Taxonomy Study

CLIENT

Menu Ordering Research Summary

SCRUBBED

04/15/2020

Outline

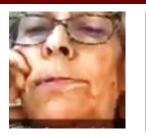
- Project Overview
- Executive Summary
- Interview Insights
- Prototype Observations
- Card Sort Taxonomy Findings
- Appendix



Project Overview

This goal for Client's menu taxonomy project was to evaluate a version of the digital ordering menu to identify areas that might be optimized, with a specific focus on incorporating dinner options. Project research was conducted in two steps

- 1. An online survey including a menu tree test completed by 429 Client Rewards members, the week of 3/9/20.
- 2. Hour-long, remote contextual inquiry interview and open card sort sessions with 17 rewards members, conducted 3/31 - 4/3.







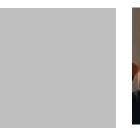




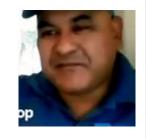


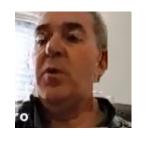
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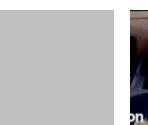


















Methodology

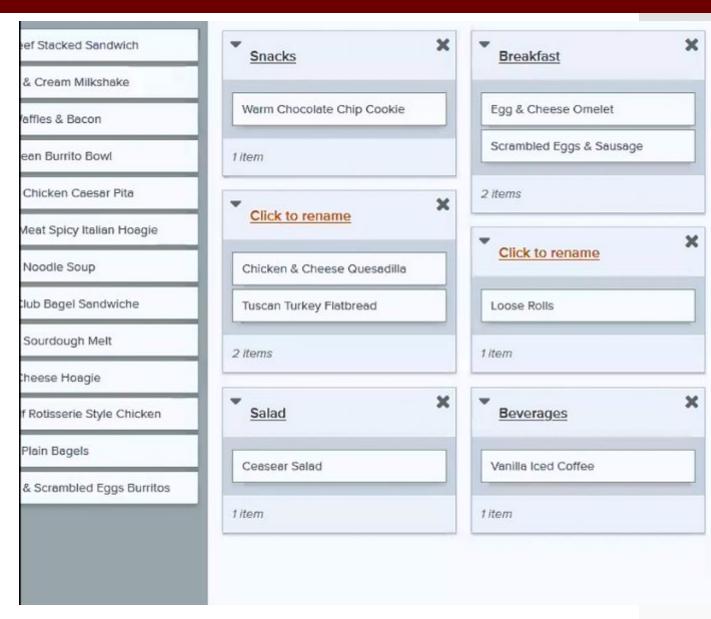
Survey

The survey & tree test was a preliminary step to understand of how users' categorized common menu items and to develop some hypothesis for follow-up in the contextual inquiries.

Interviews

One to one interviews were then conducted to understand; common ordering behavior, customers' attitudes towards Client, and dinner in general.

- Observation. After an initial interview, customers were asked to perform tasks with a kiosk simulation to observe them interacting with the kiosk.
- Card Sort (Open). Participants were then asked to complete an open card sort where they grouped and categorized (labeled) 30 menu items.
- Purposive sampling. All participants were rewards members. Participants were selected for a range of customer demographics and ordering behaviors.



Open Card Sort. Participants moved preset menu cards into open categories they then labeled.



EXECUTIVE SUMMARY

Study Interpretation

- Rewards Customers

 As expected, participants were very familiar with the existing digital
 menu and many of the food options available. While this bias should be considered when
 interpreting this study's findings, testing was sufficient to get a directional sense of how existing
 customers view categorizations.
- **Brand "Fans"** Also as expected, the Client brand was rated as highly favorable ("I love Client") by participants. That said, the discussions did reveal how some participants in the newer regions initially viewed the stores and brand. This gives some insight into potential barriers or opportunities when dealing with customers new to the brand.
- Remote Prototype The initial plan was to have participants interact with a fully functional kiosk and mobile app in person. This was not possible given the Covid-19 stay at home order. Participants were observed using a paired down version of the simulated kiosk. This exercise was still informative as it illustrated user mindset and information foraging behavior.
- Open Cart Sorts –Open card sort studies are not definitive. While not prescriptive, nor a complete picture, the study was successful in uncovering some directional guidance for taxonomy changes and potential options for expanding the overall menu.

