

KEY TAKEAWAYS:

SENTIMENT AMONG THOSE WHO HAVE HAD BURGERS IN THE PAST THREE MONTHS IS NET POSITIVE BUT HAS SEQUENTIALLY SOFTENED OVER THE PAST YEAR.

A DECLINING PERCENTAGE OF CUSTOMERS WHO HAVE BEEN TO MCDONALD'S IN THE PAST THREE MONTHS KNOW THAT THEY INCORPORATED FRESH BEEF.

FEEDBACK AROUND MCDONALD'S \$1, \$2, \$3 MENU REMAINS VERY POSITIVE AND IMPROVING SEQUENTIALLY.

IMPACTS OF REMOVING THE SIGNATURE CRAFT LINE REMAIN MINIMAL.

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Kitchens

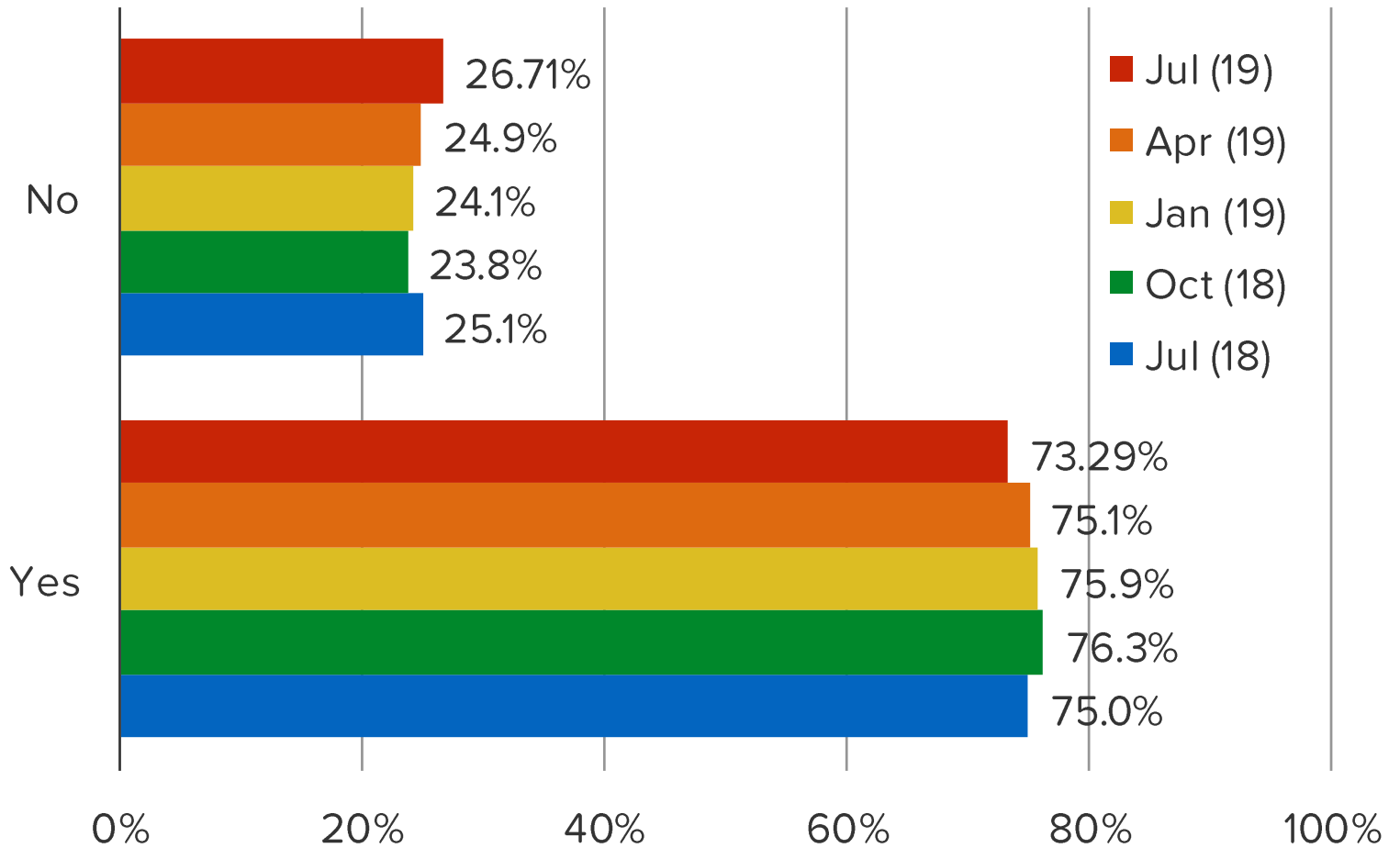
MCDONALD'S

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MCDONALD'S QUESTIONS

HAVE YOU BEEN TO MCDONALD'S IN THE PAST THREE MONTHS?

