

# UK QSR

## 2018 Consumer Experiences & Competitive Benchmarks

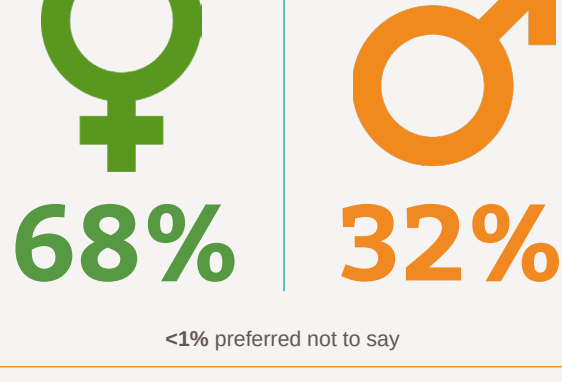
### PARTICIPANTS

**2,163**  
UK CUSTOMERS

### OVERVIEW

In February 2018 we surveyed 2,163 UK consumers and asked them about their QSR dining habits including delivery services, visit frequency, brand engagement, customer experience, and problem experience.

### GENDER



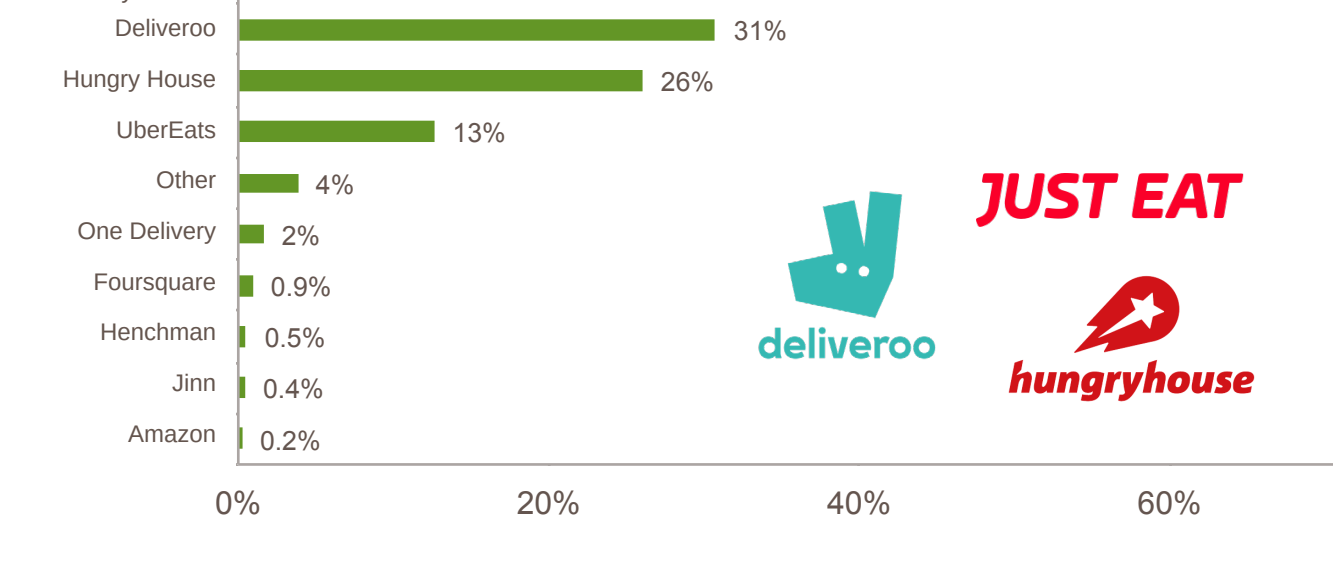
### HOUSEHOLD INCOME

**21%** EARN MORE THAN **50£**

## FOOD DELIVERY SERVICES

Overall, **over half** have used a food delivery service within the past year. In general, casual and fast-food/fast-casual restaurants receive more food delivery requests compared to upscale restaurants. Two-thirds have used Just Eat, but half have used the restaurant brands' own delivery service. With many food delivery services from which to choose, brands are vulnerable to food and service quality issues.

