

QSR INDUSTRY INSIGHTS REPORT

# ORDER UP

Unwrapping How Audiences Devour  
Quick-Service Restaurant Video Content



## INTRODUCTION

# Audiences Are Hungry For Food & QSR Video Content

QSR video content is booming on digital video powerhouses. On YouTube alone, the QSR space is clocking a dramatic 44% growth in views over the past two years as audiences flock to the platform for food reviews, challenges, recipes, and more.

It's not just user-generated content and influencers behind the explosion in QSR viewership. Brands are increasingly focusing their marketing efforts around YouTube and other video platforms to drive a measurable impact on their bottom line — including store visits, search lift, social growth, purchases and other quantifiable business results.

In this report, produced by Pixability's Insights Team, we'll focus on trends driving the growth of the QSR space on YouTube and other social video channels. Armed with these insights, marketers can cook up engaging marketing strategies, and form meaningful connections with their audiences through video.



## 01 | QSR SPACE

# QSR Is Growing Faster Than Gaming And Auto

The food and beverage space on YouTube has grown rapidly over the past two years at 46%, with QSR as a category growing at 44%. This is slightly faster growth than Gaming and Auto, two of the hottest categories in YouTube.

YouTube Views Per Industry\*

Gaming  
2.1T Views  
40% Growth

Food & Beverage  
884B Views  
46% Growth

QSR Space  
55B Views  
44% Growth

Auto  
424B Views  
40% Growth



## Brands Investing in YouTube Seeing Huge Growth in Views

Nearly all of the major QSR brands saw an increase in views in 2018, with Sonic Drive-In taking the gold for the most views and Jack in the Box seeing the largest increase in views in 2018. It's no coincidence that Sonic also had the highest estimated ad spend, as their investment paid off in view growth.

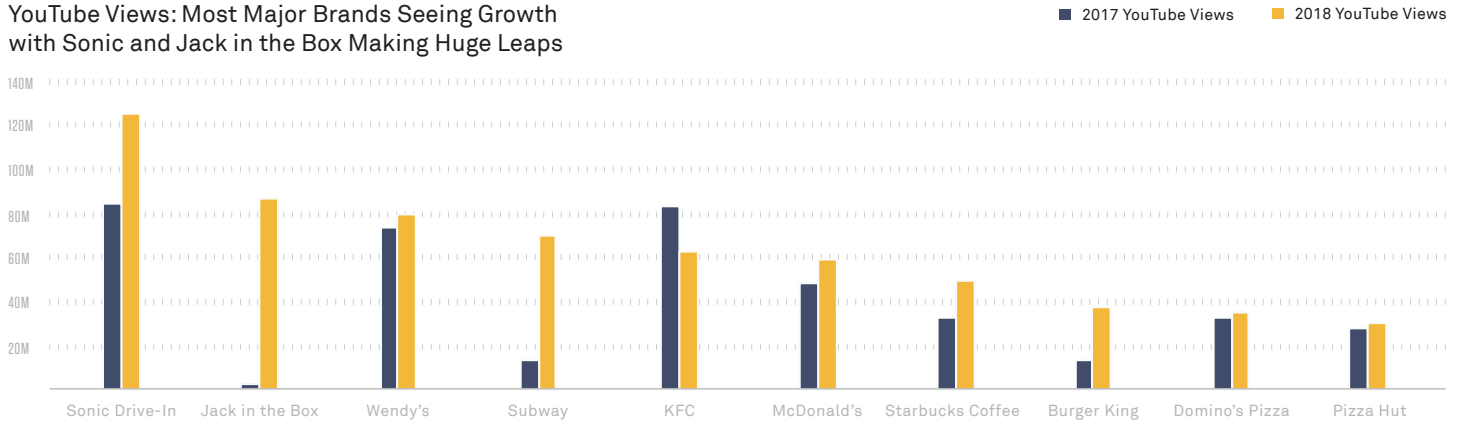
To maximize impact among consumers, QSR companies should follow the model of the stand-out brands that invested in both organic content and paid media support. Pixability found that while viewership of QSR content remains steady across quarters — with a slight uptick in Q3 — brand content sees the most views in Q4, likely due to pushes by brands during the heavy family travel season. But marketers also shouldn't limit their video strategies to tentpoles or Q4, but adopt an always-on approach. After all, viewers are hungry for content throughout the year, not just in Q4.



