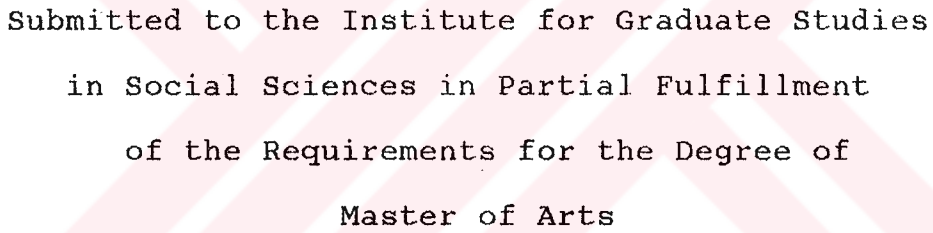


ANALYSIS OF
FAST FOOD-SERVICE INDUSTRY
IN TURKEY

by

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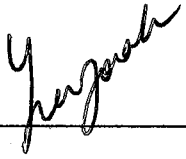
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ABSTRACT

With economic development, general labor productivity increases and labor force opportunities improve, especially for women. Many of traditional foods are time-intensive, in some cases extremely so, requiring long preparation times by the food preparers in household. The increasing value of the human time must be considered one of the factors underlying the shift from time-intensive traditional foods to time-saving foods. Fast food has emerged to satisfy the needs of people by means of clean and standard product which can be quickly prepared and eaten.

This study utilizes both descriptive and empirical approaches. In the descriptive part the evolution and development of fast food industry in the world is discussed. This part covers history and concept of fast food including changes in the character of public feeding industry. Also, key factors for success in fast food service industry and responding to fast food market changes are reported.

Besides, economic, social, and technological factors which create the demand for fast food service are outlined. It is known that the growth of fast food chains where an uniform product of high quality with relatively cheap price is served in a modern, clean, and pleasant environment has had a primary impact on the development of fast food service industry. That's why instead of local small scale businesses fast food service chains which offer products and services at international standards are taken into consideration. Finally top 20 international fast food and pizza chains are listed.

There are very few studies done in Turkey on this subject. In the empirical part of this study consumers' preferences, their eating frequency, evaluation criteria and the satisfaction with the products and services provided in the Turkish fast food-service market are analyzed. Changes in fast food consumption patterns and consumers attitudes after entering foreign fast food chains into Turkish market are also investigated.

Primary data collection method is field survey using questionnaire administered on 100 people chosen by convenience sampling.

Three major findings described in the conclusion of this research are : (a) Most significant advantages of fast food are "saving time" and "being practical"; the major disadvantages are concentrated on "being unhealthy" and "causing unbalanced nutrition". (b) Cleanliness, quality, and taste are three evaluation criteria which are assessed as most important ones. (c) Although foreign fast food service restaurants are leading chains for quality, standardization etc., some domestic restaurants are also capable of meeting the wants and needs of fast food consumers successfully. As can be seen from ranking of most preferred restaurants, Borsa Lokantası and Kristal are two domestic restaurants which take place in the first four.

In the last part of this study conclusions and implications for the operators and marketers of fast food; and for academicians and researchers are pointed out.

ÖZET

Son yıllardaki ekonomik gelişme ile beraber, genel işgücü verimliliği artmakta ve özellikle kadınlar için iş olanakları çoğalmaktadır. Geleneksel besinlerin büyük çoğunluğu zaman yoğun olup uzun hazırlama süreleri gerektirmektedir. İnsan zamanının artan önemi, zaman yoğun geleneksel besinlerden pratik, çabuk hazırlanan besinlere geçişteki en önemli faktörlerden biridir. Fast food insanların gereksinim duyduğu bu pratik, çabuk hazırlanıp çabuk yenebilen, temiz ve standart ürün ihtiyaçlarına cevap verebilmek için doğmuştur.

Bu çalışma tanımlayıcı ve ampirik yaklaşımları içermektedir. Tanımlayıcı kısmında "fast food" hizmet endüstrisinin dünyadaki gelişimi ve değerlendirmesi üzerinde durulmaktadır. Bu bölümde fast food kavramı, tarihçesi ve gıda endüstrisindeki değişiklikler yer almaktadır. Ayrıca, fast food hizmet endüstrisindeki başarıyı etkileyen faktörler ve pazardaki değişikliklere duyarlılığın önemi üzerinde durulmaktadır. Bunun yanında fast food sanayinde talebi oluşturan ekonomik, sosyal ve teknolojik faktörlerden bahsedilir. Modern, temiz ve cazip bir ortamda kaliteli, standart ve temiz ürünlerin sunulduğu yerler olan büyük fast food zincirlerinin fast food endüstrisindeki değişimde en önemli rolü oynadıkları belirtilmektedir. Bu nedenle, çalışmada küçük ölçekli yerel işletmeler yerine büyük fast food zincirleri üzerinde durulmuştur. Ayrıca en büyük yirmi uluslararası fast food zinciri ve en büyük on pizza zincirinin listesi sunulmuştur.

Türkiye'de bu konuda yapılmış çok az çalışma bulunmaktadır. Bu çalışmanın ampirik bölümünde, tüketici tercihleri, yeme sıklıkları, değerlendirme kriterlerine verilen cevaplar ve Türkiye'deki fast food pazarında sunulan hizmet ve ürünlerin tatmin dereceleriyle ilgili analizler yapılmıştır. Ayrıca Türk pazarına yabancı fast food zincirlerinin girmesiyle fast food'la ilgili tüketim alışkanlıkları ve tüketici davranışlarındaki değişiklikler incelenmiştir.

Birincil data toplama, rastgele örnekleme metoduyla seçilmiş yüz kişiye uygulanan anketle yapılmıştır.

Sonuç kısmında yer alan önemli bulguların bir kısmı şu şekilde özetlenebilir: (a) Fast food'un en önemli avantajları "zamandan tasarruf" ve "pratiklik" tir. En önemli dezavantajları ise "sağlıksız" oluşu ve "dengesiz beslenme" ye yol açmasıdır. (b) Temizlik, kalite ve lezzet fast food için en önemli üç değerlendirme kriterleri olarak ortaya çıkmıştır. (c) Yabancı fast food firmaları kalite, standardizasyon vs. açısından lider durumunda olmalarına rağmen, bazı yerli firmalar fast food tüketicisinin ihtiyaçları rahatlıkla karşılamaktadır. En çok tercih edilen fast food restoranları sıralamasından da görülebileceği gibi "Borsa Lokantası" ve "Kristal" ilk dört içinde yer almaktadır.

Bu çalışmanın son bölümünde hem araştırma sonuçları hem de fast food sanayiindeki operatörler, pazarlamacılar, akademisyenler ve araştırmacılar için öneriler sunulmaktadır.

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I. INTRODUCTION

Modern man, especially in the highly mechanized and industrialized parts of the world, can be compared to a machine, specifically, the automobile. We drive our autos into a service station when it needs fuel and similarly we rush in, fuel our bodies with food and beverages, generally prepared in advanced and for the most part served from mechanized equipment. The fueling operations for both man and machine are quick, efficient and stereotyped. Although the sequence of events may seem a bit exaggerated, people are experiencing and being subjected to this mode of fast food service. It makes the fast food service an international industry and fast food sales reached \$ 63.7 billion in 1990 all over the world (Schneider,1990).

Growth of fast food chains has had a major impact on the fast food service industry. Fast food chain restaurants are the productions and sales outlets of the fast food industry where a uniform product of the highest quality is produced and served within strictly defined principles of purchasing productions, service and sales (Thorner, 1973).

Fast food is such a major force in the world today that many countries depend on it to boost their nations' economy, morale, and even their people's nourishment.

Modern concept of fast food operations developed and became successful in the USA, but the expansion and distribution of

this concept in catering services became widespread after franchising, a method of distribution of a product or services by business agreements between two parties, came into the picture (Kocaoglu, 1989).

If we take a look at one of the giant companies of fast food service industry, McDonald's serves in its restaurants worldwide, more than 22 million people in 52 countries daily. Fast-food sales increased from \$ 59.9 billion in 1989 to \$ 63.7 billion in 1990.

The opening of McDonald's first outlet, which is the biggest international fast food restaurant chain, in Taksim-Istanbul in 1986 has played an inspiring role on the establishment of fast food-service sector in Turkey. After that there has been a remarkable interest and investment and the mushroom-like growth is observed in this sector in Turkey.

This study is designed to analyze fast food service industry, consumers' preferences, eating frequency, choice criteria, and investigate relationships between consumers' demographic characteristics and their attitude towards fast food, in Turkey. Also social, economic and technological factors which create the demand for fast food services will be outlined and effects of this newly developing sector on our eating habits will be discussed.

Respondents are major source of this study. We shall be concerned with both information obtained by asking questions to people and knowledge provided by observing behavior.

In this study questionnaire was used to collect data and 94 respondents answered the questions in questionnaire. After the data has been collected, it was analyzed efficiently so that maximum amount of usable information was obtained.

This paper should be read with full recognition of its limitations, which mainly are the following: [1] There are no previous studies and market surveys at academic or professional level. This lack of information leads to obtain information only through practical methods such as interviews or questionnaires which cause having not a enough background for this study. That's why this paper was intended to make research on this untouched subject defining, first of all, the fast food concept, stressing factors influencing growth of this sector, discussing development of fast food in considerably short time in Turkey, evaluating the results of data collected in order to give an overall idea about consumers' expectations, providing implications to marketers and entrepreneurs. [2] Unwillingness of most of the chain directors for giving necessary information about their operations and customers was another limitation of the study.

In the following section of the study literature survey is presented. The third section contains the research methodology where research objectives, data collection and data analysis techniques are explained. After presentation of the results, the study ends by the conclusions and implications section.

II. LITERATURE SURVEY

This part includes a survey of literature on fast food-service industry which starts with history and concept of fast food. Then, key factors for success in fast food-service industry and responding to fast food market changes are mentioned. Finally, importance of fast food chains on fast food-service industry is emphasized and leading international fast food and pizza chains are listed.

2.1. HISTORY AND CONCEPT

Prior to World War I, E. M. Forster wrote a book entitled The Machine Stops. He vividly described the collapse of a totally automated civilization. He pointed out that his imaginary world suffered from a loss of all contact with basic human aspirations and became completely uniform. The population, as he described it, was fed on synthetic foods and was supplied with synthetic air. People were completely subjected and became subservient to everything the machine produced. Efficiency became a habit and the people thrived, until one day the machine collapsed by malfunctioning and produced tasteless food, noxious air, and total darkness. This signalled the end of the machine society and its people died.

A more recent book Future Shock by Alvin Toffler, discussed chance and the extreme rapidity with which it is presently taking place. The main question posed in this book is whether

man is reaching the outer limits of human adaptability to the stresses and strains imposed by dramatic and uncontrolled changes.

Both of these books, although written years apart, can be applied to the present state of the food service industry and the thoughts and projections that are running through the minds of many operators (Thorner, 1973).

2.1.1. A Revolution in Foods and Services

The word revolution generally refers to a sudden and dramatic upheaval or sharp change in direction. If we apply this definition to the character of the public feeding industry we can then bring into focus the situation as it exists today (Thorner, 1973).

The industrial revolution of the 19th Century did not occur overnight; many decades passed before the machine was readily accepted. Machines became "coworkers" of man, without supplanting him, as so many feared at that time. A parallel exists with the present transition of the food service industry. However, what is not presently known is the point or stage of this transition that we are now entering.

Because of complexities of fast-food service, high cost of equipment, the confusion that surrounds convenience foods, and the use of mechanized kitchens and serving facilities, it is the opinion of many in the industry that the changes are

too rapid and the results may be disastrous. Those who share this belief do so as a normal reaction to a revolutionary environment, since time and education are needed to reach the goal of this new food service concept.

2.1.2. Automated and Fast Food Service

Automation can be defined as a self-activating operation or control of a process, equipment, or system, and is the totality of mechanical and electronic techniques and equipment used to achieve such operation or control (Thorner, 1973).

Fast is defined as acting, moving, or capable of moving quickly, swift, and accomplished in relatively little time: it is expeditious, which combines the senses of rapidity and efficiency.

Both these terms are being applied by food service personnel to describe the modern concept of these food services.

2.1.3. Historical Background of Fast Food Service

Automated and convenience food service are not entirely new, nor can they be considered an outgrowth of our modern age of technology. A number of factors that exist at the present have created the atmosphere for their acceptance on a broader scale than was possible in the past. Modern techniques of preservation, freezing and packaging, coupled with novel modes of service new concepts and developments of equipment

have helped accelerate the pace within the public food service industry.

Since the beginning of time, nature has provided man with edibles that can be consumed without prior preparation, in the form of nuts, fruits, some vegetables and varieties of marine life. The preservation of a number of foods dates back to Biblical times; preservation by salting, smoking, cheese and bread making have been traced back some 4,000 years. During the latter part of the 18th Century, techniques were discovered for preserving fruit and vegetables by crude methods of canning and bottling. Nicholas Appert, a French confectioner, in 1795, while working in a simple kitchen, observed that food heated in sealed containers was preserved if the container was not reopened or the seal did not leak. Some thirty years later, Appert had developed formulas for processing some fifty different canned foods. In the 1820's canning plants appeared in the US in Boston and New York. By 1840, canneries were in operation throughout America.

