# near

## Understanding McDonald's & Subway Consumers in Australia using Location Intelligence

Perth

Adelaide

Melbourne

Sydney

Brisbane

**RESEARCH PERIOD**
**DECEMBER 2015**
UNIQUE USERS
**125,000**

● McDonald's
● Subway

**Melbourne**
● Bourke Street
● Elizabeth Street

**Perth**
● Hay Street
● Forrest Place

**Brisbane**
● Winter Garden Shopping Centre
● Central Plaza

**Adelaide**
● Rundle Mall
● Rundle Street

**Sydney**
● George Street
● Kent Street

## McDonald's / Subway

### Footfall Trends

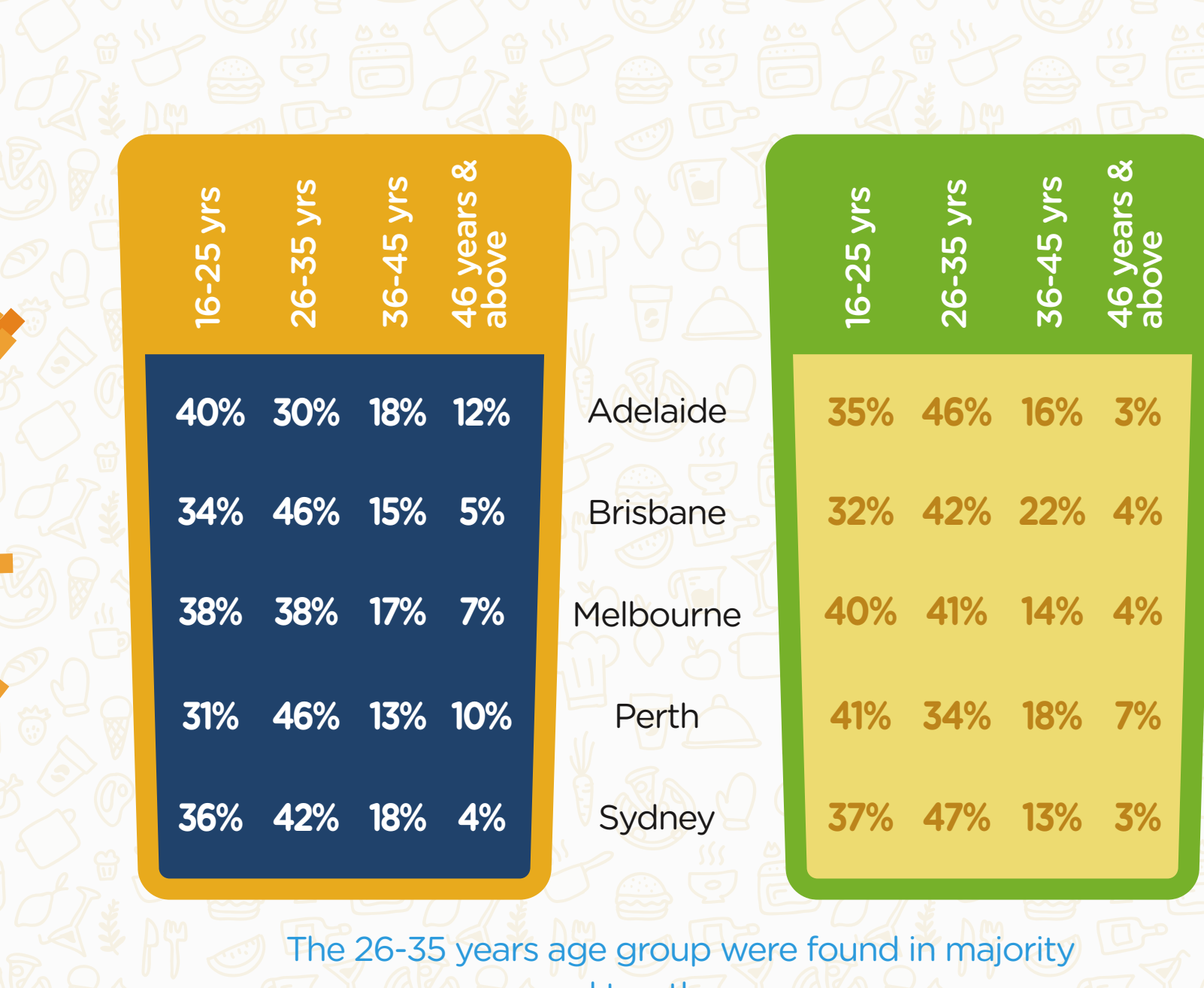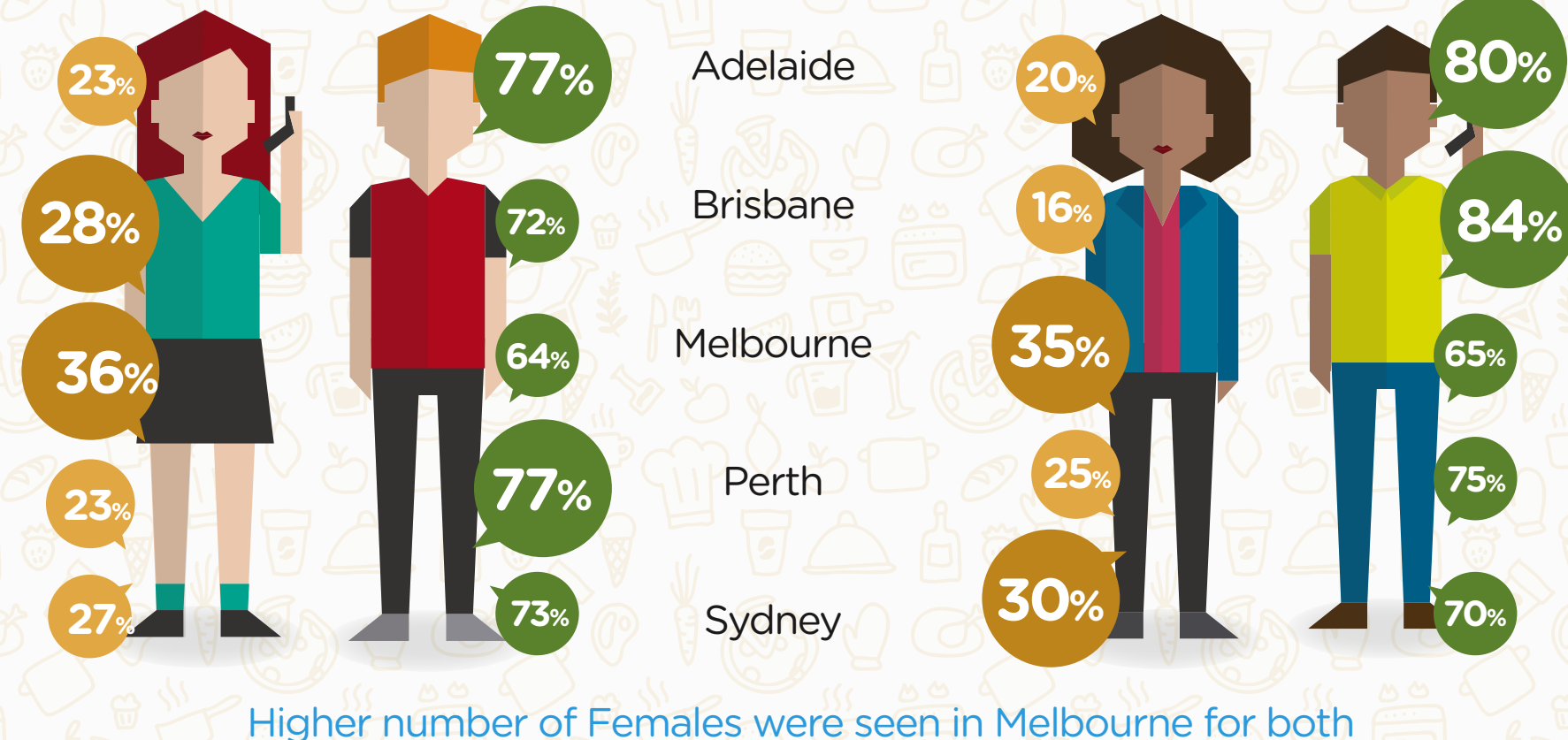|  | McDonald's | Subway |
|---|---|---|
|  | 60% | 40% |
| Adelaide | 63% | 37% |
| Brisbane | 27% | 73% |
| Melbourne | 21% | 79% |
| Perth | 46% | 54% |
| Sydney |  |  |
