

Loyalty in the Real World of Quick-Serve Restaurants

WHOSE CHEESEBURGER IS IT?

A burger customer has dozens of options and no obligation to come back. So when they're hungry again, whose cheeseburger is it?

To find out, Simpli.fi analyzed eight weeks of foot traffic across 20 U.S. metro markets and the top 20 burger QSRs. Our platform processes billions of mobile location signals a day — anonymized movement patterns indicating visits to real places. Combined with digital intent signals like search and context, that's how we can see a visitor choose one brand in June and a different one in July.

Whose Cheeseburger Is It? is the latest edition of *Loyalty in the Real World*, Simpli.fi's ongoing foot traffic analysis of brick-and-mortar industries. This one lands just before National Cheeseburger Day and covers one of America's most iconic dining traditions. But the underlying question isn't really about burgers: when customers can choose freely and switch cheaply, what actually holds them?



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Hungry customers shop for a lot of things in digital — but they can't eat a website. Like hot food, **when it comes to quick-serve restaurants (QSR), the customer spend that counts happens in the real world of physical spaces and store locations.** The U.S. Census Bureau puts e-commerce at only 17% of all retail sales, which leaves roughly 83% — about \$6.3 trillion a year — changing hands inside a store.

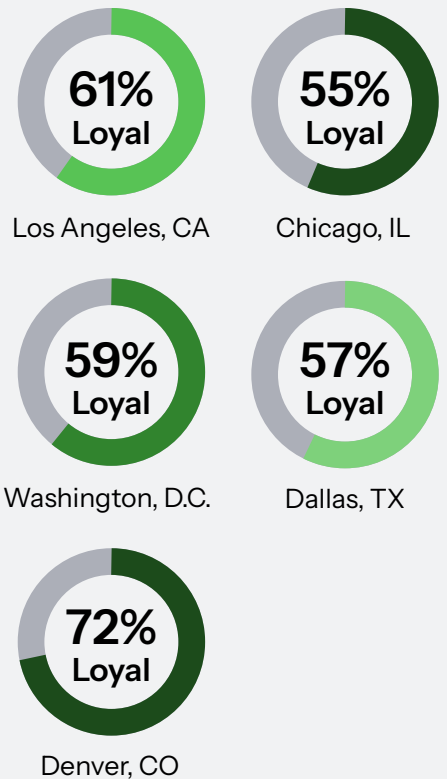
Foot traffic analysis gives QSR brands insight into the customers who walk in the door, and the ones who walk out again to a competitor. Loyalty in the Real World analyzes foot traffic to burger QSRs across the United States to reveal the competitive dynamics— which brands are winning loyalty, which are losing it, and where those losses are going.

Why Loyalty in the Real World Matters Now More than Ever

Our research shows that on average, **61% of burger QSR visitors are loyal to their favorite brand.** That's an encouraging statistic for a restaurateur or franchise owner! It also means that 39% of burger visitors are actively sampling different brands, and open to switch. Research firm **Circana** states that 6.4 billion burgers are sold every year in the United States—which means burger QSR restaurants are **fighting for the loyalty of 17 million burger meals per day.** That's a lot of beef in play.

Different cities, too, have different tastes, and different competitive dynamics. In Dallas, Five Guys is the favorite. In Chicago, it's tied between Burger King and McDonald's. In **Denver, loyalty to burgers seems to be a kind of mania, with 72% of burger QSR visitors only visiting one brand in the period; where Chicago is tougher, at only 55% loyalty rate.**

One thing is for certain: the market, and the customer, is always on the move—so brands need to stay close to their visitors in every market to maintain that loyal connection.



Are Customers **Loyal** to Burger Restaurants?

Burger lovers, it turns out, are a loyal group. Eighteen of the 20 brands in the study draw a majority of their traffic from loyalists — customers who ate a burger at exactly one brand for the full period. The category average is 61% loyal. Most categories would take that number and go home happy.

Loyalist

loyalist noun

A customer who visited a single burger brand's restaurants over eight weeks

Sampler

sampler noun

A customer who visited two or more different burger restaurants over eight weeks

17/20 Brands with Majority Loyalist Traffic



But the range runs from 99% down to 39%, and that spread helps us understand the industry dynamics. Loyalty is distributed unevenly, with the brands at the bottom handing over more than half their customer base to a competitor every month.

