1996

A Marketing Research Project: San Francisco Pier 49 Sourdough Pizza

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Conducted for

Mike Lamoreaux

and

Mike Dicou

Presented By

Arrow Research

Jason Bennett
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December 10, 1996
December 10, 1996

Mike Dicou
Mike Lamoreaux
Pier 49 San Francisco Sourdough Pizza, Inc.
2400 E 7000 S
Cottonwood, Utah

Dear Mike and Mike,

We thank you for the opportunity to conduct this research project and for support in this endeavor. We have gained valuable experience and insight through the various stages of the project.

Much valuable information has been obtained. We hope you find the information helpful and that it will lead to new opportunities for the Hillside area Pier 49. We look forward to meeting the advertising board and also hope the information serves to help the corporation as a whole.

Once again, we appreciate the generous donation to the Marriott School of Management. Your involvement with the school benefits students at many levels.

Sincerely,

Arrow Research
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Introduction
This research project was conducted through the efforts of Arrow Research, a group of marketing students at Brigham Young University. Pier 49 San Francisco Sourdough Pizza Company is a gourmet pizza franchiser whose stores are located in Utah, Idaho, California, Hawaii, and Canada. Arrow Research focused its efforts on the Hillside store located in Sandy, Utah.

Problem Statement
Pier 49's Hillside location is not maintaining acceptable levels of business. Pier 49's management is interested in finding out what steps can be taken to increase business at the Hillside store.

Specific Objectives
As stated in the research proposal, Pier 49 wants to know how it is perceived by its patrons. Management also wants to know if value products, increased number of menu items, and/or expanded services will be attractive to current and potential customers.

The study was specifically designed to answer the main points outlined in the research proposal. Research focused on residents of the Hillside area and Pier 49's customers. These main points are highlighted below:

• What are consumers' perceptions of Pier 49?
• What is the potential appeal of offering additional menu items?
• What types of restaurant services are preferred?
• What is the favorite brand of Pizza eaten by Hillside residents and what is their profile of "the ideal pizza restaurant."

In addition, a short descriptive report of Pier 49's customers is also presented. This report includes age, income, occupation, and other information relating to pizza purchasing activity. Arrow Research has, from observation and insight, also developed a limited number of additional considerations that we believe will help Pier 49.
Executive Summary

Problem Statement and Objectives
Pier 49 San Francisco Sourdough Pizza Company is a gourmet pizza franchiser whose stores are located in Utah, Idaho, California, Hawaii, and Canada. Pier 49 has experienced problems with the Hillside store located in Sandy, Utah. Due to these problems, Pier 49 management contracted Arrow Research to research the following objectives:

- What are consumers' perceptions of Pier 49?
- What is the potential appeal of offering additional menu items?
- What types of restaurant services are preferred?
- What is the favorite brand of Pizza eaten by Hillside residents and what is their profile of "the ideal pizza restaurant."

Research Methodology
- **Exploratory**: Arrow Research met with Pier 49 management at the Hillside location, and visited competing pizza restaurants in the area.
- **Secondary**: Arrow Research analyzed material from the library, Internet, and restaurant magazines.
- **Primary**: Arrow Research conducted focus groups, developed door-to-door and in-store questionnaires.

Analysis and Conclusions:
- **Hillside residents' profile of "the ideal pizza restaurant."
  The ideal pizza restaurant includes not only great pizza but the qualities of convenience, good service, delivery, and affordability. Pizza Hut was the most favored pizza.
- **Consumers' perceptions of Pier 49**: Customers rated Pier 49's pizza as being superior. Service, speed, and price received lower ratings.
- **Types of restaurant services which are preferred**: Customers of Pier 49 prefer to order at the counter and seat themselves. Residents of Hillside expect to be seated and to order at the table when eating at a "gourmet pizza restaurant."
- **Potential appeal of offering additional menu items**: Pier 49's customers are generally neutral about adding more menu items. Salad, breadsticks, and more combo deals are the main items preferred to be added to the menu.

Recommendations:
- Pier 49 should establish itself as a gourmet pizza restaurant.
- Pier 49 should increase quality of service and seriously consider delivery.
- Pier 49 should use its information system to increase its advertising efforts, especially in the areas north and north-east of the restaurant.
- Pier 49 should increase the number of combo deals.
- Pier 49 should carefully evaluate customers perceptions of the atmosphere.
Methodology

Research was conducted under the supervision of Professor Ray Andrus. Arrow Research strove to meet strict standards of ethics, dependability, statistical accuracy, and consistency.

Exploratory Research

Exploratory Research began long ago when each member of Arrow Research bit into their first slice of pizza. Since this time, members of Arrow Research (along with the rest of America's youth) have been critics of pizza and restaurants.

More formal exploratory research included visiting with the management of Pier 49 at the Hillside location on September 17, 1996. Arrow Research learned more about the specific concerns of the management and the main objectives to be reached during the research process. A proposal was drafted, finalized, and agreed upon following this meeting. Pier 49's pizza was also eaten and evaluated by Arrow Research.

Since September 17th, exploratory research has included visiting competing pizza restaurants and evaluating their strengths and weaknesses in comparison to Pier 49's. Advertisements in various media were also perused and evaluated.

Secondary Research

Secondary Research involved mostly "search-work" in the library and on the Internet. Issues of Nations Restaurant News, Restaurants & Institutions, and Restaurant Hospitality (please see bibliography) produced articles that provided many insights into successful pizza chains all over the country. Numerous insights and new ideas for pizza restaurants were found.

Primary Research

Primary Research was conducted to gather specific information regarding the Pier 49 Hillside location and the local pizza industry. This information was gathered through two methods; focus groups and questionnaires.

Focus Groups

Two focus groups were conducted at Pier 49 on September 28, 1996. Both focus groups involved seven participants and a moderator from Arrow Research. A video camera and a closed circuit television were used to monitor the participants comments and reactions regarding the pizza industry and Pier 49. The participants were selected from a reverse telephone directory obtained from the Harold B. Lee Library at Brigham Young University. Participants were telephoned by Arrow Research and asked to participate in the focus groups. These people were selected from four general areas surrounding the Hillside store location.
Questionnaire Design
Two questionnaires were developed from comments and responses obtained from the two focus groups. All questions asked on the questionnaire were designed to help find information pertaining to the four research objectives. These objectives are: What are consumers' perceptions of Pier 49? What is the potential appeal of offering additional menu items? What types of restaurant services are preferred? What is the favorite brand of Pizza eaten by Hillside residents and what is their profile of "the ideal pizza restaurant."