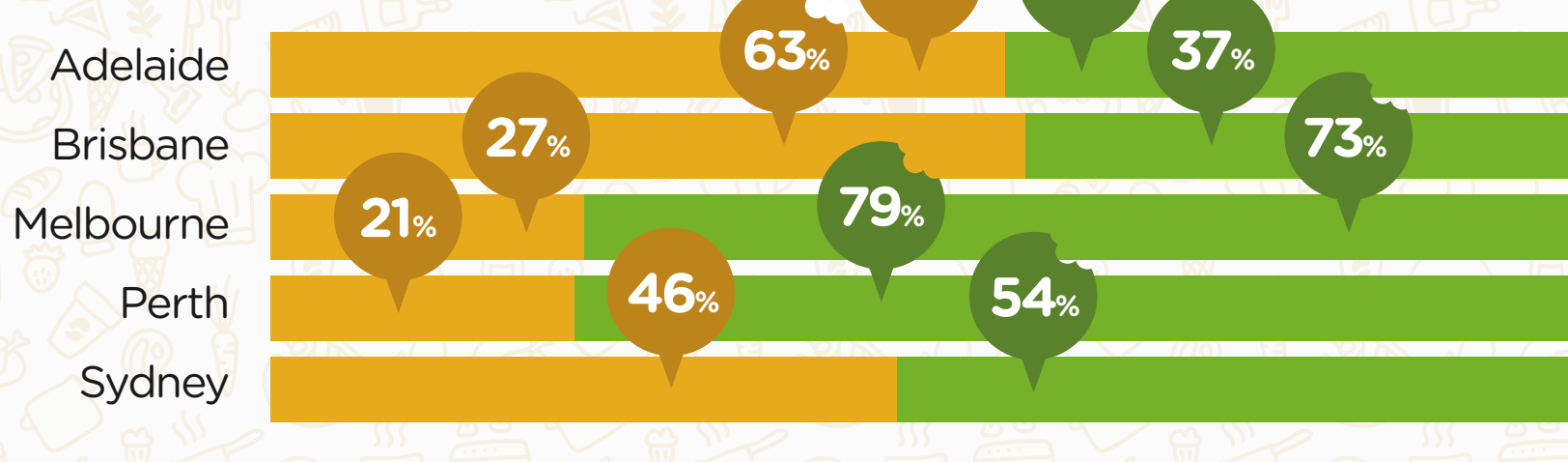
McDonald's had a greater volume of footfall in Adelaide and Brisbane while Subway had a greater volume of footfall in Melbourne, Perth and Sydney.
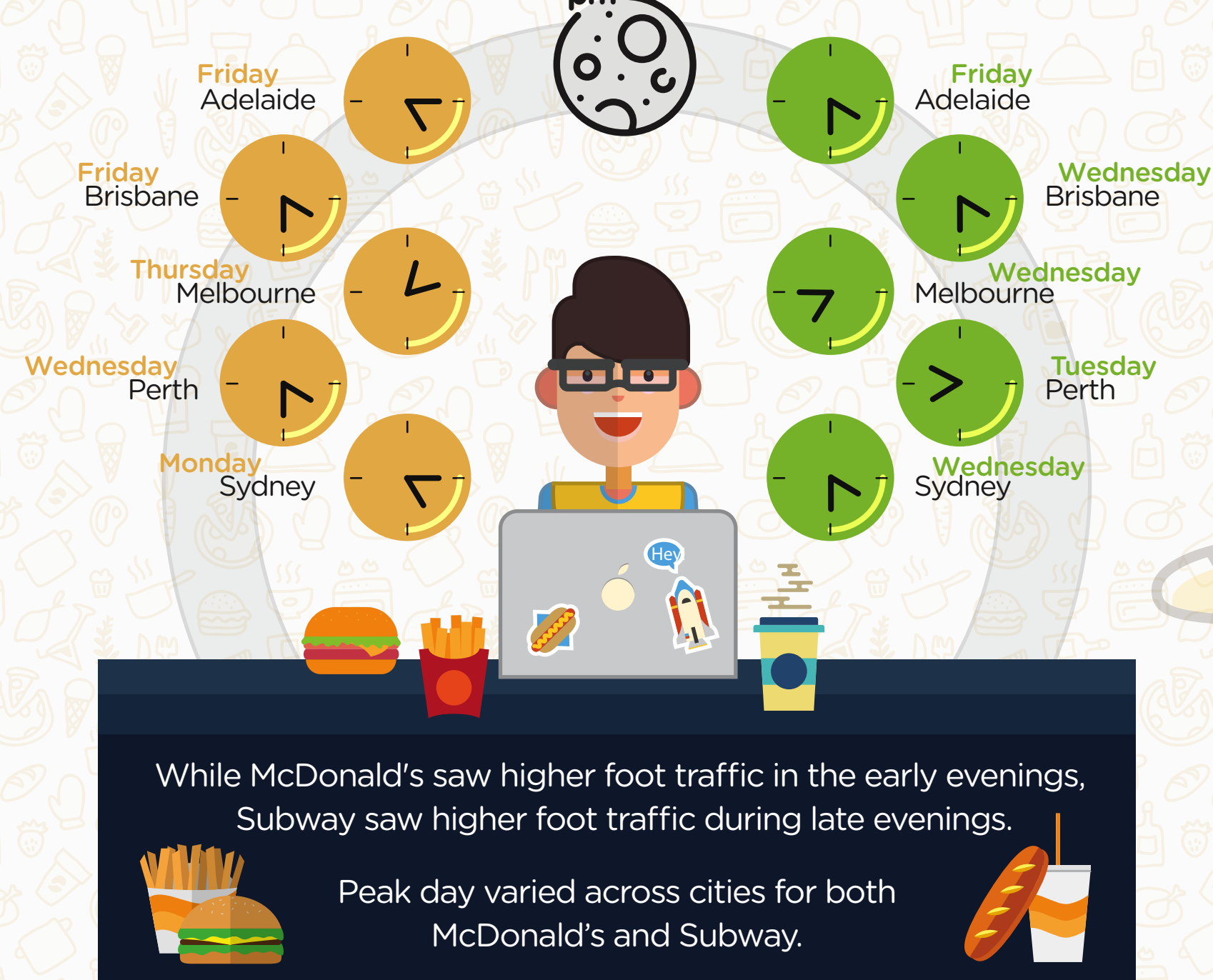
### Audience Trends

