 20 | 32 | 53 | 71 | 19 | 11 | 13 | 27 | 28 | 31 | 9 | 18 | 26 | 43 | 42 | 95 | 44 | 45 |
| Less likely (Net) | 42 | 13 | 27 | 25 | 9 | 4 | 3 | 1 | 8 | 2 | 2 | 0 | 1 | 16 | 7 | 2 | 3 | 0 | 3 | 20 | 8 | 10 |
| Somewhat less likely | 24 | 9 | 15 | 16 | 4 | 1 | 2 | 1 | 6 | 1 | 1 | 0 | 1 | 10 | 3 | 0 | 2 | 0 | 0 | 11 | 5 | 7 |
| Much less likely | 18 | 5 | 12 | 9 | 5 | 2 | 1 | 0 | 3 | 1 | 1 | 0 | 0 | 6 | 4 | 1 | 1 | 0 | 3 | 9 | 3 | 3 |
| N/A - I do not buy fast-food | 20 | 8 | 12 | 2 | 0 | 3 | 7 | 8 | 2 | 0 | 2 | 2 | 2 | 0 | 0 | 1 | 5 | 6 | 7 | 6 | 3 | 4 |

* Table Base: PREFER MCDONALD'S NEW DESIGN

**Q53Q5: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | Gender Male (B) | Gender Female (C) | Age 18-34 (D) | Age 35-44 (E) | Age 45-54 (F) | Age 55-64 (G) | Age 65+ (H) | Male Age 18-34 (I) | Male Age 35-44 (J) | Male Age 45-54 (K) | Male Age 55-64 (L) | Male Age 65+ (M) | Female Age 18-34 (N) | Female Age 35-44 (O) | Female Age 45-54 (P) | Female Age 55-64 (Q) | Female Age 65+ (R) | Region Northeast (S) | Region South (T) | Region Midwest (U) | Region West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | 488 | 217 | 260 | 156 | 78 | 77 | 78 | 99 | 68 | 33 | 42 | 34 | 41 | 88 | 44 | 35 | 44 | 58 | 84 | 205 | 91 | 109 |
| Total (Unweighted) | 486 | 201 | 275 | 173 | 77 | 81 | 69 | 86 | 69 | 35 | 37 | 23 | 40 | 104 | 42 | 44 | 46 | 46 | 96 | 223 | 94 | 73 |
| More likely (Net) | 103 | 51 | 50 | 48 | 28 | 21 | 2 | 4 | 23 | 12 | 16 | 0 | 2 | 25 | 17 | 6 | 2 | 2 | 20 | 40 | 20 | 24 |
| Much more likely | 32 | 16 | 13 | 12 | 9 | 8 | 0 | 2 | 6 | 4 | 6 | 0 | 1 | 6 | 5 | 2 | 0 | 1 | 10 | 30 | 13 | 18 |
| Somewhat more likely | 72 | 34 | 37 | 36 | 19 | 13 | 1 | 2 | 17 | 7 | 9 | 0 | 1 | 19 | 12 | 4 | 1 | 1 | 10 | 30 | 13 | 18 |
| Neither more likely nor less likely | 275 | 124 | 147 | 70 | 31 | 40 | 55 | 79 | 29 | 15 | 20 | 27 | 32 | 41 | 16 | 20 | 28 | 47 | 46 | 119 | 51 | 60 |
| Less likely (Net) | 89 | 34 | 52 | 36 | 18 | 13 | 15 | 7 | 14 | 6 | 4 | 5 | 5 | 22 | 12 | 8 | 10 | 3 | 12 | 39 | 17 | 21 |
| Somewhat less likely | 49 | 19 | 29 | 16 | 11 | 8 | 7 | 6 | 5 | 5 | 3 | 1 | 4 | 12 | 6 | 5 | 6 | 2 | 6 | 24 | 13 | 5 |
| Much less likely | 41 | 15 | 23 | 20 | 7 | 5 | 8 | 1 | 10 | 1 | 1 | 4 | 1 | 10 | 5 | 4 | 4 | 1 | 5 | 15 | 4 | 16 |
| N/A - I do not buy fast-food | 20 | 8 | 12 | 2 | 0 | 3 | 7 | 8 | 2 | 0 | 2 | 2 | 2 | 0 | 0 | 1 | 5 | 6 | 7 | 6 | 3 | 4 |