Relationship with Client

- Participants were asked about their relationship with Client both from a day-to-day functional perspective as well as from a brand affinity perspective for example "What does Client mean to you?"
- Over all the responses were very consistent. Day-to-day, most participants had a standard order or rotated through a small set of orders with occasional exceptions. For example on weekends or when working late. Brand affinity was also very high with common terms used such as; convenient, clean, friendly staff, and good food
- A key take away from this discussion is that customers are likely to be receptive to new and novel menu items from Client due to a high trust factor from the perceives brand consistency
- **Another take away** is store cleanliness and open layout is a strong contributing factor to adoption in new regions. One participant specifically mentioned to make sure the stores stay clean when asked how we might improve.

Deciding What to Eat

- Participants were asked how they decide to eat both at Client, and more generally at dinner. Most participants indicated that at some point they browsed the Client digital menu before landing on their current preferred recipes.
 There is a general preference for home cooked meals at dinner that are often negotiated and not usually planned in advance. However, there are times where customers will need to work late or find something on the run
- A key takeaway from this line of questioning is that the interview's validates existing research that customers are likely to be very receptive to new Client dinner options

Relationship with Client

Video Clip TBD

Deciding What to Eat

Video Clip TBD



Mobile vs. Kiosk Use

- Participants were asked about when they use the mobile app versus when they used the kiosk generally most
 participants who use the mobile app do that do so more often than not the reasons cited for using the key ask once
 the mobile app was discovered was that the mobile app was down or they wanted to get the order right or browse
 something that they didn't feel they could see as well in the mobile
- A key takeaway for the mobile versus kiosk usage is that there is likely to be a an increasing reliance on using the mobile app as the mobile app becomes more convenient and more accessible to people.

What is Dinner?

- Participants were asked what does dinner look like for you and your family and what is dinner what does
 dinner consist of generally speaking most participants if not all considered dinner a home cooked meal
 that was substantial and traditional. There was a discussion around how you could have lunch items or
 breakfast items at dinner while those items may be consumed at a different time they would still be
 considered breakfast items
- A key take away from the what is dinner conversation as well as the card sort is that breakfast lunch and
 dinner is not necessarily time bound. Participants who were asked specifically about adding a "Dinner"
 menu label that replaces the "Lunch" menu option after 4:00 p.m. was considered confusing as the lunch
 dinner breakfast items were not associated with specific times but more with the type of food you would
 expect to find within the category.

Mobile vs. Kiosk Video Clip TBD



Observation Summary

Strong Rote Memory

- When observing Client rewards card users using the prototype kiosk, it was notable how clear their memory of the
 menu structure and it's workflow. In fact where the prototype left off, participants continued to describe what should
 have occurred for their standard orders in perfect detail.
- A key take away is that once participants figure out how to use the system and create their preferred recipe items it becomes something they don't even think about and they just go through muscle memory and select their order. This become somewhat sensitive when making large changes to the menu structure and needs to be considered.

Information Foraging Behaviors

- Most users followed expected information foraging behaviors for any interface such as following an "F pattern" across
 the screen while scanning labels and text to get a hint of where they want to go. A notable observation specific to the
 Client menu is participants were highly likely to talk through things they've already eaten or didn't want to eat through
 a process of elimination before deciding on what they want.
- A key take away from this is that the current version of the Client kiosk does a very good job of supporting current user tasks. Future designs should be should incorporate standard user centered design principles in its layout and terminology. In addition, the recorded information foraging behavior observations could be very useful in helping support the development of a personalized recommendation engine for customers. Understanding the user's mind-set as they browse and discover what they want to eat can help designers determine the best way to offer new menu recommendations based on the user's past ordering and food preferences.

Rote Memory

Video Clip TBD

Information Foraging

Video Clip TBD



Observation Summary

Role of Images vs. Labels

- On multiple occasions while interacting with the kiosk prototype, participants were heavily swayed by looking at the image before even viewing the label. For example, when asked to go "find a Warm chocolate chip cookie," participants gravitated towards "Beverages & Soft Serve" because images were of something sweet.
- A key take away from this observation is that it is important to strategically pair the labels and the images
 appropriately to allow the user to get the best guess of what to find under category. It is recommended that this is
 done via direct user observation with proposed image and menu item pairings.