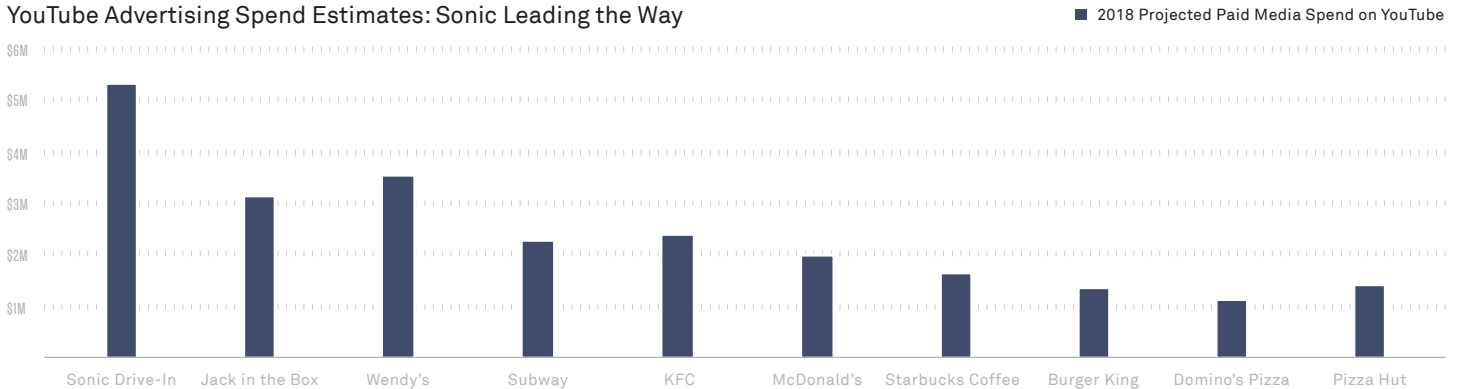
**JACK IN THE BOX,  
SUBWAY, AND BURGER  
KING ALL SAW 3X+  
GROWTH IN VIEWS**



## YouTube Views: Most Major Brands Seeing Growth with Sonic and Jack in the Box Making Huge Leaps



## YouTube Advertising Spend Estimates: Sonic Leading the Way

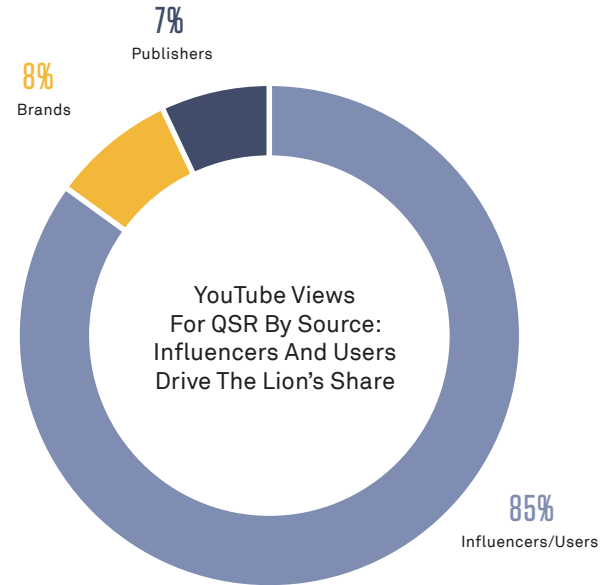
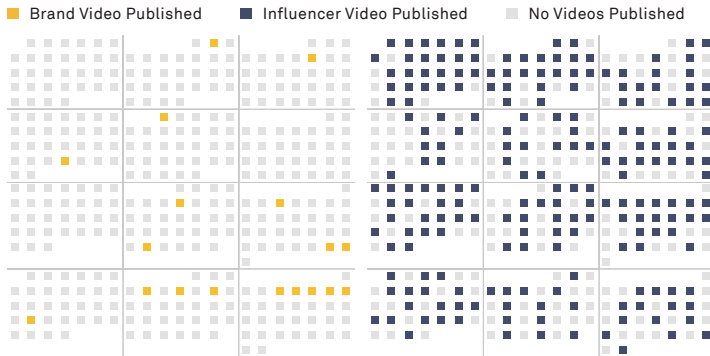