The Loyalty Spectrum



Highest: Shake Shack 99% Loyalty

The Danny Meyer, New York-based cult favorite saw almost complete loyalty — burger eaters who only eat burgers at Shake Shack.



Middle: Wayback Burgers and Rally's/Checkers 57-58% Loyalty

These are two successful brands that also have certain constraints which are causing them to give up customers—or at least, customer occasions. Wayback Burgers lacks a breakfast menu and late-night hours, so they give up customers to competitors at the book-ends of the day. Rally's/Checkers are two names on a single drive-in format. And while drive-ins do attract a late-night crowd (if not breakfast), it means the dine-in crowd will be seeking out another venue.



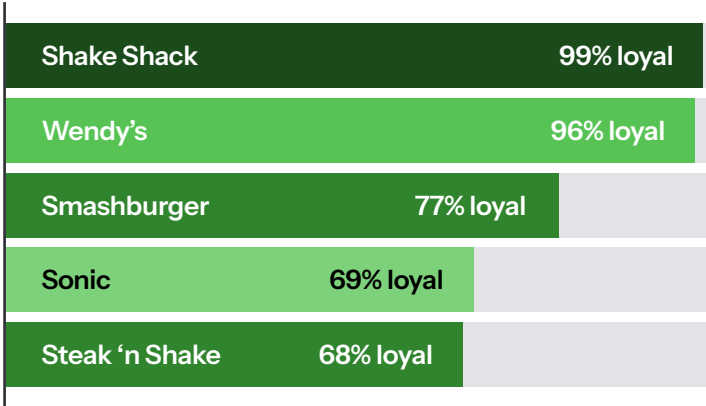
Lowest: A&W Restaurants 39% Loyalty

A&W is a beverage brand that also sells burgers, and a frosty mug of root beer, while delicious, is not everyone's drink of choice. Add a real estate footprint that runs heavily to co-locations at gas stations and travel plazas, and a picture emerges of an uneven loyalty play.

Which Brands Inspire the Most Loyalty?

These five brands ranked highest in loyalty — the largest share of customers who ate at no other burger brand during the period.

The Loyal-est Of Them All



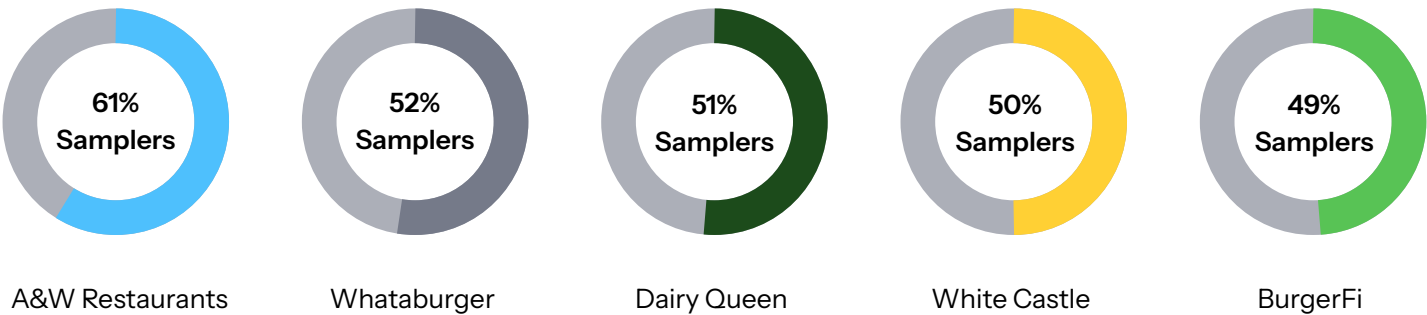
These five have almost nothing in common on the surface. One is a New York cult brand, one is a national giant, one is a technique (smashing), one is a drive-in with carhops, one is a 1934 diner from Normal, Illinois. Menu specificity is not a uniting factor—Sonic runs one of the widest menus in fast food.

What unites them is that their signature items don't have a close substitute. There is no second place to get a Frosty, a Blizzard, or a ShackBurger. Sampling is what happens when brands are interchangeable. These five are not.

Which Brands Have the Most Samplers?

These five brands had the largest share of customers who visited them and at least one competitor inside the same eight weeks.

Simply Samplers



The preponderance of Sampler visitors at this end of the scale is likely due to one reason: it's where the burger is not the main occasion. A&W and Dairy Queen are treat brands with a grill attached, and in DQ's case, some locations serve no hot food at all.