Swapping "Lunch" with "Dinner" confusing

- During the observation and card sort, some participants were asked where they would expect to find hoagies if at 4pm the label that previously said "Lunch" now said "Dinner." Two participants asked indicated that they would find this confusing. They wouldn't be sure where to look if they want of a lunch item for dinner, and wouldn't readily assume sandwiches were in "Dinner." At least on of the participants seems to want to be sure there was a label indicating only available after 4pm. There was also discussion that the participants would like to be able to see what items were available after 4:00 p.m. even if they were unable to select them so that they could plan ahead.
- A key takeaway from this discussion and observation is that the approach of labeling a top level menu "Lunch" and then changing it to "Dinner" after 4:00 p.m. should be re-investigated as it is likely to cause confusion.

Images vs. Labels

Video Clip TBD

Swapping Labels

Video Clip TBD



Card Sort Summary

Approaches to Categories

- The dominant approach to categorization was by meal; breakfast, lunch and dinner.
 Followed by food preparation / "presentation" type; hoagies & sandwiches, entrees, bowls. The least common categorization approach was by ingredient.
 - **Ingredient.** When asked, most participants indicated that an ingredient based menu (e.g. "Chicken") was helpful but not the "top of mind" approach to menu categorizations. When explored further with participants, most indicated that they felt they would still find the item in an alternate category.
 - **Meal.** There were 5 participants who created a combines "Lunch & Dinner" category. One participant indicated that this was most likely due to what they were used to in the current Client menu. It's reasonable to assume the same for the other 4.
 - **Meals not Tied to Time of Day.** While the dominant approach was by meal, this does not necessarily mean that people eat the items at the specific meal times. There are "breakfast foods," "lunch foods," and "dinner foods" that can be eaten at anytime. When explored further, participants indicated that many items spanned lunch and dinner. <u>All participants created a "Breakfast" category.</u>
 - **Presentation.** Of the 17 recorded card sorts, one structure was similar across 13 of the 17 and it was a food "presentation" based approach. This is useful in informing a possible new structure.