The moderator introduced these objectives during the focus groups. Many interesting ideas and comments were brought out from this discussion. Some examples are:

- "Does the television take away from the atmosphere of the restaurant?" From this question, the in-store questionnaire respondents were asked if they agreed or disagreed on whether or not they liked the television.
- "Should more menu items be added to attract customers?" This question was asked to respondents on both questionnaires. Specifically, the in-store questionnaire gave respondents the opportunity to agree or disagree whether they wanted more menu items.
- "Does the location of the restaurant detract from potential sales?" A question concerning location was asked twice on the in-store questionnaire. Respondents were asked to rank the importance of pizza store location and to rate Pier 49's location.
- "Should different furniture be used to add to the San Francisco theme?" This question was also raised on the in-store questionnaire as an agreement and disagreement statement.

(Examples of a door-to-door and an in-store questionnaire can be found in Appendix B.)

The door-to-door and in-store questionnaires were designed by Arrow Research with suggestions from Dr. Ray Andrus and fellow class members. The questionnaires were then given to Pier 49 management to be approved. After approval, Arrow Research tested the questionnaires for clarity, accuracy, and completeness in order to reduce bias.

The door-to-door questionnaire was administered to various residential areas surrounding the Pier 49 Hillside store. After each questionnaire was completed, a store coupon was given to the respondent. The in-store questionnaire was given to customers who visited Pier 49. An incentive of a free order of garlic bread was offered upon completion of the questionnaire.
**Types of Questions**

"Likert" scale questions are used to indicate the strength of respondents' opinions on a bipolar scale. Two examples of "Likert" scales used in the in-store questionnaire are agreement statements and rating scales (see Appendix A, In-store Questionnaire, sections 1&2). Agreement statements were followed by five boxes; the first and last boxes were labeled "Agree" and "Disagree" respectively. Rating scales stated a quality (such as Taste or Service) followed by five boxes; the first labeled "Superior," and the last "Poor."

The remaining questions on both questionnaires are self-explanatory and require no further explanation.

**Data Processing**

After all questionnaires were completed, the data from the door-to-door and in-store questionnaires were coded. Both questionnaires were then entered into a data file in a program called SPSS. The data were used to calculate frequencies and cross-tabulations regarding the various data items. The results of the data were analyzed, conclusions were formulated, and these findings were used to make recommendations.

Many valuable cross-tabulations were calculated and are included in this report. Other cross-tabulations that compared responses to demographic information most often showed no variation. For example, when age or gender was cross-tabulated by seating preferences, no variations between age or gender groups were detected.

**Limitations**

Marketing research contains many limitations which are unique to each project. The following limitations have been identified in order to help in data comparison.

**Non-Response Errors**

Many of the respondents did not answer all the questions asked on the questionnaires. "I do not know," was a frequent answer for open-ended questions on the door-to-door questionnaire. Also, many of the open-ended questions from the in-store questionnaires were left blank. These answers were not coded or included as responses by SPSS.

**Analysis and Interpretation Errors**

Errors, though not detected, may have occurred during the coding process of the questionnaires. Errors may have also occurred in the statistical manipulation of the data. Arrow Research did its best to correctly identify and code all responses given to Pier 49 in order to provide the best representation of the information produced.

**Misconceptions**

Some of the questions asked in the questionnaire may have been misunderstood by the respondents. Arrow Research tried to eliminate this problem by pre-testing both questionnaires to eliminate any unanticipated problems and to greatly improve data collection instruments.
Throughout the door-to-door questionnaire, it became apparent respondents were having a difficult time differentiating between “gourmet restaurants” and “gourmet pizza restaurants” in answering question number nine. As a result, some respondents may have answered this question with a “classic gourmet restaurant” in mind in place of the stated “gourmet pizza restaurant.”

An additional example: on question nine of the door-to-door questionnaire (see Appendix B), respondents were asked, “What type of service would you expect from a gourmet pizza restaurant?” Respondents often said, “I would want,” or, “I would prefer.” As a result, the question was often answered in terms of preference, not expectation.

In-Store Sample Selection
Arrow Research was not in the position to administer the in-store questionnaires. Therefore, employees took the role of asking customers to participate in the survey. Employees indicated some selection was made in choosing customers who received questionnaires, resulting in possible bias. In addition, many questionnaires contained comments indicating respondents were close friends of employees or management.

Originally, 300 in-store questionnaires were to be completed by customers. Having little control over how questionnaires were administered, Arrow Research obtained 133 valid questionnaires. The questionnaires were in the stores for four-and-a-half weeks, resulting in an average of approximately four or five questionnaires per day.

Focus Groups Participants
Many valid ideas and points were raised in the focus groups. However, just under half of the participants were under the age of 25—although those contacted for participation are of an older age group. Pier 49 has expressed that it is mainly interested in targeting consumers over the age of 25. As a result, the ideas raised in the focus groups reflect some outside of Pier 49’s target age group.
The Ideal Pizza Place

Research conducted within a mile of Pier 49's Hillside store shows what pizza restaurant residents prefer. The research also gives some good indications as to why particular pizza restaurants are preferred, and what Pier 49 can do to increase its sales. From this research, the characteristics of the "Ideal Pizza Place" can be determined. Residents of the Hillside area were asked in the door-to-door questionnaire, "What is your favorite Pizza Restaurant in the area?"

The Favorite Pizza
Pizza Hut is, by large margin, the favored pizza of Hillside residents (see Chart 1-1). Pier 49 is the second most favored, followed by Wasatch Pizza, Little Caesar’s, Gepetto’s, and Domino’s.

The location of these stores is important to note. Pier 49 is located at 24th East and 70th South. Wasatch is just up the street at 2065 East on 70th South; Pizza Hut is about the same distance, found at 6950 South on Highland drive. The closest Little Caesar’s is in the Fort Union area (69th South and 13th East). Domino’s is even further away, yet joins with Little Caesar’s and Gepetto’s in being the favorite of 10 percent of the respondents in the Hillside area.

Why is That Your Favorite?
The question immediately arises, “Why do customers prefer pizza restaurants that are further away from their homes?” To answer this question, respondents were asked, “Why is [that] your favorite pizza restaurant?” This question was designed to get respondents’ first responses—their main reason for patronizing a specific restaurant. See Chart 1-2.

As could be expected, the largest response was simply “Good Pizza,” or, “I like the pizza.” Other specific responses that related to pizza quality referred to good crust or good toppings—totaling 24 percent of the responses. However, quality pizza making is not the only factor that draws customers to pizza restaurants.
Forty-one percent of the respondents cited reasons other than pizza as the main reason for choosing a particular restaurant as their favorite. Convenience was the main reason for 13 percent of the respondents, and delivery the main reason for six percent. Price and coupons together were the main reason for 10 percent of the respondents.

