Managers' Perceptions of Customers Dinning Choice: Global Quick Service Restaurants in Egypt

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Abstract
The overall aim of this research was to investigate the key issues effect on customers dining choice in the global QSRs (Egypt). These issues have an obvious impact on the customers dining choice in the global QSRs' choice. The sampling frame includes the global QSRs managers and industry experts of the QSRs, such as McDonald's, Hardee's, KFC and Pizza Hut. The objective of this paper is to find out the QSRs managers' perceptions of the customers dining choice on customers' eating decisions. This paper looks at the outcome of qualitative research (semi-structured interviews with top management and industry experts of global Quick Service Restaurants (QSRs).
Findings revealed key issues affect the customers' decision eating out. The research findings refer to brand image, taste preference, cleanliness, quick service and finally word of mouth. This word of mouth builds a good or bad reputation of the QSRs in Egypt. This paper makes recommendations should help the local Egyptian QSRs to understand key elements affects the customers' dining choice in the global QSRs market.
Keywords: Quick Service Restaurants (QSRs), Customers Dining Choice,

Introduction
Globalization impacts on cookery especially in fast food chains such as McDonald's, Burger King, Kentucky Fried Chicken, Pizza Hut, etc. (Leidner, 2012). The QSR industry in Egypt comprises 24% international franchises and 76% local franchisees, 40% of international franchisees are American chains. US franchisees account for about 35% of total franchise revenues in Egypt (Abdelgawwad, 2012). The global QSRs had started its first branch in Egypt since the late of 1970 with British chain Wempy (Maher, 2007) after the open door policy. In the beginning of 1993, the global American QSRs started its business by launching Kentucky Fried Chicken (KFC) and Pizza Hut. Since 1994, when McDonald's QSRs opened its first two restaurants simultaneously in the Cairo districts of Heliopolis and El Mohendieseen, its Egyptian operations have grown so that today over 40,000 customers per day are served under the Golden Arches at over 54 outlets (McDonald's Egypt Web Site, 2013: online).The majority of foreign and local franchises are launched in Cairo. If successful, expansion into Alexandria would follow. International franchises were opening in Egypt such as global American QSRs chains such as McDonald's, KFC, Pizza Hut, Hardee's, Burger King QSRs and etc. On the other hand, there are local QSRs like Mo'men, Cook Door, Wessaya, Gad, Felfela, ElShabrawy QSRS and others (Maher, 2007). The arrival of the global QSR chains, particularly KFC and Wimpy, prompted the establishment of local QSR chains, e.g. Mo'men and Wessaya, from the late 1980s. There are now many local Egyptian QSR chains offering fast meals and sandwiches - Kebab, Kofta, Chicken, and Fried spicy liver sandwiches, Shish Tawook, Shawrma, Foul, Falafel and Koshary - to suit Egyptian preferences taste(Abdelgawwad, 2012). QSRs are new business of as a result of globalization which has a long history when considers street Kebabs in Turkey, Fish and chips in Britain, Noodles in China and station box lunches in Japan (Delaney & Delaney, 2004).
Today, QSRs play a successful role in the hospitality industry which has a narrow product range and standardization of responsibilities (Michman & Mazze, 1998). In these days the QSRs

industry extends globally which has its roots in the united states QSRs operations are often regarded as symbolic of culture, albeit the industry has certain been shared by its American origins (Leidner, 2002). *The fast-food sector is now more global than ever and international QSRs consumption continues to increase in popularity. Customers usually form perceptions of QSRs outlets* (Kara *et al*., 1997:381)

QSRs are a part of the hospitality industry, recently the global development and growth of the QSRs has become a considerable phenomenon, i.e., McDonald's, KFC and Pizza Hut characterize this expansion (Ball & Roberts, 2003), this QSRs' expansion is not only in the western countries but also in the Middle-east countries.