Menu Rationale

Similar IAs: 13/17

9 groups submitted by participant

Kids

Similar group labels

Kid's Meal

Kids Menu

Kid's / Sr Menu

Chicken Nugget Kid's Meal

Breakfast

Similar group labels

Breakfast Items

Breakfast Platter

breakfast

Egg & Cheese Omelet

Scrambled Eggs & Sausage

Maple Waffles & Bacon

Chicken & Scrambled Eggs Burritos

Sandwiches

Similar group labels

Sandwiches & Burgers

Sandwiches & Hoagies

Sandwich/Hoagie

Double Meat Spicy Italian Hoagie

Honey Mustard Roasted Chicken Sandwich

Chipotle Turkey Club Sandwich

Meatball Hoagie

Ham & Cheese Hoagie

Roasted Chicken Caesar Pita

Western Sourdough Melt

Roast Beef Stacked Sandwich

Turkey Club Bagel Sandwiche

Tuscan Turkey Flatbread

Southwest Burger

Plant-based Meatball Hoagie

Dessert

Similar group labels

Desserts

Snacks

Warm Chocolate Chip Cookie

Entrees & Sides

Similar group labels

Dinner items

Dinner Option

Dinners

BBQ Half Rotisserie Style Chicken

Pork Roast Entrée Platter

Mashed Potatoes

Baked Penne with Marinara

Drinks

Similar group labels

Beverages

Custom Drinks

Cold Specialized Drinks

Vanilla Iced Coffee

Cookies & Cream Milkshake

Quesadillas, Burrito Bowls

Similar group labels

Quesadilla & Bowls

Mexican dishes

Chicken & Cheese Quesadilla

Rice & Bean Burrito Bowl

Breads & Muffins

Similar group labels

Bakery

Baked Goods

Toasted Plain Bagels

Loose Rolls

Soups & Salads

Similar group labels

Chicken Noodle Soup

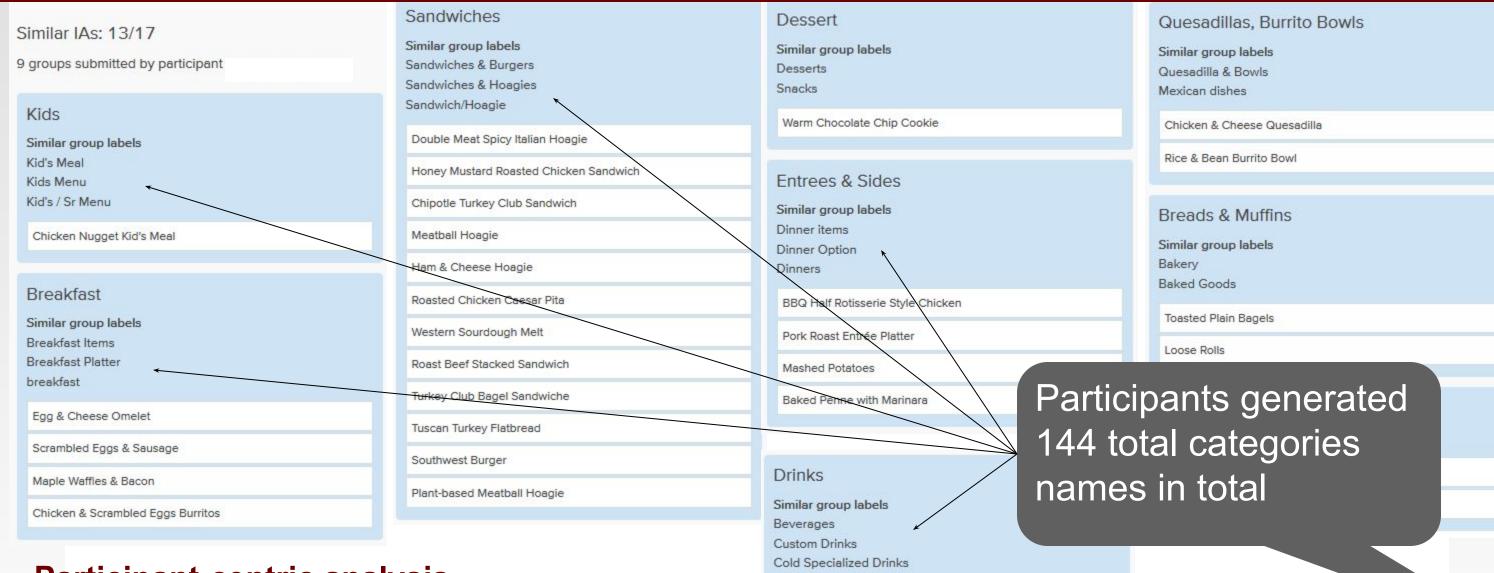
Ceasear Salad

Participant-centric analysis

(Closest to a modified Delphi, aggregate approach to analysis)



Menu Rationale



Vanilla Iced Coffee

Cookies & Cream Milkshake

Participant-centric analysis

(Closest to a modified Delphi, aggregate approach to analysis)



Menu Rationale

Common Card Sort Discussion (Montage)





Menu Example for Testing

Important to note this is based on participant responses and accounts for a 5 menu item home screen limit, not inclusive of business priorities. * Rewards customers

Example Menu based on Results

Beverages & Snacks

- Specialty Coffees
- Bakery Items
- Smoothies
- Milkshakes
- Soft Serve
- ...

Breakfast

- Sandwiches
- Burritos
- Br. Bowls
- Bagels, C
- ...

Sandwiches & Hoagies

- Cold Hoagies
- Hot Hoagies
- Flatbreads
- Clubs
- Pretzel Roll
- . .

Bowls & Entrees

- Bowls
- Dinner Entrees
- Burgers
- ...

Salads, & Sides

- Soups
- Salads
- Sides
- Loose Rolls
- ...

Prototype Menu

Beverages & Soft Serve Treats

Breakfast

Lunch & Dinner

Kids Menu

Alternate



Next Steps Research

- Create & Validate an New Menu Structure Develop new menu structure with visuals and A/B test primary options with users. Remote, un-moderated study with statistically significant sample size.
 - Does this proposed structure intuitively accommodate 80% of users with minimal confusion and comparable task completion success?
 - Does the new proposed structure do a better (or comparable) job of exposing users to new menu items and promotions?
 - What is the potential impact of not having an alternate "5th" menu item?
- Mobile Observation Study Conduct a mobile specific baseline user observation study to inform potential usability and feature/function improvements. Onsite, moderated.