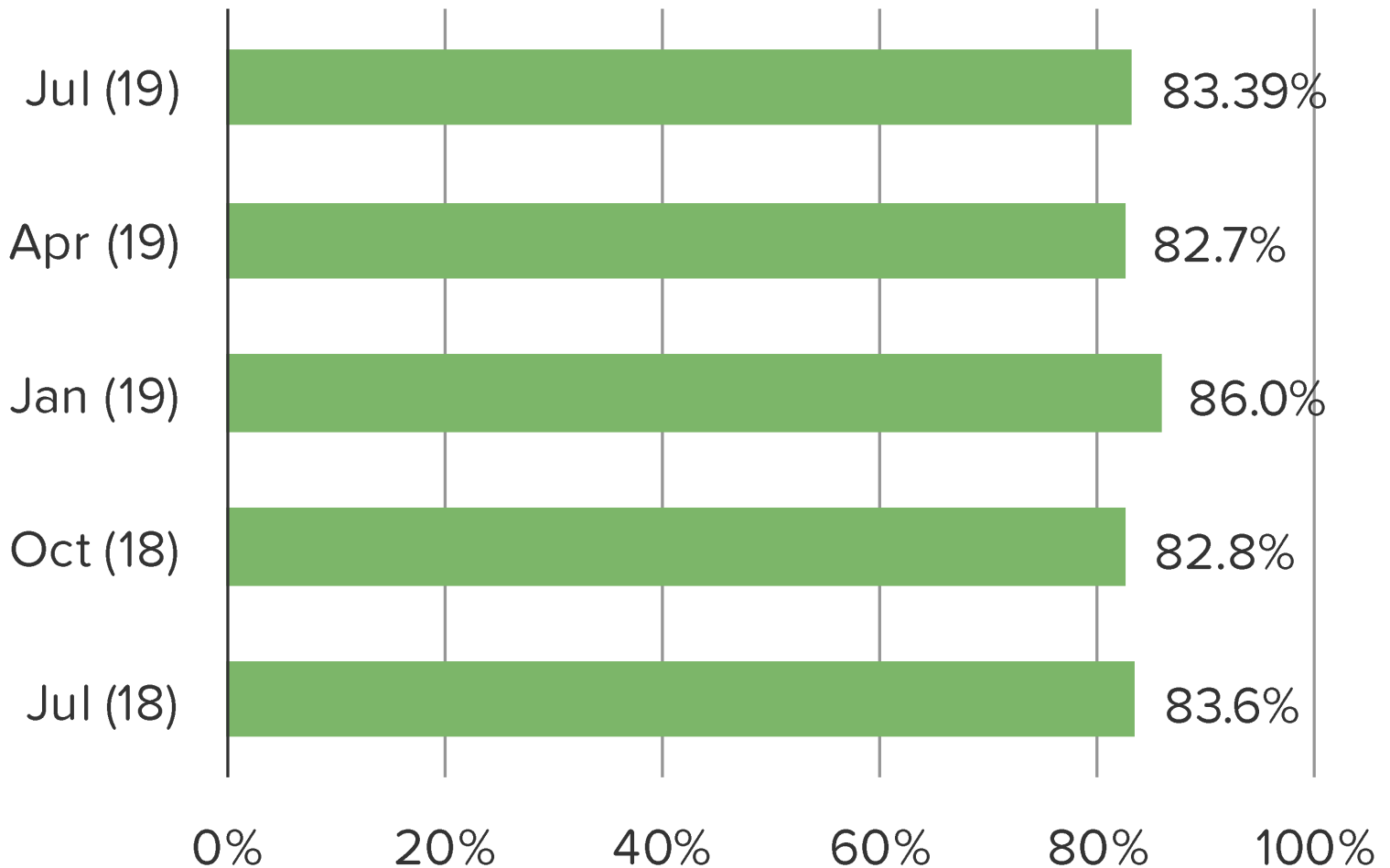
Posed to all respondents.



MCDONALD'S QUESTIONS

HAVE YOU HAD A BURGER FROM MCDONALD'S IN THE PAST THREE MONTHS?

Posed to respondents who have been to McDonald's in the past three months.