* Table Base: PREFER MCDONALD'S NEW DESIGN

**Q53Q6: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | Gender Male (B) | Gender Female (C) | Age 18-34 (D) | Age 35-44 (E) | Age 45-54 (F) | Age 55-64 (G) | Age 65+ (H) | Male Age 18-34 (I) | Male Age 35-44 (J) | Male Age 45-54 (K) | Male Age 55-64 (L) | Male Age 65+ (M) | Female Age 18-34 (N) | Female Age 35-44 (O) | Female Age 45-54 (P) | Female Age 55-64 (Q) | Female Age 65+ (R) | Region Northeast (S) | Region South (T) | Region Midwest (U) | Region West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | 571 | 286 | 276 | 155 | 97 | 90 | 98 | 132 | 87 | 53 | 38 | 50 | 64 | 68 | 44 | 51 | 48 | 67 | 100 | 199 | 128 | 145 |
| Total (Unweighted) | 573 | 255 | 309 | 149 | 100 | 105 | 96 | 123 | 72 | 49 | 42 | 33 | 66 | 77 | 51 | 63 | 63 | 57 | 127 | 231 | 119 | 96 |
| More likely (Net) | 274 | 156 | 113 | 89 | 64 | 45 | 43 | 33 | 53 | 39 | 24 | 23 | 19 | 35 | 25 | 22 | 20 | 14 | 46 | 92 | 57 | 79 |
| Much more likely | 135 | 71 | 62 | 43 | 49 | 18 | 15 | 10 | 23 | 31 | 9 | 3 | 5 | 20 | 17 | 10 | 12 | 5 | 27 | 45 | 22 | 42 |
| Somewhat more likely | 139 | 85 | 51 | 46 | 15 | 27 | 28 | 23 | 30 | 7 | 15 | 21 | 14 | 16 | 8 | 12 | 7 | 9 | 19 | 47 | 35 | 37 |
| Neither more likely nor less likely | 224 | 102 | 120 | 43 | 22 | 34 | 49 | 77 | 21 | 6 | 12 | 27 | 38 | 22 | 16 | 22 | 22 | 39 | 43 | 81 | 55 | 45 |
| Less likely (Net) | 33 | 14 | 18 | 17 | 8 | 6 | 1 | 1 | 10 | 4 | 2 | 0 | 0 | 7 | 4 | 6 | 1 | 1 | 6 | 14 | 9 | 5 |
| Somewhat less likely | 21 | 7 | 13 | 12 | 4 | 5 | 0 | 0 | 6 | 2 | 2 | 0 | 0 | 5 | 2 | 5 | 0 | 0 | 3 | 8 | 5 | 5 |
| Much less likely | 12 | 6 | 6 | 5 | 4 | 1 | 1 | 1 | 4 | 2 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 3 | 6 | 3 | 0 |
| N/A - I do not buy fast-food | 40 | 15 | 25 | 7 | 4 | 3 | 6 | 21 | 3 | 3 | 0 | 0 | 7 | 4 | 0 | 2 | 6 | 14 | 5 | 12 | 7 | 16 |

* Table Base: PREFER BURGER KING'S NEW DESIGN

**Q53Q7: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | Gender Male (B) | Gender Female (C) | Age 18-34 (D) | Age 35-44 (E) | Age 45-54 (F) | Age 55-64 (G) | Age 65+ (H) | Male Age 18-34 (I) | Male Age 35-44 (J) | Male Age 45-54 (K) | Male Age 55-64 (L) | Male Age 65+ (M) | Female Age 18-34 (N) | Female Age 35-44 (O) | Female Age 45-54 (P) | Female Age 55-64 (Q) | Female Age 65+ (R) | Region Northeast (S) | Region South (T) | Region Midwest (U) | Region West (V) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | 571 | 286 | 276 | 155 | 97 | 90 | 98 | 132 | 87 | 53 | 38 | 50 | 64 | 68 | 44 | 51 | 48 | 67 | 100 | 199 | 128 | 145 |
| Total (Unweighted) | 573 | 255 | 309 | 149 | 100 | 105 | 96 | 123 | 72 | 49 | 42 | 33 | 66 | 77 | 51 | 63 | 63 | 57 | 127 | 231 | 119 | 96 |
| More likely (Net) | 146 | 77 | 68 | 40 | 49 | 19 | 28 | 10 | 25 | 31 | 6 | 13 | 3 | 15 | 18 | 14 | 15 | 7 | 29 | 47 | 32 | 38 |
| Much more likely | 53 | 19 | 34 | 13 | 22 | 6 | 9 | 2 | 6 | 10 | 1 | 0 | 1 | 7 | 12 | 4 | 9 | 1 | 14 | 19 | 10 | 9 |
| Somewhat more likely | 93 | 58 | 35 | 26 | 27 | 14 | 19 | 8 | 18 | 21 | 5 | 13 | 1 | 8 | 6 | 9 | 6 | 6 | 15 | 27 | 22 | 28 |
| Neither more likely nor less likely | 308 | 152 | 148 | 87 | 36 | 44 | 57 | 84 | 49 | 15 | 16 | 34 | 43 | 38 | 20 | 29 | 23 | 41 | 52 | 109 | 74 | 73 |
| Less likely (Net) | 77 | 42 | 35 | 21 | 8 | 22 | 8 | 18 | 10 | 3 | 15 | 3 | 12 | 11 | 6 | 7 | 5 | 6 | 13 | 32 | 14 | 18 |
| Somewhat less likely | 39 | 21 | 18 | 13 | 6 | 11 | 2 | 6 | 6 | 1 | 7 | 1 | 6 | 7 | 5 | 4 | 1 | 0 | 8 | 16 | 10 | 6 |
| Much less likely | 38 | 21 | 18 | 8 | 2 | 11 | 6 | 11 | 4 | 2 | 8 | 2 | 5 | 4 | 1 | 3 | 4 | 6 | 5 | 16 | 5 | 13 |
| N/A - I do not buy fast-food | 40 | 15 | 25 | 7 | 4 | 3 | 6 | 21 | 3 | 3 | 2 | 0 | 7 | 4 | 0 | 2 | 6 | 14 | 5 | 12 | 7 | 16 |