QSR's division is now more universal in consumption which has a huge reputation globally (Kara et *al*., 1995). Furthermore, QSRs is now produced at restaurants, drive-through, at stadiums, airports, zoos, high schools, elementary schools, and at universities, on cruise ships, trains and airplanes, at K-Marts, Wal-Marts, gas stations and even at hospital cafeterias (Schlosser, 2001). Grunert (2005) stated that characteristics of food quality are depending on the food brand and customers' taste preference. Additionally, different personal perceptive determinants on food quality may also lead to the struggle to understand the consumer taste preference (Rijswijk & Frewer, 2008)**.**

Customers' Dining Choice

Restaurant managers know real causes why customers select restaurants (Njite et al., 2008). So, this research depends on the managers' perceptions to know the real factors of customers' dining-out choice. The customers dining choice impacted by factors such as the following: customers' attributes such as; age, sex, and job; characteristics of the dining-out location such as proximity of restaurants, quality, atmosphere, recommendation, advertising, previous experience, environmental influences, quality influences (Aksoydan; 2007). Pettijohn et al. (1997) explained that the three key factors of QSRs choice are quality, cleanliness and value. Furthermore, Marinkovic, et *al*. 2015 stated that the most important factors restaurants selection is quality of food; service quality; price; interior and exterior. Additionally, values, eating habits, family structure, taste, preference, affect consumer food choice decision (Anada, 2011).
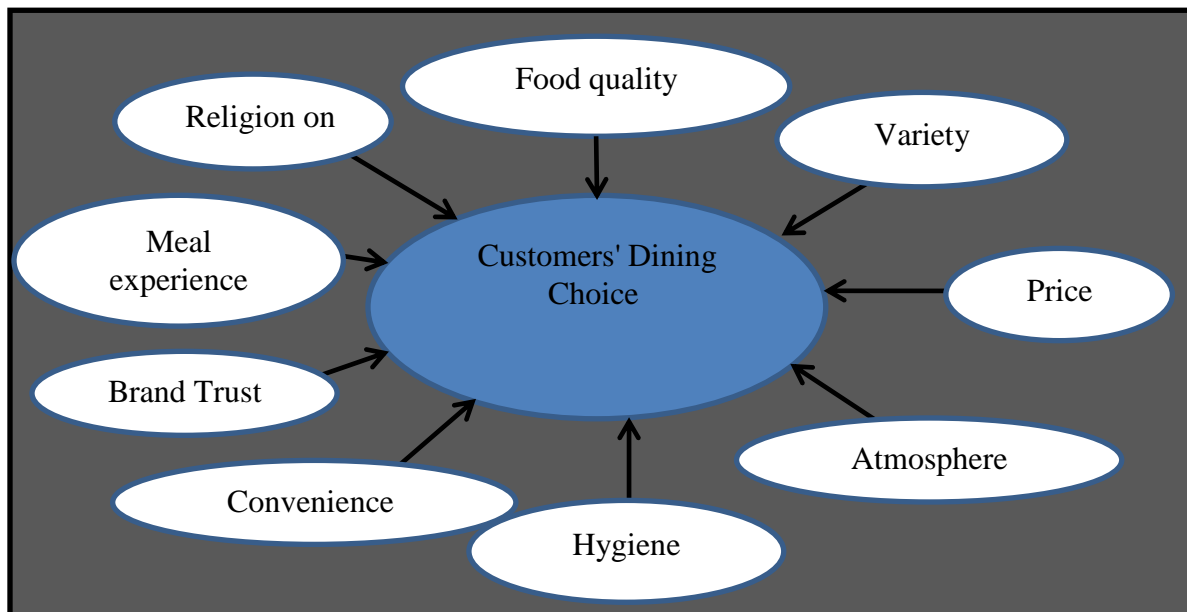
"*Several factors can influence consumers' perceived meal experiences in restaurants; these include information search, consumer value set, attitudes towards enjoyment, and practical expectations*" (Jensen & Hansen, 2007: 604). Due to, the absence of research on customers dining choice in the QSRs in Egypt, the researcher conducted this research. Chief among these empirically determined attributes are the quality of the food offered and its price or value. Service, atmosphere, location and convenience also frequently play a role, although they may vary in importance from one outlet to another and also in terms of the dining occasion (Auty 1992; Gregoire *et al*. 1995). The five factors most commonly included in respondents' rankings were: range, quality, price of food; atmosphere; and speed of service. One of the most important components of the customers dining choice is products' taste since the ancient days, the customers' taste preference linked closely to the cultures (Wright et al., 2001). So, the consumer preferences may be changed for new product and more innovative idea according to the new trends of taste in the global QSRs for instance; some Pizza restaurants emphasize the way of food preparation to be unique from old restaurants (Reiad and Bojanic, 2010). As, a result of food fashion the global QSRs use adaptation strategy which is necessary for many factors including consumer tastes/preferences and laws /customs. There are many situations where McDonald's modified the product because of religious laws and customs in a country (Vignali,