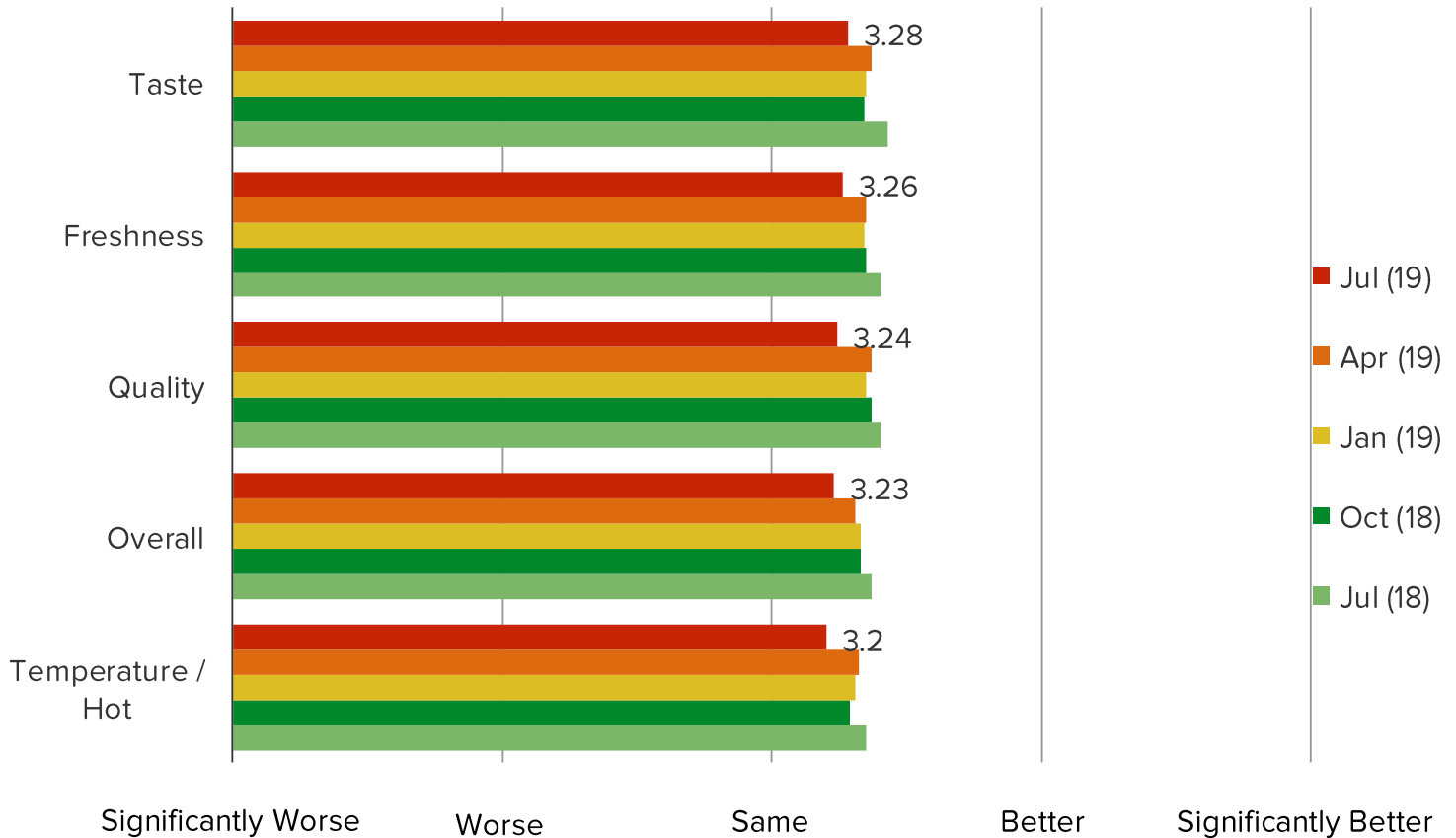


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MCDONALD'S QUESTIONS

DID YOU NOTICE ANY CHANGES TO THE BURGERS YOU HAVE HAD AT MCDONALD'S IN THE PAST THREE MONTHS?

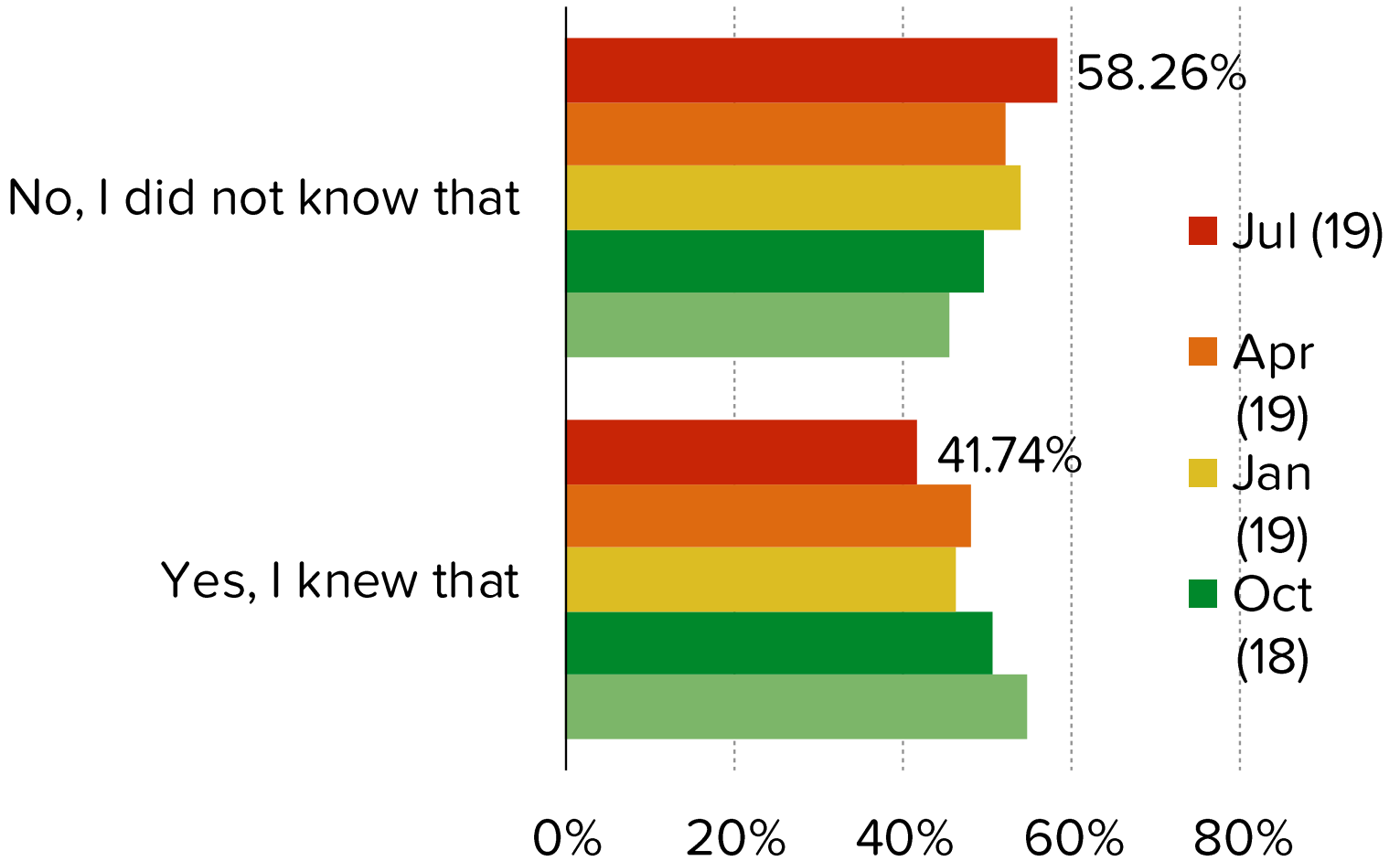
Posed to respondents who have been to McDonald's in the past three months AND ate a burger from McDonald's during that time.