INSIGHTS & CONSIDERATIONS

Relationship with Client

- As expected, rewards customers were very positive about Client. The most common language used for why they "Loved Client" were; consistent, convenient, clean, friendly staff, good food, fast and fresh. Client staff was mentioned repeatedly as being friendlier and more helpful than competitive convenient store options. At least 2 participants mentioned a counter staff member knew their regular order.
- At least 2 participants were particularly knowledgeable about Client as a business.

 E.g. "It's a strong brand." The participants mentioned Client's history, ownership, name origin, etc.

Regional Differences

Participates in regions newer to Client (e.g. FL or GA vs. PA or NJ) generally found out about Client from word-of-mouth or promotions. These participants were more likely to consider Client a gas station. This was seen as undesirable when considering the negative association of "gas station food." At least two participants specifically indicated "gas station food" as an inhibiting factor when initially learning about Client and trying the food. The negative association of gas station food was overcome by the cleanliness and open layout of the stores.



Consideration gas station food was an interesting finding that should be investigated



Relationship with Client

Common Scenarios

- The most common ordering scenario was breakfast on the way to the work via the mobile app pick up. At least 2 customers also grab their lunch for eating later at work at breakfast time. One mentioned this is why she chooses cold items.
- Commonly, participants indicated a set routine for one order at a certain time for example a specific sizzly or salad, but also indicated occasions where they deviated from this; during the weekend or other time of the day than usual. In addition at least 3 participants indicated that they responded to seasonal as well as newly promoted items. Only one participant, when asked, indicated that he did not even look at the kiosk promotional items.



Consideration validate that even consistent routine buyers are readily willing to review and try new menu items if presented with a relevant promotion

Relationship with Client

Competition

- Participants were asked about competitive options to Client. Competition categories were roughly in 3 categories; gas stations & convenience stores, coffee shops, and fast food. Competitors for gas stations included 7-Eleven, Sheets, Royal Farms, and Circle K
- Coffee shops were Dunkin Donuts and Starbucks. Two participants said that Client has recently replaced their Starbucks and Dunkin Donuts.
- Fast food options mentioned were; Wendy's, Burger King, Chick-fil-A, and sub shops

Food, Quality of Food

- A number of participants indicated that the quality of food at Client was good or that while will had good food as follow up they were ask what is good food generally the responses were consistent in that good food didn't necessarily track back to healthy food it meant fresh tasty.
- One participant made a note that because Client is so busy they move stock so there is a high expectation that unlike competitors the food will be the freshest quality even the stuff that's on the shelves



Deciding What to Eat

Healthy Food

- In contrast to good food healthy options and healthy food with seen differently healthy options by-and-large was seen as a low carb and/or salad option. Although at least 2 participants indicated that while anything can be put on a salad to make it less healthy it's generally thought of as a healthy option only to persists appearance indicated that they regularly actively seek out or have ordered items from a 500 calorie or less or limited calorie menu option this is not to say that this is not a desirable feature as the qualitative study is not predictive of frequency
- One participant in his mental dialog as he moved through the kiosk discussed how he
 thinks how much bread do I want and completely uses starches and bred to decide if
 he wants a healthy or not healthy option for example do I want a lot of bread like a
 hoagie, a little bread like a pita or no bread like a salad (clip)

Exploring New Menu Items

- Participants indicated a number of ways they found new menu items; advertisements
 & promotions, word of mouth, and menu explorations.
 - At least two were interested in Quinoa bowls.
 - Cost / Price Cost did not play a significant factor in choosing what to eat at Client.

Mobile vs. Kiosk Use

- Participants were rewards members so there's an oversampling of mobile app users.
 Most heard about the app via promotion or related to the rewards card or gift cards.
 There was a common, clear value case made for using the mobile app. Participants use it to bypass the line at lunch or during busy time as well as to pay via the application and skip checkout. Participants were pleased with the app moving away from kiosk ordering once they began using the app.
- Consideration the mobile app might make a case for a personalize menu recommendations and for multiple user favorites for families.
- Customers also indicated that they would like to be able to scan buy more things than
 just made to order items via the app
- The number of persists against used mobile app 75% or more of the time over all their experience was very positive some common request were to be able to use a multiple gift cards on the app and be able to include move items more items to pay with fear the app this also reflected in the quantitative sturb survey
- Consideration conduct a mobile app usability study to understand areas to improve and better expose new items while adding personalization such as menu recommendations