* Table Base: PREFER BURGER KING'S NEW DESIGN

**Fast Food Brand Designs**

**QS3Q2: Regardless of which brand you may prefer, which of the following packaging designs makes the food look more appetizing?**

Column key — Household Income: Less than $50K (B), $50K-$74.9K (C), $75K-$99.9K (D), $100K+ (E); Education: HS or Less (F), Some College (G), College Grad+ (H); Employed: Yes (I), No (J); Children in HH: Yes (K), No (L); Parent of Child Under 18: Yes (M), No (N); Home Ownership: Homeowner (O), Renter (P); Marital Status: Married (Q), Not married (R); Race/Ethnicity: White (S), AA (T), Hispanic (U)

| | Total (A) | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | N=1059 | 289 | 159 | 131 | 404 | 341 | 350 | 205 | 582 | 477 | 405 | 654 | 349 | 710 | 731 | 292 | 494 | 565 | 649 | 126 | 174 |
| Total (Unweighted) | N=1059 | 411 | 165 | 136 | 271 | 329 | 334 | 234 | 578 | 481 | 378 | 681 | 347 | 712 | 703 | 318 | 513 | 546 | 735 | 131 | 109 |
| McDonald's | 44% | 41% | 43% | 41% | 47% | 47% g | 38% | 46% | 47% i | 40% | 48% l | 41% | 48% n | 41% | 44% | 40% | 42% | 46% | 42% | 51% | 48% |
| Burger King | 56% | 59% | 57% | 59% | 53% | 53% | 62% f | 54% | 53% | 60% i | 52% | 59% k | 52% | 59% m | 56% | 60% | 58% | 54% | 58% | 49% | 52% |

* Table Base: U.S. RESPONDENTS

**QS3Q3: Regardless of which brand you may prefer, which of the following packaging designs do you prefer?**

| | Total (A) | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | N=1059 | 289 | 159 | 131 | 404 | 341 | 350 | 205 | 582 | 477 | 405 | 654 | 349 | 710 | 731 | 292 | 494 | 565 | 649 | 126 | 174 |
| Total (Unweighted) | N=1059 | 411 | 165 | 136 | 271 | 329 | 334 | 234 | 578 | 481 | 378 | 681 | 347 | 712 | 703 | 318 | 513 | 546 | 735 | 131 | 109 |
| McDonald's | 46% | 45% | 45% | 40% | 50% | 51% G | 39% | 48% g | 47% | 45% | 48% | 45% | 49% | 44% | 46% | 45% | 46% | 45% | 47% | 46% | 53% |
| Burger King | 54% | 55% | 55% | 60% | 50% | 49% | 61% Fh | 52% | 53% | 55% | 52% | 55% | 51% | 56% | 54% | 55% | 54% | 55% | 53% | 54% | 47% |

* Table Base: U.S. RESPONDENTS

**QS3Q4: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | N=488 | 128 | 72* | 53* | 202 | 174 | 135 | 99* | 273 | 215 | 196 | 292 | 172 | 316 | 334 | 132 | 230 | 258 | 283 | 64* | 91* |
| Total (Unweighted) | N=486 | 189 | 72* | 60* | 132 | 161 | 135 | 110 | 275 | 211 | 187 | 299 | 174 | 312 | 322 | 142 | 236 | 250 | 322 | 65 | 59 |
| More likely (Net) | 41% | 49% E | 43% | 48% e | 33% | 41% | 38% | 45% | 46% i | 35% | 57% L | 30% | 61% N | 31% | 38% | 50% O | 40% | 42% | 36% | 45% | 50% s |
| Much more likely | 22% | 24% | 26% | 21% | 17% | 19% | 18% | 26% | 25% | 17% | 29% L | 16% | 33% N | 15% | 20% | 25% | 21% | 22% | 20% | 20% | 29% |
| Somewhat more likely | 20% | 25% e | 17% | 28% | 16% | 22% | 20% | 19% | 21% | 18% | 28% L | 14% | 27% N | 15% | 17% | 25% | 19% | 20% | 16% | 25% | 22% |
| Neither more likely nor less likely | 46% | 40% | 45% | 38% | 54% Bd | 46% | 46% | 46% | 41% | 53% I | 27% | 59% L | 23% | 59% M | 48% | 42% | 50% | 43% | 53% TU | 31% | 34% |
| Less likely (Net) | 9% | 10% | 9% | 6% | 10% | 10% | 12% | 6% | 10% | 5% | 14% L | 5% | 16% N | 4% | 5% | 6% | 6% | 11% | 2% | 15% S | 9% S |
| Somewhat less likely | 5% | 6% | 5% | 3% | 5% | 7% | 4% | 5% | 5% | 5% | 8% l | 3% | 9% N | 3% | 4% | 6% | 4% | 6% | 2% | 15% S | 9% S |
| Much less likely | 4% | 4% | 4% | 4% | 4% | 3% | 7% H | 0% | 5% | 2% | 6% l | 2% | 7% N | 2% | 5% | 1% | 2% | 5% | 3% | 5% | 5% |
| N/A - I do not buy fast-food | 4% | 1% | 3% | 7% B | 4% | 3% | 4% | 4% | 3% | 5% | 2% | 6% k | 0% | 6% M | 4% | 3% | 4% | 4% | 5% | 4% | 2% |