MCDONALD'S QUESTIONS

DID YOU KNOW THAT MCDONALD'S CHANGED THEIR BURGERS TO FRESH BEEF?

Posed to respondents who have been to McDonald's in the past three months.

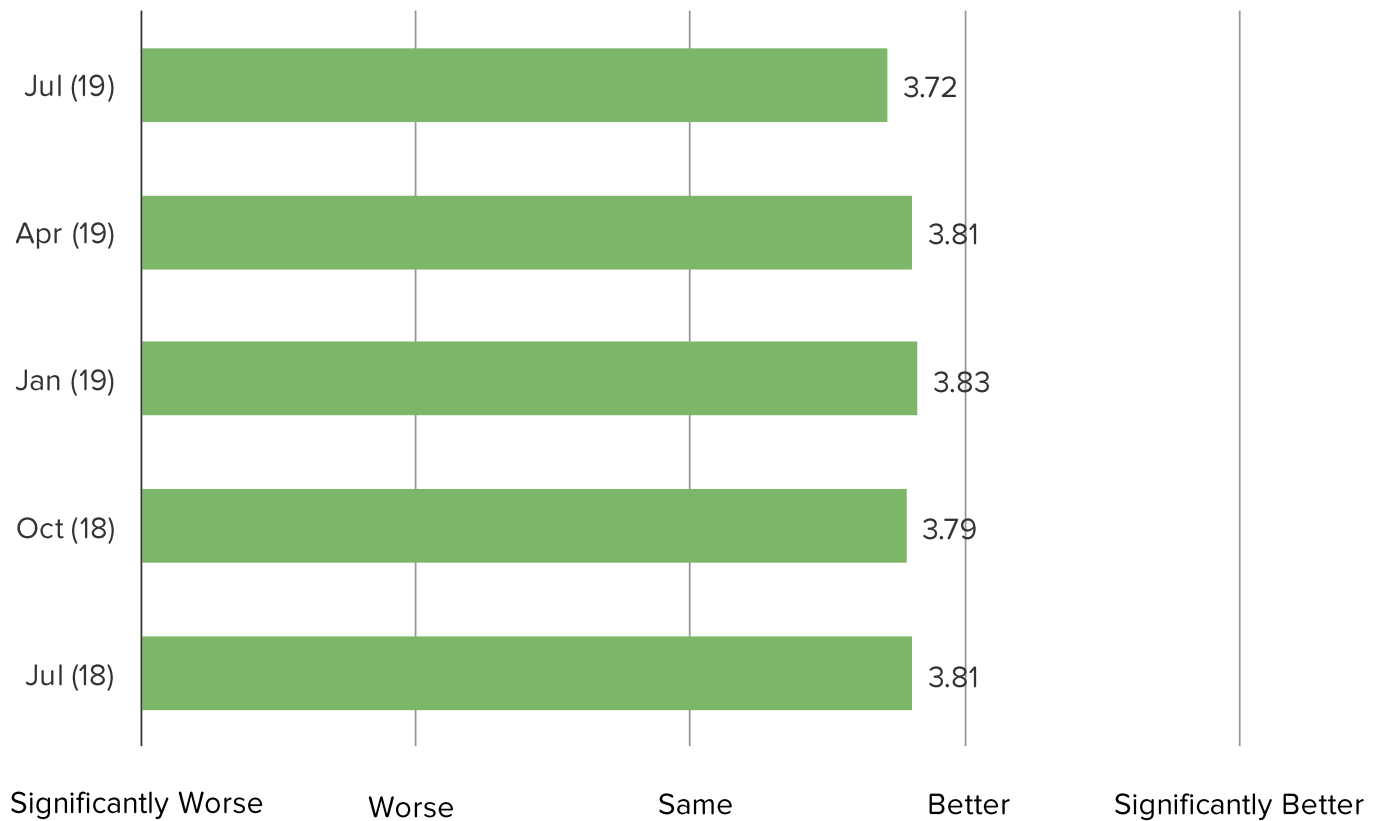


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MCDONALD'S QUESTIONS

DOES THE USAGE OF FRESH BEEF BY MCDONALD'S CHANGE YOUR PERCEPTION OF MCDONALD'S AT ALL?

Posed to respondents who have been to McDonald's in the past three months.