2001). The marketers follow the new trends of food fashion to build the customers' taste preference throw different steps which are adaptation, customization before setting the standards (Abdelgawwad, 2012). Lewis (1981) highlighted on the most important five factors for selecting food places which are *"food quality; menu variety; price; atmosphere; and convenience factors"*. In the same side, previous experience for the customers in their own home countries affected on selecting food places outside their home countries similar to McDonald's; KFC; Hardee's which served a consistent quality with quick service. (Wright et al., 2001) stated that religion is one of the most issues which build the customers preference for examples eating products' pork prohibited for Muslims but for non-Muslims it is allowed, the second examples, eating Cow's meat is prohibited for Muslim. "*Markets are people not products*". Hollenson, 2007:19). So understanding the customers' preference experience is the key of success for any business. On the other side, failing to understand the customers' preference experience means failure.

The qualitative research has been adapted to realize understanding the impact of preference experience on the customers buying decision in selecting their food in Egypt (Creswell, 2003). This research was conducted to determine the most effective elements of the customers dining choice through sequential investigative interviews with industry experts and top marketing managers.

This article uses exploratory analysis to reflect on the vital role of key issues which act on the customers dining choice decision positively or negatively in Egypt. The key question is what are the key issues affected on customers dinning choice in the global and local Egyptian QSRs. The consumer selected restaurant as a result of consumers' loyalty (Clarke & Wood, 1999), in the same time, as brand trust which depends on the quality consistency and hygiene. Moreover, the meal experience presents a moment in the everyday life of human beings so the individual characteristics of customers will have their own experiences in eating at home or restaurant (Warde & Martens, 2000).

Figure 1: Customers' dining choice in the global QSRs according to previous studies.

Methodology

"*Methodology is the strategy, plan of action, processor design lying behind the choice and use of particular methods and linking the choice and use of methods to the desired outcomes*" (Crotty, 2003: 3). 20 semi-structured interviews were conducted face to face with global QSR managers and industry experts in and out their working hours in July 2016 in Cairo. The aim was to know the perceptions of industry experts, marketing managers and branch managers about the customers dining choice in the global QSRs (Yin, 2009).

These exploratory interviews were designed to illicit on their perceptions of customers dining choice of the industry practitioners and the marketing managers. For confidentiality the industry expert's names were coded. Each of them was replaced by IN.EX. In the same vein, the marketing managers of QSRs were coded as M.M. and Branch managers were being B.M.

The research methodology adapted a case study. Case study is an effective tool for an exploratory research. Moreover, case study is a successful strategy for exploring "how" and "why" questions (Yin, 2009; Woodside, 2010). The overall aim of this research is: 1) critically review relevant literature about the QSRs' customers dining choice; 2) survey the key issues which affected the customers dining choice in the global QSRs; provide recommendations to the local Egyptian QSRs. Table 1 shows the global chain QSRs in Egypt. In this research focus on the global QSRs such as such as McDonald's, Hardee's, KFC and Pizza-Hut etc (Gillham; 2005).

Table 1: The global chain QSRs in Egypt

Global Chain QSRs	
Restaurants' Names	**Business Concept**
McDonald's	Burger Sandwich
KFC	Chicken Sandwich
Hardee's	Burger Sandwich
Burger King	Burger Sandwich

Accessibility was a critical issue in my work because there are some of interviewees would not allow me to conduct interviews with them. They included respondent's top management. Despite repeated contact. Now I would like to ask myself why this numbers of interviews, I continued to conduct interviews with respondents till one of these respondents repeat the same information of last interview.