Which of the following food delivery companies have you used to deliver your restaurant meal? Please mark all that apply:



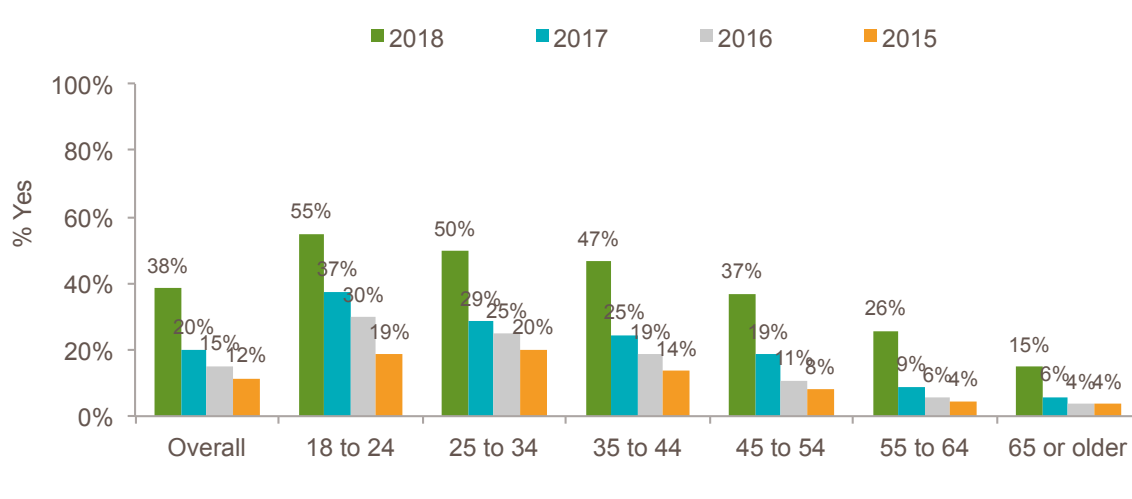
## QSR TECHNOLOGY

QSR guests have clearly adopted restaurant apps and growing with **about half** using a smartphone app or other technology to place orders. About 2 in 3 use technology to place orders, and 2 in 3 use technology to pay for orders. Although this trend is most prevalent with younger generations, older generations also use their smartphones to manage the ordering and payment process.

38%

41%

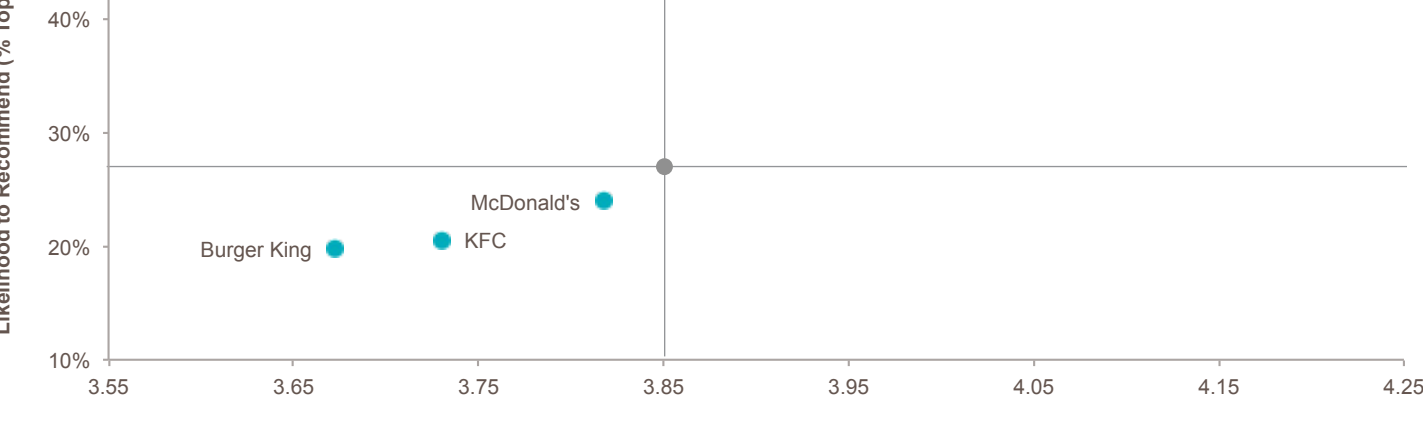
In the past 90 days, have you PAID for a fast-food or fast-casual restaurant meal using a mobile app or digital wallet on your smartphone?