A cross-tabulation between respondents’ favorite pizza and why this pizza is their favorite is revealing. Chart 1-3 outlines the main reasons why people in the Hillside area choose their favorite pizza restaurant. The top three are Pizza Hut, Pier 49, and Wasatch Pizza.

![Chart 1-3 Favorite Pizza Restaurants and Why they are Favorite](chart1-3.png)

Just under 50 percent of the people who choose Pizza Hut responded they do so primarily for the characteristics of the pizza itself (area to the left of point A). In contrast, 83 percent of those who choose Pier 49 do so for the pizza characteristics. This disparity can be explained by examining the remaining responses.

Close to 20 percent of the Pizza Hut respondents indicated that convenience was very important while only eight percent of the Pier 49 respondents did so. Eight percent

![Chart 1-4 Favorite Pizza Restaurant and Why Favorite](chart1-4.png)
choose Pizza Hut for the delivery service while Pier 49 does not offer a delivery service. Another eight percent choose Pizza Hut for its prices while none choose Pier 49 for that reason. Four percent choose Pizza Hut for the coupons while only two choose Pier 49.

In summary, over half of the respondents in the Hillside area who choose Pizza Hut do so for reasons other than the characteristics of the pizza. In contrast, less than 20 percent who choose Pier 49 do so for reasons other than the pizza.

Pizza Hut’s strategy is easily seen: Pizza Hut produces a pretty good pizza that is fast and convenient that does not cost too much. Pizza Hut’s delivery attracts customers who desire delivery. Because Pizza Hut appeals to many for many different reasons, it is the favorite of Hillside residents. This is evidenced by the 116 who choose Pizza Hut as their favorite pizza restaurant. The strategy of other pizza places is also seen when similar cross-tabulations are done (see Chart 1-4).

Wasatch Pizza and Gepetto’s attract customers essentially only by offering quality pizza. Little Caesar’s largest attractor of customers is price while Domino’s goes after the delivery bunch.

**Other Important Characteristics**

Respondents were asked another characteristics question following the first. This question drew out other important qualities in successful pizza restaurants. The responses were broken down into categories and are shown in Chart 1-5.

Again, good pizza is the most important factor—occupying 27 percent of the chart. However, the importance of delivery, price, and service is large—adding up to 39 percent. Interestingly, 14 percent of the respondents indicated delivery is one of the most important factors, which service Pier 49 does not offer.

The in-store questionnaires contained a question asking respondents to rank the importance of quality pizza, quality service, location, atmosphere, and price. The results showed quality pizza is the most important, followed by quality service, location, price and atmosphere. Location and price were very close to each other (see Chart 1-6).

Other questions from the in-store questionnaire support these results. When asked to evaluate the statement, “I am willing to pay more money for a quality pizza,” respondents generally said they agreed. When asked to evaluate, “I feel low price is more important
than good service,” respondents generally disagreed. Once again, the importance of
good service was generally felt to be less important than quality pizza and service are emphasized.