Analysis

I conducted all global QSRs managers' interviews in their official offices and I take oral permission to conduct interviews. On the other hand, the vast majority of conducted interviews with local QSRs managers were out of their working hours. The interviews were mainly conducted in Arabic language. Interviews involving experts and managers were conducted in Arabic as they did not have a good command of English. In such situations, independent verification of translation was sought from relevant sources mainly managers to ensure that the translation accurately represented the views and opinions of respondents. Annotations were used in addition and involved the use of informal notes alongside the interviewee's words and drew on field notes taken during and after the interviews. Consequently, the data quoted from them were afterwards translated to the English language. By taking in consideration the fact that colloquial Arabic was used during the interviews, literal translation was inapplicable. Thus, conceptual translation was applied.

Data analysis
Content analysis was adopted to analyse semi-structured interviews data. *"A major goal of any scientific investigation is to provide a description or explanation of a phenomenon in a way that avoids the biases of the investigator"* (Neuendorf, 2002: 13). Berelson (1952, cited in Perry, 2002:97) said that *"a research technique for the objective, systematic, and quantitative description of the manifest content of communication".* Furthermore, Salkind (2010: 233) defined content analysis as "a research technique for making replicable and valid inferences from texts (or other meaningful matter) to the context of their use.*" Also,* he added that content analysis is a methodical tool which can give new kinds of figuring out social phenomena or notify decisions on relevant events.

Research Results and Discussion
Customers' dining choice is a vital issue to the global QSRs market which customers prefer to eat with global QSRs such as McDonald's, Hardee's, KFC, Pizza Hut and etc. when they are out of their home country for reasonable reasons. *"There are some factors which affect the customers' dining choice experience such as restaurants decoration; staff appearance; restaurants location; staff behaviors; general appearance and promotion".* One of customers' perceptions explained that *"Teenage customers are eating out just for fun and imitating American life without considering real reasons of selecting restaurants such as taste, flavor, packaging, time, sanitation, hygiene and etc."*

1) Brand image
One of branch managers distinguish that the global brands' images (such as McDonald's, KFC. Pizza Hut, Hardee's and etc) are famous with CHAMPS: Cleanliness; Hospitality; Accuracy; Maintenance; Product with a consistent quality; Service (quick service) which affected on the international customers on selecting their food in Egypt. In the same vein, one of the customers assured that *"global brands are famous with sanitation and hygiene so, I am eating without doubting in food poisoning".*
"The factors affected on QSRs' image are: Staff appearance; Restaurants' decoration; site of restaurants; Staff behaviors; Management; General appearance; Tools of Promotion" as one of the marketing managers explained. The IN.EX explained that *"the global brand's image are very important for international and A, B customers class in selected their food outcome borders",* on the other side, one of the M.M. highlighted that *"there is a few numbers of the international customers trying to taste the authentic Egyptian taste when they come first time".* On the opposite side, one of M.M. stressed that brand images means a lot for the high class customers. "*McDonald's is well educator, Children today will be future youth*" which mean McDonald's build the image of McDonald's in the children perceptions by serving toys. One of the B.M. stated that: *"The brand image builds in the customers' perceptions through meal experience"* which means that meal experience makes brand trust which customers search for its favorite brand.
"One of the most popular elements affect the customers' dining choice is restaurants' image so if you would like to take care of restaurants' image you should make a continuous remolding and innovation". IN. Ex.
In the same vein, one of M.M. highlighted that *"Preference experience customer linked with logo of restaurant so overseas customers prefer to eat in global known QSRs because of the same taste preference".* M1 highlighted that *"preference experience means all customer's*

previous experience about restaurants which includes standard taste, size, flavor, features, texture, packaging and finally food hygiene" as Wright et al.2001) highlighted on the importance of taste for the Egyptian customers.

2) Product taste preference

In terms of meeting consumers' needs, we make market landscape research to understand the local taste, eating habits, and way of thinking to eat. This research is focusing in the A, B, C1 class; this research asked these three classes about what are they like to eat in dinner and lunch.