White Castle, with its specific (and to some of us, irresistible) slider sells an episodic craving rather than a habitual family meal. Two brands' status may reflect their corporate reality: BurgerFi's has recently substantially reduced location count; and Whataburger has opened many locations in recent years, which are arguably still building their loyalty base.

Still, these brands maintain a strong level of loyalty—most hovering just below the 50% mark indicating they remain competitive even without loyalty as a strong suit.

Rivalries

Where do these brands face off — where is there a tug-of-war for the same customer? We looked at the burger QSR rivalries to reveal which brands may be stealing share, and which need to work to defend their customers' attention. The analysis is based on the greatest overlap between one brand and the next, in rank order.

Who Do You Love?

McDonald's vs. Everyone.

McDonald's is the one to beat, for everyone. It is the top rival to virtually every brand in the category. National leaders Burger King and Wendy's share significant customer counts with McDonald's, as do mid-size players Shake Shack, Five Guys, Jack in the Box and Whataburger.

The interesting part is that McDonald's own loyalty sits mid-pack at 60%—but that may be exactly because it's taking customers from everyone else. With more than 13,500 locations and the widest menu in the category, McDonald's is positioned to catch a customer any place there's an opening. It doesn't have to be anyone's favorite, to be everyone's second visit.

Battle of the Indies: Shake Shack vs. Smashburger.

Smashburger's top rival is Shake Shack—the two premium smash-patty brands compete for what appears to be the same customer—who seems to love the product and then bounce between brands.

Whopper vs. Slider: Burger King vs. White Castle.

White Castle's top rival is Burger King, a matchup of two very different formats competing for the same featured offering: a distinctive burger with a robust tradition.

How to Build Customer Loyalty with Your Ad Strategy

Understanding loyalty dynamics shows a brand where it stands. Turning that understanding into an advantage takes action. Marketing tactics that use foot traffic data can defend loyal customers, reclaim share losses, or target the dayparts where all locations, or specific ones, have room to build. And even though the foot traffic happens in the real world, targeted digital advertising influences customer choices.

Here are the tactics and tools that put QSR brands in charge of loyalty in the real world:



Defend the Loyalists.

Identify the households that already choose a QSR brand exclusively and put first-party loyalty or CRM data to work. Household targeting reaches loyal customers directly, while suppression logic keeps acquisition spend focused on the new prospects. A brand running 80% or 90% loyalty is holding a real asset, and those loyal customers deserve their own budget and share of voice.



Win the Rivalry.

Geofencing around competitor locations identifies customers the moment they walk into a rival's restaurant, whether that customer is a wavering regular, or a prospect who has never tried the advertiser's brand. Then, offline retargeting keeps a brand in front of that same visitor across every device, defending the ones at risk of switching and pulling in the ones ready to try someone new.



Scale to Every Location.

Running this playbook across dozens or even hundreds of locations means keeping brand control, and local activation, working together. That requires a platform that centralizes brand guardrails, approved creative, geo boundaries, and budget, while giving local operators the ability to activate pre-approved, market-specific campaigns in minutes. A five-location regional chain and a five-hundred-location national franchise can run on the same infrastructure, without losing precision at a single location.



Expand into New Meal Times.

Visitor pattern and daypart data show where a trade area's daytime population differs from its residential one, and where a brand's "occasion gap" sits. A location strong at dinner but quiet at breakfast can target commuters and daytime workers moving through that same trade area each morning, with creative purpose-built for that occasion.



Measure What Moved.

Foot traffic attribution, cross-screen measurement, and revenue tied to specific campaigns show which tactic worked, which trade area responded, and where to shift budget next—while a campaign is still running.

Urban Burgers

One thing is certain: customer tastes vary wildly depending on where you go. Sometimes from one neighborhood to the next. Definitely from one city to the next, when those metros are as different as L.A. and Chicago, or Denver and D.C.



When it comes to choice of burger QSR brands, these cities show their independence by often bucking the national trend.

Below we've identified the burger QSR brands that command the most loyalty—or show the most sampling—at some of the top cities in America.