**Graph 1-6 -- Ranking of Important Qualities**

Summary
Pizza Hut is by far the favored pizza restaurant by respondents in the Hillside area. It
attracts customers because of its balanced package including good pizza, convenience,
price, delivery, and good service. These important characteristics are reemphasized with
other data (see Charts 5,6). Pier 49, the second most-favored pizza restaurant, seems to
attract most of its customers with its unique pizza characteristics.

```
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How Pier 49 is Perceived

The perceptions of Pier 49 San Francisco Sourdough Pizza Company have been identified through the two questionnaires. Questions were included that asked about Hillside residents' knowledge of and experience with Pier 49. The customers were asked to rate and rank their experience with Pier 49 in several areas. Other questions asked about perceptions of gourmet pizza. Several questions related specifically to Pier 49's atmosphere, and open-ended questions also proved insightful.

First Introduction to Pier 49

Three hundred and four Hillside residents were asked if they had heard of Pier 49. Eighty-four percent of them had heard of the restaurant. Fifty-three percent of those surveyed had eaten there. The majority of those familiar Pier 49 first discovered the restaurant by seeing it. Chart 2-1 shows the various ways the residents had heard of Pier 49.

Forty-four percent of the respondents of the in-store questionnaire said they first heard about Pier 49 by seeing the store itself. Twenty-four percent first heard about it from friends, and only eight percent heard about the restaurant from ads or coupons.

Pier 49's Rating

The in-store questionnaire asked the customers of Pier 49’ features and qualities. As indicated in the previous section, Pier 49’s greatest strength is the delicious pizza: close to 70 percent of the responses rated taste as superior. Cleanliness was rated somewhat lower. Service, speed, and price received the lowest scores from Pier 49’s customers.
The lower ratings on service, speed, and price could be detrimental to Pier 49. From the previous section, convenience, price, and service were all important characteristics in the ideal pizza restaurant.

**Gourmet Pizza**

However, Pier 49’s gourmet pizza can be its greatest strength and lead the restaurant to new heights. Research has shown that currently a void exists in the Gourmet Pizza area.

The residents of the Hillside were also asked the question, “What pizza restaurant comes to mind when I say ‘Gourmet Pizza?’” Most respondents answered with, “there is no gourmet pizza restaurant” or “none” which was said 29.6 percent of the time. The most frequently mentioned restaurant was Wasatch pizza, being indicated by 22 percent of the residents. Pier 49 pizza was second with 18.4 percent. Chart 2-3 shows the responses given by the Hillside residents when asked this question.

<table>
<thead>
<tr>
<th>None</th>
<th>29.6%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wasatch</td>
<td>22.0%</td>
</tr>
<tr>
<td>Pier 49</td>
<td>18.4%</td>
</tr>
<tr>
<td>Other</td>
<td>16.8%</td>
</tr>
<tr>
<td>Pizza Hut</td>
<td>5.6%</td>
</tr>
<tr>
<td>Godfather’s</td>
<td>4.6%</td>
</tr>
<tr>
<td>The Pie</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

Because of the large percentage of respondents not knowing of a gourmet pizza restaurant, Arrow Research believes that Pier 49 can use marketing techniques to distinguish itself as the gourmet pizza.

**Pier 49’s Atmosphere**

The focus group participants made various comments about the atmosphere of Pier 49. Some comments included compliments and criticisms of the furniture, television, and decorations. Questions were developed and placed in the in-store questionnaire to help learn customer’s preferences concerning these areas.
Generally, Pier 49’s customers react positively to the TV, the decorations, the furniture, and the general feeling of the restaurant (see Chart 2-4).

### Chart 2-4 – Customer Agreement Statements
Concerning Atmosphere

<table>
<thead>
<tr>
<th>Statement</th>
<th>1-Agree</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5-Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like the TV</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Decorations add well to S.F. theme</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>I like the general feeling of the restaurant</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>I like furniture</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Open-ended Opinions
Interesting information was discovered from open-ended questions asking what customers like the most and the least about Pier 49 (see Charts 2-5 & 2-6). The quality of the pizza is the most liked, followed by the decorations, crust, location, and finally, service. Seventy-three customers responded to the question asking what was least liked about Pier 49. The aspects least liked were Pier 49’s price, service, and location.

These graphs, along with previously mentioned data, suggest that Pier 49 would do well to improve its service and value for the customer.
Service Preferences in Pizza Restaurants

At Pier 49, customers have traditionally ordered and picked up pizza at the counter. Pier 49’s management wants to know if its customers would like to be offered more services. Focus group participants varied in their opinions. While they all placed high importance on good service, most wanted to order at their table and be waited on. Others indicated they are used to ordering pizza at the counter, and that is fine with them.

Questions on both questionnaires focused on the issue of how important service is and what types of service is preferred. Previous sections of this report have shown good service is one of most important factors in choosing a pizza restaurant and that customers feel Pier 49’s service is not one of its strengths (see Charts 1-5, 1-6, 2-2, 2-5, and 2-6).

Order at the Table or at the Counter

In the in-store questionnaire, the agreement statement “I prefer to order at my table instead of at the counter,” was used to determine whether customers preferred ordering at the table or the counter. One-hundred-twenty-nine customers responded to this statement.

Thirty-five percent of respondents indicated they disagree with this statement; they prefer to order at the counter. Twenty-nine percent of the respondents feel indifferent about the statement, checking the center box. The other three categories were very close in number of responses. Therefore, Pier 49’s customers seem to like to order at the counter (see Chart 3-1).

Contrasting results were found in the door-to-door survey. The question, “What type of service would you expect from a gourmet pizza place?” was followed by the choices, “Order at the Counter or Order at the Table.” Though this question was worded as “What would you expect from a gourmet pizza restaurant,” it was often interpreted as preference, not as expectation.
Three-hundred-four people responded to this question. Seventy-five percent indicated that they expect table service from a gourmet pizza place. Fifteen percent expect to order at the counter. The remaining 10% indicated that they felt neutral about the question.

Thus, while Pier 49’s customers seem to prefer to order at the counter, a vast majority of those surveyed in the door-to-door survey expect to order at the table when eating at a gourmet pizza restaurant. The respondents of the door-to-door survey were asked what they would expect from a gourmet pizza restaurant; whereas, customers of Pier 49 were simply asked to respond to the agreement statement, “I prefer to order at my table instead of at the counter.”

The main question: do current patrons of Pier 49 perceive Pier 49 as a “gourmet pizza restaurant?”

I Prefer to Seat Myself
The agreement statement, “I prefer to seat myself over being seated by a host/hostess,” was used to ascertain customers’ preferences in regard to seating. One-hundred-twenty-nine responded to this question.

Sixty-two percent indicated that they agree with this statement. Most all agreed at least to some degree with the statement. Only seven percent responded below the Neutral category (see Chart 3-1).