|  | McDonald's | | | | | Subway | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
|  | Affluent | Homemakers | Professionals | Students | Travellers | Affluent | Homemakers | Professionals | Students | Travellers |
| Adelaide | 15% | 25% | 26% | 20% | 14% | 10% | 26% | 32% | 26% | 6% |
| Brisbane | 28% | 19% | 35% | 6% | 12% | 22% | 20% | 24% | 16% | 18% |
| Melbourne | 23% | 21% | 34% | 5% | 17% | 32% | 14% | 36% | 2% | 15% |
| Perth | 34% | 12% | 32% | 12% | 10% | 31% | 10% | 43% | 13% | 3% |
| Sydney | 27% | 11% | 30% | 19% | 13% | 22% | 18% | 26% | 16% | 18% |
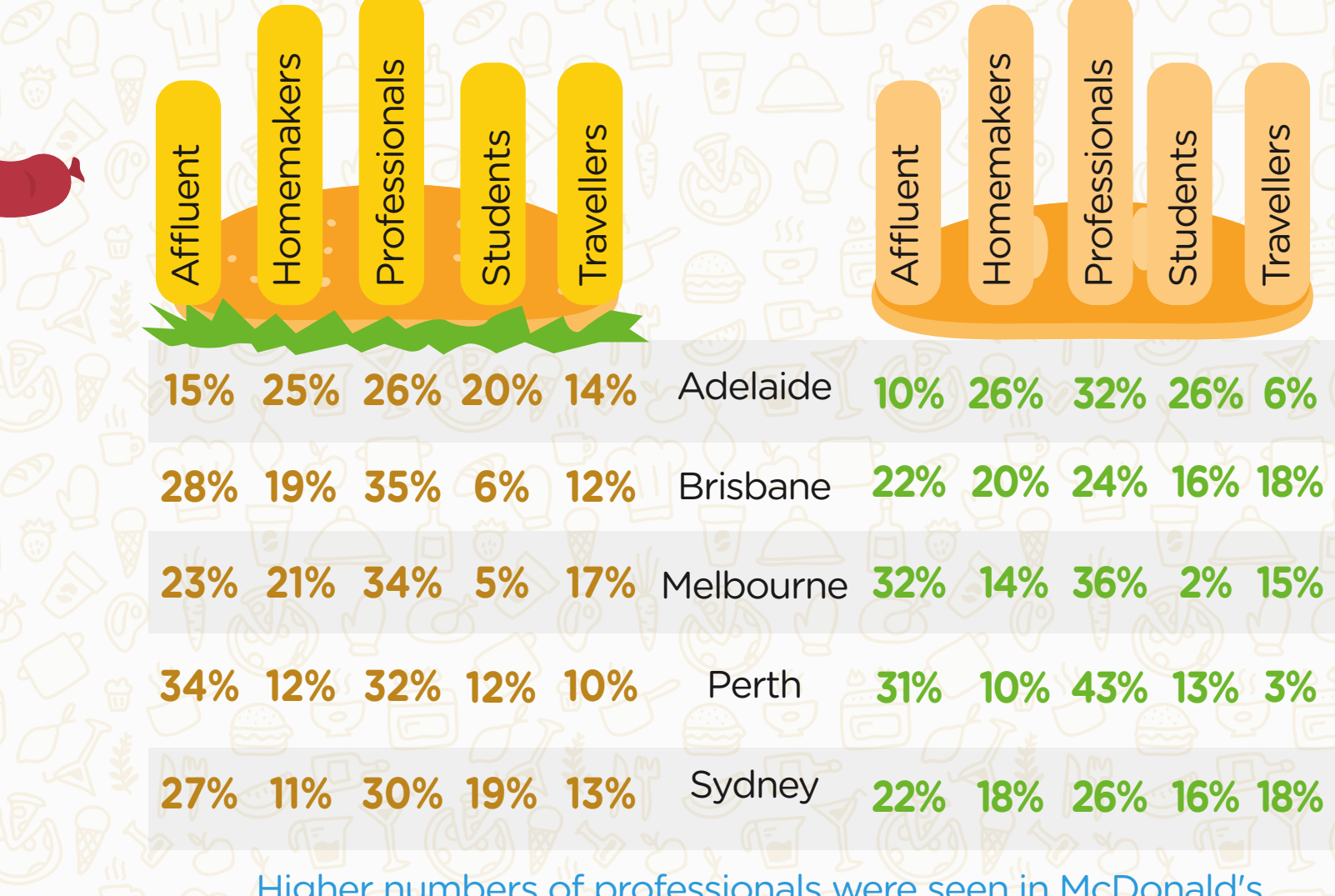
Higher numbers of professionals were seen in McDonald's and Subway compared to other audience segments.