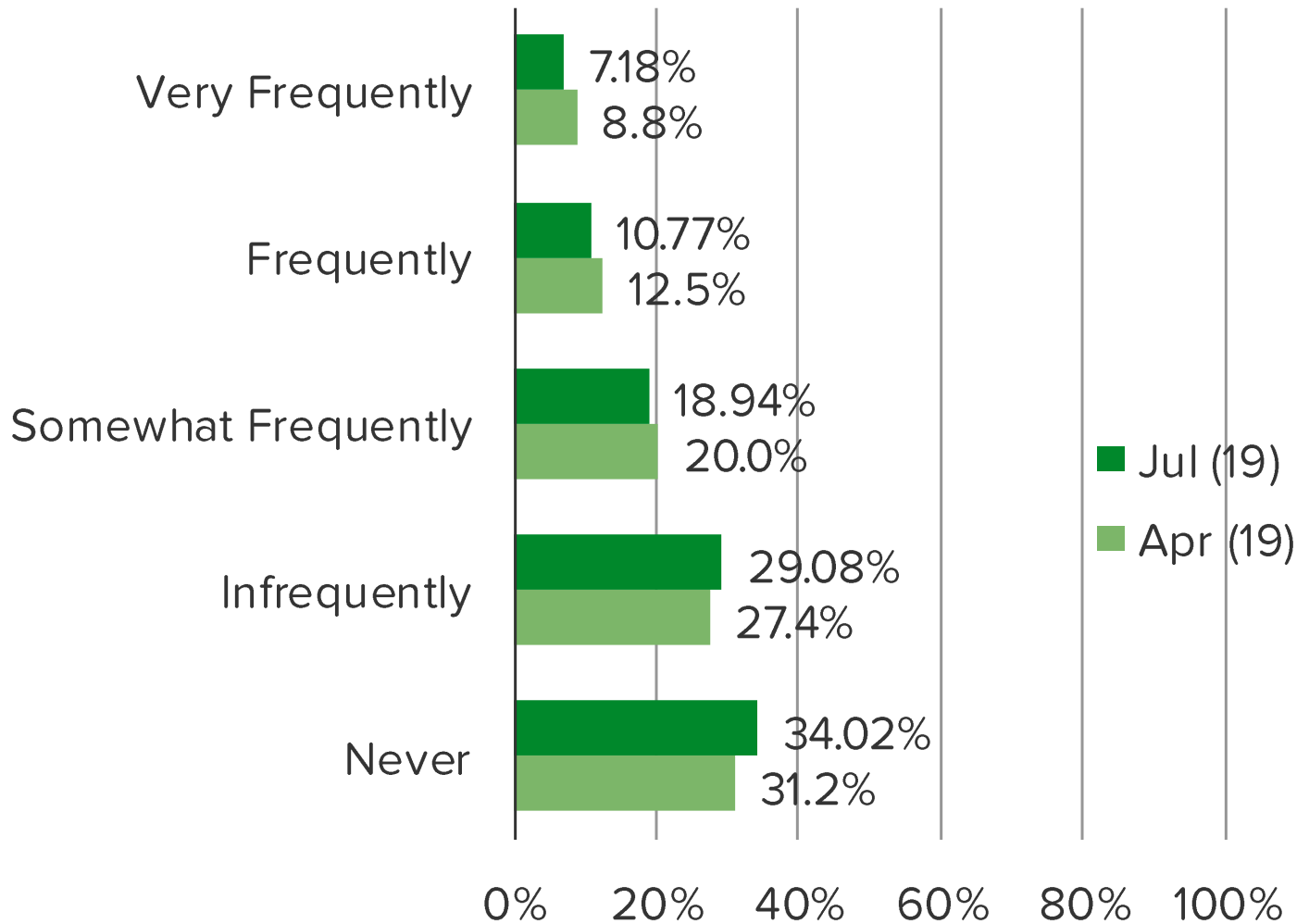


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MCDONALD'S QUESTIONS

HOW OFTEN DO YOU EAT FROM MCDONALD'S SIGNATURE CRAFTED RECIPES MENU?

Posed to respondents who have been to McDonald's in the past three months.