With the advent of canning a variety of preserved prepared foods in every conceivable category became available. A complete line of fruits, vegetables, meats, gravies, macaroni and spaghetti mixtures, fish, condiments, jams, pickles, salads, soup and a myriad of other items too numerous to list were offered to the consumer. During World War I advancements in packaging and preservation methods continued as a means of feeding armies in Europe. Other major strides in the field

were recorded during World War II. The period from 1941 to 1946 signalled not only a dramatic need for prepared package foods, but also a concerted effort for the development of fast food-serving techniques and assembly line production commissaries.

The armed services together with their industrial counterpart required prepared foods and quick methods of service. The prerequisites were foods that were palatable and that required a minimum of labor to prepare. Due to labor shortages industrial food establishments were forced to develop make-shift fast food-serving devices. Food vending machines of all types were introduced to ease the critically short labor market and central commissaries were established to mass-produce food. These were centrally located so that they could supply their output to a number of plants within a small radius.

During the post-war period refinements were made in the crude methods introduced from 1941 to 1946. The frozen food industry exhibited wide gains and became a major source of freshly prepared and precooked edibles. Many food concoctions appeared and entire menus were build around them. In addition automation became more sophisticated as a new equipment was designed to handle the precooked foods. The vending industry mushroomed as a result of new machines incorporating electronic components that achieved a high degree of automation.

The result of the work of some pioneers revolutionized the eating habits of the Western world, since this was the beginning of the "convenience food" age.

In 1930 Birdseye began to market frozen vegetables, fruits, meats, and fish in the New England area under his trade name. His ideas were considered premature, and the program did not meet with popular appeal. In addition, the primitive state of distribution, poor freezing control, scarcity of suitable storage facilities, and the economic severity of the depression had a deterrent effect on his program. World War II rescued the infant frozen food industry and it began to flourish. Frozen orange juice concentrate made its appearance in 1945 and became immediate success. Other frozen items followed, as it now seemed that the public was ready to accept them.

2.1.3.1. The Age of Convenience Foods

From its humble beginning in the Birdseye laboratories, the age of convenience foods, featuring pre-prepared frozen entrees, started a meteoric rise during 1950. French-fried potato spearheaded the surge in the popularity of prepared frozen foods. Sales were mainly in retail stores, but as labor costs continued to rise, the food service industry realized the economies of this product and commenced to use it. Other items soon followed.

During the early part of the last decade the plastic industry developed film that served a dual purpose. Not only did the film protect the contents of the package, but enabled the entire package to be placed in boiling water for heating.

With advances in packaging and methods of freezing, nearly every conceivable food item appeared on the market. Networks of the freezer facilities and storage areas were constructed to accommodate the needs of the frozen food industry.

Specially designed trucks and freight cars were constructed to move the vast amounts of frozen food products. The food service industry, because economic factors and the growth of fast food systems, realized the merits of convenience items, so that service facilities were designed and planned to take advantage of their views. Equipment manufacturers and frozen food processors pooled their resources in the form of research grants to foster methods of handling and reconstituting prepared frozen items properly and efficiently. These efforts brought about the development of microwave and convection ovens, high-speed steam cookers, infrared ovens, automatic deep fryers, char-broilers, thawing refrigerators and new concept of freezer design.

2.1.3.2. Development of Fast Food Service

Since prehistoric times the human being, primarily because of his animal instinct has for the most part devoured his food in a ravenous manner. Throughout history the mass of the

population ate rapidly and gave little thought to their food. Only on rare occasions, such as religious festivals, did man actually relax while eating. Royalty, the educated and others in the higher social order, consumed their food in an easy and slow manner. Wars, social unrest, revolutions and problems resulting from abnormal acts of nature, such as storms, famine and earthquakes, are the factors chiefly responsible for the inherent rapid eating habits of mankind (Thorner, 1973).

2.1.4. Concepts of Fast Food Operations

In the fast food operations generally denoted : [1] any facility centered around a short-order counter, where the customer sat on a stool or remained standing. [2] self-service, such as the cafeteria or stand. However, the use of the term "fast food" when applied to segments of today's public feeding industry, takes on a much broader meaning and covers a wide range of installations.

Fast food based on current concepts falls into three basic categories: [1] utilization of time-saving equipment; [2] utilization of labor-saving equipment; [3] utilization of self-service devices or methods to reduce labor overhead.

When we apply these concepts of fast food service we find that facilities with or without table service can meet these requirements. Combinations of both are encountered, such as drive-ins, where the personnel are needed to wait on those

customers in their cars; in addition many drive-ins provide counter or cafeteria areas. Diners are another example of both counter and table service.

The utilization of time-saving equipment encompasses for the most part those developments of recent origin, such as the microwave oven and postmix beverage dispensers. Examples of labor-saving are ware washers, automatic potato peelers and automatic coffee brewers. The utilization of self-service devices or methods to reduce labor overhead include vending machines, cafeteria systems and buffet tables.

2.1.5. Fast Food Preparation Centre

The fast or automated food facility, where the entire activity is based solely on convenience or convenient production, is sometimes referred to as the "kitchenless" restaurant. To use the expression kitchenless is fallacy, since fully complemented or conventional kitchens and those for the fast food operation are both necessary centers for the preparation and portioning of food. The conventional kitchen is equipped for the cooking process, so that a variety of raw or semi-processed foods can be prepared, portioned and served. Fast food, for the most part, employ pre-prepared items that also require preparation, garnishing, and portioning. However, the differences between the two are the techniques and equipment involved. If we interpret both concepts within the framework of preparation centers, we can

then evolve a better understanding of the basic requirements for proper fast food handling. This concept will aid in the production of acceptable, high quality, and palatable edibles.

2.1.5.1. Straight-line Production Systems

Fast food preparation is conducive to simple straight-line production. The design and layout of efficient preparation systems are feasible. Efficient production lines were rarely achieved with conventional kitchens. Within the conventional facility the many steps needed to prepare a variety of foods necessitated the re-use, overlap, and back-tracking of equipment, so that effective systems could not be generated without duplicating costly devices, as well as increasing kitchen areas beyond their economic capabilities.

Mobility is a unique advantage of many items of equipment used for the preparation of fast food. Dollies or wheels are provided so that changes in location can be made in order to meet changes in production. The added advantage of mobility makes for increased flexibility, enabling a number of desirable and efficient systems to be worked out.

The fundamental straight-line concept starts with receipt of raw materials at one end of the plant and shipment of finished goods at the other end. Between the two are raw storage areas, manufacturing and the finished storage adjacent to the shipping.

2.1.6. Pre-Prepared Foods

"Soggy," "tasteless," "lack consistency," "washed-out look," and "what will our customer think," are reasons given by food service operators when asked about their attitude or experiences for with pre-prepared foods (Thorner, 1973). On the other hand, the organizations that have embarked on a pre-prepared food program cite the following positive views as to why they have proved successful:

- (1) Service has improved; added flexibility resulted.
- (2) Food costs have been reduced by waste reduction, less shrinkage, easier inventory and portion control.
- (3) Sales have increased since more time and effort are spent on merchandising and customer relations.
- (4) Foods and beverages are more uniform after we have mastered the art of their preparation and handling.
- (5) Sanitation chores have been reduced.
- (6) Reliance on skilled chefs and cooks has diminished.
- (7) Overall efficiency and employee morale have improved.
- (8) Increase in menu versatility, especially by the addition of nationality foods.

Although the foregoing list exhibits many advantages of pre-prepared foods, two other factors are considered responsible for this dramatic shift from conventional cooking. The demands by the younger generation and young couples have created a major market for quick service and a stereotyped menu. The second reason is that this form of service is direct outgrowth of our technological society.

2.2. KEY FACTORS FOR SUCCESS IN THE FAST FOOD-SERVICE BUSINESS

Food service is a volatile industry, reliant on the nearly unpredictable swings of customer tastes. Despite the difficulty of making specific predictions, it seems possible to identify a few key factors for success in the food-service business. We will examine the factors that have been contributing to restaurant-industry growth (Lee, 1987).

2.2.1. Five Keys

Product quality is essential to a company's success. If the food isn't good or restaurants are unclean, people will not return. No food-service chain can survive long without repeat customers.

A second key is standardization. The value of a chain is that its sign implies a reliable, known product. That doesn't mean every restaurant has to be identical or even offer identical prices. McDonald's, for example, does not have nationally mandated prices and even allows regional differences in its menu.

The term franchising refers to a wide spectrum of business arrangements made between two parties for the distribution of goods and services, the distinguishing characters of which are described in detail. A franchise is a license granted by the franchisor to the franchisee to carry on a particular

business under a specific name belonging to the franchisor. It entitles the franchisor to exercises control during the period of franchise and obliges him to provide the franchisee with assistance in carrying on the business (in terms of the organization of the business, the training of staff, merchandising, management and etc.). Franchising has been the key to menu chains' success, while leading to the demise of others. Word spreads fast in the restaurant business-faster than any single operator could open new outlets. Most of today's major chains achieve their large sizes through franchising.

Adaptability is also important. People tastes are fickle, and more restaurants concept remains popular on its own for very long without adapting.

The most important criterion for success, however, is management. Managers, of course, director marketing, oversee product quality and standardization, and decide when and how to adapt. Much of McDonald's success came from having the right management at the right time. In the beginning it was the McDonald brothers, with their great attention to detail and their entrepreneurial willingness to try new concepts. They were unwilling, however, to think in the grander terms of what the company could become-or undertake the enormous effort to make it happen. (They were reportedly afraid of plain travel.) Successor Ray Kroc, on the other hand, was and itinerant salesman with equally strong ideas about keeping

things simple and moving conservatively.

2.2.2. Demand Factors

To the extent that every one must eat, the food industry (including restaurants) has a fairly stable demand base. But that does not mean there are guaranteed riches or an absence of volatility. Restaurant-industry sales have grown ten percent per year on average over the past ten years and nine percent each year for the past 25. This expansion comes principally from four factors: Population growth, inflation, improved living standards, and a gradual shift from eating at home to eating away from home (Lee, 1987).

It is easy to see why population growth is important. More people eat more food. Inflation's impact is also clear. In fact, food prices constitute a significant component of most inflation indices.

The increase in the number of working women is probably the major reason for the change. Two people working outside of a household usually means more income and, some would argue, fewer willing cooks.

With economic development, general labor productivity increases and labor force opportunities improve, especially for woman. Many of the traditional foods are time-intensive, in some cases extremely so, requiring long preparation times by the food preparers in household. The increasing value of

the human time must be considered one of the factors underlying the shift from time-intensive traditional foods to time-saving foods (Long, 1986).

The advent of fast-food restaurants have also fostered this trend. It is relatively cheaper and easier to eat away from home than it might have been 25 years ago, even though the cost of an equivalent meal has gone up. While the cost of dinner at the neighborhood steakhouse is higher in real terms, there is now a wider assortment of cheaper alternatives - some of which may cost little more than eating at home.

2.2.3. Other Factors

Consumer disposable income is higher now than in 1960. Single people tend to eat out more often than married ones. Transportation has become much cheaper and more convenient, and we as a society have become more mobile.

The food-service chains that will succeed in the game of gaining more market share are those that are strong on the fundamental factors. Assuming chains offer a standard product of a given quality level, those that are able to grow relatively rapidly through franchising, that can adapt their product to meet changing tastes, and that can market their product will do well. But the key factor in all this, of course, is management.

2.2.4. Negative Effects on Fast Food-Service Market

The major force militating against the trend toward eating out is television and, more lately, Video Cassette Recorders (VCRs) - forms of entertainment that give us a reason to stay home. Likewise, such conveniences as dishwashers, microwave ovens, and Teflon make it easier now to cook at home than previously.

Some restaurateurs have worried about the potential effects of home-prepared meals and entertainment on the food-away-from-home market. Improved convenience food might make eating at home more attractive. Gourmet microwave dinners have improved the palatability of home-consumed convenience food. These meals were formerly called "TV dinners," and they were the sort of food that we as kids would consume only under threat of being sent to bed early.

Times have changed. Microwave ovens can reduce the cooking time of a frozen dinner to some three minutes - nearly as fast as the counter service at McDonalds's. But these microwave products hardly spell doomsday for the fast-food industry. Even at today's sales level of over \$ 3 billion per year, the entire microwave-meal category accounts for less than one percent of the food dollar. The dramatic growth this segment may be a small negative factor in restaurant-industry growth.