* Table Base: PREFER MCDONALD'S NEW DESIGN

**QS3Q5: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | N=488 | 128 | 72* | 53* | 202 | 174 | 135 | 99* | 273 | 215 | 196 | 292 | 172 | 316 | 334 | 132 | 230 | 258 | 283 | 64* | 91* |
| Total (Unweighted) | N=486 | 189 | 72* | 60* | 132 | 161 | 135 | 110 | 275 | 211 | 187 | 299 | 174 | 312 | 322 | 142 | 236 | 250 | 322 | 65 | 59 |
| More likely (Net) | 21% | 26% | 18% | 21% | 19% | 14% | 24% f | 13% | 23% | 13% | 33% L | 13% | 38% N | 12% | 20% | 23% | 23% | 20% | 20% | 21% | 30% |
| Much more likely | 6% | 6% | 11% d | 1% | 6% | 5% | 8% | 3% | 9% | 3% | 11% L | 4% | 12% N | 3% | 7% | 7% | 6% | 7% | 8% | 5% | 3% |
| Somewhat more likely | 15% | 21% C | 7% | 20% c | 14% | 9% | 16% | 20% F | 18% | 10% | 22% L | 10% | 26% N | 9% | 14% | 16% | 16% | 13% | 11% | 16% | 27% s |
| Neither more likely nor less likely | 56% | 53% | 64% d | 45% | 61% b | 59% | 53% | 60% | 52% | 62% i | 45% | 64% k | 41% | 65% M | 58% | 53% | 54% | 59% | 59% U | 52% | 41% |
| Less likely (Net) | 18% | 19% | 15% | 27% | 16% | 24% h | 19% | 13% | 17% | 20% | 20% | 17% | 21% | 17% | 17% | 21% | 19% | 17% | 16% | 23% | 27% s |
| Somewhat less likely | 10% | 11% | 10% | 10% | 9% | 11% | 10% | 10% | 10% | 10% | 12% | 8% | 11% | 9% | 10% | 11% | 12% | 8% | 9% | 11% | 11% |
| Much less likely | 8% | 8% | 5% | 17% ce | 6% | 13% H | 9% | 3% | 7% | 11% | 8% | 9% | 10% | 7% | 7% | 10% | 8% | 9% | 6% | 12% | 16% s |
| N/A - I do not buy fast-food | 4% | 1% | 3% | 7% B | 4% | 3% | 4% | 4% | 3% | 5% | 2% | 6% k | 0% | 6% M | 4% | 3% | 4% | 4% | 5% | 4% | 2% |

* Table Base: PREFER MCDONALD'S NEW DESIGN

**QS3Q6: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | N=571 | 160 | 87* | 78* | 202 | 166 | 215 | 106 | 308 | 263 | 209 | 362 | 177 | 394 | 397 | 160 | 264 | 307 | 366 | 62* | 82* |
| Total (Unweighted) | N=573 | 222 | 93 | 76* | 139 | 168 | 199 | 124 | 303 | 270 | 191 | 382 | 173 | 400 | 381 | 176 | 277 | 296 | 413 | 66* | 50* |
| More likely (Net) | 48% | 43% | 43% | 48% | 54% b | 51% | 46% | 54% | 59% | 35% | 61% L | 40% | 64% N | 41% | 44% | 59% O | 47% | 49% | 42% | 48% | 70% St |
| Much more likely | 24% | 24% | 16% | 17% | 32% Cd | 28% | 21% | 20% | 34% J | 12% | 34% L | 18% | 40% N | 17% | 23% | 27% | 25% | 23% | 21% | 24% | 47% ST |
| Somewhat more likely | 24% | 20% | 27% | 32% b | 22% | 23% | 25% | 34% | 25% | 23% | 28% | 22% | 24% | 24% | 21% | 33% O | 22% | 26% | 21% | 16% | 47% ST |
| Neither more likely nor less likely | 39% | 41% | 43% | 44% | 33% | 32% | 45% F | 37% | 30% | 50% I | 27% | 46% K | 26% | 45% M | 41% | 34% | 45% R | 34% | 47% tU | 31% | 16% |
| Less likely (Net) | 6% | 11% dE | 5% | 3% | 4% | 12% GH | 4% | 1% | 6% | 3% | 9% L | 4% | 8% | 7% | 3% | 3% | 8% Q | 3% | 13% S | 9% |
| Somewhat less likely | 4% | 6% | 4% | 1% | 3% | 7% H | 3% | 0% | 3% | 4% | 6% L | 2% | 5% | 3% | 5% | 3% | 2% | 1% | 6% Q | 2% | 8% S | 6% |
| Much less likely | 2% | 5% E | 1% | 2% | 0% | 5% G | 1% | 1% | 3% | 1% | 3% | 2% | 3% | 2% | 3% | 1% | 1% | 3% Q | 1% | 8% S | 3% |
| N/A - I do not buy fast-food | 7% | 5% | 1% | 5% | 10% C | 6% | 5% | 8% | 5% | 10% i | 3% | 9% K | 2% | 9% M | 8% | 4% | 8% | 4% | 5% | 9% | 5% |