A similar question was asked in the door-to-door questionnaire. When asked what type of service was expected from a gourmet pizza restaurant, 56 percent expected to be seated. Thirty percent expected to seat themselves, and 14 percent had no preference.

Once more, the results seem to be somewhat conflicting, assuming Pier 49 is a “gourmet pizza restaurant.”

Salad Service Preference
Residents of Hillside were asked what type of service they expected from a gourmet pizza restaurant in regards to salad. They were questioned as to whether they expected a pre-made salad or a self-serve salad bar.

A majority of 60 percent indicated they expected a self-serve salad bar. Thirty-three percent expected a pre-made salad and seven percent indicated the choice was not important.

Rating of Pier 49’s Service
Customer’s of Hillside were finally asked to rate Pier 49’s service on a scale of one to five (see Chart 2-2). Of the seven categories, service scored fifth, and speed scored sixth, followed only by price. Service, one of the easiest factors to control, is not as high as it could or should be.
Menu Items: Added Value

Focus group participants differed in their opinions on menu items at a pizza restaurant. Some indicated they simply want pizza when they go to a pizza place. Others stated they like to order such items as pasta, sandwiches, etc.

Two sets of questions were included in the door-to-door and in-store questionnaires in order to ascertain which menu items are the most popular. Another question was asked of Pier 49’s customers to discover whether or not more menu items are even desired.

Door-To-Door Menu Items
Three-hundred and four valid door-to-door responses were collected. Three main menu items were mentioned most frequently. Salad was mentioned 34 percent of the time, breadsticks 23 percent, and pasta 12 percent. An interesting note is that nine percent indicated that they prefer only pizza on the menu.

In-Store Menu Items Added
From a list, customers checked three items they wanted added to Pier 49’s menu. Four items on the questionnaire were mentioned most often out of the valid 133 in-store responses. Salad bar constituted 24 percent of the responses, followed by breadsticks with 18 percent, more combo deals had 17 percent, and pasta 16 percent (see Chart 4-1).

Agreement Statement: I want more menu items
A question in the in-store questionnaire evaluates whether or not Pier 49’s customers desire more menu items. Thirty-two percent of the responses are indifferent to wanting more items on the menu. However, 39 percent of the clientele surveyed agreed or somewhat agreed that more items should be presented on the menu (see Chart 4-2).

As indicated in Chart 4-2, the clientele of Pier 49 seems to be fairly evenly divided in their opinions of the menu. Though slightly skewed toward “Agree,” the largest segment of those surveyed is indifferent.
In conclusion, the main items people like to see on a pizza restaurant’s menu are salad, breadsticks, and pasta. Seventeen percent of Pier 49’s clientele would like more combo deals to the list. Thirty-nine percent lean toward more menu items while 26 percent tend to indicate satisfaction with the menu.
Who is Coming to Pier 49, and Who is Eating Pizza?

Pier 49 targets upper-middle class pizza eaters who are willing to pay a little more money for an extra pizza. Focus groups responded they are, "... willing to spend an extra buck if the pizza is good." This section is a report of who participated in the survey research, both in the store, and at their homes.

**Pier 49 Customer Demographics.**

Of the 133 respondents surveyed, the ages were between 11 and 73, with an average of 34 years old. The highest number of respondents came from the 20-29 age group bracket, equaling 30 percent of total in-store respondents. The second highest number of respondents came from the 30-39 age group bracket, with 25 percent of the responses. The lowest number of respondents came from the 60 and over age group, equaling only 3 percent of total respondents.

Fifty-seven percent of the in-store responses came from males, with 43 percent coming from females.

**In-store Respondent’s Address**

The majority of the respondents live South-East and South-West of the Pier 49 establishment (see Figure 5-1). The least amount if respondents came from the North-East and North-West quadrants. This would suggest that more advertising be positioned in the North-East and North-West areas.

![Figure 5-1 - Respondents Address by quadrant](chart.png)

**In-Store Respondents’ Income and Occupation**

Respondents’ income varied. The highest number of respondents placed themselves in the $50,000-$80,000 income bracket, equaling 32 percent of the total. The lowest number of respondents were found in the $30,000-$49,000 income bracket, equaling 17 percent of the total.

![Chart 5-1 -- Income of Clientele](chart.png)
The largest number of respondents placed themselves in the Business occupational category, equaling 40 percent. Those in technical or construction fields followed with 13 percent, followed by teachers with six percent, and doctors/nurses with 4 percent. The smallest number of people were found to occupy the occupational categories of house wife with and student—with three percent each.

Customer’s Frequency of Visits
The 97 customers responding to this question eat at Pier 49 an average of 2.1 times per month. Almost 40 percent eat at Pier 49 only once a month, 30 percent visit twice per month, and 14 percent visit three times per month. Out of the 133 total respondents, twenty-seven percent were eating at Pier 49 for the first time the day they filled out the questionnaire.

The Groups Eating at Pier 49
Fifty-eight percent of the responding clientele came to Pier 49 with family members. Eighteen percent came with friends, and 24 percent came alone.

The average number of friends brought to Pier 49 was 2.3. If you believe it, the average number of family members was also 2.3.

Door-to-Door Respondents
The respondents of the door-to-door questionnaire were varied, and came in all shapes and sizes, and from all walks of life. The age spanned between the early teens to the early eighties. The average age was 41.4 years.

The frequency that Hillside residents eat out is almost as wide-spread as is their age. Some never eat out, and one gentleman reported eating out as much as sixty times in one month. Almost 47 percent of the respondents said they ate out between one and six times per month. Thirty-seven percent eat out from seven to 15 times per month. The average number of times respondents eat restaurant food (excluding outliers) is 11.01 times per month.

Hillside respondents claim to eat pizza much less frequently, however. Almost 16 percent indicated that they did not eat pizza at all in the past month. Thirty-four percent ate pizza only once, 21 percent ate pizza twice, 11 percent ate pizza three times, with 17 percent eating pizza over three times in the past month. The average number of times respondents ate pizza prepared at a restaurant was 1.95 times.

The fact that people in the immediate area of Hillside plaza seem not be eating pizza very often may lead Pier 49 to consider additional menu items more strongly.
Conclusions

Information is good. However, if the information does not lead to action, it serves no purpose. The information provided from the research, allows many conclusions to be drawn and recommendations made. Arrow Research has narrowed the conclusions and recommendations to answer the specific questions posed in the research proposal.

**Question: What are the characteristics of the Ideal Pizza Restaurant?**

For residents of the Hillside area, it is clear the ideal pizza restaurant does not just have quality pizza. Convenience (and delivery), price, and service are very important qualities (Charts 1-2, 1-5). Customers of Pier 49 also indicate these qualities are important. Arrow Research believes Pizza Hut is the favored pizza of the Hillside residents because it possesses these qualities and appeals to many who want a good pizza that is inexpensive and quick (Chart 1-3).