2.3. RESPONDING TO FAST FOOD MARKET CHANGES

Changing consumer tastes are a fact of life for the restaurant industry. The "healthy dining" concept is a major turning point for the industry and one of the biggest menu developments in the food-service industry in many years (Senaur, 1986). Today's menus reflect a marketing approach that looks at wholesomeness and variety of foods. Several writers have noted that seafood and chicken are perceived as being "light" and healthy (Kochack, 1985). Not surprisingly, many major food-service chains have developed chicken products for their menus. On the other hand, one survey proclaimed fish the fastest growing category in take-out foods, after recording a 91 percent increase in fish sales between 1981 and 1987. The NRA/Gallup survey found also that people are turning away from deep-fried items in favor of broiled, grilled, or baked items (Hoyt, 1986).

2.3.1. Core Issues

The way a restaurant produces its meals is its core technology. Most chain restaurants use a mass-production approach to food. Unlike the small operators who prepare a batch of food at a time to order, the chains have created a production system in which nearly every job has been broken down to its essentials and made routine. This system has been put under substantial pressure as menus have grown larger. The increased popularity of fresh foods, for instance, has

made purchasing a greater challenge. Fresh foods require more control, staffer purchasing standards, and different kinds of storage than packaged and frozen foods.

Core technology is manifested in the equipment installed in the restaurant. Some chains have made much of the differences in this technology.

Breakfast in fast-food shops is only one example of how market changes can affect core technology. Consumers demands for nutritious menu items and variety put an extra burden on food-service operators, because consumers "crave change and diversity in their dining experience" (Tabacchi, 1987). Once embarked upon a strategy of pursuing the customer who wants fresh, light food, restaurateur must consider how to maintain the consumer's interest. Ethnic food are one vehicle for satisfying consumers' need for diversity. Ethnic foods, however present their own challenge in the areas of product development, training of production people, and operation.

2.3.2. Cooking

The kitchen has felt the greatest impact from the changes in consumers' tastes. With the rise in popularity of grilling and broiling, many restaurants have changed their cooking methods.

2.3.3. Local impact

Menu redesign is the key issue in meeting the consumer

demands for nutrition and variety. Variety and nutrition were the bases for the introductions of new products.

2.3.4. Reorganizing the Kitchen

For almost all fried food, the restaurants that previously used animal fat have changed to vegetable fat. Salads have had more effect on restaurant design than any other menu item.

2.3.5. Centralization

Fast-food chains are characterized by a high degree of centralization. In some chains, new menu items and the rules for serving those items emanate from a central office. The regional managers periodically discuss trends and products, but each unit manager experiments with his or her local market. More chains should take this regional approach, so that their menus will mirror consumer tastes more closely. Since the demand for variety in menu items will continue to grow, operators must be given more flexibility. These operators will have to be creative in their menu design, but the new menu items they create must not demand too many radical changes in the operation. Each bit of menu diversification must take into account the restaurant's core technology (Robichaud, 1989).

2.4. IMPORTANCE OF FAST FOOD CHAINS IN FOOD SERVICE INDUSTRY

The growth of fast food chains has had a great impact on food

service industry. Considering some statistical data we can see the size of the market and obtain hints for prospective growth trends.

It can be stated that fast-food equals growth in America today. The fast-food industry is thriving: both the number of franchised restaurants and volume of fast-food sales have been increasing at double digit rates, and industry's ethnic component is enjoying a 25 % annual growth rate. There is no immediate slowdown insight. Predictions are that the amount spent in restaurants by Americans will rise from one out of every three food dollars to one out of every two dollars by the 1990's (Waldman, 1978).

McDonald's serves in its restaurants worldwide, more than 22 million people in 52 countries daily. Fast-food sales increased from \$ 59.9 billion in 1989 to \$ 63.7 billion in 1990. Fast-food industry continues to grow and expand internationally. Euromonitor, a marketing agency that measures restaurants in the UK and the continent, reports a 15 % yearly growth in the number of fast-food outlets, meals and the value of the meals.

Market power, a UK research firm that focuses on catering away from home predicts that fast food in Great Britain will grow to 386 million meals in 1992, compare to it 271 million meals in 1988.

20 leading international fast food chains' ranking based on 1989 unit counts are as follows :

TABLE 1 - Top 20 International Fast Food Chains

Rank (by units)	Chain Headquarters Parent Co.	Units Countries
	Products & Company Profile	
1	McDonald's Oakbrook, III. USA McDonald's Corp.	11,162 52
	Sales '89: \$ 17.3 billion; 8 % growth. 131 units under construction. Chain expanding faster outside USA. McChicken is newest product; fish still offered.	
2	Kentucky Fried Chicken Louisville, Ky. USA PepsiCo	7,948 58
	All religions love chicken so KFC can go anywhere. Total sales '89: \$ 5.4 billion. Of 5,833 franchises, Japan has 701.Co. adding 400 stores.	
3	Burger King Miami, USA Grand Metropolitan Plc	6,042 34
	Grand Met took over Jan. 1989; started refurbishing stores, eliminated 3 levels of management and put in point-of-sale computers. Wimpy's in UK converting.	
4	Subway Sandwiches Milford, Conn. USA Subway Sandwiches	4,000 5
	As the world seeks healthier foods, Subway's sandwiches and salads become more popular. Units in USA, Latin America, Mideast, Asia/Pacific	
5	Wendy's Dublin, Ohio USA Wendy's International	3,755 23
	Competition caused revenues to deep. Supervalu menu with 99 cent items attracting business. Hungary, Turkey are new international markets.	

Rank (by units)	Chain Headquarters Parent Co.	Units Countries
	Products & Company Profile	
6	Hardee's Food Systems Inc. Rocky Mount, N.C. USA Imasco Ltd.	3,291 9
	Buying 600 Roy Rogers restaurants from Marriot, and converting these fast food units to Hardee's. '89 sales: about \$ 3.5 billion.	
7	Taco Bell Irvine, Calif. USA PepsiCo	3,125 5
	These Mexican food units are the fastest growing of PepsiCo's 3 chains, though Pizza Hut and KFC are bigger. Soft tacos becoming more popular.	
8	Kozo Sushi Osaka Masugi Yamaki	2,347 3
	A Japanese favorite, raw fish, sells mainly in suburban locations. Every unit is franchised; check average: \$ 3. Six units in USA.	
9	Arby's Atlanta, USA Chesapeake Financial Corp.	2,224 8
	Roast beef sandwiches gaining popularity in Asia/Pacific area; menu additions: country-fried steak, fruit flavored swirl. Sales: \$ 1.3 billion.	
10	Long John Silvers Seafood Lexington, Ky. USA Jerrico	1,500 3
	Basic menu is deep-fried, batter fish and chicken tenders, but baked fish is being added. Only 500 unit now franchised but future stores all will be.	

Rank (by units)	Chain Headquarters Parent Co.	Units Countries
	Products & Company Profile	
11	Church's Fried Chicken Jefferson, La. USA AL Copeland Enterprises Inc.	1,111 9
	Copeland, new parent co. as of Sept. '89, operates and franchised both Church's and Popeyes chicken stores. International expansion is limited.	
12	Big Boy Warren, Mich. USA Elias Brothers Restaurants	1,000 3
	These hamburger experts, the franchisor of Marriott's Big Boys, have acquired all of Marriott's units, with total sales of \$ 1 billion.	
13	Popeyes Jefferson, La. USA Al Copeland Enterprises Inc.	750 6
	Spicy fried chicken has wide appeal; parent company has two chicken chains to lessen competition, help expansion and purchasing.	
14	Lotteria Tokyo Lotte Co. Ltd.	702 3
	Hamburgers, fries and milk shakes are the basic menu, but Cutlet Curry Burger and Sukiyaki Burger have been added plus yogurt dessert.	
15	A & W Restaurants Inc. Livonia, Mich. USA A & W Restaurants Inc.	599 9
	Root beer stars on the menus of these units that serve hamburgers and hot dogs. Root beer popular in the 64 Pacific Rim units.	

Rank (by units)	Chain Headquarters Parent Co.	Units Countries
	Products & Company Profile	
16	Taco Time Eugene, Ore. USA Taco Time International Inc.	321 7
	Mexican fast food continues to thrive, even in Japan and the Arab Emirates. New prototype have solarium style or tile-roofed Spanish look.	
17	Country Kitchen Intl. Minneapolis, Minn. USA Carison Companies Inc.	265 2
	These family restaurants are styled to fit the name with early American interiors, and simple country fare. Expansion plans include Japan.	
18	White Castle System Inc. Columbus, Ohio USA The Ingram Family	244 2
	Tiny, 13 sq.-cm hamburgers with gravy on small rolls differ markedly from standard fast food; are popular with kids and oldsters.	
19	Wimpy London Max Woolfenden & Group	220 21
	United Biscuits sold most of its Wimpys to Grand Met who is changing them to Burger Kings. But at year end, table service stores not acquired.	
20	Flunch Villeneuve d'Ascq, France Agapes Restauration	118 3
	Most units in France; a few of these self-service restaurants are also in Spain and Corsica. Units cater to tourists in cities or on motorways.	

(Source : Schneider, 75 Restaurant Chains That Feed a Hungry World, Hotels, 1990)

Pizza can withstand so many variations and differing ingredients and still retain its character, it could become the most universally accepted of the fast foods.

10 Top pizza chains around the world were ranked as follows:

TABLE 2 .- TOP 10 INTERNATIONAL PIZZA CHAINS

Rank (by units)	Chain Headquarters Parent Co.	Units Countries	Sales (\$)
1	Pizza Hut Wichita, Kan. USA PepsiCo	7,410 58	3.4 billion
2	Domino's Pizza Ann Arbor, Mich USA	5,100 18	2.3 billion
3	Little Caesar's Pizza Detroit, USA	2,747 3	1.2 billion
4	Pizza Inn Dallas, USA Pantera Corp.	666 5	
5	Godfather's Pizza Omaha, Neb. USA	511 2	240 million
6	Shakey's Pizza. Irving, Texas USA Inno-Pacific	405 7	261 million
7	Pizzaland London Grand Met	162 6	100 million
8	Pizza Express London Peter Boizot	58 2	50.5 million
9	Pizza Pai Villeneuve d'Ascq, France Agapes	24 2	38 million
10	My Kinda Town London	20 7	48 million

(Source : Schneider, 75 Restaurant Chains That Feed a Hungry World, Hotels, 1990)

III. RESEARCH METHODOLOGY

3.1. Research Objectives :

The objective of this study is to discuss, recently appearing, fast food service industry concept in Turkey and figure out consumption patterns, preferences, choice criteria, and consumers' attitudes. Also, after entering foreign fast food chains into Turkish market, changes in fast food consumption and consumers' attitudes were investigated.

Since there are very few research studies conducted in Turkey about fast food industry before, this study is intended to collect information about previously done researchs abroad and present related concepts, history, and development of this industry.

At the same time, fast food consumers' attitudes, opinions, interests, likes and dislikes not only for fast food products but also for the outlets were measured by survey technique. Evaluation and implications of these data could create feedback for operators in the market.

3.2. Data Collection

3.2.1. Data Collection Methods and Questionnaire Design:

Primary data collection method is field survey using questionnaire designed in terms of information about demographics, attitudes, and behaviors. The prototype of the

questionnaire was tested on a convenience sample group and according to the results of this, necessary changes were done on the questionnaire so that any misunderstanding could be prevented.

The final form of the questionnaire (given in the appendix) was administered to 100 people chosen by convenience sampling. Six of them were discarded because of many blank questions and misunderstanding. Ninety-four questionnaires were used for further analyses. One questionnaire takes approximately 10-15 minutes to answer.

The questionnaire consists of mainly four parts. In the first part, first three questions, respondents are investigated as to how often and when they have fast food.

Second part concerns with respondents' opinions about some certain characteristics of fast food-service industry. For example, advantages and disadvantages of fast food, also how much importance they give to some criteria when they choose a specific fast food restaurant are asked.

Third part aims to figure out respondents' brand choices (i.e. restaurants), and level of satisfaction related to these brands. For example, respondents are asked to rank their favorite fast food restaurant and for their most favorite choice, the degree of satisfaction in terms of some criteria such as prices, standardization, quality of product is measured.

Forth and the final part of questionnaire consists of demographic and soci-oeconomic questions.

3.2.2. Sample Selection

Respondents are selected from central part of Istanbul especially places in which many fast food outlets are gathered. Instead of individual restaurants, shopping malls including fast food restaurants are preferred to eliminate specific restaurants' misleading effects.

The demographic characteristics of the sample are summarized in TABLE 3.