> *McDonald's is a market leader because it spent a lot of money on market research so McDonald's build its strategy according to "landscape research. The aim of "landscape research" (it cost high expenses) is to know all customers' habits and the local taste, the way of thinking, what are they watching on T.V.? What are they (A. B., C1) eating in the dinner? What are they preferring in their launches?*

B.M

> *Understanding the changes in customer preferences is one of the most important things for restaurants companies to consider this understanding could lead to launching new menu items (for example, chicken products) as well as new cooking system (for example, "made for you" by McDonald's). Consumers are continuing to shift preferences in flavour those products considered as healthy in diet.*

(Hahm and Khan, 2001: 77)

In terms of the importance product taste, restaurants make taste panel and focus group to take their notes in account before launching new products in markets. The taste panel or focus group which includes from experts of quality insurance, operation managers and training managers.

> *We make taste panel or focus group free for taste (without participants' paying money) before we intend to introduce this product to the market. This taste panel will include experts of quality insurance, operation mangers and training managers.*

M.M

Egyptian customers like the eastern taste like spicy and grilled items taste. So global and local Egyptian chain QSRs compete with each other in adapting a popular local Egyptian taste dishes.

> *Because of the importance of taste preference, McDonald's is doing focus group for NP to know if it satisfies customers' needs with local taste or no. There are some of specific researches to identify the different tastes of the different parts of the same country, based on the scores.*

B.M

It is important for restaurants to take in account taste preference of its customers. Some of global QSRs like KFC introduced some products in spicy taste to suit with Egyptian customers' taste. "*Taste preference suit culture because the Egyptians prefer spicy taste so we introduce spicy meals. 60% of total sales from spicy meals*" (M.M)

There another case of global QSRs McDonald's adapted Mc Do sandwich (sweet and sour taste) from McDonald's Philippines. McDonald's in Egypt changed the taste of sandwich from sweet and sour taste to spicy taste to suit with Egyptians customers' taste. "*The taste of products according to the culture of people (Egyptian culture) depends on customers' demands. Ex. sweet and sour sauce does not fit the Egyptian tastes.*" (B.M)

KFC create two versions of a new product which called Reezo (long grain Rice) for KFC in Egypt and another in Saudi Arabia (Basmati rice). KFC (Egypt) used the Egyptian rice in the Reezo recipe because Egyptian customers like Egyptian rice. KFC (Saudi Arabia) used the

Basmati rice in Reezo recipe because Saudis like to eat this type of rice. "*Taste of products differs from country to another like Reezo (Egyptian rice with chicken breast slices) plates which introduce in Egypt differ from Saudi Arabia (Basmati rice)* (M.M.). In taste, Egyptian prefers eastern taste. "*Taste in our country prefers Eastern flavour because Egyptian taste is old"*. (B.M) The spicy and herbs taste is the most acceptable for Egyptian customers. *Egyptian taste prefers spicy and herbs in the meals* (IN.EX). So, as a result of cultural diversity around the world McDonald's has adapted its products to national traditions and taste, such as the "Mckroket" in Holland, the "McKabab" burger in India, and the "Teriyaki burger" in Japan (Molz, 2006).

3) Cleanliness

Customers know that the global brands' images (such as McDonald's, KFC. Pizza Hut, Hardee's and etc) are famous with CHAMPS: Cleanliness; Hospitality; Accuracy; Maintenance; Product with a consistent quality; Service (quick service) which affected on the international customers on selecting their food in Egypt. *"Cleanliness is valued not as a means for ensuring health"* (Reiter, 1996; 117). Cleanliness was ranked as the most highly valued aspect of restaurant selection among almost all respondents which was followed by taste of food, atmosphere, and quality of service, price, children's menu, and menu variety (Elder *et al.*1999). The American QSRs such as McDonald's, KFC etc had large windows allowing witness to see into the kitchen, the stainless-steel counters and tiled floors reflected high standards of cleanliness (Lozada, 2005). Furthermore, (77%) percent of fast-food consumers rated that cleanliness of a restaurant as an "extremely important" attribute of QSR chains, which include traditional fast-food shops such as McDonalds and Burger King (Research Alerts, 2006). "*We are always keeping everything in our restaurants cleaned and sanitized starting from the restaurants' door until toilets*" M.M.