## COMPETITIVE BENCHMARKS

### Burger & Chicken

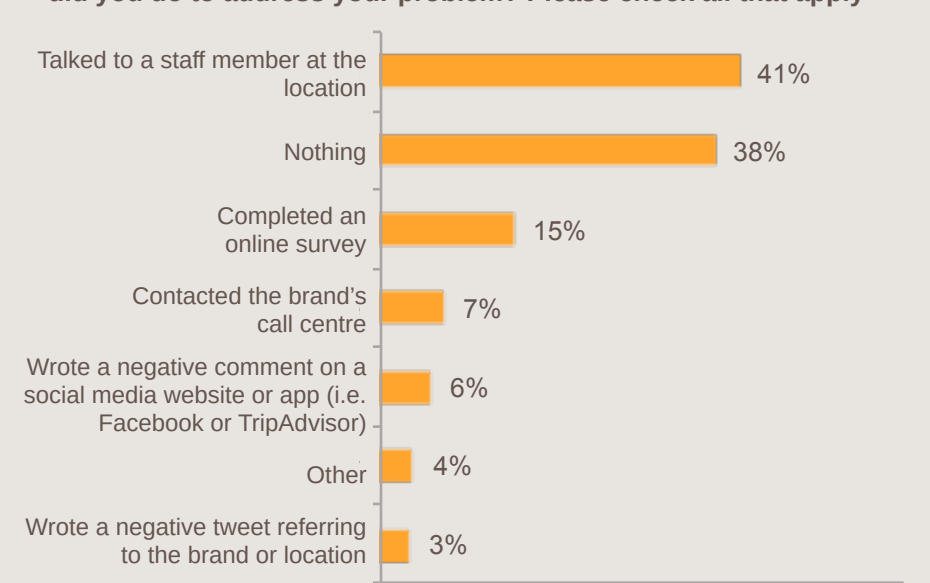
Burger / Chicken / Grill Competitive Landscape



#### Guests do not report dissatisfaction.

Most QSR guests (two-thirds to nearly half) do not report their dissatisfaction. The most common way to do so is via a survey or bringing it to the attention of a staff member or manager. The least used channel is social media. Brands must be very careful about relying on this channel to assess customer satisfaction.

At your recent visit to a Burger or Chicken QSR, which of the following did you do to address your problem? Please check all that apply



### Coffee/Café/Snacks

Coffee / Café / Snack Competitive Landscape



### Pizza/Italian

Pizza/Italian Competitive Landscape



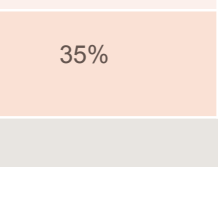
#### QSRs have the opportunity to differentiate on value—

which is driven by quality of food for price paid. PizzaExpress is the only brand to achieve a good balance of value and food quality. But brands in burger/chicken, coffee/café/snack, and sandwich food categories struggle to find the balance.

#### PizzaExpress has the lowest problem experience; and they are best at resolving problems

Restaurant	Experienced a Problem (% Yes)	Resolved to Satisfaction (% Yes)
PizzaExpress	9.5%	65%
Domino's	9.6%	32%
Pizza Hut	10.1%	35%

**PizzaExpress is the only brand to achieve a good balance of value and food quality.**



### Sandwich

Sandwich Competitive Landscape



## QSR CONCLUSION

On average, **1 in 4** guests had a disappointing experience at the QSR restaurant they most recently visited. And dissatisfaction ranges from 22% to 30% depending on the food category. At the same time, top box scores across all food groups has fallen compared to 2017; results emphasise the fierce competition in this category. It takes a top box 5 experience to be competitive as most ratings range between 4 and 5.

#### Excellence makes a difference!

On average across the categories, "delighted" customers are **3.9x** times more likely to recommend a brand than those who give a 4 rating.