TABLE 3 - Demographic Characteristics of the Sample

	number of respondents	percentage of respondents (%)
<u>Age</u>		
13 and below	1	1.1
14 - 19	10	10.9
20 - 25	37	40.2
26 - 30	25	27.2
31 - 40	12	13.0
41 - 50	6	6.5
51 and over	1	1.1
<u>Sex</u>		
Male	49	54.4
Female	41	45.6
<u>Marital Status</u>		
Married	39	41.9
Single	52	55.9
Divorced/widow	2	2.2

	number of respondents	percentage of respondents (%)
<u>Marriage span</u>		
2 and below	5	15.2
3 - 5 years	11	33.3
6 and over	17	51.5
<u>Number of Family Members</u>		
1	1	1.1
2	16	17.6
3	22	24.2
4	37	40.7
5	7	7.7
6 and over	8	8.8
<u>Education</u>		
Elementary School	1	1.1
Secondary School	5	5.5
High School	29	31.9
Graduate	42	46.2
Post Graduate	14	15.4
<u>Working Status</u>		
Student-not working.	12	12.9
Student-part time	8	8.6
Not working	4	4.3
Part time	5	5.4
Full time	64	68.8
<u>Monthly Income</u>		
750,000 and below	6	7.2
750,001 - 1,500,000	24	28.9
1,500,001 - 2,500,000	19	22.9
2,500,001 - 4,000,000	17	20.5
4,000,001 and over	17	20.5

	number of respondents	percentage of respondents (%)
<u>Expenditure for Fast Food</u>		
100,000 and below	19	25.3
100,001 - 200,000	27	36.0
200,001 - 300,000	17	22.7
300,001 - 400,000	4	5.3
400,001 and over	8	10.7
<u>Spare Time</u>		
Strolling	14	15.9
Sport activities	12	13.6
Music	5	5.7
Reading	10	11.4
Arts	1	1.1
Theater	3	3.4
Cinema	17	19.3
No spare time	5	5.7
Course	1	1.1
TV	2	2.3
Be amused	5	5.7
Chess and bridge	1	1.1
Resting	2	2.3
Research	2	2.3
Being with friends	5	5.7
Other	3	3.4

The results show that the respondents' sexes are almost equally represented in research. The sample is observed to be quite young as 67.4 % of the sample is in the 20 - 30 age group. Education level of the sample is quite high, with 61.6 % of them being university degree. This means that conscious and rational respondents are involved in this research. From working status standpoint, 68.8 % of the sample has full time working status. This, however, is not a weakness because increasing number of working people is one of the main factors for development of fast food-service

industry. Also, monthly fast food expenditure of 58.7 % of the sample is between 100,000 - 300,000 TL.

3.3. Data Analyses Techniques

For data analyses, SPSSPC is used in this research. Frequency analysis is conducted for all variables to see general characteristics and tendencies of the sample. Means, modes and standard deviations of the variables are seen by means of frequency analysis. Also, cross tabulation, T-test, and oneway analysis of variance analyses are used to show the significant relations between key variables. Also, factor analysis is performed to classify the respondents' choice criteria for fast food product and outlets.

IV. FINDINGS

Results of frequency, cross tabulation, oneway analysis of variance, T-test, and factor analyses are tabulated and summarized in this section.

4.1. Frequency Distributions

The first analysis performed is the frequency distribution by which data can be more easily understood and interpreted.

4.1.1. Fast Food Eating Frequency

As a first question, "How often do you have fast food ?" is asked to respondents to figure out how much they consume fast food as an indicator of its place in their daily life.

The results are summarized in TABLE 4.

TABLE 4 - Fast Food Eating Frequency

	number of respondents	percentage of respondents (%)
Every day	18	19.1
A few times a week	46	48.9
Once a week	18	19.1
Once a fortnight	9	9.6
Other	3	3.2
TOTAL	94	100.0

The table shows that majority of the sample with 48.9% have fast food a few times a week. Also it can be said that 87.2% of the respondents have fast food at least once a week and

68.0% of the respondents have at least a few times a week. Result of this analysis can be concluded that fast food is taking place of traditional way of eating.

4.1.2. Eating Time During Day

At which hours of the day respondents prefer to have fast food is investigated in this part. Preferences of respondents can give some clues to operators to revise their marketing strategies. Results can be seen from TABLE 5.

TABLE 5 - Eating Time During Day

	<u>number of respondents</u>	<u>percentage of respondents (%)</u>
Before 11:00	2	2.3
Between 11:00 - 14:00	29	33.3
Between 14:00 - 18:00	40	46.0
Between 18:00 - 21:00	14	16.1
After 21:00	2	2.3
TOTAL	<u>87</u>	<u>100.0</u>

The findings show that 46.0% of the respondents eat fast food between 14 and 18 o'clock. Then, 33.3% prefer fast food at lunch. As easily can be seen from the figures, only 2.3% of the respondents eat at breakfast hours. Offering breakfast is a great opportunity for incremental sales. Developing and introducing new-products and menu items for breakfast and other needs can help expand a restaurant firm's market share.

4.1.3. Eating Time During Week

TABLE 6 shows sample' choices in terms of eating time during week.

TABLE 6 - Eating Time During Week

	number of respondents	percentage of respondents (%)
Weekdays	23	24.7
Weekend	37	39.8
All week long	33	35.5
TOTAL	93	100.0

TABLE 6 shows that 39.8% of respondents eat fast food at weekend against 24.7% of them eat at weekdays. It can be concluded that more people choose weekend to participate their eating activity, because most of them find eating fast food activity amusing and they like to be in a modern and social environment of most fast food restaurants.

4.1.4. Advantages of fast food

In this section, open ended questions were directed to respondents to get their detailed opinions about advantages of fast food. In TABLE 7 advantages of fast food is listed.

TABLE 7 - Advantages of Fast Food

	<u>number of respondents</u>	<u>percentage of respondents (%)</u>
Time saving	55	59.8
Practical	26	28.3
Product variety	1	1.1
Convenient price	1	1.1
Easy to reach	1	1.1
Taste	3	3.3
Social environment	1	1.1
No advantage	1	1.1
Sense of fullness	2	2.2
Amusing	1	1.1
TOTAL	<u>92</u>	<u>100.0</u>

TABLE 7 shows that 59.8% of respondents think that most important advantage of fast food is time saving, then being practical follows with 28.3%. Totally, 88.1% of the respondents emphasize time advantage.

4.1.5. Disadvantages of Fast Food

TABLE 8 - Disadvantages of Fast Food

	<u>number of respondents</u>	<u>percentage of respondents (%)</u>
Different from traditions	5	5.6
Unhealthy	24	26.7
Unbalanced nutrition	17	18.9
Low nutritive value	9	10.0
No disadvantage	10	11.1
Causing fatness	6	6.7
High prices	7	7.8
Less variety	4	4.4
No sense of fullness	2	2.2
Low quality	3	3.3
No pleasure of eating	2	2.2
TOTAL	<u>89</u>	<u>100.0</u>

In TABLE 8 disadvantages of fast food is listed. Most repeated disadvantage is being unhealthy with 26.7% and unbalanced nutrition with 18.9%. This shows that 62.3% of respondents' (including 10.0% of low nutritional value and 6.7% of causing fatness) complaints are related to health. This implies that people who does not prefer fast food as a eating alternative think that fast food causes health problems. Also, 11.1% of respondents report that there is no disadvantage for fast food.

4.1.6. Responses to some statements

Respondents are asked to report their opinions about following statements in terms of Likert Scale, giving number "1" if they certainly disagree and giving number "4" if they certainly agree.

TABLE 9 -Responses to some statements

Statements	1 - Completely disagree		4 - Completely agree	
	Degree of agreement	Number of respondents	Number of respondents	(%)
- Time saving is a important criterion to choose fast food.	1	5		5.3
	2	7		7.4
	3	31		33.0
	4	51		54.3
- Fast food outlet's social environment is important.	1	6		6.5
	2	17		18.5
	3	33		35.9
	4	36		39.1
- Having fast food is amusing.	1	9		9.6
	2	25		26.6
	3	43		45.7
	4	17		18.1

Statements	Degree of agreement	Number of respondents	(%)
- Fast food is preferred to other foods because of its convenient price.	1	26	28.3
	2	22	23.9
	3	30	32.6
	4	14	15.2

Above results in line with TABLE 6 in terms of social environment and finding fast food amusing. 75.0% of respondents agree that social environment is important and 63.8% find fast food amusing. Also, it seems that fast food is chosen not because of cheapness. Consequently, offering low price may not be right marketing strategy all the time for marketers.

4.1.7. Any Increase in Number of Eating Fast Food After Foreign Fast Food Chains

The respondents are asked if number of eating out increased to investigate effects of foreign fast food chains on Turkish market. Results are summarized in TABLE 10.

TABLE 10 - Any Increase in Number of Eating Fast Food After Foreign Fast Food Chains

	number of respondents	percentage of respondents (%)
Increase after foreign chains	58	62.4
No increase	35	37.6
TOTAL	93	100.0

62.4% of respondents report increasing number of eating out after entering foreign fast food chains into Turkish market. Number of eating out 37.6 of respondents do not increase.

Fast food operators in the market should consider this quite high percentage and in order to reach this consumers' segment they should develop new marketing strategies. Consumer behavior researches should be conducted to identify consumers' needs and according to these needs consumer must be persuaded that this product will satisfy their needs.

4.1.8. Having Fast Food Alone or in a Group

TABLE 11 - Having Fast Food Alone or in a Group

	number of respondents	percentage of respondents (%)
Alone	25	27.8
Group	65	72.2
TOTAL	90	100.0

Figures above stress the point that most of the respondents (72.2%) go to fast food outlets with their friends not alone. They evaluate eating activity not only having meal but also having fun with their friends and being inside a modern environment to satisfy their social needs.

4.1.9. Evaluation Criteria for Fast Food

In this part, concerning with fast food, respondents are asked to give their opinions about each evaluation criterion by giving number "1" for the criterion that they think it is the most important and by giving number "5" for the criterion that they think it is the least important. Each criterion is handled separately to be evaluated with "Likert Scale" of

1 to 5 range.

TABLE 12 - Evaluation Criteria for Fast Food-Service Industry

Criteria	Degree of importance	Number of respondents	(%)	
- Product variety	1	65	70.7	Mean= 1.62
	2	7	7.6	
	3	13	14.1	
	4	4	4.3	
	5	3	3.3	
- Convenient price	1	39	43.3	Mean= 2.31
	2	15	16.7	
	3	17	18.9	
	4	7	7.8	
	5	12	13.3	
- Proximity to home	1	11	12.4	Mean= 3.73
	2	11	12.4	
	3	13	14.6	
	4	10	11.2	
	5	44	49.4	
- Cleanliness	1	85	91.4	Mean= 1.17
	2	5	5.4	
	4	1	1.1	
	5	2	2.2	
- Quality of product	1	81	88.0	Mean= 1.22
	2	6	6.5	
	3	2	2.2	
	4	2	2.2	
	5	1	1.1	
- Nutritive value	1	43	47.3	Mean= 2.10
	2	20	22.0	
	3	14	15.4	
	4	4	4.4	
	5	10	11.0	
- Fast service	1	67	72.8	Mean= 1.53
	2	14	15.2	
	3	3	3.3	
	4	3	3.3	
	5	5	5.4	

Criteria	Degree of importance	Number of respondents	(%)	
- Taste	1	76	82.6	Mean= 1.25
	2	12	13.0	
	3	2	2.2	
	4	1	1.1	
	5	1	1.1	
- Standardization	1	35	42.2	Mean= 2.41
	2	12	14.5	
	3	18	21.7	
	4	3	3.6	
	5	15	18.1	
- Decoration	1	37	40.7	Mean= 2.20
	2	22	24.2	
	3	19	20.9	
	4	3	3.3	
	5	10	11.0	
- Personnel behavior	1	68	73.9	Mean= 1.51
	2	13	14.1	
	3	4	4.3	
	4	2	2.2	
	5	5	5.4	
- Reputation	1	26	28.6	Mean= 2.85
	2	14	15.4	
	3	20	22.0	
	4	10	11.0	
	5	21	23.1	
- Closing lately	1	31	34.4	Mean= 2.79
	2	11	12.2	
	3	16	17.8	
	4	10	11.1	
	5	22	24.4	

Ranking the criteria in order of importance with the first one as the most important, the result is as follows:

Cleanliness

Quality

Taste

Personnel behavior

Fast service
Product variety
Nutritive value
Decoration
Convenient price
Standardization
Closing lately
Reputation
Proximity to home

In TABLE 12 among the attributes of fast food-service industry, the one evaluated as the most important criterion is cleanliness then quality of product and service come. The least important criteria are proximity to home, reputation, and closing lately. Respondents do not care about standardization, price, and nutritive value too much.

4.1.10. Ranking of Favorite Outlets

TABLE 13 - Ranking of Respondents' Favorite Fast Food Outlets

	number of respondents	percentage of respondents (%)
McDonald's	48	51.6
Borsa Lokantasi	9	9.7
Kentucky Fried Chicken	8	8.6
Kristal	6	6.5
Wimpy	4	4.3
Sicily's Pizza	4	4.3
Pizza Hut	3	3.2
Green's	3	3.2
Jimmis	2	2.2
Big Burger	2	2.2
Wendys	1	1.1
Taksim Bufe	1	1.1
Sheko Burger	1	1.1

As can be seen from TABLE 13, McDonald's is clearly leader in ranking of most preferred fast food chains. The most important advantage of McDonald's in comparison with the other brands is being first investor in Turkish fast food market with its unique product quality, franchising, standardization and management. After this success McDonald's continues to open new outlets all over Turkey.