## Influencers Grab The Biggest Piece Of The Pie

Across YouTube, influencers grab the majority of audience eyeballs — but brands can close the gap by taking pages from influencer playbooks by doing the following:

- Publish consistently to keep audiences subscribing
- Publish long-form content to keep audiences engaged
- Incorporate made-for-digital genres into brand strategies
- Partner with other brands and influencers to tap into pre-built audiences

### 2018 Publishing Calendar For A Major QSR Brand vs. A Major Influencer



## QSR Content Menu: Here's What Viewers Are Watching



**Top List:** Rankings or lists of fast food restaurants, facts, ingredients, etc.



**Challenge:** QSR-related dares or competitions, such as tasting different flavors or menu items while blindfolded.



**Commercial Ad:** Repurposed TV commercial asset, usually between 15–60 seconds in length.



**Food Entertainment:** Traditional comedic content centered around a food item or establishment.



**News:** QSR-related news content, such as new menu items.



**Parody:** Satire or parody videos lampooning QSR food, establishments, or mascots.



**Tutorial:** An instructional video on how to recreate QSR meals.



**Review:** A review of a meal or menu item, often branded and packaged products.



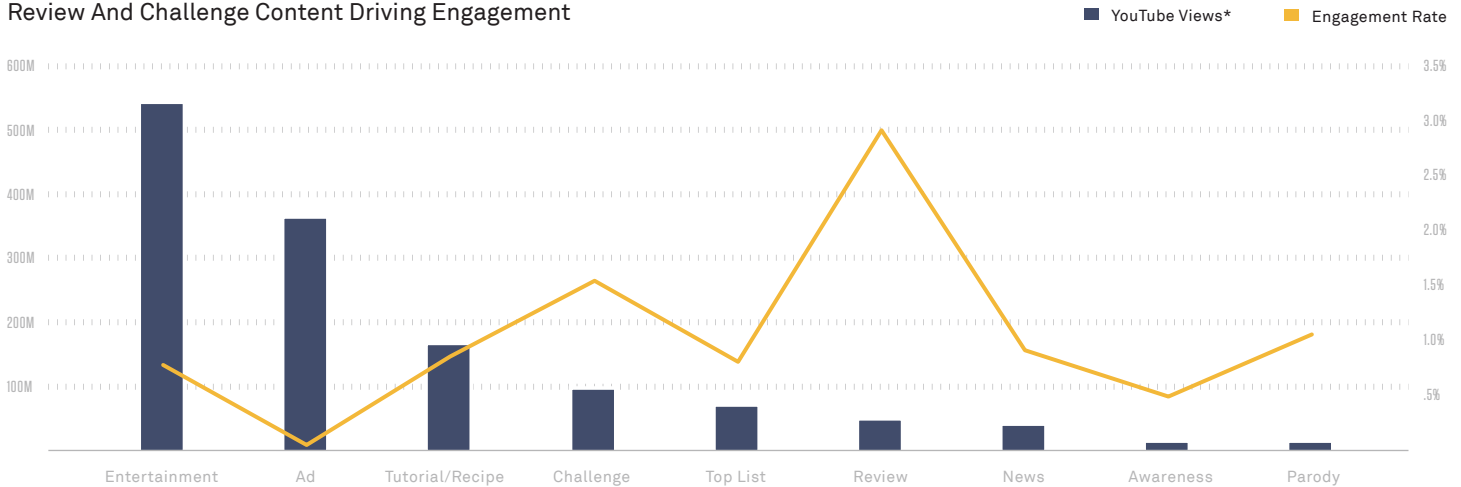
**Awareness:** Raising awareness of social and current issues, such as bullying.