Dinner

- Participants were asked about dinner, and more specifically, dinner at Client
- Most participants described a scenario where they ate at home 3 to 5 days a week for On the remaining days, the common scenario was going out to eat or ordering take out. The most common food mentioned for takeaway or delivery was pizza at least 4 participants mentioned pizza as a highly liked dinner option.
- Family households gave a common scenario of having to negotiate dinner among a number of different people in the family with different tastes. One participant described a scenario where going to Client for dinner was a good choice because there was a range of options to please everyone.
- When asked "What is dinner to you?" most participants indicated a full meal involving a meat, a side, and vegetable.
- Many of the participants had at one point or another gone to Client for dinner. In each case the participant indicated that the food they ordered was lunch item, but for dinner. The common scenario for going to Client for dinner as being last minute, or late coming home from work option. "Let's see what Client has..."
- Generally Client was not thought of as a place for dinner.
- Consideration today customers do not think of Client as a dinner place but overall were generally receptive
 to the new menu. Only 2 of the participants mentioned that the entree items as something that they did not
 expect to see during the court sort

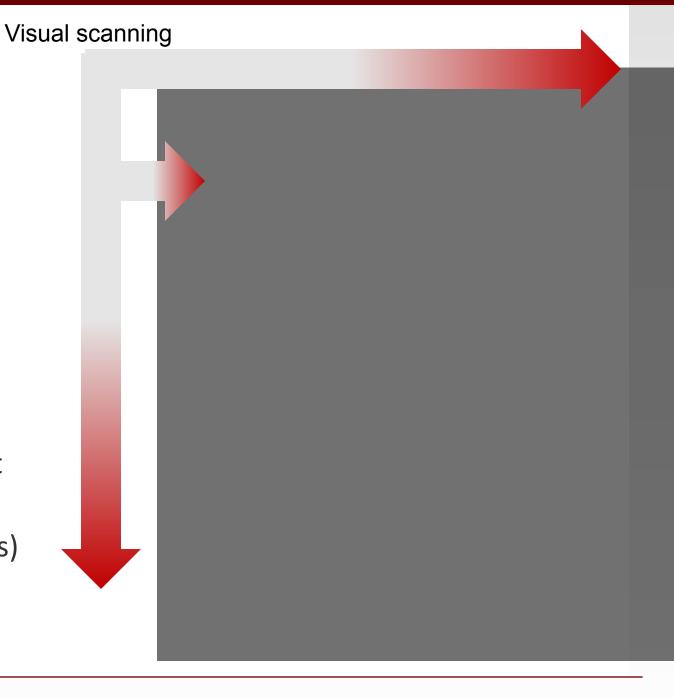


Prototype Observations

Information Foraging Theory

Current menu does a good job at supporting user tasks...

- "F pattern" visual scanning
- Scent of information
 - First 2 words
 - The importance of visuals with the labels
- Users will continue if they think on right track (even if not) end up assuming an item does not exist.
- Mental model (very strong in rewards members) keep stable menu structure
- Full change vs. incremental updates





Prototype Observations

- **Main menu** Most tasks participants went straight for the lunch & dinner option. It's expected that there will be some hesitancy and minor confusion from users should this top line level be changed
- You recently saw a Client ad that mentioned a new pasta dish, but don't remember what it was specifically. Where would you expect to find it? - participants looked for pasta or expected to be in one of the to hero advertisements
- Where would you expect to find a roasted chicken sandwich on a brioche bun? The image of the bun played a dominant role in this task once user click through lunch and dinner they immediately bee lined. For the bun image and then supported with the word chicken. While selecting what was assumed to be the correct item participants were not sure because the term brioche was not there
- Where would you expect to find a small macaroni and cheese? Like the brioche bun
 participants bee-lined to the image of the macaroni and cheese and the lunch and dinner menu option
 once their most participants all participants who were asked to perform the task found the item some
 participants indicated that they had ordered the macaroni and cheese in the past