In respect to domestic chains, Borsa Lokantasi attracts attention as a second preferred fast food chain in Turkey even though It doesn't have much experience in fast food. Also, in ranking Kristal is at forth place. The case of Borsa Lokantasi and Kristal shows that domestic operators are competitors of foreign fast food chains and their success can go further by developing new marketing strategies corresponding to existing consumers' demand.

4.1.11. Evaluation Criteria for Fast Food-Service Chains

Respondents are asked to report their degree of satisfaction with their most favorite fast food restaurant in terms of following choice criteria by giving number "1" for the criterion that they are most satisfied with and by giving number "5" for the criterion that they are least satisfied with. Each criterion is evaluated with "Likert Scale" of 1 to 5 range.

TABLE 14 - Evaluation Criteria for Fast Food-Service Chains

Criteria	Degree of satisfaction	Number of respondents	(%)	
- Product variety	1	57	63.3	Mean= 1.53
	2	21	23.3	
	3	9	10.0	
	4	3	3.3	
- Convenient price	1	34	37.8	Mean= 2.39
	2	15	16.7	
	3	21	23.3	
	4	12	13.3	
	5	8	8.9	
- Proximity to home	1	22	25.9	Mean= 3.28
	2	5	5.9	
	3	18	21.2	
	4	7	8.2	
	5	33	38.8	
- Cleanliness	1	72	79.1	Mean= 1.27
	2	15	16.5	
	3	3	3.3	
	4	1	1.1	
- Quality of product	1	72	80.9	Mean= 1.26
	2	12	13.5	
	3	4	4.5	
	4	1	1.1	
- Nutritive value	1	39	44.8	Mean= 1.99
	2	23	26.4	
	3	17	19.5	
	4	3	3.4	
	5	5	5.7	
- Fast service	1	59	66.3	Mean= 1.56
	2	20	22.5	
	3	4	4.5	
	4	2	2.2	
	5	4	4.5	
- Taste	1	64	73.6	Mean= 1.35
	2	18	20.7	
	4	4	4.6	
	5	1	1.1	

Criteria	Degree of satisfaction	Number of respondents	(%)	
- Standardization	1	42	52.5	Mean= 1.93
	2	16	20.0	
	3	14	17.5	
	4	2	2.5	
	5	6	7.5	
- Decoration	1	41	47.1	Mean= 1.98
	2	24	27.6	
	3	13	14.9	
	4	1	1.1	
	5	8	9.2	
- Personnel behavior	1	51	58.0	Mean= 1.66
	2	25	28.4	
	3	7	8.0	
	4	1	1.1	
	5	4	4.5	
- Reputation	1	40	46.0	Mean= 2.13
	2	18	20.7	
	3	16	18.4	
	4	4	4.6	
	5	9	10.3	
- Closing lately	1	39	45.3	Mean= 2.29
	2	17	19.8	
	3	11	12.8	
	4	4	4.7	
	5	15	17.4	

Putting the above criteria in their order of importance, first one being the most satisfied, they are placed as follows:

Quality

Cleanliness

Taste

Product variety

Fast service

Personnel behavior

Standardization
Decoration
Nutritive value
Reputation
Proximity to home
Closing lately
Convenient price

According to figures of above table, quality and cleanliness are most satisfied needs by respondents' favorite restaurants. However, convenient price, closing lately, and proximity to home are least satisfied criteria.

4.2. Interrelations Among Variables

In this section, the interrelations between some key variables and other variables are discussed. Detailed information is presented for the relations found to be statistically significant.

4.2.1. Cross Tab Results

TABLE 15 - Significant Cross Tab Results
FREQUENCY OF EATING FAST FOOD VS.

Variable	Chi-square	df	Significance
- Eating time during week	35.15	4	.000
- Relatively cheap	17.56	6	.007
- Any changes after foreign fast food companies	5.33	2	.070
- Nutritive value	22.69	8	.004
- Difference b/w domestic and foreign companies	8.97	2	.011
- Convenient price	16.25	8	.039

Variable	Chi-square	df	Significance
- Sex	6.62	2	.037
- Marital status	8.38	2	.015
- Monthly income	13.35	4	.010
- Expenditure for fast f.	17.62	4	.002

EATING TIME DURING DAY VS.

Variable	Chi-square	df	Significance
- Eating time during week	10.72	4	.030
- Group or alone	5.49	2	.064

EATING TIME DURING WEEK VS.

Variable	Chi-square	df	Significance
- Social environment	19.87	6	.003
- Amusing	19.00	6	.004
- Changes after foreign fast food companies	10.21	2	.006
- Group or alone	13.19	2	.001
- Nutritive value	16.18	8	.040
- Taste	11.83	6	.066
- Sex	6.62	2	.037
- Expenditure for fast f.	11.20	4	.024

AGE VS..

Variable	Chi-square	df	Significance
- Amusing	17.12	9	.047
- Changes after foreign fast food companies	12.08	3	.007

Significant cross tab analysis results are listed in TABLE - 15. In order to observe the relationships between variables which is suitable for cross tab analysis, detailed tables are formed. In tables, chi-square, degree of freedom, and significance values are given. 0.05 significance level is accepted normally but in some cases 0.07

significance level also accepted if this analysis helps to reach a conclusion.

In TABLE 16, significant relationship between how often respondents have fast food and when they have it during week is presented. As can be seen from the table, respondents who have fast food every day go to restaurants all week long, and respondents who have fast food once a week or less, prefer to eat it at weekends. Unlike the other two groups, respondents who eat a few times a week go to fast food restaurants both weekdays and weekends.

TABLE 16 - Frequency of Eating Fast Food vs. Eating Time During Week

	Weekdays	Weekend	All week	Row Total
Every day	3	1	13	17
A few times a week	14	13	19	46
Once a week or less	6	23	1	30
Column Total	23	37	33	93

Chi-Square = 35.15 df = 4 Significance = .000

"Fast food restaurants are preferred to other restaurants because of their relatively cheap prices." Answers to this statement and respondents' fast food eating frequency are discussed in terms of their relationship.

TABLE 17 - Frequency of Eating Fast Food vs. Evaluation of the Price Aspect

1 - Completely disagree 4 - Completely agree

	1	2	3	4	Row Total
Every day	10	5	1	1	17
A few times a week	9	14	15	7	45
Once a week or less	7	3	14	6	30
Column Total	26	22	30	14	92

Chi-Square = 17.56 df = 6 Significance = .007

In TABLE 17, respondents who eat every day think that price is not a dominant factor choosing fast food. Respondents who belong to other two groups mostly agree with above statement. This result shows that most frequent fast-food eaters are not price-sensitive.

TABLE 18 - Frequency of Eating Fast Food vs. Any Increase in Number of Eating Fast Food After Foreign Fast Food Companies

	Yes	No	Row Total
Every day	14	4	18
A few times a week	30	15	45
Once a week or less	14	16	30
Column Total	58	35	93

Chi-Square = 5.33 df = 2 Significance = .069

TABLE 18 presents the figures of significant relationship between fast food eating frequency and number of eating out after foreign fast-food service chains in Turkey. Most frequent eaters (every day) are very much influenced from foreign chains and 77.78% of them have increased number of eating out after the foreign fast-food restaurants that bring better quality, service and standardization. Also respondents who eat a few times a week have been effected by foreign chains with 66.67%. With respect to respondents who eat once a week or less, 53.33% of them have not increased their number of eating out. The reason may be their loyalty to convenient Turkish restaurants which are more specialized on traditional taste.

TABLE 19 - Frequency of Eating Fast Food vs. Degree of Satisfaction with Nutritive Value

1 - Completely satisfied 5 - Completely unsatisfied

	1	2	3	4	5	Row Total
Every day	14	3	-	-	-	17
A few times a week	12	12	13	3	5	45
Once a week or less	13	8	4	-	-	25
Column Total	39	23	17	3	5	87

Chi-Square = 22.69 df = 8 Significance = .004

As can be seen TABLE 19, the more the respondents eat fast food, the more satisfaction they get with its nutritive value. Respondents who eat fast food every day find fast food

quite nutritious and appropriate for daily regular feeding. Only 9.1% of the overall respondents think that nutritive value of fast food is poor in comparison with alternative foods served by other restaurants.

TABLE 20 - Frequency of Eating Fast Food vs. Degree of Importance of Convenient Price

1 - Very important, 5 - Not important at all

	1	2	3	4	5	Row Total
Every day	6	1	2	1	7	17
A few times a week	21	10	10	3	2	46
Once a week or less	12	4	5	3	3	27
Column Total	39	15	17	7	12	90

Chi-Square = 16.25 df = 8 Significance = .039

Significant relationship is found between price and eating frequency as summarized in TABLE 20. Price is not found to be important for frequent eaters. But less frequent eaters are sensitive in terms of fast food prices.

TABLE 21 - Frequency of Eating Fast Food vs. Sex

	Female	Male	Row Total
Every day	3	14	17
A few times a week	22	21	43
Once a week or less	16	14	30
Column Total	41	49	90

Chi-Square = 6.62 df = 2 Significance = .037

In TABLE 21, relationship between sex and eating frequency of fast food is obvious. Male respondents consume more fast food than females. This result can be explained by differences of working status between males and females. Although number of working women are getting larger, working men are more than working women.

TABLE 22 - Frequency of Eating Fast Food vs. Marital Status

	Married	Single	Row Total
Every day	5	12	17
A few times a week	15	31	46
Once a week or less	19	11	30
Column Total	39	54	93

Chi-Square = 8.38 df = 2 Significance = .015

From Table 22, It is seen that married respondents mostly eat once a week or less. Single eaters constitute 70.59% of every-day eaters. This result may be interpreted that dependent status of married people causes to them stay and eat at home more than single ones.

TABLE 23 - Eating Time During Day vs. Eating Time During Week

	weekdays	weekends	all week	Row Total
Before 14:00	14	7	10	31
14:00 - 18:00	7	20	13	40
After 18:00	2	9	5	16
Column Total	23	36	28	87

Chi-Square = 10.72 df = 4 Significance = .030

TABLE 23 shows that respondents who eat at weekdays prefer to have fast food at noon, even though respondents who eat at weekend prefer to have it in the afternoon.

TABLE 24 - Eating Time During Day vs. Going to Fast Food Restaurant Alone or in a Group

	Alone	Group	Row Total
Before 14:00	13	17	30
14:00 - 18:00	9	30	39
After 18	2	13	15
Column Total	24	60	84

Chi-Square = 5.49 df = 2 Significance = .064

Being alone or in a group is one of the important factors for fast food consumption pattern. Groups are more interested in having fun while they eat, afternoon and evening hours are preferred for this purpose. Respondents who eat alone choose before 14:00 to have fast food as lunch, according to results of TABLE 24.

TABLE 25 - Eating Time During Week vs. Evaluation of the Social Environment Aspect

1 - Completely disagree 4 - Completely agree

	1	2	3	4	Row Total
Weekdays	1	10	7	4	22
Weekend	-	4	15	18	37
All week long	4	3	11	14	32
Column Total	5	17	33	36	91

Chi-Square = 19.87 df = 6 Significance = .003

TABLE 26 - Eating Time During Week vs. Evaluation of Pleasure of Eating Fast Food

1 - Completely disagree 4 - Completely agree

	1	2	3	4	Row Total
Weekdays	5	11	7	-	23
Weekend	2	6	20	9	37
All week long	1	8	16	8	33
Column Total	8	25	43	17	93

Chi-Square = 19.00 df = 6 Significance = .004

TABLE 27 - Eating Time During Week vs. Degree of Importance of Nutritive Value

	1 - Very important				5 - Not important at all		
	1	2	3	4	5	Row Total	
Weekdays	11	9	1	-	1	22	
Weekend	16	9	7	1	2	35	
All week long	16	2	6	3	6	33	
Column Total	43	20	14	4	9	90	

Chi-Square = 16.18 df = 8 Significance = .040

Looking at TABLES 25, 26, and 27, it can be seen that weekend customers believe having fast food is enjoyable and social environment of fast food restaurant is important. However they do not give too much importance on nutritive value. All week long eaters share same belief with weekend eaters. On the other hand, weekday customers do not care about environment and amusement of eating session.

Marketers operating in the fast food-service industry should be careful about differences of two above mentioned group. The restaurants especially doing business at lunch hours should stress product quality, fast service and nutritive value. But restaurants close to shopping centers would better emphasize social environment, decoration, and pleasure of eating.

TABLE 28 - Eating Time During Week vs. Any Increase in Number of Eating Fast Food After Foreign Fast Food Companies

	Yes	No	Row Total
Weekdays	9	14	23
Weekend	23	14	37
All week long	26	6	32
Column Total	58	34	92

Chi-Square = 10.21 df = 2 Significance = .006

TABLE 29 - Eating Time During Week vs. Going to Fast Food Restaurant Alone or in a Group

	Alone	Group	Row Total
Weekdays	12	10	22
Weekend	4	33	37
All week long	9	22	31
Column Total	25	65	90

Chi-Square = 13.19 df = 2 Significance = .001

According to result of TABLE 28, weekend and all week long eaters' eating habits seems to change after recent foreign fast food restaurants. Particularly, all week long eaters' number of eating out sharply increased with entering of fast food chains into Turkish market. TABLE 29 shows that not only all week long but also weekend eaters go to restaurants as groups. 89.19% of weekend eaters have fast food with their friends.