* Table Base: PREFER BURGER KING'S NEW DESIGN

**QS3Q7: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | N=571 | 160 | 87* | 78* | 202 | 166 | 215 | 106 | 308 | 263 | 209 | 362 | 177 | 394 | 397 | 160 | 264 | 307 | 366 | 62* | 82* |
| Total (Unweighted) | N=573 | 222 | 93 | 76* | 139 | 168 | 199 | 124 | 303 | 270 | 191 | 382 | 173 | 400 | 381 | 176 | 277 | 296 | 413 | 66* | 50* |
| More likely (Net) | 26% | 24% | 17% | 26% | 32% C | 25% | 22% | 33% g | 34% J | 15% | 38% L | 18% | 43% N | 18% | 24% | 29% | 25% | 26% | 25% | 39% su | 19% |
| Much more likely | 9% | 8% | 5% | 6% | 15% bC | 10% | 8% | 12% | 13% J | 5% | 17% L | 5% | 19% N | 5% | 8% | 12% | 10% | 9% | 7% | 21% S | 7% |
| Somewhat more likely | 16% | 16% | 13% | 20% | 17% | 15% | 14% | 21% | 21% J | 11% | 21% l | 13% | 24% N | 13% | 16% | 17% | 15% | 17% | 17% | 18% | 12% |
| Neither more likely nor less likely | 54% | 57% E | 70% E | 55% | 43% | 56% | 58% | 50% | 45% | 65% I | 47% | 58% K | 40% | 60% M | 53% | 55% | 56% | 52% | 57% T | 37% | 51% |
| Less likely (Net) | 14% | 14% | 12% | 14% | 15% | 14% | 14% | 9% | 16% | 11% | 12% | 14% | 15% | 13% | 15% | 12% | 13% | 14% | 10% | 15% | 25% S |
| Somewhat less likely | 7% | 8% | 6% | 7% | 7% | 7% | 7% | 5% | 9% i | 4% | 6% | 7% | 8% | 6% | 7% | 8% | 7% | 7% | 7% | 4% | 10% |
| Much less likely | 7% | 5% | 6% | 7% | 8% | 7% | 7% | 4% | 7% | 6% | 6% | 7% | 7% | 7% | 8% | 4% | 7% | 7% | 4% | 12% S | 16% S |
| N/A - I do not buy fast-food | 7% | 5% | 1% | 5% | 10% C | 6% | 5% | 8% | 5% | 10% i | 3% | 9% K | 2% | 9% M | 8% | 4% | 8% | 4% | 5% | 9% | 5% |

* Table Base: PREFER BURGER KING'S NEW DESIGN

**Fast Food Brand Designs**

**QS3Q2: Regardless of which brand you may prefer, which of the following packaging designs makes the food look more appetizing?**

| | Total (A) | Less than $50K (B) | $50K - $74.9K (C) | $75K - $99.9K (D) | $100K+ (E) | HS or Less (F) | Some College (G) | College Grad+ (H) | Yes (I) | No (J) | Yes (K) | No (L) | Yes (M) | No (N) | Homeowner (O) | Renter (P) | Married (Q) | Not married (R) | White (S) | AA (T) | Hispanic (U) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Household Income** | | | | **Education** | | **Employed** | | **Children in HH** | | **Parent of Child Under 18** | | **Home Ownership** | | **Marital Status** | | **Race/Ethnicity** | | |
| Total | 1,059 | 289 | 159 | 131 | 404 | 341 | 350 | 205 | 582 | 477 | 405 | 654 | 349 | 710 | 731 | 292 | 494 | 565 | 649 | 126 | 174 |
| Total (Unweighted) | 1,059 | 411 | 165 | 136 | 271 | 329 | 334 | 234 | 578 | 481 | 378 | 681 | 347 | 712 | 703 | 318 | 513 | 546 | 735 | 131 | 109 |
| McDonald's | 464 | 119 | 68 | 53 | 190 | 158 | 134 | 94 | 274 | 190 | 194 | 270 | 169 | 295 | 324 | 117 | 206 | 258 | 270 | 65 | 83 |
| Burger King | 595 | 170 | 90 | 78 | 214 | 182 | 216 | 110 | 308 | 288 | 211 | 384 | 180 | 415 | 407 | 175 | 289 | 307 | 378 | 62 | 91 |