**Question: How is Pier 49 perceived by its customers?**

Not many respondents indicated they first heard of Pier 49 from coupons or advertisements (Chart 2-1). In fact, a very small percentage of customers actually heard of Pier 49 through the media. Pier 49’s pizza is rated very high by customers while service, speed, and price are rated somewhat lower.

According to an article in *Nations Restaurant News* in February of 1996, “Pizza has grown up... It’s a little more adult than it was a few years ago. I definitely see a trend away from just the simple mushroom, pepperoni, and sausage.” Unique types of pizza are one of Pier 49’s strengths and characterize a gourmet pizza restaurant. A large amount of Hillside residents believe no real gourmet pizza restaurant exists. However, Wasatch and Pier 49 are the main candidates for being such a restaurant (Chart 2-3).

**Question: What are the preferred services of pizza eaters?**

People who eat out do not just eat out for pizza, they want a complete experience. Chart 2-4 shows customers generally like three aspects of the atmosphere, however, 14 percent indicated the atmosphere was what they liked least about Pier 49 (Chart 2-6). This contradiction indicates that our data is inconclusive.

Hillside residents love delivery. Charts 1-2 and 1-5 indicate delivery is important to pizza eaters in the Hillside area. Chart 2-6 further shows 10 percent of the aspects least liked by Pier 49 customers is Pier 49’s lack of delivery. Another quote follows: “Savvy restaurateurs operating traditional restaurants have responded [to things going on around and outside the business]. By adding home delivery, upscale and midscale restaurants have broadened their appeal beyond the sit down experience.”
Pier 49's customers prefer the limited services of seating themselves and ordering at the counter. In contrast, the door-to-door respondents expect the increased services of being seated and ordering at the table at a gourmet pizza restaurant.

**Question:** What additional menu items can Pier 49 add to its menu?

Pier 49's customers tend to be fairly neutral about adding menu items (see Chart 4-2). Salad, breadsticks, combo meals, and pasta are the main items customers want added to Pier 49's menu (see Chart 4-1). In addition, Sixty percent of the Hillside respondents indicated they expect (or prefer) a self-serve salad bar over a pre-made salad.
Recommendations

From the previously-mentioned conclusions, the following recommendations are suggested:

- Pier 49 should seek to establish itself as “The Gourmet Pizza Restaurant” in the area. Advertisements, mailed coupons, in-store signs and menus should emphasize the gourmet theme.

- In accordance with the gourmet theme, Pier 49 should also increase the quality of its services. Service should be as superior as Pier 49’s pizza. Employee training and evaluation, accessible corporate standards, and customer service manuals can be utilized to achieve the highest level of service.

- Pier 49 should evaluate its current services offered. For those who eat in, we recommend higher levels of table service be offered to differentiate Pier 49 further from other pizza stores. Due to the popularity of pizza delivery in the Hillside area, we suggest delivery services be carefully considered.

- The Pier 49 Hillside store has the capability to collect customers’ addresses and patronage activities. We recommend Pier 49 use this system to improve its advertising activities and that direct mailing be used as a marketing tool. Residents living directly north and northwest of Pier 49 should be emphasized. Magnets with Pier 49’s logo and phone number can be mailed to increase awareness of Pier 49 and convenience in placing orders.

- The data regarding atmosphere is somewhat contradictory and, therefore, inconclusive. We recommend Pier 49 involve customers in scrutinizing its atmosphere closely.

- We recommend more combo deals be added to Pier 49’s menu. Combo deals are easily and inexpensively added to the menu.
September 17, 1996

Mike Dicou
Mike Lamoreaux
Pier 49 San Francisco Sour Dough Pizza
2227 So. Highland Dr.
Salt Lake City, UT 84106

Dear Mike and Mike,

Here is the proposal we worked out for the research project. First of all, we want to thank you for considering the project. We are excited about the project, and feel it will definitely be worth your time and investment.

We call ourselves Arrow Research. Arrow Research consists of four happy, bright, enthusiastic students: Jason Bennett, John Brasher, Kristina Davis, and Greg Gordon. Jason and Greg are the current presidents of BYU's Marketing Association; John and Kristina are both vice-presidents of the Association. We are all excited about this project and have many ideas.

We look forward to meeting with you on Wednesday at 3:00 p.m. at the Hillside store. We plan on discussing the proposal further, and making any necessary adjustments. From our conversations with you, we have tried to understand your expectations and specific needs and hope these are met by the proposal.

We also plan on learning more about Pier 49; its history, its progress, its strengths and weaknesses, and your plans for the future. In addition, we look forward to discussing the specific challenges you have had at the Hillside store. We hope the proposal is clear and acceptable. If you have any questions, please give us a call.

See you on Wednesday.

Sincerely,

Arrow Research
Jason Bennett
John Brasher
Kristina Davis
Greg Gordon
Market Research Proposal Prepared for
Pier 49 San Francisco Sour Dough

A Study of Customer Perceptions and Preferences
in the Hillside Area

by Arrow Research
September 17, 1996

INTRODUCTION:

Pier 49 is a gourmet pizza franchiser. Its original crust and toppings differentiate it from its competitors. The company began in Salt Lake City in 1991 and has 15 pizza stores located in Utah, Idaho, California, Hawaii, and Canada.

Pier 49 is interested in knowing how it is perceived by its patrons. Pier 49 also wants to know if the current market aim—gourmet pizza for the upper-middle class—is too narrow. In addition, the managers are interested in exploring the possibility of offering value products, new and varying menu items (i.e., sandwiches, pastas, more salad options), and expanded services.

OBJECTIVES:

This study will examine customers' preferences and perceptions of the Pier 49 Hillside store. The research will determine (for residents of the Hillside area):

- The profile of “their ideal pizza restaurant,”
- Their perceptions of Pier 49,
- The customer appeal of adding sandwiches, pastas, and salad items to Pier 49’s menu,
- The preferred services; counter, table, delivery,
- The favorite brand of pizza eaten by residents of Hillside.

METHODOLOGY:

Exploratory Research will include visiting the Pier 49 office and company directors, becoming more familiar with Pier 49 and its products, and gaining a basic understanding of company philosophy. Arrow Research will also visit other competing pizza restaurants and examine their strengths and weaknesses.

Secondary Research will include examining trade publications and other data resources to locate articles and scenarios of successful pizza chains. Arrow
Research will try to better understand the pizza industry and characteristics of successful pizza restaurants.

**Primary Research** will include three different steps to meet the above objectives.

1. **Focus Groups:** Two focus groups of eight to ten people will be conducted. We propose that posted notices, sign-up sheets, and free pizza be used to attract customers to participate in the focus groups. We suggest the focus groups be conducted in the Hillside store (or other appropriate location) on September 28th, 11:00 am. The focus groups will be used to learn the following:
   - General impressions of the Pier 49 Hillside store
   - Customers' first exposure to the Pier 49 Hillside store
   - Any variations in the menu that would be preferred
   - Preferred service (i.e., table, counter, delivery)
   - Most important criteria for “the ideal pizza restaurant”

   The results of the focus group will be used to help develop questionnaires.

2. **In-House/Take-Out Questionnaires:** Questionnaires will be administered to current patrons from October 4th to November 11th. A minimum of 300 questionnaires will be collected and tabulated. Arrow Research proposes that coupons be used to ensure return of questionnaires given to take-out customers.