### Age-wise Trends

|  | McDonald's | | | | Subway | | | |
|---|---|---|---|---|---|---|---|---|
|  | 16-25 yrs | 26-35 yrs | 36-45 yrs | 46 years & above | 16-25 yrs | 26-35 yrs | 36-45 yrs | 46 years & above |
| Adelaide | 40% | 30% | 18% | 12% | 35% | 46% | 16% | 3% |
| Brisbane | 34% | 46% | 15% | 5% | 32% | 42% | 22% | 4% |
| Melbourne | 38% | 38% | 17% | 7% | 40% | 41% | 14% | 4% |
| Perth | 31% | 46% | 13% | 10% | 41% | 34% | 18% | 7% |
| Sydney | 36% | 42% | 18% | 4% | 37% | 47% | 13% | 3% |

The 26-35 years age group were found in majority compared to other age groups.

### Gender-wise Trends

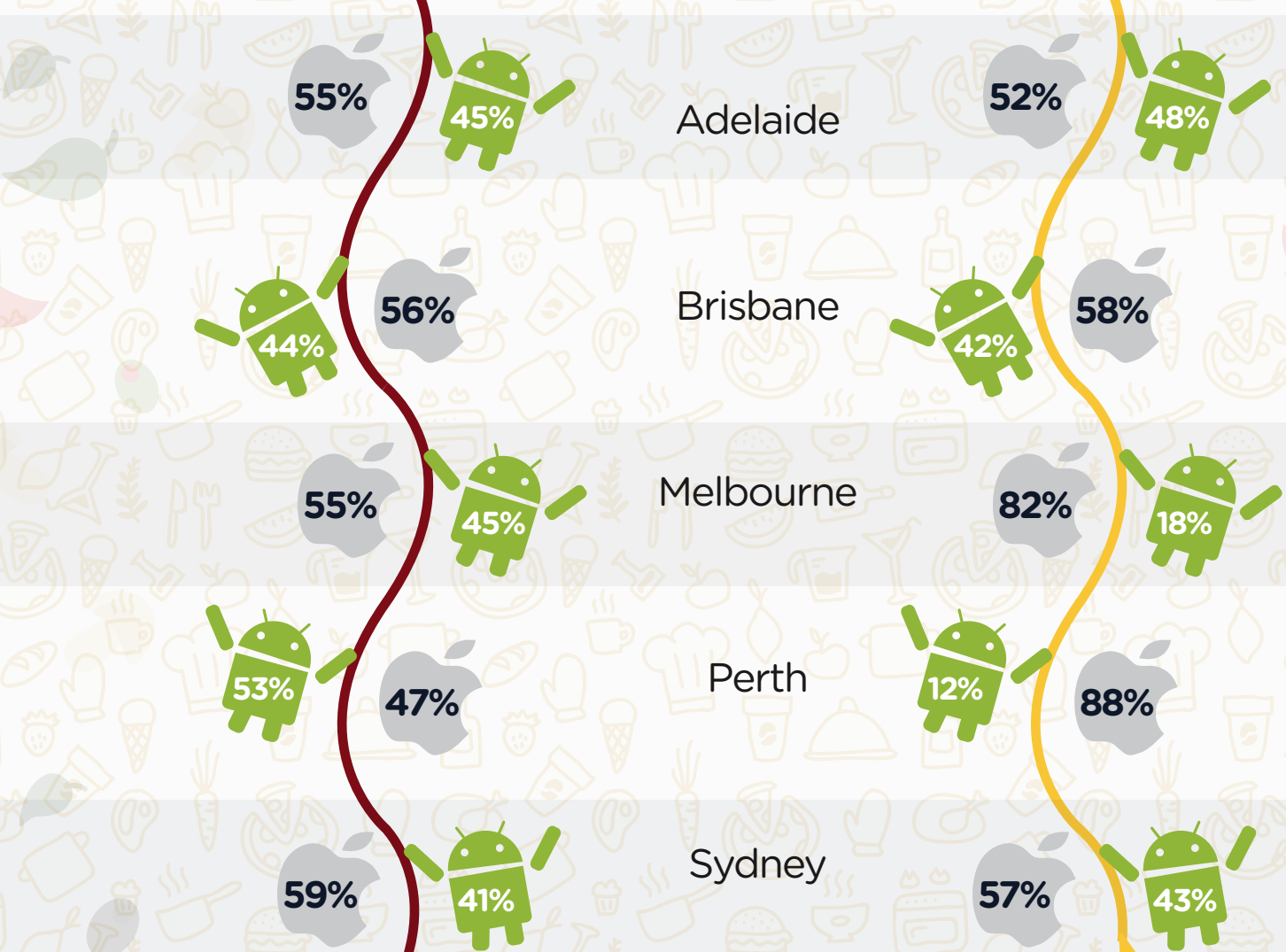|  | McDonald's | | Subway | |
|---|---|---|---|---|
|  | Female | Male | Female | Male |
| Adelaide | 23% | 77% | 20% | 80% |
| Brisbane | 28% | 72% | 16% | 84% |
| Melbourne | 36% | 64% | 35% | 65% |
| Perth | 23% | 77% | 25% | 75% |
| Sydney | 27% | 73% | 30% | 70% |