Los Angeles, California



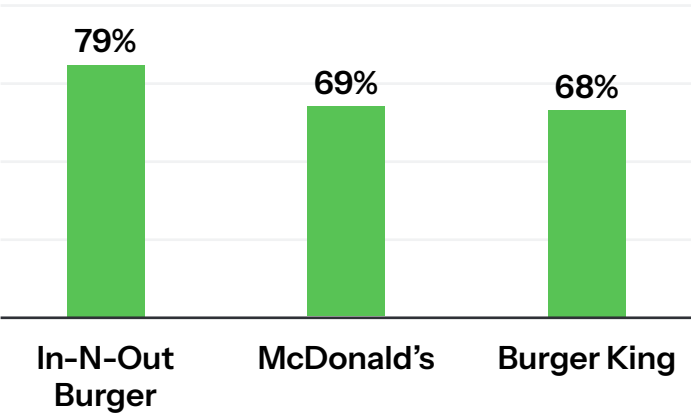
61% Loyal Burger
QSR Customers

39% Sampler Burger
QSR Customers

Which Brands Inspire the Most Loyalty?

These three brands ranked highest in
Los Angeles during the period:

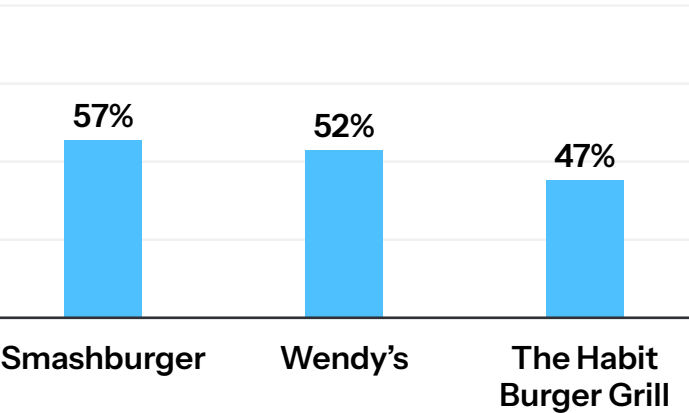
L.A. Loyals



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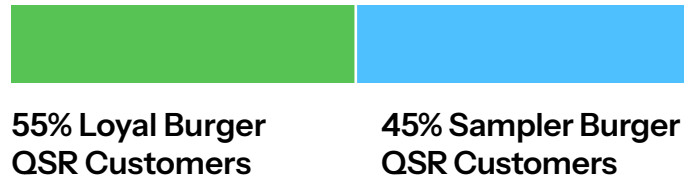
These three brands had the largest share of customers who visited
them and at least one competitor inside the same eight weeks.

SoCal Samplers





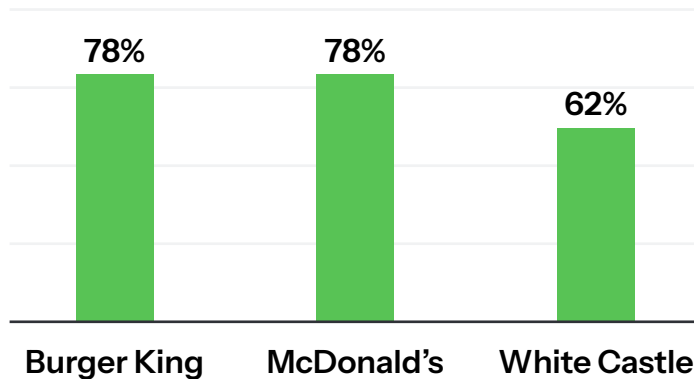
Chicago, Illinois



Which Brands Inspire the Most Loyalty?

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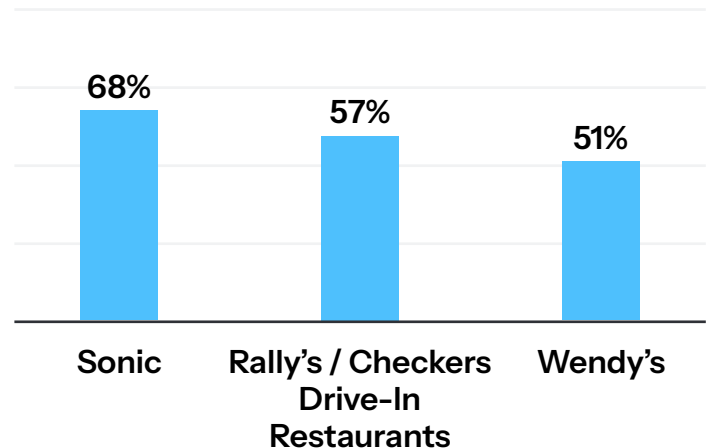
Chi-Town Chemistry



Which Brands Have the Most Samplers?