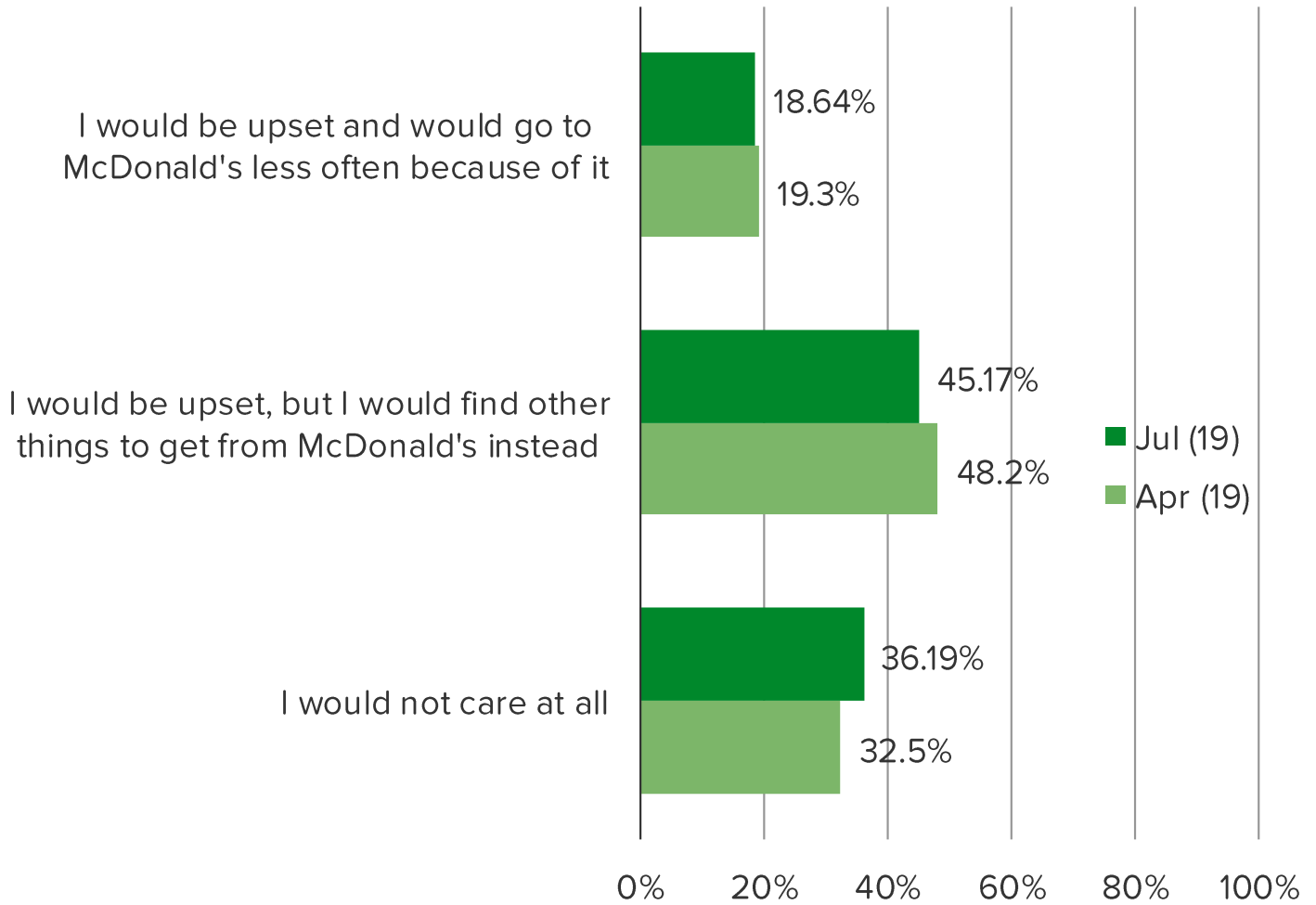


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MCDONALD'S QUESTIONS

WHAT WOULD YOU DO IF THIS LINE OF SIGNATURE CRAFTED RECIPE SANDWICHES AND BURGERS WAS REMOVED FROM THE MENU?

Posed to respondents who have been to McDonald's in the past three months.