Higher number of Females were seen in Melbourne for both McDonald's & Subway while higher number of Males were seen in Adelaide & Perth for McDonald's and in Brisbane for Subway.

### Time Trends

**McDonald's**
Friday Adelaide
Friday Brisbane
Thursday Melbourne
Wednesday Perth
Monday Sydney

**Subway**
Friday Adelaide
Wednesday Brisbane
Wednesday Melbourne
Tuesday Perth
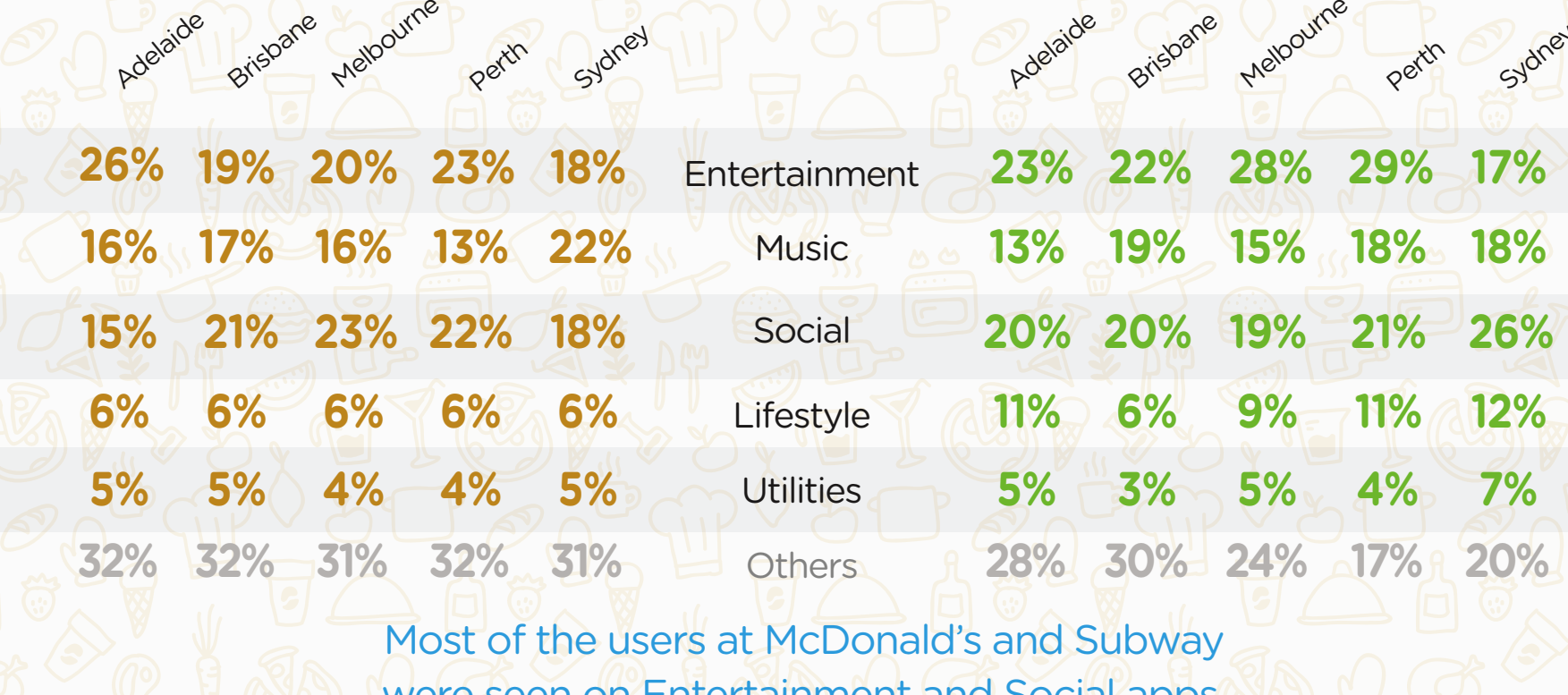Wednesday Sydney