* Table Base: U.S. RESPONDENTS

**QS3Q3: Regardless of which brand you may prefer, which of the following packaging designs do you prefer?**

| | Total (A) | Less than $50K (B) | $50K - $74.9K (C) | $75K - $99.9K (D) | $100K+ (E) | HS or Less (F) | Some College (G) | College Grad+ (H) | Yes (I) | No (J) | Yes (K) | No (L) | Yes (M) | No (N) | Homeowner (O) | Renter (P) | Married (Q) | Not married (R) | White (S) | AA (T) | Hispanic (U) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Household Income** | | | | **Education** | | **Employed** | | **Children in HH** | | **Parent of Child Under 18** | | **Home Ownership** | | **Marital Status** | | **Race/Ethnicity** | | |
| Total | 1,059 | 289 | 159 | 131 | 404 | 341 | 350 | 205 | 582 | 477 | 405 | 654 | 349 | 710 | 731 | 292 | 494 | 565 | 649 | 126 | 174 |
| Total (Unweighted) | 1,059 | 411 | 165 | 136 | 271 | 329 | 334 | 234 | 578 | 481 | 378 | 681 | 347 | 712 | 703 | 318 | 513 | 546 | 735 | 131 | 109 |
| McDonald's | 488 | 128 | 72 | 53 | 202 | 174 | 135 | 99 | 273 | 215 | 196 | 292 | 172 | 316 | 334 | 132 | 230 | 258 | 283 | 64 | 91 |
| Burger King | 571 | 160 | 87 | 78 | 202 | 166 | 215 | 106 | 308 | 263 | 209 | 362 | 177 | 394 | 397 | 160 | 264 | 307 | 366 | 62 | 82 |

* Table Base: U.S. RESPONDENTS

**QS3Q4: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | Less than $50K (B) | $50K - $74.9K (C) | $75K - $99.9K (D) | $100K+ (E) | HS or Less (F) | Some College (G) | College Grad+ (H) | Yes (I) | No (J) | Yes (K) | No (L) | Yes (M) | No (N) | Homeowner (O) | Renter (P) | Married (Q) | Not married (R) | White (S) | AA (T) | Hispanic (U) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Household Income** | | | | **Education** | | **Employed** | | **Children in HH** | | **Parent of Child Under 18** | | **Home Ownership** | | **Marital Status** | | **Race/Ethnicity** | | |
| Total | 488 | 128 | 72 | 53 | 202 | 174 | 135 | 99 * | 273 | 215 | 196 | 292 | 172 | 316 | 334 | 132 | 230 | 258 | 283 | 64 * | 91 * |
| Total (Unweighted) | 486 | 189 | 72 * | 60 * | 132 | 161 | 135 | 110 | 275 | 211 | 187 | 299 | 174 | 312 | 322 | 142 | 236 | 250 | 322 | 65 * | 59 * |
| More likely (Net) | 201 | 63 | 31 | 26 | 67 | 72 | 52 | 44 | 126 | 75 | 113 | 88 | 104 | 96 | 125 | 67 | 91 | 109 | 102 | 29 | 46 |
| Much more likely | 105 | 31 | 19 | 11 | 35 | 33 | 25 | 26 | 68 | 37 | 58 | 48 | 57 | 48 | 67 | 33 | 48 | 58 | 56 | 13 | 26 |
| Somewhat more likely | 95 | 32 | 12 | 14 | 32 | 39 | 27 | 18 | 57 | 38 | 55 | 41 | 47 | 48 | 58 | 34 | 44 | 52 | 46 | 16 | 20 |
| Neither more likely nor less likely | 225 | 51 | 32 | 20 | 108 | 79 | 62 | 45 | 112 | 113 | 52 | 173 | 40 | 185 | 160 | 56 | 116 | 110 | 150 | 20 | 31 |
| Less likely (Net) | 42 | 13 | 6 | 3 | 19 | 18 | 16 | 6 | 27 | 15 | 28 | 14 | 28 | 14 | 35 | 6 | 14 | 28 | 15 | 13 | 13 |
| Somewhat less likely | 24 | 8 | 3 | 1 | 11 | 12 | 6 | 5 | 14 | 10 | 15 | 9 | 15 | 9 | 19 | 4 | 9 | 14 | 6 | 10 | 8 |
| Much less likely | 18 | 5 | 3 | 2 | 9 | 6 | 10 | 0 | 13 | 5 | 13 | 6 | 13 | 5 | 16 | 2 | 5 | 13 | 9 | 3 | 5 |
| N/A - I do not buy fast-food | 20 | 1 | 2 | 4 | 8 | 5 | 5 | 4 | 9 | 11 | 3 | 17 | 0 | 20 | 14 | 4 | 9 | 11 | 15 | 3 | 2 |