TABLE 30 - Age vs. Evaluation of Pleasure of Eating Fast Food

1 - Completely disagree 4 - Completely agree

	1	2	3	4	Row Total
19 and below	-	1	4	6	11
20 - 25	2	8	19	8	37
26 - 30	3	12	9	1	25
31 and over	4	3	10	2	19
Column Total	9	24	42	17	92

Chi-Square = 23.88 df = 9 Significance = .005

TABLE 31 - Age vs. Any Increase in Number of Eating Fast Food After Foreign Fast Food Companies

	Yes	No	Row Total
19 and below	10	1	11
20 - 25	24	12	36
26 - 30	16	9	25
31 and over	6	13	19
Column Total	56	35	91

Chi-Square = 11.68 df = 3 Significance = .009

Looking at TABLES 30 and 31, 19 years old or younger respondents agree that having fast food is enjoyable and foreign fast food service chains have caused increase in number of eating out. These foreign restaurants have given

rise to new aspects causing development of industry and constituting competitive market.

As respondents' age increases, the importance they give to amusement of meal decreases except for the respondents younger than 31 years old. Also, 68.42% of respondents whose age 31 or older have not been influenced from foreign chains with respect to number of eating fast food.



4.2.2. T - Test Results

TABLE 32 - Significant T-Test Results

SEX VS.

Variable	T Value	df	Prob.
- Convenient price	-2.41	84	.018
- Quality of Product	-2.24	86	.028
- Nutritive Value	-2.52	85	.014
- Fast Service	-2.24	86	.027
- Taste (importance)	-2.94	86	.004
- Taste (satisfaction)	-1.80	82	.076
- Reputation	-2.75	81	.007

ANY INCREASE IN NUMBER OF EATING OUT AFTER FOREIGN FAST FOOD COMPANIES VS.

Variable	T Value	df	Prob.
- Social Environment	2.31	90	.023
- Amusing	2.04	91	.044
- Product Variety (impor.)	-2.13	89	.036
- Taste (importance)	-1.94	89	.056
- Product Variety (satis.)	-1.96	87	.053
- Quality of product	-2.01	86	.047
- Taste (satisfaction)	-2.44	84	.017

GROUP OR ALONE VS.

Variable	T Value	df	Prob.
- Social Environment	-3.17	86	.002
- Decoration	2.03	85	.045
- Closing Lately	1.87	84	.065
- Taste	2.10	82	.039

Significant t-test analyses results are listed in TABLE - 32. In order to discuss the relationships between significant variables more detailed tables are given showing group means, standard deviations, degree of freedom, and significance.

TABLE 33 - Degree of Importance of Convenient Price vs. Sex

1 - Very important 5 - Not important at all

	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>T</u>	<u>df</u>	<u>p</u>
Women	39	1.922	1.285	-2.41	84	.018
Men	47	2.660	1.522			

TABLE 34 - Degree of Importance of Quality of Product vs. Sex

1 - Very important 5 - Not important at all

	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>T</u>	<u>df</u>	<u>p</u>
Women	39	1.026	.160	-2.24	86	.028
Men	49	1.327	.826			

TABLE 35 - Degree of Importance of Nutritive Value vs. Sex

1 - Very important 5 - Not important at all

	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>T</u>	<u>df</u>	<u>p</u>
Women	39	1.744	1.069	-2.52	85	.014
Men	48	2.458	1.522			

TABLE 36 - Degree of Importance of Fast Service vs. Sex

	1 - Very important			5 - Not important at all		
	n	mean	st.dev.	T	df	p
Women	39	1.256	.715	-2.24	86	.027
Men	49	1.776	1.295			

TABLE 37 - Degree of Importance of Taste vs. Sex

	1 - Very important			5 - Not important at all		
	n	mean	st.dev.	T	df	p
Women	39	1.026	.160	-2.94	86	.004
Men	49	1.429	.842			

TABLE 38 - Degree of Satisfaction of Taste vs. Sex

	1 - Completely satisfied			5 - Completely unsatisfied		
	n	mean	st.dev.	T	df	p
Women	38	1.211	.474	-1.80	82	.076
Men	46	1.478	1.522			

TABLE 39 - Degree of Satisfaction with Reputation vs. Sex

	1 - Completely satisfied			5 - Completely unsatisfied		
	n	mean	st.dev.	T	df	p
Women	38	1.684	1.016	-2.75	81	.007
Men	45	2.467	1.486			

TABLES from 33 to 39 summarize the results of significant relationships between sex and key variables. These tables clearly show that sex is a quite important demographic characteristic in terms of evaluating fast food-service industry and satisfaction they get from fast food-service restaurants.

Women give more importance to price, quality, nutritive value, fast service, taste than men with respect to finding out evaluation criteria. Since women have been involved in cooking more than men because of Turkish culture, they are more selective in terms of foods. Particularly, taste and nutritive value of fast food are two major criterion that women give significantly more importance than men.

Also women are more satisfied with reputation of fast food restaurants giving service in the market and taste of product served in restaurants.

TABLE 40 - Evaluation of Social Environment vs. Any Increase in Number of Eating Fast Food After Foreign Chains

	1 - Completely agree			4 - Completely disagree		
	n	mean	st.dev.	T	df	p
Yes	58	3.241	.865	2.31	90	.023
No	34	2.794	.946			

TABLE 41 - Evaluation of Pleasure of Eating Fast Food vs. Any Increase in Number of Eating Fast Food After Foreign Chains

	1 - Completely agree			4 - Completely disagree		
	n	mean	st.dev.	T	df	p
Yes	58	2.862	.868	2.04	91	.044
No	35	2.486	.853			

TABLE 42 - Degree of Importance of Product Variety vs. Any Increase in Number of Eating Fast Food After Foreign Chains

	1 - Very important			5 - Not important at all		
	n	mean	st.dev.	T	df	p
Yes	57	1.421	.944	-2.13	89	.036
No	34	1.912	1.240			

TABLE 43 - Degree of Importance of Taste vs. Any Increase in Number of Eating Fast Food After Foreign Chains

	1 - Very important			5 - Not important at all		
	n	mean	st.dev.	T	df	p
Yes	57	1.140	.515	-1.94	89	.056
No	34	1.412	.821			

TABLE 44 - Degree of Satisfaction with Product Variety vs. Any Increase in Number of Eating Fast Food After Foreign Chains

	1 - Completely satisfied			5 - Completely unsatisfied		
	n	mean	st.dev.	T	df	p
Yes	57	1.404	.728	-1.96	87	.053
No	32	1.750	.916			

TABLE 45 - Degree of Satisfaction with Quality of Product vs. Any Increase in Number of Eating Fast Food After Foreign Chains

	1 - Completely satisfied			5 - Completely unsatisfied		
	n	mean	st.dev.	T	df	p
Yes	57	1.158	.492	-2.01	86	.047
No	31	1.419	.720			

TABLE 46 - Degree of Satisfaction with Taste vs. Any Increase in Number of Eating Fast Food After Foreign Chains

	1 - Completely satisfied	5 - Completely unsatisfied				
	n	mean	st.dev.	T	df	p
Yes	54	1.204	.451	-2.44	84	.017
No	32	1.563	.914			

Respondents whose number of having fast food after foreign restaurants increased and their evaluation criteria and degree of satisfaction hold significant relationships. These are displayed in TABLES 40 to 46. Respondents whose number of eating out increased after foreign chains agree that social environment of restaurant is important and eating fast food is enjoyable. Furthermore, product variety and taste are important factors for them and they are satisfied with quality, product variety, and taste.

These significant results can be interpreted that last five years play a crucial role in the success of fast food-service industry. Expectations and preferences of people have been changing in regard to way of eating. As the value of human time is increasing, time saving is one of the most important reasons why people choose fast food. However, they want to be in a nice and elegant place where good quality, delicious, and many different food is served. The fulfillment of people's new arising needs pertinent to eating will determine the success of the fast food-service industry.

According to above tables' results (TABLE 44,45, and 46), presently operating fast food restaurants satisfy taste, quality, and product variety needs of respondents who are changing their eating habits toward foods requiring less preparation time, more quality and variety, finally more fast food.

TABLE 47 - Evaluation of Social Environment Aspect vs. Going to Fast Food Restaurant Alone or in a Group

	n	mean	st.dev.	T	df	p
Alone	23	2.609	.891	-3.17	86	.002
Group	65	3.262	.834			

TABLE 48 - Degree of Importance of Decoration vs. Going to Fast Food Restaurant Alone or in a Group

	n	mean	st.dev.	T	df	p
Alone	25	2.640	1.469	2.03	85	.045
Group	62	2.032	1.173			

TABLE 49 - Degree of Importance of Closing Lately vs. Going to Fast Food Restaurant Alone or in a Group

	n	mean	st.dev.	T	df	p
Alone	24	3.333	1.659	1.87	84	.065
Group	62	2.629	1.528			

TABLE 50 - Degree of Satisfaction with Taste vs. Going to Fast Food Restaurant Alone or in a Group

	1 - Completely satisfied			5 - Completely unsatisfied		
	n	mean	st.dev.	T	df	p
Alone	23	1.609	1.033	2.10	82	.039
Group	61	1.262	.480			

The figures in TABLE 47 to 50 show the relationship between going to fast food restaurants "alone" or "group" and variables related to evaluation criteria. Respondents who choose to have fast food with their friends in a group think that social environment, decoration and closing time of the restaurant are important and they are significantly different from respondents who eat alone. Moreover, "group" eaters are satisfied with taste.

4.2.3. Results of One-Way Analysis of Variance

TABLE 51 -Significant Results of One-Way Analysis of Variance
FREQUENCY OF HAVING FAST FOOD VS.

Variable	F Ratio	Prob.
- Relatively Cheap	6.395	.003
- Cleanliness	2.679	.074
- Nutritive Value	12.250	.000
- Personnel Behavior	2.751	.069

EATING TIME DURING DAY VS.

Variable	F Ratio	Prob.
- Convenient Price	5.506	.006
- Proximity to Home	2.790	.067

EATING TIME DURING WEEK VS.

Variable	F Ratio	Prob.
- Taste	6.013	.004
- Proximity to Home	2.781	.067
- Social Environment	5.182	.008
- Amusing	10.805	.000

AGE VS.

Variable	F Ratio	Prob.
- Enjoyable	4.892	.001
- Product Variety	4.841	.010
- Convenient Price	5.076	.008
- Cleanliness	2.524	.086
- Quality of Product	8.391	.001
- Decoration	3.476	.036
- Reputation	3.547	.033

NUMBER OF PERSON IN THE FAMILY VS.

Variable	F Ratio	Prob.
- Time Saving	3.088	.051

EDUCATION

Variable	F Ratio	Prob.
- Product Variety	2.566	.060
- Cleanliness	3.536	.018

EXPENDITURE FOR FAST FOOD VS.

Variable	F Ratio	Prob.
- Closing Lately	4.837	.011

MONTHLY INCOME VS.

Variable	F Ratio	Prob.
- Convenient Price	5.349	.007
- Fast Service	2.929	.059

Significant oneway analysis results are listed in

TABLE - 51. In order to observe the relationships between

variables which are suitable for oneway analysis, detailed tables are formed.

TABLE 52 - Evaluation of the Price Aspect vs. Frequency of Eating Fast Food

	1 - Completely Disagree			4 - Completely Agree	
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
Every Day	17	1.588	.870		
A Few Times a Week	45	2.444	.990	6.395	.003
Once a Week or Less	30	2.633	1.066		

TABLE 53 - Degree of Satisfaction with Cleanliness vs. Frequency of Eating Fast Food

	1 - Completely Satisfied			5 - Completely Unsatisfied	
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
Every Day	17	1.000	.000		
A Few Times a Week	46	1.370	.679	2.679	.074
Once a Week or Less	28	1.250	.518		

TABLE 54 - Degree of Satisfaction with Nutritive Value vs. Frequency of Eating Fast Food

	1 - Completely Satisfied			5 - Completely Unsatisfied	
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
Every Day	17	1.177	.393		
A Few Times a Week	45	2.489	1.273	12.250	.000
Once a Week or Less	25	1.640	.757		

TABLE 55 - Degree of Satisfaction with Personnel Behavior
vs. Frequency of Eating Fast Food

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
Every Day	17	1.235	.562		
A Few Times a Week	46	1.870	1.1276	2.751	.069
Once a Week or Less	25	1.560	.917		

Significant relationships are encountered between frequency of eating fast food and variables which are price, cleanliness, nutritive value, and personnel behavior (from TABLE 52 to 55). The more the eating frequency of respondents increases, the less they are sensitive about price. Every day eaters are the least price sensitive because it is the way of their nutrition.