### Day-wise Trends

While McDonald's saw higher foot traffic in the early evenings, Subway saw higher foot traffic during late evenings.
Peak day varied across cities for both McDonald's and Subway.

### OS Trends

|  | McDonald's | | Subway | |
|---|---|---|---|---|
|  | iOS | Android | iOS | Android |
| Adelaide | 55% | 45% | 52% | 48% |
| Brisbane | 56% | 44% | 58% | 42% |
| Melbourne | 55% | 45% | 82% | 18% |
| Perth | 53% | 47% | 88% | 12% |
| Sydney | 59% | 41% | 57% | 43% |

Higher number of users were seen on iOS platform compared to Android.

Higher number of users were seen using an **iPhone 6** across cities.

### Content Consumed

|  | McDonald's | | | | | | Subway | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
|  | Adelaide | Brisbane | Melbourne | Perth | Sydney |  | Adelaide | Brisbane | Melbourne | Perth | Sydney |
| Entertainment | 26% | 19% | 20% | 23% | 18% |  | 23% | 22% | 28% | 29% | 17% |
| Music | 16% | 17% | 16% | 13% | 22% |  | 13% | 19% | 15% | 18% | 18% |
| Social | 15% | 21% | 23% | 22% | 18% |  | 20% | 20% | 19% | 21% | 26% |
| Lifestyle | 6% | 6% | 6% | 6% | 6% |  | 11% | 6% | 9% | 11% | 12% |
| Utilities | 5% | 5% | 4% | 4% | 5% |  | 5% | 3% | 5% | 4% | 7% |
| Others | 32% | 32% | 31% | 32% | 31% |  | 28% | 30% | 24% | 17% | 20% |

Most of the users at McDonald's and Subway were seen on Entertainment and Social apps.

## About Near:

Near is the largest location intelligence platform providing real-time information on places, people and products. The Near platform powers Allspark, its flagship product enabling customers to visualize, engage and analyze audience data including their location and behaviour for data-driven decisions.

Founded in 2012, Near is headquartered in Singapore with a presence across Australia, South East Asia, Japan and Europe. To date, the company has more than 700 million profiled audiences and has put it to work for marquee brands including P&G, Coca Cola, Ikea, Audi, McDonald's, Toyota, Nike and Samsung.

Near is backed by investments from leading venture capitalists Sequoia Capital, JP Morgan Private Equity Group, Telstra Ventures and Global Brain Japan.
Visit www.near.co to find out more.