* Table Base: PREFER MCDONALD'S NEW DESIGN

**QS3Q5: You indicated you prefer the new packaging design by McDonald's. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | Less than $50K (B) | $50K - $74.9K (C) | $75K - $99.9K (D) | $100K+ (E) | HS or Less (F) | Some College (G) | College Grad+ (H) | Yes (I) | No (J) | Yes (K) | No (L) | Yes (M) | No (N) | Homeowner (O) | Renter (P) | Married (Q) | Not married (R) | White (S) | AA (T) | Hispanic (U) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Household Income** | | | | **Education** | | **Employed** | | **Children in HH** | | **Parent of Child Under 18** | | **Home Ownership** | | **Marital Status** | | **Race/Ethnicity** | | |
| Total | 488 | 128 | 72 | 53 | 202 | 174 | 135 | 99 * | 273 | 215 | 196 | 292 | 172 | 316 | 334 | 132 | 230 | 258 | 283 | 64 * | 91 * |
| Total (Unweighted) | 486 | 189 | 72 * | 60 * | 132 | 161 | 135 | 110 | 275 | 211 | 187 | 299 | 174 | 312 | 322 | 142 | 236 | 250 | 322 | 65 * | 59 * |
| More likely (Net) | 103 | 34 | 13 | 11 | 39 | 24 | 32 | 23 | 75 | 28 | 65 | 39 | 65 | 38 | 68 | 31 | 52 | 51 | 55 | 13 | 28 |
| Much more likely | 32 | 7 | 8 | 1 | 12 | 9 | 10 | 3 | 25 | 7 | 21 | 11 | 21 | 11 | 22 | 9 | 15 | 17 | 24 | 3 | 3 |
| Somewhat more likely | 72 | 27 | 5 | 10 | 28 | 15 | 22 | 20 | 50 | 21 | 44 | 28 | 44 | 28 | 46 | 22 | 38 | 34 | 31 | 10 | 25 |
| Neither more likely nor less likely | 275 | 69 | 46 | 23 | 123 | 103 | 72 | 59 | 143 | 133 | 88 | 187 | 70 | 205 | 195 | 70 | 124 | 151 | 168 | 33 | 37 |
| Less likely (Net) | 89 | 24 | 11 | 14 | 32 | 42 | 26 | 13 | 46 | 43 | 39 | 50 | 37 | 52 | 57 | 27 | 44 | 45 | 45 | 14 | 24 |
| Somewhat less likely | 49 | 14 | 7 | 5 | 19 | 18 | 14 | 10 | 28 | 20 | 24 | 24 | 20 | 29 | 34 | 14 | 27 | 22 | 27 | 7 | 10 |
| Much less likely | 41 | 11 | 4 | 9 | 13 | 23 | 12 | 3 | 18 | 23 | 15 | 26 | 17 | 23 | 24 | 13 | 18 | 23 | 18 | 8 | 15 |
| N/A - I do not buy fast-food | 20 | 1 | 2 | 4 | 8 | 5 | 5 | 4 | 9 | 11 | 3 | 17 | 0 | 20 | 14 | 4 | 9 | 11 | 15 | 3 | 2 |