## Reviews And Challenges Serve Up The Highest Engagement Rates

While repurposed tv ads and videos in the entertainment category are driving the majority of the views, the videos that drive that most engagement are review and challenge videos. Brands should look to move beyond just repurposed tv ads to some of these other types of videos with a more user-generated content (UGC) feel, to drive higher engagement.

**YouTube Views & Engagement By QSR Category:  
Review And Challenge Content Driving Engagement**

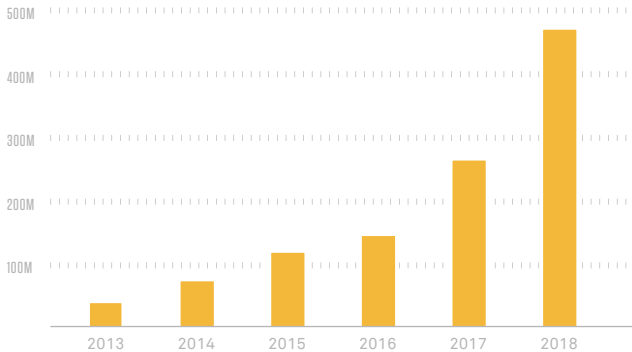




## The Breakfast War Heats Up On YouTube

On YouTube, audiences are increasingly craving breakfast content — annual views of this sub-space increased by 78% since 2016, almost twice as fast as the growth in the overall QSR space on YouTube. Brands that offer breakfast, lunch and dinner — such as McDonald’s — should invest in paid media to support their breakfast content to get in front of these content-hungry audiences.

YouTube Views For Breakfast Content Within QSR



**ANNUAL VIEWS OF  
BREAKFAST CONTENT  
INCREASED BY 78%  
SINCE 2016**

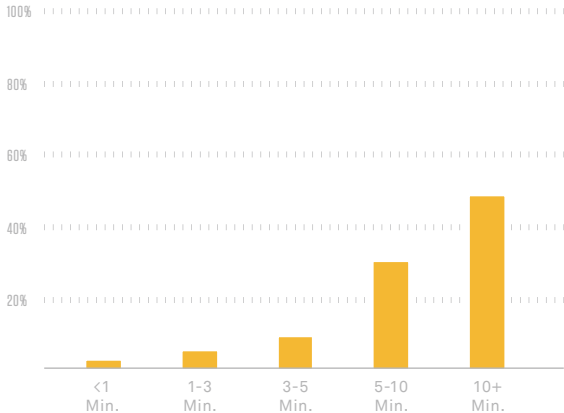


### 03 | CHARTING QSR INFLUENCERS

## QSR Influencers Driving Views Through Longer-Form Content

QSR viewers are hungry for long-form content. Nearly 50% of QSR influencer views are on videos that are over 10 minutes long. Conversely, brands are predominantly publishing and advertising with short-form content, with roughly 90% of brand views occurring on videos less than 1 minute in length.