Satisfaction with cleanliness, nutritive value, and personnel behavior have the significant relationships with fast food eating frequency in the same way. Most frequent eaters (every day) are the most satisfied with above-mentioned variables, least frequent eaters (once a week or less) comes next and last one is medium frequent eaters (a few times a week).

TABLE 56 - Degree of Satisfaction with the Price vs. Eating Time During

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	n	mean	st.dev.	F Ratio	prob.
Before 14:00	30	2.867	1.456		
14:00 - 18:00	39	2.180	1.211	5.506	.006
After 18:00	15	1.600	.910		

TABLE 57 - Degree of Satisfaction with Proximity to Home vs. Eating Time During Day

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	n	mean	st.dev.	F Ratio	prob.
Before 14:00	29	3.828	1.441		
14:00 - 18:00	36	3.250	1.628	2.800	.067
After 18:00	15	2.667	1.712		

TABLE 56 and 57 indicate significant relationship between eating time in day and degree of satisfaction with price, proximity to home. Respondents who eat fast food before and at noon are the least satisfied with price and proximity to home.

If working status of the sample is considered (69 % are working full time), since eating at noon means limited choices in a limited time, respondents' dissatisfaction can be evaluated usually.

Respondents who eat after 18 o'clock mostly do not care about proximity of restaurant compare to respondents who eat earlier. Because people have more time to go to a fast food restaurant at night than at noon, and they are free from their job and other obligations. Therefore, they are the most satisfied respondents.

TABLE 58 - Degree of Satisfaction with Taste vs. Eating Time During Week

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	n	mean	st.dev.	F Ratio	prob.
Weekdays	21	1.762	1.044		
Weekend	35	1.257	.505	6.013	.004
All Week Long	31	1.161	.374		

TABLE 59 - Evaluation of the Social Environment Aspect vs. Eating Time During Week

	1 - Completely Disagree		4 - Completely Agree		
	n	mean	st.dev.	F Ratio	prob.
Weekdays	22	2.636	.848		
Weekend	37	3.378	.681	5.182	.008
All Week Long	32	3.094	1.027		

TABLE 60 - Evaluation of Pleasure of Eating vs. Eating Time During Week

	1 - Completely Disagree			4 - Completely Agree	
	n	mean	st.dev.	F Ratio	prob.
Weekdays	23	2.087	.733		
Weekend	37	2.973	.799	10.805	.000
All Week Long	33	2.940	.788		

TABLE 58,59, and 60 shows the significant relationships between Eating time in week and social environment, enjoyable eating, taste. Respondents who eat fast food at weekdays do not think about social environment of restaurant, pleasure of eating and taste of food too much. Weekend eaters are satisfied with taste and find factors of social environment and enjoyable eating important since they go to fast food restaurants in their spare time.

TABLE 61 - Evaluation of Pleasure of Eating vs. Age

	1 - Completely Disagree			4 - Completely Agree	
	n	mean	st.dev.	F Ratio	prob.
19 and below	11	3.455	.688		
20 - 30	62	2.661	.829	4.892	.010
31 and over	18	2.500	.985		

TABLE 62 - Degree of Satisfaction with Product Variety vs. Age

	1 - Completely Satisfied			5 - Completely Unsatisfied	
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
19 and below	11	1.091	.302		
20 - 30	59	1.492	.728	4.841	.010
31 and over	17	2.000	1.118		

TABLE 63 - Degree of Satisfaction with Convenient Price vs. Age

	1 - Completely Satisfied			5 - Completely Unsatisfied	
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
19 and below	10	1.500	.850		
20 - 30	60	2.333	1.361	5.076	.008
31 and over	17	3.118	1.269		

TABLE 64 - Degree of Satisfaction with Cleanliness vs. Age

	1 - Completely Satisfied			5 - Completely Unsatisfied	
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
19 and below	11	1.000	.000		
20 - 30	61	1.262	.513	2.524	.086
31 and over	16	1.500	.894		

TABLE 65 - Degree of Satisfaction with Quality of Product vs. Age

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
19 and below	10	1.100	.316		
20 - 30	61	1.164	.416	8.390	.001
31 and over	15	1.800	1.014		

TABLE 66 - Degree of Satisfaction with Decoration vs. Age

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
19 and below	9	1.333	.707		
20 - 30	61	1.934	1.223	3.476	.036
31 and over	14	2.643	1.336		

TABLE 67 - Degree of Satisfaction with Reputation vs. Age

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	<u>n</u>	<u>mean</u>	<u>st.dev.</u>	<u>F Ratio</u>	<u>prob.</u>
19 and below	11	1.273	.647		
20 - 30	59	2.186	1.371	3.547	.033
31 and over	14	2.643	1.336		

TABLES from 61 to 67 gives the results of significant relationships between age and key variables. The more age of

the respondents increases, the less satisfaction they get from evaluation criteria which are product variety, price, cleanliness, quality, decoration, and reputation.

TABLE 68 - Degree of Importance of Convenient Price vs. Monthly Income

	1 - Very Important	5 - Not Important at All			
	n	mean	st.dev.	F Ratio	prob.
1,500,000 and below	28	1.714	1.182		
1,5000,001-4,000,000	35	2.543	1.502	5.349	.007
4,000,001 and over	16	3.063	1.482		

TABLES 68 summarizes significant relationship between monthly income and price. Respondents who have low monthly income give more importance to price.

TABLE 69 - Degree of Satisfaction with Cleanliness vs. Education

	1 - Completely Satisfied	5 - Completely Unsatisfied			
	n	mean	st.dev.	F Ratio	prob.
Secondary and lower	5	1.000	.000		
High School	28	1.036	.189		
Graduate	42	1.333	.612	3.536	.018
Post Graduate	13	1.539	.776		

TABLE 70 - Degree of Satisfaction with Product Variety
vs. Education

	1 - Completely Satisfied		5 - Completely Unsatisfied		
	n	mean	st.dev.	F Ratio	prob.
Secondary and lower	6	1.000	.000		
High School	28	1.321	.670	2.566	.060
Graduate	42	1.691	.841		
Post Graduate	11	1.818	1.079		

TABLES 69 and 70 express the relationships between level of education and cleanliness, product variety. More educated respondents are less satisfied with cleanliness and product variety. Because high education level brings very developed quality concepts.

V. CONCLUSION AND IMPLICATIONS

Conclusions :

The overall objective of this study is to investigate fast food-service industry in Turkey, starting from fast food concept and concluding with consumers' degree of satisfaction with present fast food-service restaurants. Fast food consumption patterns of consumers are investigated and relations between these characteristics and key variables, which are importance of evaluation criteria, degree of satisfaction with these criteria, and demographics characteristics of respondents, are found out.

Before going into the detail of study results, development of fast food-service industry will be summarized. As indicated in the literature survey of this study, history of fast food goes back to quite old times in Turkey and over the world. But gaining modern meaning of fast food is new in Turkey. Producing a uniform product of high quality and serving within strictly defined principles made fast food an industry which is growing very fast especially in big cities. In the last five years lots of new fast food-service restaurants were opened in Istanbul, and number of them is increasing rapidly. For example, only McDonald's have 6 outlets in Istanbul and plans to expand its operations all over Turkey. Also, new Turkish operators get their position in the market. Some old Turkish fast food restaurants are changing their marketing strategies and designing them according to new opportunities in the market. For example, Kristal, which

has been operating in this business for a long time compared to foreign chains, developed new strategies in accordance with characteristics of fast food-service industry such as standardization, quality, and adaptability. Also Borsa Lokantasi which has been operating in gourmet restaurant business entered in a new market segment opening its fast food service restaurant to fulfil the needs of customer with great success.

One of the objectives of this study is to explore the effects of foreign fast food-service chains on Turkish market and consumers. Observations shows that foreign chains has positive effects to form fast food-service industry's principals and expand the market.

If we look at the frequency of having fast food, the numbers are encouraging for this industry. 87.2% of the sample have fast food at least once a week and 68.0% at least a few times a week. Since the questionnaires were distributed in a shopping centre not at a fast food-service restaurant, the sample represents the population quite well. Regarding these percentages, fast food seems to be a considerable alternative against traditional foods or eating at home. Especially increasing number of working men and women give an acceleration to growth rate of fast food-service industry.

The most preferred eating period in day is found to be between 14:00 and 18:00 o'clock. This implies that fast food

is not perceived as a proper meal, but it is taken as a kind of aperitif. Because, in contrary to traditional meal, size is small and eating period of the fast food is short. These factors make the people feel that they are bolting a peace of food, therefore they are still not satiated with food they had. Also customs in terms of people's nutrition support the idea that fast food is not enough and sufficient as food. Because ingredients, style, and shape of fast food is different.

Marketers should be aware of this weak point and in order to overcome it, fast food must be presented in a way that it fulfills the need of food completely. Product variety can be expanded appealing to every possible taste.

Before 14:00 o'clock it is found that there is very little demand for fast food. In terms of breakfast a great opportunity exist in the market. Operators should make consumer researches in this segment to determine the demands and develop new products to serve as breakfast in the morning satisfying consumers' wishes.

Weekend is preferred for having fast food more than weekdays. Because, even though the fast food is expected to be consumed in a fast manner, in Turkey people would like to stay long in the fast food-serving restaurant and talk to each other especially groups. Notably, young generation finds having fast food enjoyable and wish to be in a modern atmosphere

which most of the fast food-serving restaurants offer. Also social environment is evaluated as an important criterion for fast food.

The most significant advantages of fast food are : (1) It saves a great amount of time ; preparation time is very short and it is consumed in a very little time compared to other eating alternatives. (2) It is practical ; eating time in a day is flexible, because it is available anytime during the day and easy to reach. Sometimes people do not consider fast food as a meal but as light food.

The major disadvantages of fast food are concentrated on health and nourishment. People think that it is unhealthy and having fast food leads to unbalanced nutrition. In addition, ingredients of fast food contain low nutritive value. These three primary disadvantages denote that people consider nutritive value of food they have important. In order to compensate these weak points operators should find some solutions. They can improve the nutritional value of their food, developing new products and increasing variety of products they serve. For example, fresh products can be put into menu to emphasize containing more vitamins in their products. Salad bar is the example of this philosophy in fast food restaurants recently. Moreover, the ingredients of fast food products can be claimed in advertisements and comparisons can be made between fast food products and other alternative foods in terms of nutritional value.

Cleanliness, quality, and taste are three evaluation criteria which are assessed as most important ones. If we look at the degree of compensation with respect to these criteria, Turkish fast food consumers are significantly satisfied with the service they get from fast-food restaurants. This is an indication for success of fast food service industry in terms of meeting consumers' demand.

At this point before going on to other conclusions on any other subjects, the brand preferences should be given to observe the demand for foreign and domestic fast food-service restaurants. The highest market share in the market belongs to McDonald's which is preferred by 51.1% of the respondents. The second preferred brand is Borsa Lokantasi by 9.7% share. Following these two brands, Kentucky Fried Chicken takes the third place by 8.6% and Kristal takes the fourth by 6.5% share.

One of the most striking results of this study is finding out that, although foreign fast food-service restaurants are leading chains for quality and standardization etc., domestic restaurants are capable of meeting the wants and needs of fast food consumers successfully as can be seen from ranking of most preferred restaurants. Two domestic restaurants of the most preferred first four fast food-service restaurants are Borsa Lokantasi and Kristal. Borsa Lokantasi was operating in restaurant business, but not in fast food until this year. By opening first outlet this year, it quickly drew

attention of the fast food consumer by means of its quality, standardization, and cleanliness oriented service. In a very short time, It managed to reach a considerably important market share. Also Kristal was operating in fast food segment with quite a big market share but after foreign chains it had to revise its marketing strategies according to changing market conditions. And now, it is one of the successful domestic operators in the market with its new outlets.

Significant relationships are encountered in this study between respondents who are influenced by foreign fast food-service restaurants and evaluation criteria of social environment, enjoyable eating, product variety, and taste. Foreign chains created quite important effects on people by settling some new regulations in fast food service market. People who are influenced from foreign chains give importance to social atmosphere of restaurant and pleasure of eating. Because they come there not only to satisfy nutritive needs but also social needs like talking to friends, listening to music, being in a modern climate etc. Also taste and variety of product are substantial parameters for these people. In addition, more frequent fast food eaters are more influenced from foreign chains than less frequent eaters. Another significant relationship exists between age of the people and influence from foreign chains. As age increases, influence decreases.

The results shows that frequent eaters are not price sensitive, because they are loyal customers. Sex and age are two significantly important criteria which effect the people's opinion of price. Women give more attention to price than men. Further, satisfaction with price decreases when the age increases. Young generation is most satisfied with price, but older ones do not think that way and they find fast food more expensive compared to young ones.