4) Quick Service

The concept of time is very important to the QSRs' customers so to serve customers' orders before time is on time and to serve on time will be late and late will be not acceptable for the concept of QSRs. *"Quick service is a fundamental step for QSRs because it is core concept for QSRs compete to serve customers rapidly to attract more customers"* which every QSRs has its unique way in service as (Reiad and Bojanic, 2010) clarified. "*Unique service to compete your competitors" trying to give customer's orders before time*". For example, *Hardees restaurant served 5 star services to his customers, customers do not stand up except go toilets or go to home" speed of service must not exceed more 5 minutes for sandwiches, 7 minutes for some meals, 12 minutes for chicken meal"*. "Speed of service is the core concept of QSRs so this point is very important to QSRs' customers". Also, one of the successful factors of QSRs is their ability to serve food without waiting "quick service restaurants" (Dittmer & Griffin 1997).

- One of the M.M. expressed that *"there are four truth glances which are the moment of greetings, the moment of taking orders from customers, the moment of serving customers and the moment of greetings customers before leaving the restaurants"*. Similarly, one of the INEX explained that preference experience built on the **M**oment **of T**ruth (M.O.T) which includes ten steps: *Driving By or walking around; Entering; Received; Ordering; Getting the food; Eating; Visiting toilets; Experience; Empty tray; Hospitable manner"*.
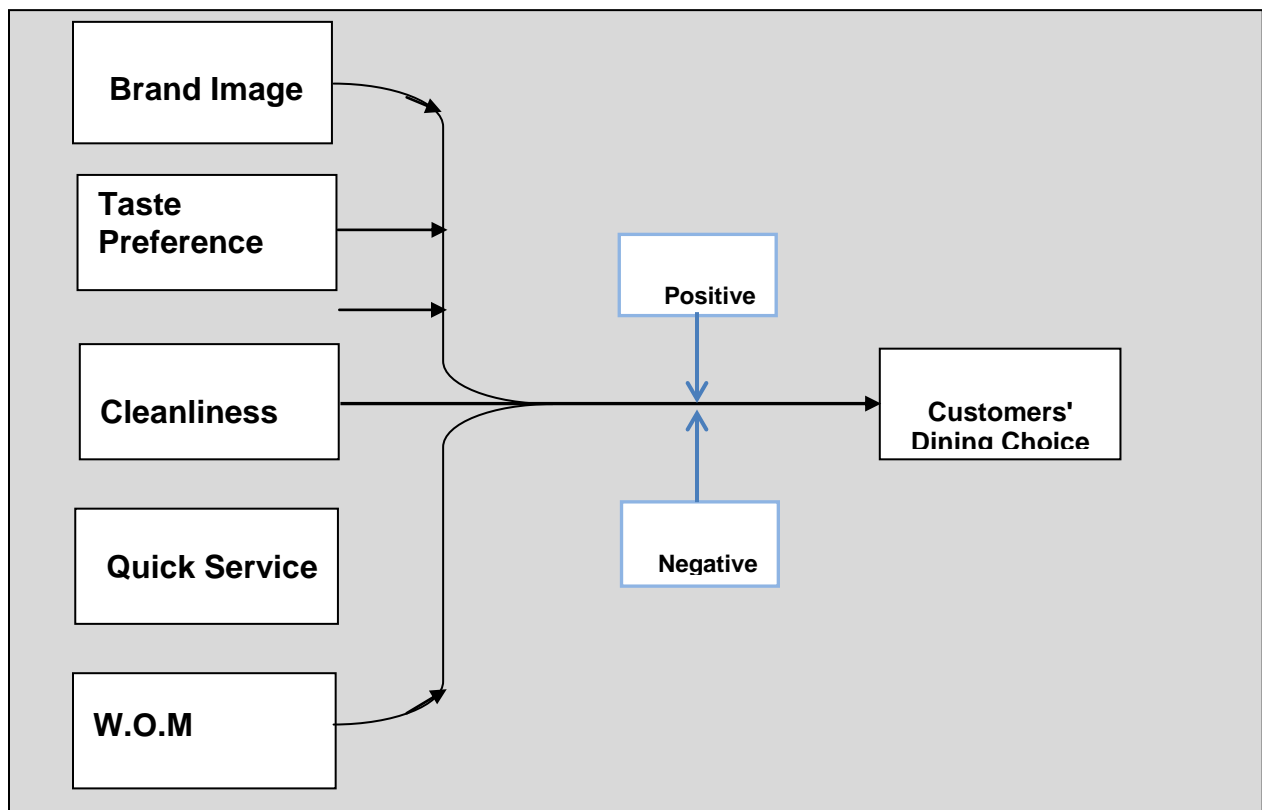
5) Word of Mouth (W.O.M)