   These questionnaires will be used to gain a more specific knowledge of the findings from the focus groups. Specifically, the problems of customers' perceptions, opinions of menu additions, and preferred services (as outlined in the aforementioned objectives), will be addressed. The questionnaires will include the date and time to ensure that customers of all time periods (weekdays, weekends, afternoons, and evenings) will be surveyed.

3. **Door-to-Door Questionnaires:** These questionnaires will be used to determine the following from a sample population of the Hillside area:
   - How often do people eat pizza?
   - What is the most eaten brand pizza in the Hillside area and why?
   - How well known is Pier 49?
   - How does Pier 49 compare to other pizza restaurants in specified categories?
Streets in a two-mile radius of the Hillside store will be selected where the questionnaires will be administered. A minimum of 300 questionnaires will be filled out by Arrow Research representatives.

All data collected will be compiled by Arrow Research and analyzed using BYU’s SPSS computer software. Descriptions of findings and recommendations will be presented in both a written and an oral form.

**Schedule:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 18</td>
<td>Finalize proposal with Mike Lamoreaux and Mike Dicou</td>
</tr>
<tr>
<td>September 18</td>
<td>Conduct Exploratory research.</td>
</tr>
<tr>
<td>September 18-28</td>
<td>Collect names &amp; phone numbers for focus groups</td>
</tr>
<tr>
<td>September 28</td>
<td>Conduct focus groups at Hillside store</td>
</tr>
<tr>
<td>September 30</td>
<td>Develop in-store/take-out questionnaires</td>
</tr>
<tr>
<td>October 5</td>
<td>Deliver in-store/take-out questionnaires</td>
</tr>
<tr>
<td>October 12</td>
<td>Conduct door-to-door surveys</td>
</tr>
<tr>
<td>October 15</td>
<td>Begin tabulations of door-to-door surveys</td>
</tr>
<tr>
<td>October 19</td>
<td>Conduct additional surveys as needed</td>
</tr>
<tr>
<td>November 11</td>
<td>Pick up all in-store/take-out surveys</td>
</tr>
<tr>
<td>November 15</td>
<td>Data tabulation/calculations completed</td>
</tr>
<tr>
<td>November 18</td>
<td>Rough draft completed</td>
</tr>
<tr>
<td>November 25</td>
<td>Final draft completed</td>
</tr>
<tr>
<td>November 25</td>
<td>Information submitted for printing</td>
</tr>
<tr>
<td>December 10</td>
<td>Presentation of findings and recommendations on BYU campus</td>
</tr>
</tbody>
</table>

**Research Budget:**

- Long distance telephone calls: $25.00
- Travel (10 trips to Hillside @ 90 miles x $.22/ mile): $198.00
- Survey Copies (800 @ $.05): $40.00
- Binding ($25 + 6 books @$12): $97.00
- Printing (100@$$.05, 10@$$.50 x 6 books): $60.00
- Presentation: $100.00
- Food for Focus Group: N/C
- Contingency: $150.00
- Total: $670.00

*Does not include $500 donation to BYU*
**AGREEMENT STATEMENT:**

Arrow Research agrees to complete the marketing research and to present all findings and recommendations as outlined in this proposal. Arrow Research accepts full responsibility for all research conducted. Neither BYU nor Dr. Ray Andrus are responsible for the research or recommendations, though it is understood that Arrow Research will receive assistance from the expertise and experience of Dr. Andrus and BYU’s resources to provide a professional study.

Pier 49 agrees to pay all expenses incurred during the research project, not to exceed $670. Arrow Research requires $100.00 at the commencement of this project to cover exorbitant expenses. A summary of the rest of the expenditures will be submitted and reimbursed on a monthly basis. Any money not used by Arrow Research will be refunded to Pier 49 at the conclusion of the project. BYU and Arrow Research appreciate the donation of $500 to the Marriott School of Management.

A formal presentation of the research and its findings will be on December 10, 1996 on BYU campus. Pier 49 agrees to have at least one representative present at the presentation.

**PIER 49:**

---

M. LAMOREAUX  
M. DICOU  
APPROVED BY:  
DR. RAY ANDRUS

**ARROW RESEARCH:**

---

J. BENNETT  
K. DAVIS  
G. GORDON  
J. BRASHER
APPENDIX B -- QUESTIONNAIRES
Hi, my name is ___. I am a college student conducting a door-to-door survey for a class project and for a client in the pizza industry. May I have a few moments of your time to ask a few quick questions?

1. How many times in the last month have you eaten food prepared by a restaurant?

2. Of those times, how many times did you eat pizza?

3. What is your favorite pizza restaurant in the area?

4. Why is [that] your favorite pizza restaurant in the area?

5. What characteristics of [that restaurant] are the most important to you?

6. What entrees do you like to see on a menu when you go to a pizza restaurant (besides Pizza)?

7. Would you be willing to spend $17.00 for a large gourmet pizza that feeds four or five people?

8. What Pizza Restaurant comes to mind when I say, “Gourmet Pizza?”

9. What types of services would you expect from a gourmet pizza restaurant?
   - [ ] Order at counter or [ ] Order at table
   - [ ] Be seated by host/ess or [ ] Seat myself
   - [ ] Self-serve salad bar or [ ] Pre-made salad

10. Have you ever heard of Pier 49 Pizza?

11. Have you ever eaten at Pier 49?

12. What three words would describe your experience at Pier 49?

May I please have your:

1. Age ____ 2. Occupation ___

3. [ ] Male [ ] Female

Thank you very much! Have a nice day.
**IN-STORE QUESTIONNAIRE, FRONT**

**Tell us your preferences**  
(Check one box per sentence)

<table>
<thead>
<tr>
<th>Preference</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer ordering my pizza at my table instead of at the counter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I prefer seating myself over being seated by a host/hostess</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I feel low price is more important than good service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am willing to pay more money for a quality pizza</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Please rank the following items in order of importance**  
(1=most important, 5=least important)

<table>
<thead>
<tr>
<th>Item</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Atmosphere</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good Price</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good Pizza</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Rate Pier 49 in the following categories:**

<table>
<thead>
<tr>
<th>Category</th>
<th>Superior</th>
<th>Poor</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Atmosphere</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cleanliness</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I like the furniture</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I like the TV</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I like the general feeling</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>of the restaurant</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The decorations add well to the</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>San Francisco theme</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I want more menu items</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**What do you like most about Pier 49?**
Check three items you want added to Pier 49's menu:

- Salad bar
- Bake-at-home pizza
- Pasta
- More combo deals
- Bread sticks
- Sub sandwiches
- Other

**What do you like least about Pier 49?**

**What is your favorite pizza restaurant?**

**Please tell us about yourself:**

<table>
<thead>
<tr>
<th>I came to Pier 49 today:</th>
<th>How did you first hear about Pier 49?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>Friend</td>
</tr>
<tr>
<td>With family (# members)</td>
<td>Family</td>
</tr>
<tr>
<td>With friends (how many)</td>
<td>Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I came today</th>
<th>Age</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>To pick up pizza</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To sit down and eat</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I come here</th>