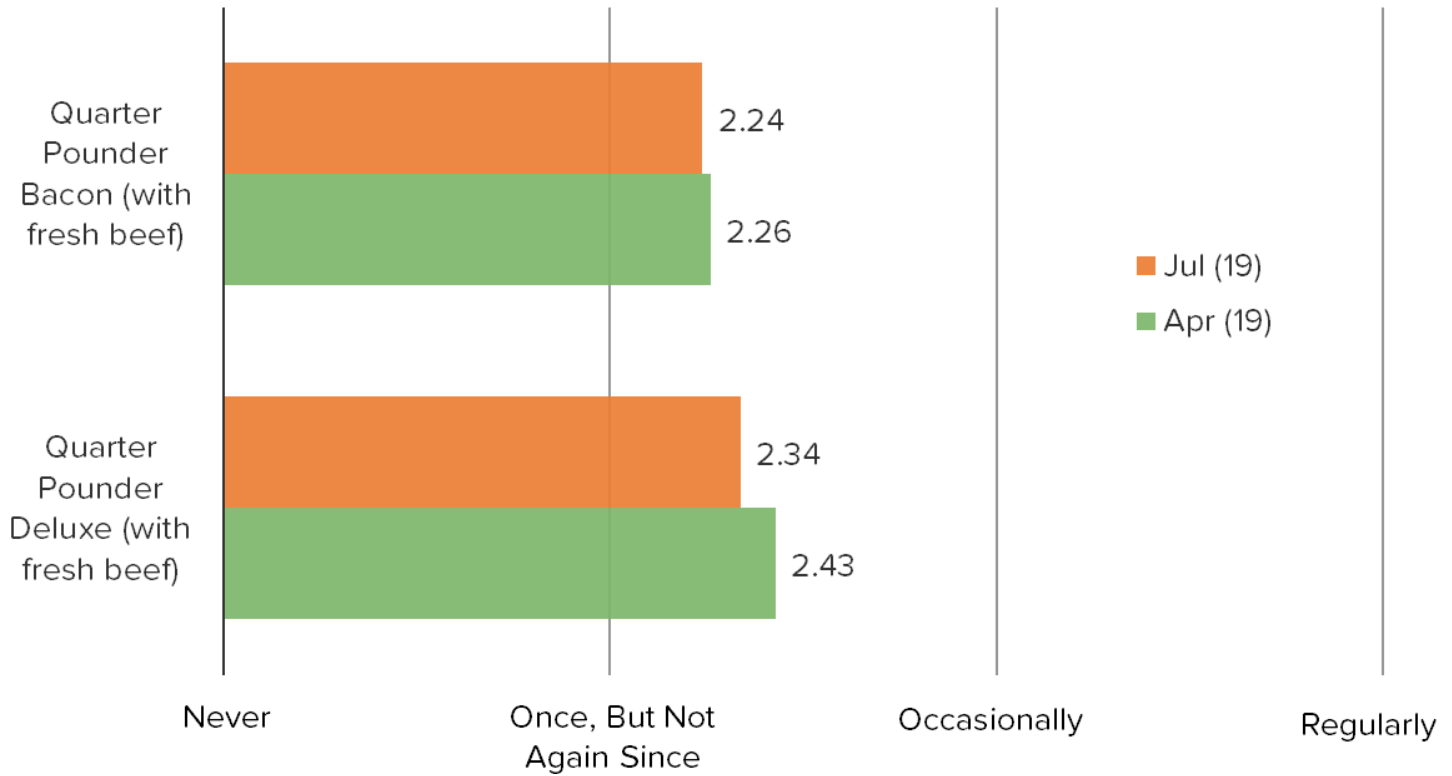


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MCDONALD'S QUESTIONS

HOW OFTEN DO YOU ORDER THE FOLLOWING AT MCDONALD'S...

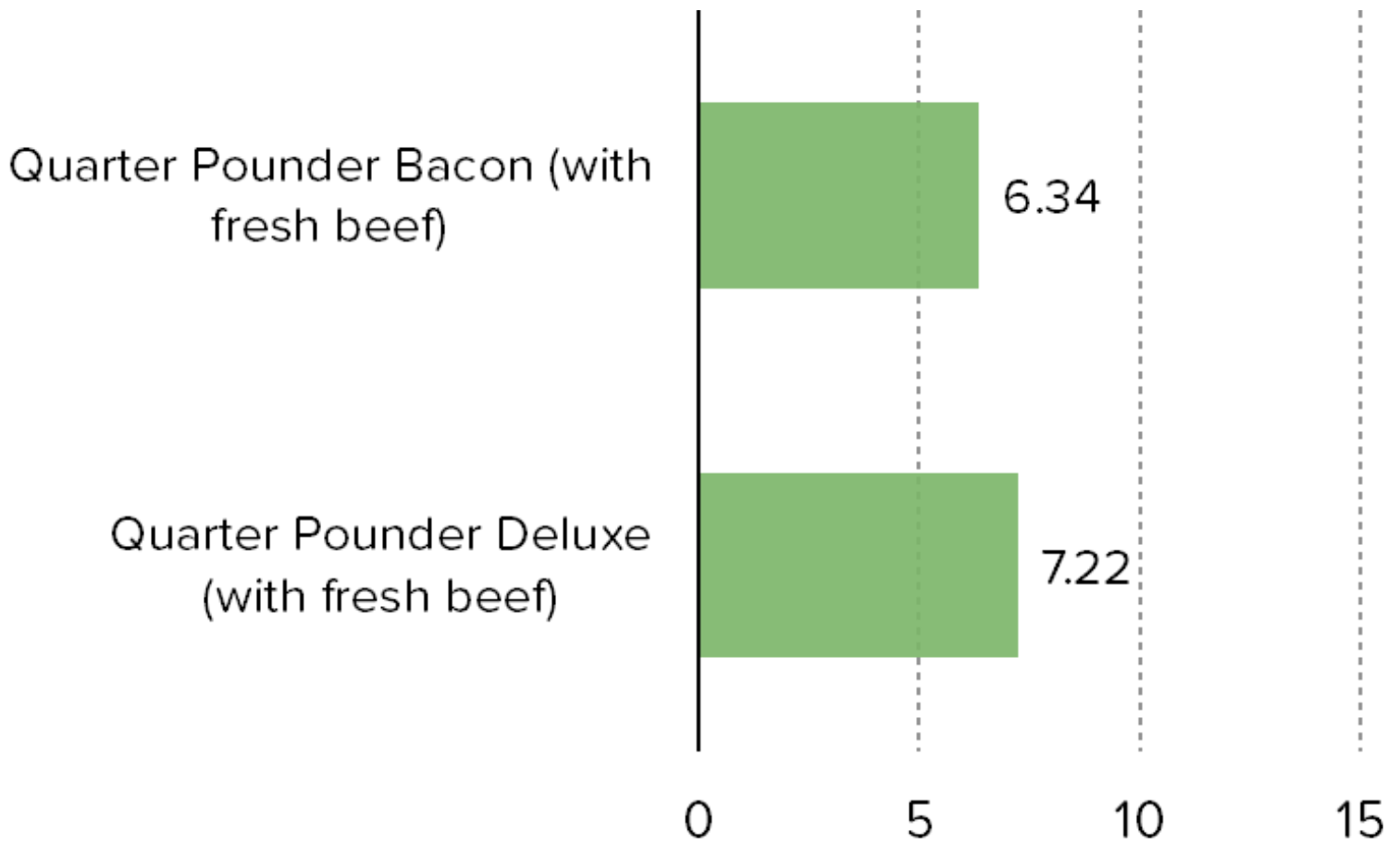
Posed to respondents who have been to McDonald's in the past three months.



MCDONALD'S QUESTIONS

HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

Posed to respondents who have been to McDonald's in the past three months.