#### QSR Influencer Views On YouTube By Video Length

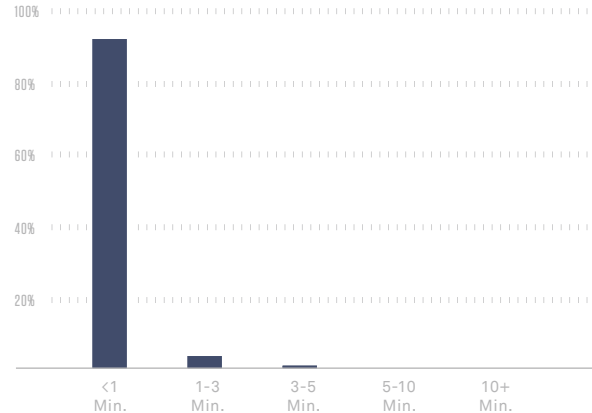


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**OVER 80% OF INFLUENCER  
VIEWS ARE DRIVEN BY VIDEOS  
OF 5+ MINUTES**

#### QSR Brand Views On YouTube By Video Length

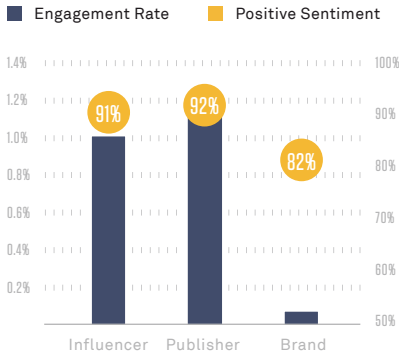


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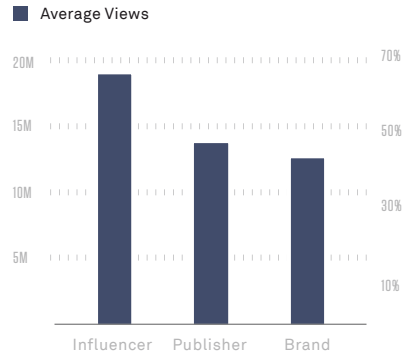
## Influencer Strategies Attract Audiences, Engagements, Positive Sentiment

Through engaging video strategies, influencers are delivering high viewership, engagement rates, and positive sentiment. Brand marketers should be comfortable creating content that is more in-line with what influencers and users create, and even leverage influencers and users in their content to maximize engagement.

#### YouTube Engagement Rate & Positive Sentiment By Source



#### YouTube Average Views Per Top Videos By Source



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### SPOTLIGHT

## Popular User-Generated QSR Video

“How to Make Ruffles McDonald’s and Pepsi Vending Machine”

**Video Length:** 5:09

**Views:** 58M – 3.5X more views than the average views among top 100 QSR videos

**Likes:** 186K

**Description:** This user-generated how-to video has more views than any currently published brand video, showing that you don’t need high production values to drive views and engagements.



## Q3 | CHARTING QSR INFLUENCERS

# Top QSR Influencers Across Digital Video Platforms

### Furious Pete, Matt Stonie, and Epic Meal Time Reign Supreme

Rank	Channel	YouTube Relevant Views*	YouTube Subscribers	Facebook Page Likes	Instagram Followers	Twitter Followers
1	Furious Pete	236M	5M	694K	503K	138K
2	Matt Stonie	180M	8M	95K	206K	56K
3	Epic Meal Time	144M	7M	1.7M	264K	429K
4	TwinMuscle	142M	2M	8K	568K	322K
5	Daym Drops	134M	943K	72K	58K	42K
6	Huma in the Kitchen	133M	1M	35K	31K	98
7	Nicko's Kitchen	130M	1M	1.7M	25K	10K
8	The Report of the Week	107M	1.3M	3K	51K	79K
9	HellthyJunkFood	83M	2M	216K	76K	13K
10	Zach Choi ASMR	66M	1M	358	230K	1K