<th>Occupation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Times per month</td>
<td></td>
</tr>
<tr>
<td>This is my first time</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Approximate</th>
<th>Household Income:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>E.</td>
<td></td>
</tr>
<tr>
<td>S</td>
<td></td>
</tr>
</tbody>
</table>

| Under $30,000                     | $30,000-49,000    |
| $50,000-80,000                    | Over $80,000      |

**Thank You! Please Put Comments on Back!**
PIER 49
Customer Questionnaire

Free Garlic Bread

Fill out this questionnaire for a FREE order of specialty Garlic Bread!!!!

Please Check:
It is a: □ Weekend or □ Weekday
It is an: □ Afternoon or □ Evening

Thank You!!
Please Leave your comments!!!

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

⇒ Arrow Research ⇒
APPENDIX C - QUEST
**DOOR-TO-DOOR QUESTIONNAIRE COMMENTS**

"Three words that describe your experience at Pier 49"

<table>
<thead>
<tr>
<th>POSITIVE COMMENTS</th>
<th>FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good Pizza; Good; Very Good</td>
<td>82</td>
</tr>
<tr>
<td>Great Tasting Pizza; Excellent</td>
<td>10</td>
</tr>
<tr>
<td>Positive</td>
<td>8</td>
</tr>
<tr>
<td>Good Crust</td>
<td>7</td>
</tr>
<tr>
<td>Good Service</td>
<td>5</td>
</tr>
<tr>
<td>Different Pizza</td>
<td>4</td>
</tr>
<tr>
<td>Fast Service; Efficient; Prompt</td>
<td>4</td>
</tr>
<tr>
<td>Nice Atmosphere</td>
<td>4</td>
</tr>
<tr>
<td>Good Toppings</td>
<td>3</td>
</tr>
<tr>
<td>Barbeque Chicken Pizza</td>
<td>3</td>
</tr>
<tr>
<td>Satisfied With Product</td>
<td>3</td>
</tr>
<tr>
<td>Full; Filling</td>
<td>3</td>
</tr>
<tr>
<td>Pleased with the Take Out</td>
<td>3</td>
</tr>
<tr>
<td>Good Variety</td>
<td>2</td>
</tr>
<tr>
<td>Pleasant Service; Friendly</td>
<td>2</td>
</tr>
<tr>
<td>Cheap; Good Price</td>
<td>2</td>
</tr>
<tr>
<td>Like the Television</td>
<td>2</td>
</tr>
<tr>
<td>Untraditional Flavors; Good Flavor</td>
<td>2</td>
</tr>
<tr>
<td>Convient</td>
<td>2</td>
</tr>
<tr>
<td>I Liked It</td>
<td>2</td>
</tr>
<tr>
<td>We Love It</td>
<td>2</td>
</tr>
<tr>
<td>Pretty Good</td>
<td>2</td>
</tr>
<tr>
<td>Better Than Pizza Hut</td>
<td></td>
</tr>
<tr>
<td>Generally Good</td>
<td></td>
</tr>
<tr>
<td>Better Than Others</td>
<td></td>
</tr>
<tr>
<td>Looks Good</td>
<td></td>
</tr>
<tr>
<td>Texture</td>
<td></td>
</tr>
<tr>
<td>Family</td>
<td></td>
</tr>
<tr>
<td>Good Quality Product</td>
<td></td>
</tr>
<tr>
<td>Best Pizza; One of Favorites</td>
<td></td>
</tr>
<tr>
<td>Food is Wonderful</td>
<td></td>
</tr>
<tr>
<td>Consistent Food</td>
<td></td>
</tr>
<tr>
<td>We only do Take Out</td>
<td></td>
</tr>
<tr>
<td>Wonderful</td>
<td></td>
</tr>
<tr>
<td>Better Than Average Pizza</td>
<td></td>
</tr>
<tr>
<td>Yum</td>
<td></td>
</tr>
<tr>
<td>Reasonable</td>
<td></td>
</tr>
</tbody>
</table>
POSITIVE COMMENTS FROM DOOR-TO-DOOR QUESTIONNAIRE (CONT.)

Enjoyable
Pleased
Fun
Really Like It
Courteous
Clean
Not Too Expensive
Good Counter Service
Served Warm
Adequate Service
Good Value
Not to Spicy
Good Amount of Ingredients
Great Service
Good Decent Pizza

NEGATIVE COMMENTS

<table>
<thead>
<tr>
<th>Comment</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Too Expensive; High Priced</td>
<td>8</td>
</tr>
<tr>
<td>Very Slow</td>
<td>6</td>
</tr>
<tr>
<td>Don’t Deliver, So We Go Elsewhere</td>
<td>5</td>
</tr>
<tr>
<td>Bad Atmosphere</td>
<td>4</td>
</tr>
<tr>
<td>It’s OK</td>
<td>4</td>
</tr>
<tr>
<td>Bad Customer Service</td>
<td>3</td>
</tr>
<tr>
<td>Fair</td>
<td>3</td>
</tr>
<tr>
<td>Empty</td>
<td>2</td>
</tr>
<tr>
<td>Average</td>
<td>2</td>
</tr>
<tr>
<td>Not Impressed with Crust</td>
<td></td>
</tr>
<tr>
<td>Not Great</td>
<td></td>
</tr>
<tr>
<td>Like San Francisco Sour Dough Better</td>
<td></td>
</tr>
<tr>
<td>Not the Best</td>
<td></td>
</tr>
<tr>
<td>I Got Sick</td>
<td></td>
</tr>
<tr>
<td>Need a Salad Bar</td>
<td></td>
</tr>
<tr>
<td>Won’t Go Back</td>
<td></td>
</tr>
<tr>
<td>Thich Gross Pizza</td>
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<tr>
<td>Adults Liked It; Kids Did Not</td>
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<tr>
<td>Bad Salads</td>
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<tr>
<td>Looking for Better</td>
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<tr>
<td>Satisfactory</td>
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<tr>
<td>Not Good Flavor</td>
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<tr>
<td>Wasatch is Better</td>
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<tr>
<td>Noisy</td>
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</tbody>
</table>
NEGATIVE COMMENTS FROM DOOR-TO-DOOR QUESTIONNAIRE (CONT.)

Do Not Like the Television
Ingredients were Sparse
We Did Not Like It
On A Scale from 1 to 10; it’s a 5
Nothing to Draw Me There
Improve on Atmosphere; Not Cozy
Low or No Service
Television Not Hooked Up to Cable
Not Very Many Locations Close
Not Clean
Needs Extra Sauce
They Hate the Customers
Over Priced
Good Value for Lunch, Want it for Dinner
45 Minute Wait
Bad Dough
Wants Value Deals for Dinner
Not Accomodating For Customers
Young Kids are not Personable
Good, But They Forgot My Order
Hard to Order with Kids
Slow Counter Service
Liked It; But Sometimes Not Cooked Fully
A Little Expensive
IN-STORE QUESTIONNAIRE COMMENTS

“What do you like most about Pier 49?”

Golden Gate Bridge
Bird Decorations
Lombard Street
Barbeque Chicken Pizza
Peaceful; Quiet
Spacious; Television
Chicken Pizza is the Best
Clean, Attractive, Comfortable Environment
Good Family Place
Alfredo Sauce
Good Bread; Easy on Garlic
Italian Sausage
We Can Hear Each Other
Workers
Not Greasy
Single Slice Purchases
Sourdough
Variety
Cheese Bread
Big Pizza
White Sauce

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<th>FREQUENCY</th>
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<tr>
<td>2</td>
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</table>

* These comments are those not included in chart 2-5
“What do you like least about Pier 49?”

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<thead>
<tr>
<th>Comment</th>
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<tbody>
<tr>
<td>The Size of the Drink Cups</td>
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<td>Time To Do Pizza Was Too Long</td>
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<tr>
<td>I Only Know of Two Locations</td>
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<tr>
<td>Sports on Television</td>
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<tr>
<td>The Wait</td>
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<tr>
<td>Chicken Pizza</td>
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<tr>
<td>Packaged Salad Dressing</td>
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<tr>
<td>A Little Noisy</td>
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<tr>
<td>The Menu Is Too Small</td>
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<tr>
<td>The TV; Family Should be Able to Talk</td>
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<tr>
<td>No Buffalo Wings</td>
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<tr>
<td>Not Open on Sunday</td>
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<tr>
<td>No Delivery</td>
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<td>The Wait</td>
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<tr>
<td>Take Out Slow Service</td>
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<td>San Francisco Access</td>
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<tr>
<td>Price</td>
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<td>Long Distance From Work</td>
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<td>Flying Segulls</td>
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<td>Inconsistent Quality</td>
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<td>Bird Decorations</td>
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<td>No Artichokes</td>
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<td>Combination Pizza</td>
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<td>Not A Large Selection</td>
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* These comments are those not included in chart 2-6