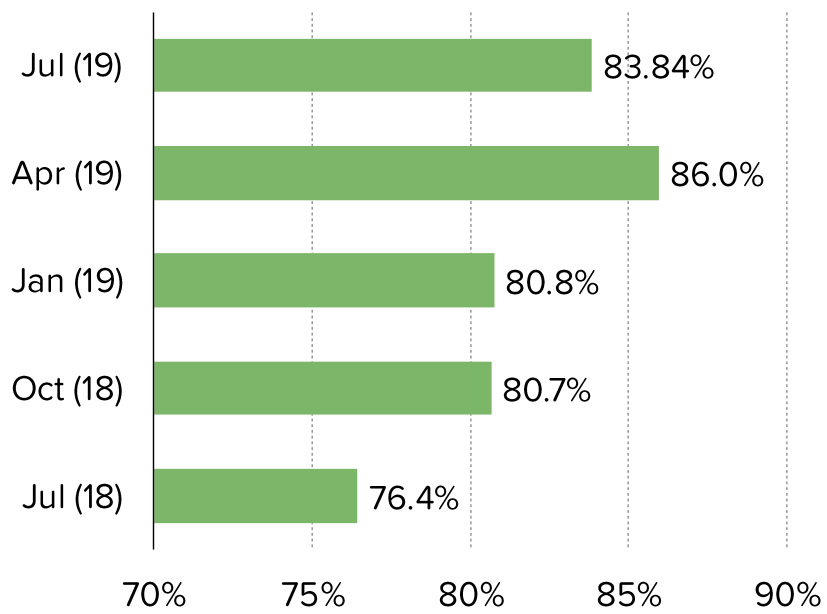


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MCDONALD'S QUESTIONS

HAVE YOU ORDERED FROM THE \$1, \$2, OR \$3 MENU AT MCDONALD'S? (PICTURED ABOVE)

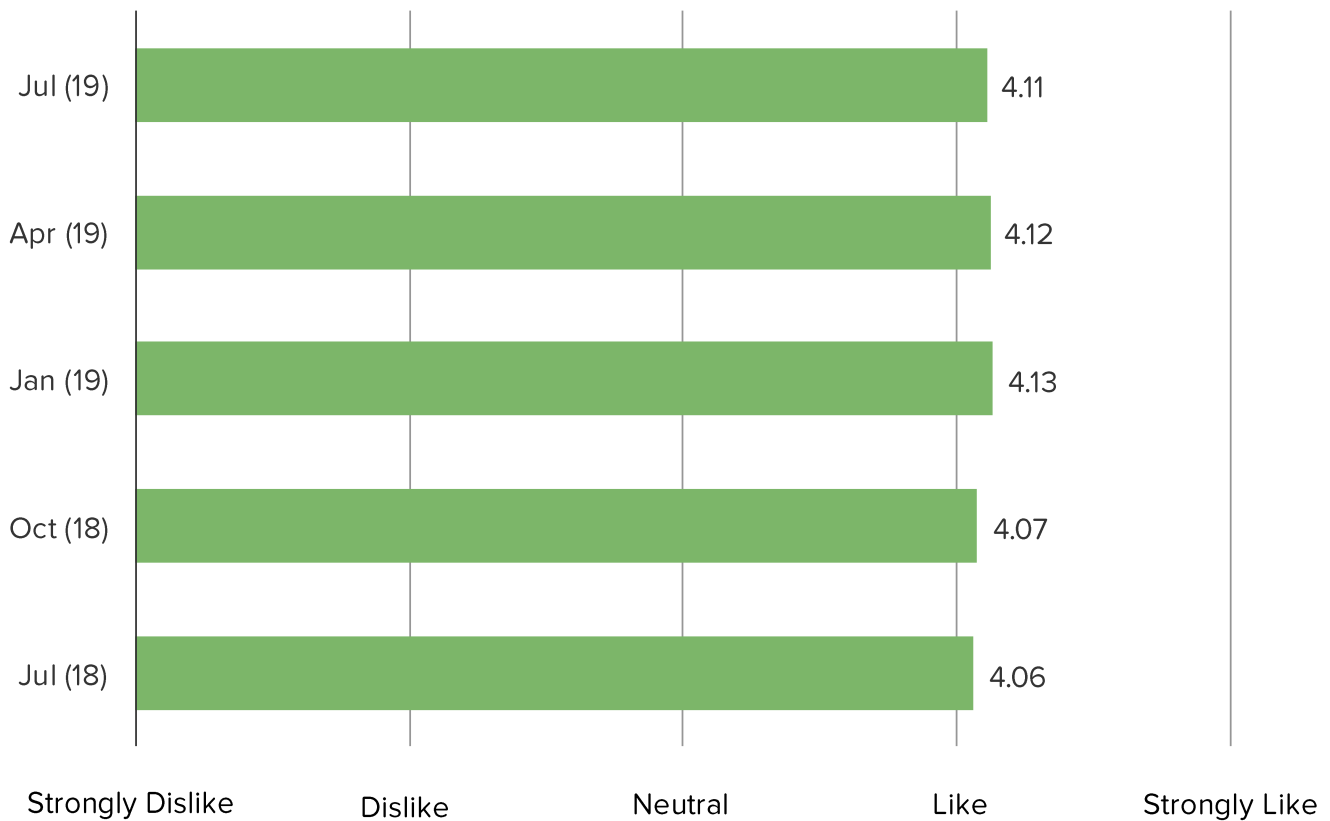
Posed to respondents who have been to McDonald's in the past three months.



MCDONALD'S QUESTIONS

WHAT IS YOUR OPINION OF THE \$1, \$2, \$3 MENU?

Posed to respondents who have been to McDonald's in the past three months.



MCDONALD'S QUESTIONS

PLEASE RATE HOW MUCH YOU AGREE WITH THE FOLLOWING:

Posed to respondents who have been to McDonald's in the past three months.