- **W**ord **o**f **M**outh (**W.O.M**) is very important for the communication between the customers tells each other's about bad or good food as Jeff Bezos President of Amazon.com said that "*If you build a great experience, customers tell each other about that. Word of mouth is very powerful*". So, one of the industry expert explained that *"All the best and bad issues which customers received will translate to the word of mouth*".

> *These perceptions may be formed by word-of-mouth communication, exposure to promotion from fast-food restaurants, past personal experience and other sources. Some perceptions may even be incorrect; they may differ from country to country*.

(Kara *et al*., 1997:381)

One of the M.M. stated that *"global brand has a strong advertising ".* In the similar vein, one of the industry experts stressed that *"promotion must be fit the delivered product or service".*

Figure 2: The vital elements affect customers' dining choice in the global QSRs

Recommendations and Conclusion

The key determinants of the preference experience are the moment of truth, quick service and finally hygienic food which have a strong impact on the international customers. The customers have preference experience so they are not going to eat from the local Egyptian QSRs. there is pervious image about the international QSRs such as McDonald's, Pizza hut, KFC, Hardee's and etc. the local Egyptian QSRs should:

1) Enhance the moment of truth which includes which includes ten steps: Driving by or walking around which customers find the restaurant logo; Entering which notice the cleanliness of the restaurant; Received by warm smile of the staff; Ordering; Getting the food on time; Eating;

Visiting toilets which is clean; Experience; Empty tray; Hospitable manner. All of these steps build a strong customers' perception for the global QSRs;

2) The local Egyptian QSRs should develop and improve CHAMPS which are a basic character of the global QSRs. CHAMPS: Cleanliness, Hospitality; Accuracy; Maintenance; Quality of product and Quick service, but also on the global QSRs served an international taste for the foreigners;

 3) All the food which served in the local Egyptian QSRs should be hygienic food.

- Local QSRs should improve its brand name (staff appearance; restaurants' decoration; location of restaurants; staff behaviours; management and tools of promotion) by following the same track of the global QSRs.
- Local QSRs should focus on the authentic Egyptian taste as a competitive advantage.
- The local QSRs should serve hygienic food by following steps of cleanliness in the global QSRs.
- The Local QSRs' service should be quickly.
- The local QSRs should develop its tools of internal and external marketing.
- The local Egyptian QSRs should develop and improve CHAMPS which are a basic character of the global QSRs.

Research Implications and Limitation
Qualitative research depends on the interaction between the researcher and participants through semi-structured interviews. This personal interaction may be biased and affects the course of research. The interview depends on the ability of the participants on telling the story and the researcher ability to pose questions and understand answers.

Future Research
For further research will conduct quantitative research with the international customers to reflect their perceptions. The quantitative research should hold with customers to what they will suggest; to improve the local Egyptian QSRs. Questionnaire with regular customers of the QSRs were undertaken to evaluate the important issues affected on preference experience in the QSRs. The preference experience affected consumers' buying decision in their food selection, especially in Egypt who had no previous experience in the local Egyptian chain QSRs, such as Mo'men, Cook Door etc., which has a previous image about the local Egyptian QSRs. Furthermore, one of the important issues which affect the preference experience is a good brand name, such as McDonald's, KFC, Hardee's, etc., which provide a quick service of consistent quality items.

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