Although people who eat at weekdays are more concerned with nutritional value of fast food, weekend eaters care about social environment and entertainment of the meal. Because weekend eaters do not go to fast food-service restaurants just for having a meal. Another association with nutritive value is that frequent eaters do not look after nutritive value of fast food too much. Another finding is that women care about price more than men.

Most of the respondents go to fast food-service restaurants as groups. Groups pay attention to social environment and decoration of the restaurant, and the attribute of closing lately. Also, They are satisfied with taste of the fast food which is served. It is clearly observed that fast food consumers choose to be in a group when going to have fast food and they enjoy it.

Women are more quality oriented than men, and women also give much more importance to fast service and taste. Satisfaction

with not only quality but also product variety, cleanliness, decoration and reputation decrease as age of the people increases. This implies that at present situation in the fast food market, market fulfills the wants and needs of young consumers who are under 19 years, old but after that point achievement gradually declines. In the future, success of fast food-service industry depends on fulfillment of the middle and older age segments. So far, young generation was the target market for operators in the market, but after that in order to increase the market share, firms should develop competitive advantages in regard to new products, promotion and advertising campaigns, new restaurant design etc.

Coming to taste criterion, results point out that groups and all week eaters are the most satisfied with taste whose common characteristic is to go frequently to fast food-service restaurants for getting pleasure and not only to eat food. Furthermore, women find the taste of product served in fast food-service restaurants more satisfactory than men. And, people, whose number of eating out increased after foreign fast food chains commenced to operate in Turkish market, are significantly satisfied compared to the rest.

As far as relationships between reputation of the restaurant and demographic characteristics of consumers are concerned, it is observed that women and young generation (under 19 years old) are more satisfied with reputation.

It is also found that education level of consumers and degree of satisfaction with some criteria holds significant relationships. As education level increases, satisfaction with cleanliness and product variety decreases. This outcome can be assessed as normal, because consumers who have higher degree of education demand better service and their standard of expectation may be higher. Also, cleanliness and personnel behavior are found adequate by most frequent consumers who have fast food every day and young consumers whose age are under 19.

Implications :

Implications for managers of fast food-service companies :

(1) As far as age is concerned, young consumers find having fast food enjoyable, and fulfil their social needs being in a modern environment of fast food restaurants. Since the youth market is already reached emphasis now should be given to middle age and elderly consumers, because success of fast food-service industry will increase by penetrating into this group of consumers as well. Young consumers are more satisfied with product variety, price, cleanliness of restaurant, quality, decoration, and reputation. As age of the consumers increase, satisfaction with evaluation criteria tends to decrease. Researches on preferences and behaviors of middle age and older consumers should be conducted to determine the reasons behind their dissatisfaction with evaluation criteria. (2) Sex is also an important demographic characteristic for evaluating fast food-service industry and

satisfaction they get from fast food-service restaurants. Women give more importance to price, quality, nutritive value, fast service, and taste than men. Standards of quality, service, nutritive value etc. should be improved in order to answer the expectations of women. (3) Eating time of the customers during week provides some important clues to interpret their behavior. Weekend customers and all week long eaters think that having fast food enjoyable and social environment of restaurant are important. However, weekday eaters care about nutritional value of food. In addition, majority of weekend eaters have fast food in a group. (4) Eating time of consumers during day gives important signals for new marketing strategies. Niche marketing can be applied for fulfilling the fast food needs of consumers at breakfast. Managers should be aware of this niche before other competing firms. Another important point is that weekend eaters prefer afternoon hours for having fast food while weekday eaters prefer noon. Managers should try to change the image of fast food for weekend eaters who mostly go to fast food restaurants during afternoon hours for fun. Image of fast food should be perceived as a proper meal besides fun food. Marketers, who want to stay in the market with high market shares, must create loyal consumers who will guarantee repurchase of the brand. For this to be accomplished, the market signals should be carefully evaluated and the needs and wants of the target groups should be met. Moreover the brand must convey the image of being reliable by giving

necessary information to create the trust without misleading the consumers.

The success of international fast food chains in Istanbul has played an inspiring role on Turkish entrepreneurs to initiate similar operations locally.

During the last two decades, under the effects of social and economic changes in big cities, a rapid increase of a new type of quick food shops is observed such as stands. These operations are likely to make transformations and adopt their small scale business into proper fast food operations to meet the rapidly changing demands of this highly competitive market.

A few key factors can be identified for success of transformation from small scale operation to proper fast food-service chain and gaining more market share. Product quality, standardization, franchising, adaptability, market-driven approach, advertising, and management are the fundamental factors for success in the fast food-service industry. Production in fast food operations depends largely on utilization of time and labor saving equipment and techniques. Menu is standardized and limited, and it facilitates the use of specific types of comparatively advanced technology suitable for its operations. Wide use of technology results in achieving higher quality in a short time and this reduces cost factors while increasing revenues.

The wide use of convenience foods in the fast food sector is another important factor for the success and subsequent expansion of the industry. The growth of the fast food-service chains will in turn cause improvement and growth of the pre-prepared convenience food sector.

Since fast food operations is based on production of a limited menu which should be produced and served in a fast manner to achieve its goal of high volume sales, special importance should be given to personnel training. An initial short orientation program can be applied during which new employees are introduced into the system by getting familiar with the equipment, convenience foods and the principles of production including the work flow.

To produce the limited menu profitably, more mechanical equipment of all kinds should be used. This will lead to further improvements in advanced cooking technology.

Fast food chains should continually search for innovations that will increase employee productivity and compensate for labor shortages. Also, maintaining product consistency, training employees, and expanding into new areas become easier when the product and service is standardized. Training new employees becomes routine , and the stress involved in relocating between units is reduced because policies, procedures, products, and services are uniform. New menu items can help expand a restaurant firm's market share. But these new products must fit in with the restaurant's existing

menu and with the company's overall goals. Below some areas which are affording prime opportunities for new menu products are listed:

- Breakfast foods
- Light or nutritious foods
- New taste sensation
- Foods that cannot be prepared easily at home
- Foods that lend themselves to take out
- Delivery foods

These opportunities have arisen from the demands of customers who are older, better educated, more convenience-oriented, and more nutrition and/or weight conscious than restaurant customers of the past. Consumers today express greater interest in health, nutrition, fitness, general well-being, or in simply looking and feeling good.

The concept of time affects much of consumer activity today. One aspect of changing lifestyles is a heightened urgency for the use and management of time. Projections indicate that in the future, more food money will derive from consumers' having heavy demands on their time. Because of their hectic daily schedule, consumers will continue to require convenience in their food choices.

The concept and habit of eating out at a restaurant inexpensively while getting standard quality for the money's worth will be established. More and more consumers will be

expecting standard quality, clean and pleasant environment and fast service in exchange for the money they pay.

Some competitive methods used in the fast food-service industry to design new marketing strategies as follows:

- Developing new products and services
- Focusing on customer service
- Concentrating on operational efficiency
- Emphasizing quality control
- Using innovative equipment and facility design
- Using competitive pricing
- Developing a broad menu
- Minimizing overhead through standardization
- Stress brand identification
- Purchasing raw food and supplies to specifications
- Advertising
- Developing and maintaining a reputation within the industry
- Forecasting market growth
- Using innovative marketing techniques

Implications for the academicians and researchers :

This study may also serve the generic function by leading to further empirical research to find answers to following issues ;

(1) Market segments and their share on sales revenues for different locations and brands, (2) possible effects of fast food-service chains on changing Turkish cuisine and eating

habits, (3) similarities and differences between domestic and foreign fast food-service companies, (4) relationship between the growth of fast food service chains and improvement of pre-prepared convenience food sector, (5) effects of advanced cooking technology on the development of fast food-service industry, (6) developing new products and services to expand firm's market share, (7) role of franchising on fast food chains success.



APPENDIX - The Questionnaire

BU ANKET FAST-FOOD (HAMBURGER, PIZZA, VS.) ENDÜSTRİSİNİN
TÜRKİYE'DEKİ GELİŞİMİNİ İNCELEMELİK İÇİN HAZIRLANMIŞTIR.
KATKILARINIZA ŞİMDİDEN TEŞEKKÜR EDERİZ.

1- Ne kadar sık fast-food yersiniz ?

- Hergün,
- Haftada birkaç kere,
- Haftada bir kere,
- İki haftada bir keré,
- Diğer.

2- Genellikle 'günün hangi saatlerinde fast-food yersiniz ?

- Sabahtan 11'e kadar,
- 11 - 14 arası,
- 14 - 18 arası,
- 18 - 21 arası,
- 21'den sonra

3- Genellikle fast-food'u

- Hafta içi,
- Hafta sonu,
- Hafta boyunca

mı yersiniz, lütfen işaretleyiniz.

4- Fast-food'un avantajları nelerdir ?

.....
.....
.....

5- Fast-food'un dezavantajları nelerdir?

.....
.....
.....

6- AŞAĞIDAKİ İFADELERE NE DERECE KATILIYORSUNUZ ?

- 1.Hiç katılmıyorum,
- 2.Katılmıyorum,
- 3.Oldukça katılıyorum,
- 4.Tamamen katılıyorum.

- Çabuk yenmesi ve zaman kazandırması fast-food'u tercih etmede önemli bir kriterdir.

- | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Fast-food yenilen yerin sosyal ortamı önemlidir.

- | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Fast-food yemek eğlencelidir.

- | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Fast-food yenilen yerler diğer restoranlara göre daha ucuz olduğu için tercih edilir.

- | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

7- Yabancı fast-food yenilen yerlerin Türkiye'ye girmesinden sonra dışarıda yemek yeme sayınızda bir artış oldu mu ?

- Evet Hayır
- Neden?..... Neden?.....

8- Genellikle fast-food yemeye yalnız mı yoksa grup olarak mı gidirsiniz ?

- Yalnız Grup

9- Fast-food ile ilgili olarak aşağıdaki özelliklere ne derece önem verirsiniz ? (Lütfen uygun kutuya işaret koyunuz)

1-Çok önemli

5-Hiç önemli değil

1 2 3 4 5

	1	2	3	4	5
Ürünlerin çeşitliliği					
Fiyatların uygunluğu					
Eve yakınlığı					
Yenilen yerin temizliği					
Ürünün kalitesi					
Ürünün besin değeri					
Hızlı servis					
Lezzet					
Standart ürün					
Yenilen yerin dekorasyonu					
Personelin davranışları					
Yenilen yerin tanınmış olması					
Akşam geç kapanması					
Diğer (belirtiniz)					

10- Aşağıdaki fast-food yenilen yerlerden 3 tanesini işaretleyip tercih sıranıza göre numaralayınız. (en çok tercih ettiğinize 1, sonraki tercihinize 2, gibi)

Mc Donald's

Pizza Hut

Jimmi's

Kentucky Fried Chicken

Kristal

Diğer.....

Wimpy

Wendy's

Big burger

Sicily's Pizza

Borsa Lokantası

11- Yukarıda en çok tercih ettiğinizi belirttiğiniz yeri aşağıdaki özellikleri göre değerlendiriniz.
(Lütfen uygun kutuya işaret koyunuz)

1-Çok olumlu

5-Çok olumsuz

1 2 3 4 5

	1	2	3	4	5
Ürünlerin çeşitliliği					
Fiyatların uygunluğu					
Eve yakınlığı					
Yenilen yerin temizliği					
Ürünün kalitesi					
Ürünün besin değeri					
Hızlı servis					
Lezzet					
Standart ürün					
Yenilen yerin dekorasyonu					
Personelin davranışları					
Yenilen yerin tanınmış olması					
Akşam geç kapanması					
Diğer (belirtiniz)					

12- Sizce yerli ve yabancı fast-food yenilen yerler arasında fark var mıdır ?

Evet

Hayır

Nelerdir:.....

13- Yaş grubunuzu belirtiniz.

- 13 ve altı 14-19 arası 20-25 arası
 26-30 arası 31-40 arası 41-50 arası
 51 ve üstü

14- Cinsiyetiniz : Kadın Erkek

15- Medeni durumunuz : Evli Kaç yıllık :
 Bekar
 Dul/Boşanmış

16- Aile fert sayınız(siz dahil):

17- Eğitim durumunuz: Okur-yazar Lise
 ilkokul Üniversite
 Ortaokul Lisansüstü

18- Çalışma durumunuzu belirtiniz.

- Öğrenciyim çalışmıyorum
 Öğrenciyim kısmi zaman çalışıyorum
 Çalışmıyorum
 Kısmi zaman çalışıyorum
 Tam zaman çalışıyorum

19- Toplam aylık net geliriniz :

- 750.000 TL'den az
 750.001 -1.500.000 arası
 1.500.001 -2.500.000 arası
 2.500.001 -4.000.000 arası
 4.000.000'den fazla

20- Ayda yaklaşık fast-food harcamanız ne kadar?

.....

21- a)Boş vakitlerinizi nasıl değerlendiriyorsunuz ?

.....

b)Nasıl değerlendirmek isterdiniz ?

- Aynı
 Başka (belirtiniz).....

ANKETE ZAMAN AYIRDIĞINIZ İÇİN TEŞEKKÜRLER.

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