## Tracking Brand Performance

## Most-Followed QSR Brands Across Digital Video Platforms

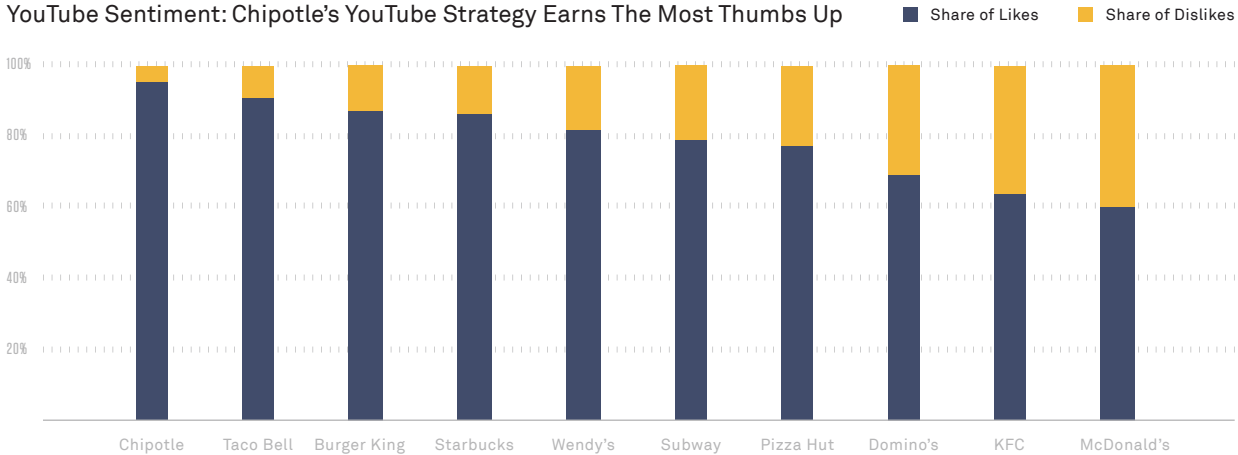
Rank	Brand	2018 <b>YouTube</b> Views	Publicly Listed Video Views ( <b>YouTube</b> )	<b>YouTube</b> Subscribers	<b>Facebook</b> Fans	<b>Instagram</b> Followers	<b>Twitter</b> Followers
1	Sonic Drive-In	126M	21M	37K	4M	480K	372K
2	Jack in the Box	87M	8M	21K	1.2M	155K	99K
3	Wendy's	79M	27M	86K	8M	847K	3M
4	Subway	70M	19M	71K	24M	1M	2.4M
5	KFC	63M	52M	407K	53M	1.4M	1.3M
6	McDonald's	60M	12M	395K	79M	3.4M	3.5M
7	Starbucks Coffee	50M	87M	213K	37M	17M	11M
8	Burger King	38M	31M	98K	8M	1.6M	1.7M
9	Domino's Pizza	35M	42M	168K	21M	1.4M	1.3M
10	Pizza Hut	30M	26M	78K	32M	1.5M	1.6M



## Chipotle Leads Brands In Positive Sentiment

Chipotle leads top brands in positive sentiment, highlighting the brand's investment in innovative and impactful video strategies, as even food safety scandals couldn't unseat the brand's place. The brand's long-form content series showcases its investment in quality ingredients and its people.

YouTube Sentiment: Chipotle's YouTube Strategy Earns The Most Thumbs Up

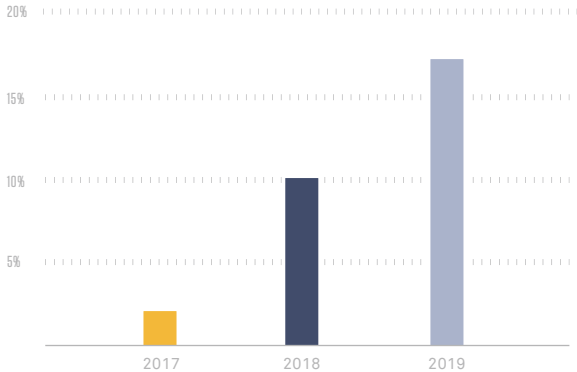


## Q4 | TRACKING BRAND PERFORMANCE

# Brands Are Increasingly Investing In Bumper Ads

QSR brands are increasing their use of 6-second Bumper ads, as they now represent 1 out of every 6 brand videos published. These can be effectively used alongside long-form brand videos by serving up a Bumper ad, and then sequentially retargeting viewers with the longer video.