Prototype Observations

- Where would you look for healthy food options? This task was somewhat muddier than some of the other task participants looked under lunch and dinner, then a few of them went for the salad some considered at least 2 participants mentioned the calorie count on the menu as being desirable generally speaking however there were multiple strategies that participants use to who determine if food is healthy for example, carbs, or calories, or portion control.
- Where would you expect to find a warm chocolate chip cookie? Participants who were asked to perform this task their 1st choice was beverages and soft serve because the images were of something sweet the 2nd choice was then it would be found in the kids menu somewhere
- Where would you expect to find a strawberry banana smoothie? All participants
 ask to perform this task did so quickly with no issues.
- Where would you find a crispy chicken salad? When asked where they could find a crispy chicken salad participants were able to find the salad but were somewhat unsure of whether to go to salads or chicken confirm this
- Kids Menu Discussions Participants were in favor having a kids menu but non actually had used it. One participant mentioned allowing kids to self-select. Two participants mentioned that kid's menus were good for Seniors for smaller portions

IA & TAXONOMY FINDINGS

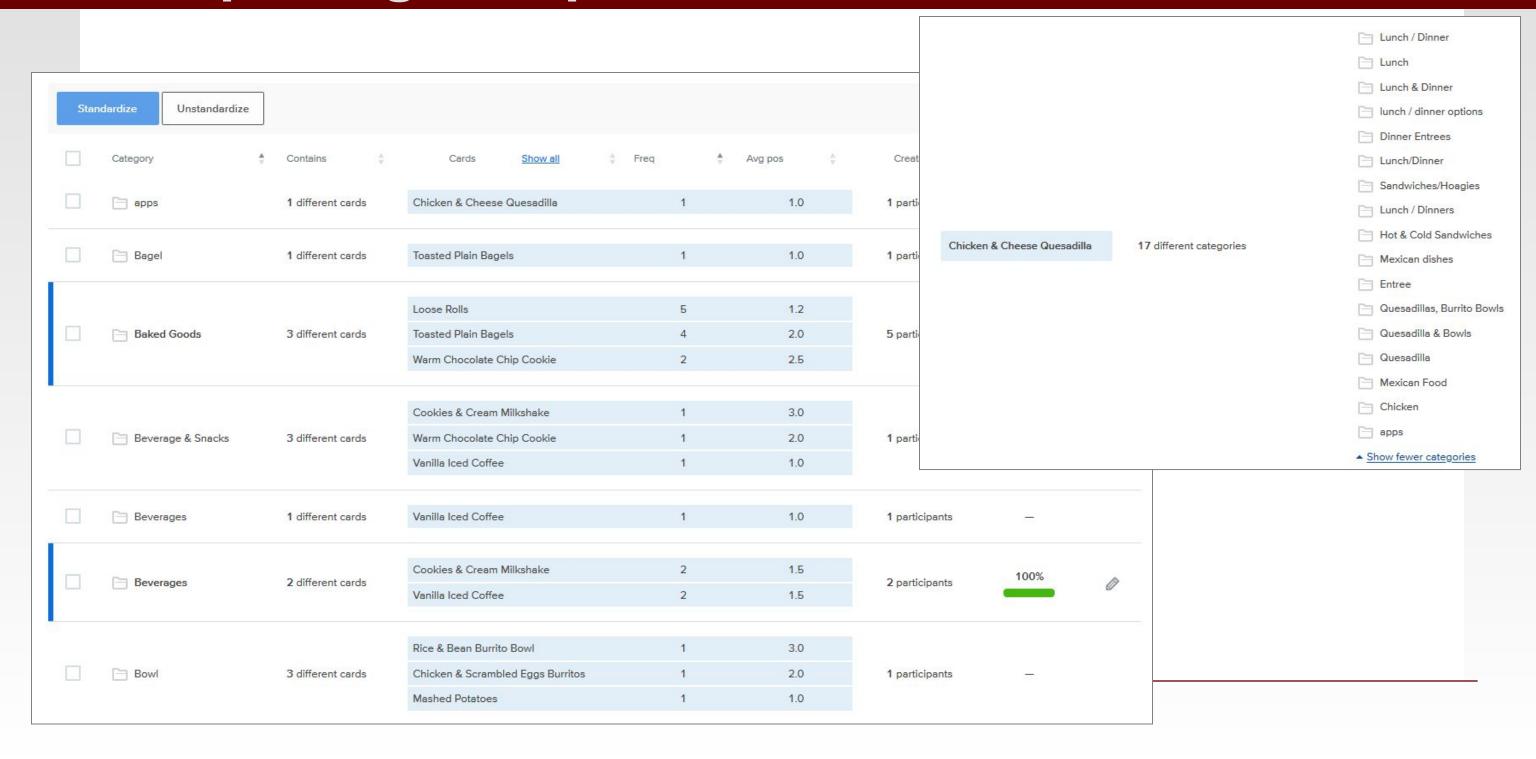
There were a few common themes, some were as follows:

- Kids Menus
- Ingredient vs. preparation
- Breakfast lunch dinner
- Showing hiding dinner at 4:00 p.m.
- Memorization of items in the menu and the process

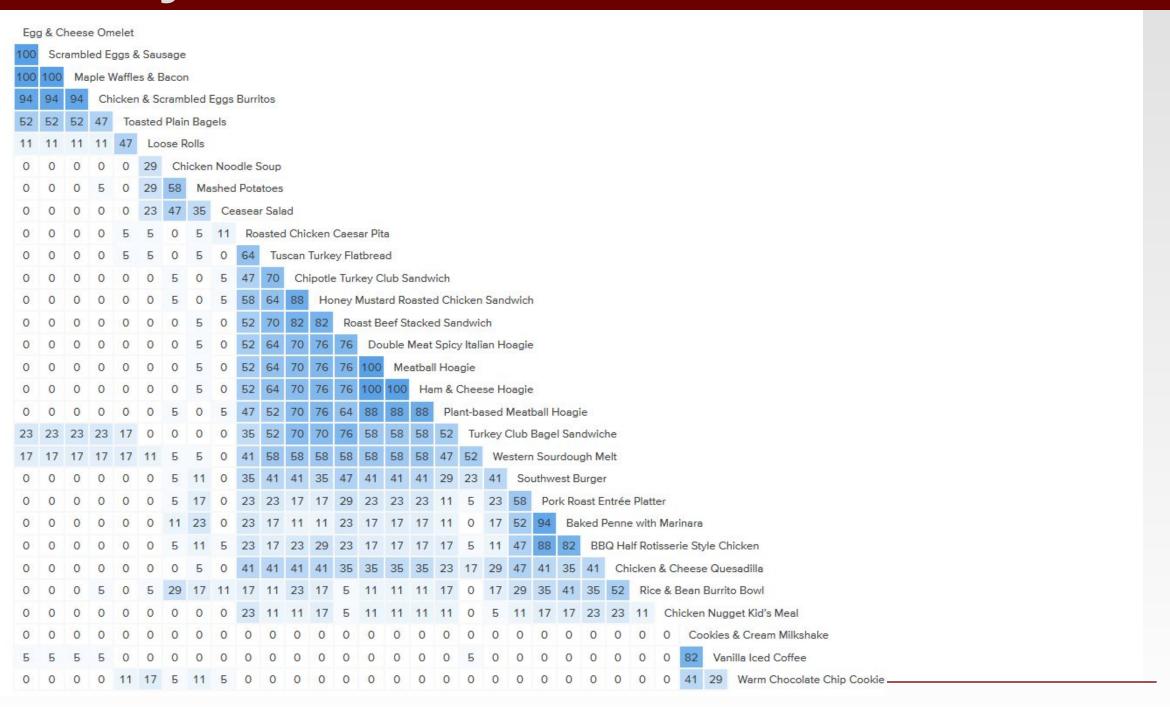
- Entree sit down versus handheld
- Bagels equal breakfast
- A bowl vs. a platter vs. entrée
- A salad could be a side or a meal
- Burgers are not a sandwich, not really an entree it's its own thing

- Most of participants we observed needing or assumed additional subcategories when completing the card sort
- Flatbread was thought of as pizza at least 3 times
- Easy items; Breakfast, sides, sandwiches and hoagies, beverages
- Difficult items; Anything on a non-standard or specialty breads, chocolate chip cookie, rolls.

Interpreting an Open Card Sort









APPENDIX

Appendix

- 1. Participant Details
- 2. Discussion Guide
- 3. Interview Videos
- 4. Prototype Link
- 5. Card Sort Layout
- 6. Card Sort Analysis Link
- 7. Tree Sort Survey Report Link

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