* Table Base: PREFER MCDONALD'S NEW DESIGN

**QS3Q6: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy Burger King?**

| | Total (A) | Less than $50K (B) | $50K - $74.9K (C) | $75K - $99.9K (D) | $100K+ (E) | HS or Less (F) | Some College (G) | College Grad+ (H) | Yes (I) | No (J) | Yes (K) | No (L) | Yes (M) | No (N) | Homeowner (O) | Renter (P) | Married (Q) | Not married (R) | White (S) | AA (T) | Hispanic (U) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Household Income** | | | | **Education** | | **Employed** | | **Children in HH** | | **Parent of Child Under 18** | | **Home Ownership** | | **Marital Status** | | **Race/Ethnicity** | | |
| Total | 571 | 160 | 87 | 78 | 202 | 166 | 215 | 106 | 308 | 263 | 209 | 362 | 177 | 394 | 397 | 160 | 264 | 307 | 366 | 62 * | 82 * |
| Total (Unweighted) | 573 | 222 | 93 * | 76 * | 139 | 168 | 199 | 124 | 303 | 270 | 191 | 382 | 173 | 400 | 381 | 176 | 277 | 296 | 413 | 66 * | 50 * |
| More likely (Net) | 274 | 69 | 37 | 38 | 109 | 85 | 99 | 57 | 182 | 92 | 129 | 145 | 112 | 162 | 176 | 95 | 124 | 149 | 154 | 30 | 58 |
| Much more likely | 135 | 38 | 14 | 13 | 64 | 46 | 44 | 21 | 103 | 32 | 70 | 65 | 70 | 65 | 91 | 43 | 66 | 69 | 78 | 20 | 19 |
| Somewhat more likely | 139 | 31 | 24 | 25 | 44 | 39 | 54 | 36 | 78 | 61 | 58 | 81 | 42 | 96 | 85 | 52 | 59 | 80 | 76 | 10 | 38 |
| Neither more likely nor less likely | 224 | 66 | 45 | 34 | 66 | 53 | 96 | 39 | 94 | 130 | 56 | 168 | 47 | 177 | 163 | 54 | 119 | 105 | 170 | 19 | 13 |
| Less likely (Net) | 33 | 17 | 4 | 2 | 7 | 20 | 9 | 1 | 19 | 15 | 19 | 15 | 14 | 19 | 27 | 4 | 7 | 26 | 12 | 8 | 7 |
| Somewhat less likely | 21 | 9 | 4 | 1 | 7 | 12 | 7 | 0 | 10 | 11 | 13 | 8 | 10 | 12 | 17 | 2 | 4 | 18 | 8 | 5 | 5 |
| Much less likely | 12 | 8 | 0 | 1 | 1 | 8 | 1 | 1 | 8 | 4 | 5 | 7 | 5 | 7 | 10 | 2 | 3 | 9 | 4 | 3 | 2 |
| N/A - I do not buy fast-food | 40 | 8 | 1 | 4 | 20 | 9 | 12 | 8 | 15 | 26 | 6 | 34 | 3 | 37 | 31 | 6 | 14 | 27 | 29 | 5 | 4 |

* Table Base: PREFER BURGER KING'S NEW DESIGN

**QS3Q7: You indicated you prefer the new packaging design by Burger King. Given this new packaging design, how much more likely or less likely are you to buy McDonald's?**

| | Total (A) | Less than $50K (B) | $50K - $74.9K (C) | $75K - $99.9K (D) | $100K+ (E) | HS or Less (F) | Some College (G) | College Grad+ (H) | Yes (I) | No (J) | Yes (K) | No (L) | Yes (M) | No (N) | Homeowner (O) | Renter (P) | Married (Q) | Not married (R) | White (S) | AA (T) | Hispanic (U) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Household Income** | | | | **Education** | | **Employed** | | **Children in HH** | | **Parent of Child Under 18** | | **Home Ownership** | | **Marital Status** | | **Race/Ethnicity** | | |
| Total | 571 | 160 | 87 | 78 | 202 | 166 | 215 | 106 | 308 | 263 | 209 | 362 | 177 | 394 | 397 | 160 | 264 | 307 | 366 | 62 * | 82 * |
| Total (Unweighted) | 573 | 222 | 93 * | 76 * | 139 | 168 | 199 | 124 | 303 | 270 | 191 | 382 | 173 | 400 | 381 | 176 | 277 | 296 | 413 | 66 * | 50 * |
| More likely (Net) | 146 | 39 | 15 | 20 | 65 | 41 | 47 | 35 | 106 | 40 | 80 | 66 | 76 | 70 | 96 | 47 | 66 | 80 | 90 | 24 | 16 |
| Much more likely | 53 | 13 | 4 | 5 | 31 | 16 | 17 | 13 | 41 | 12 | 35 | 18 | 33 | 19 | 31 | 19 | 26 | 26 | 27 | 13 | 6 |
| Somewhat more likely | 93 | 26 | 11 | 15 | 33 | 25 | 30 | 22 | 66 | 28 | 45 | 49 | 43 | 51 | 65 | 28 | 40 | 53 | 63 | 11 | 10 |
| Neither more likely nor less likely | 308 | 92 | 61 | 43 | 88 | 93 | 126 | 53 | 138 | 170 | 98 | 210 | 71 | 236 | 212 | 87 | 149 | 158 | 210 | 23 | 42 |
| Less likely (Net) | 77 | 22 | 10 | 11 | 30 | 23 | 31 | 10 | 50 | 28 | 26 | 52 | 26 | 51 | 58 | 19 | 35 | 42 | 37 | 10 | 21 |
| Somewhat less likely | 39 | 13 | 6 | 5 | 13 | 12 | 16 | 5 | 27 | 12 | 12 | 27 | 14 | 25 | 26 | 12 | 18 | 21 | 24 | 2 | 8 |
| Much less likely | 38 | 9 | 5 | 6 | 17 | 11 | 15 | 5 | 22 | 16 | 14 | 25 | 12 | 26 | 32 | 7 | 18 | 21 | 13 | 7 | 13 |
| N/A - I do not buy fast-food | 40 | 8 | 1 | 4 | 20 | 9 | 12 | 8 | 15 | 26 | 6 | 34 | 3 | 37 | 31 | 6 | 14 | 27 | 29 | 5 | 4 |

* Table Base: PREFER BURGER KING'S NEW DESIGN