YouTube Bumper Ads By QSR Brands As A Percentage Of Videos Created



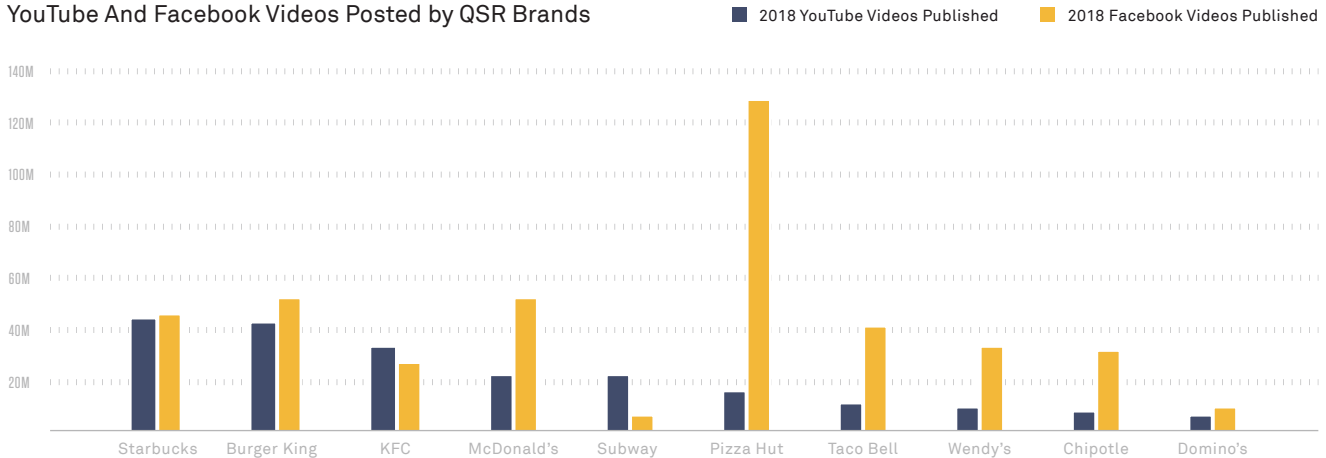
1 OUT OF EVERY 6  
QSR BRAND VIDEOS  
PUBLISHED IS A  
6-SECOND BUMPER AD



## Pizza Hut Leads In Facebook Video Publishing, But Starbucks Leads On YouTube

Across the most-subscribed-to brands, Starbucks published the most videos on YouTube in 2018, while Pizza Hut delivered the most Facebook videos. While it's important to publish a good volume of content to drive views, it's obviously more important that video creation is part of a holistic paid and organic strategy across the social platforms that has the goal of driving real business results.

YouTube And Facebook Videos Posted by QSR Brands





## 05 | WRAPPING UP QSR VIDEO

Across the QSR space, there are no runaway leaders in video. We see Pizza Hut with the most videos on Facebook, but McDonalds with the most Facebook fans. KFC is #1 in YouTube subscribers, but Sonic won the battle of video views in 2018 on YouTube, partially due to their investment in paid advertising.

No matter where each brand ranks, all should take note of strategies that are working well for influencers who continue to drive the majority of views in the QSR space. Marketers should look beyond sheer production value for their ads, and create long-form content in categories proven to engage their audience like challenges, tutorials, and others.

QSR audiences are hungry for content — can your brand deliver?

For the full results of this study, including a deeper look at brand performance, contact us at: [QSRInsights@pixability.com](mailto:QSRInsights@pixability.com).

[www.pixability.com](http://www.pixability.com)



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## VIDEO CHEAT SHEET

1

Develop content types that have proven to deliver user engagement like challenges and tutorials.

2

Publish snackable content on Facebook and Instagram

3

Publish more long-form content on YouTube

4

Utilize Bumper ads to retarget viewers on YouTube

5

Constantly test and optimize targeting strategies to isolate your core audience