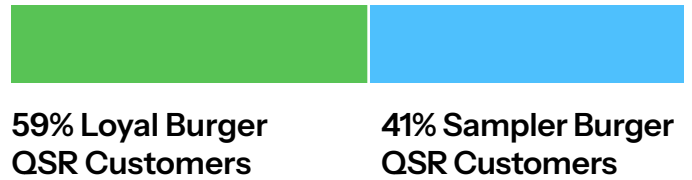
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Windy City Wanderers





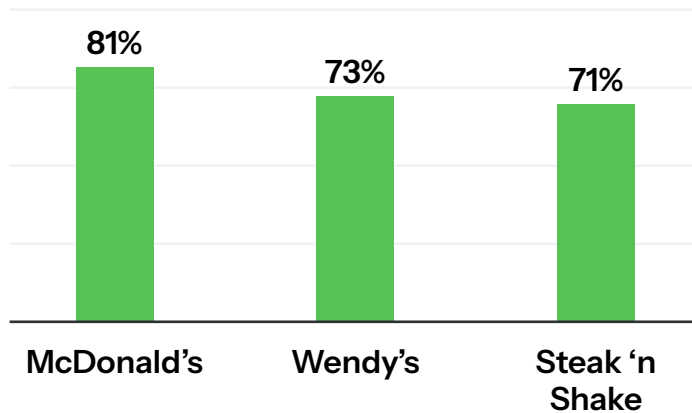
Washington, D.C.



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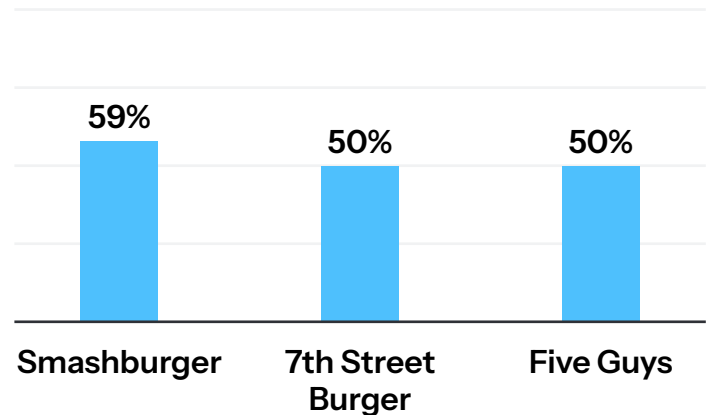
The D.C. Dedicated



Which Brands Have the Most Samplers?

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The Capital Conflicted





Dallas, Texas



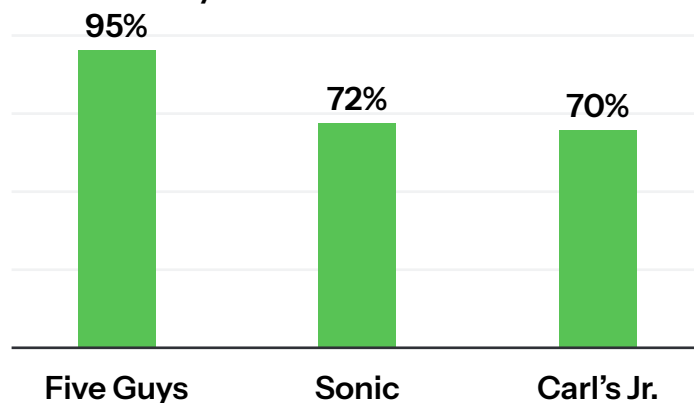
57% Loyal Burger
QSR Customers

43% Sampler Burger
QSR Customers

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Dallas during the period:

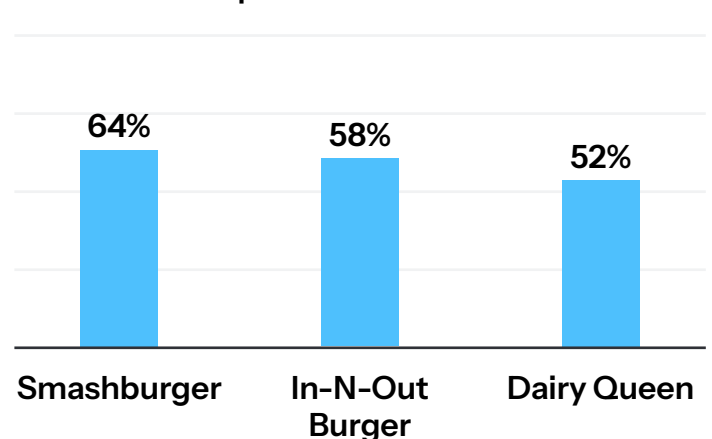
Lone Star Loyals



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The Texas Tempted





Denver, Colorado



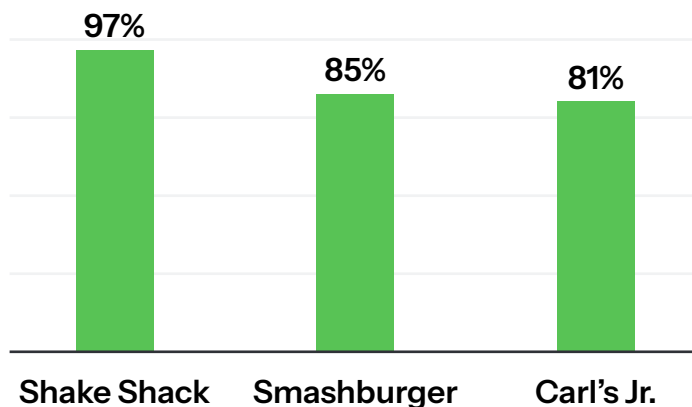
72% Loyal Burger
QSR Customers

28% Sampler Burger
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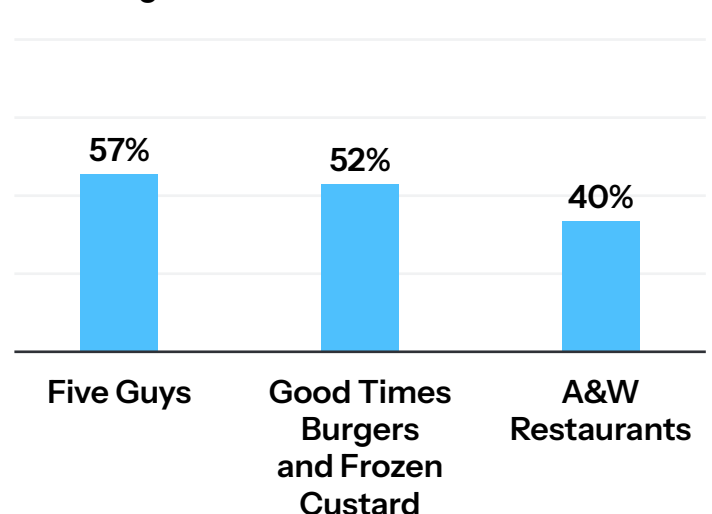
Reliable Rockies



Which Brands Have the Most Samplers?

These three brands had the largest share of customers who visited
them and at least one competitor inside the same eight weeks.

Bouncing Broncos



Methodology

Foot traffic data is derived from mobile location signals that indicate visits to restaurant locations. Over an eight-week period in June and July of this summer, Simpli.fi analyzed a sample of hundreds of thousands of visitors to U.S. burger QSRs across 20 metro markets. The national analysis covers the top 20 burger QSRs by foot traffic volume. The city-level analyses also include regional brands that rank among the most-visited in that metro.

During the period, did a visitor appear at one burger brand, or more than one? Visitors who went to the location(s) of a single brand, and only that brand, are loyalists. Customers who visited two or more are samplers. Every figure that follows is expressed as a share of a brand's own measured visit activity—so a regional chain and a national chain can be read on the same playing field.

In addition, to reveal the dynamics of burger QSR loyalty at the city level, five major metropolitan areas were analyzed for visitor loyalty.

Los Angeles, CA | Chicago, IL | Washington D.C | Dallas, TX | Denver, CO



About Simpli.fi

Simpli.fi is the real-world media platform built for the age of immediacy. By unifying digital behavior and real-world movement into a single actionable signal, Simpli.fi enables over 2,000 agencies, advertisers, and media groups to target, optimize, and measure campaigns precisely where consumer decisions happen. Built on the truth that people use digital to navigate the physical world, Simpli.fi is engineered to connect these signals in real time—allowing brands to act on consumer intent the moment it occurs and measure the impact all the way to the door. We thrive on innovation, data-driven results, and a culture of continuous improvement to make marketing more immediate, intelligent, and connected.

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