



# How the world eats

A look at global trends from Blis State of the Nation reports

Food is at the heart of our daily activities and as we get busier and lead increasingly mobile lives, quick-service restaurants (QSRs) are outpacing casual dining establishments in their growth.

## Summary



Each of the five global QSRs saw high rates of crossover outside of their direct segment competitors.



Loyalty to a brand is impacted by population density.

## Blis looked at how people interact with QSRs globally



133,000 locations



2.5 million consumers



4 million device signals



81 branded QSRs globally



July 2019

## We focused on international brands:



## Share of visits from QSRs in each region

### USA

Chicken	8%
Sandwiches	24%
Burgers	39%
Pizza	9%
Other	19%

### UK

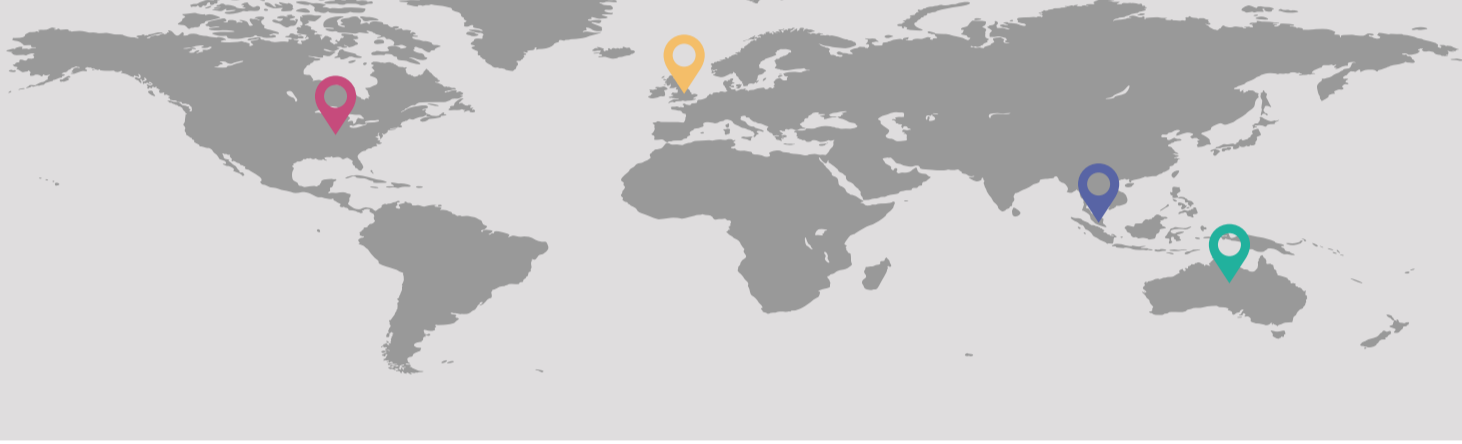
Chicken	15%
Sandwiches	40%
Burgers	18%
Pizza	18%
Other	9%

### Singapore

Chicken	22%
Sandwiches	10%
Burgers	25%
Pizza	9%
Other	34%

### Australia

Chicken	26%
Sandwiches	21%
Burgers	28%
Pizza	11%
Other	15%

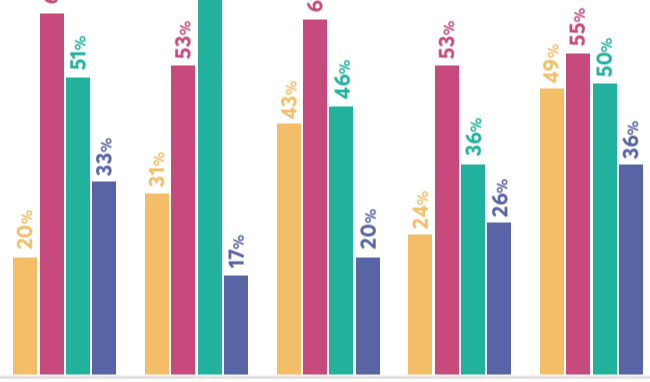


## Exclusivity to individual restaurants differs dramatically across the world

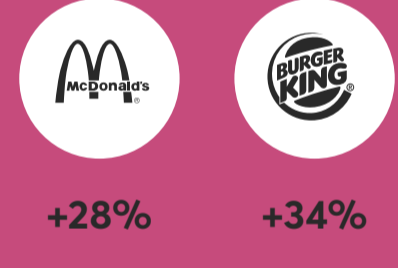
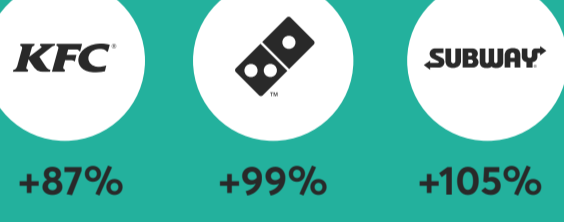
### Loyalty on average



### Exclusivity of global QSRs by country

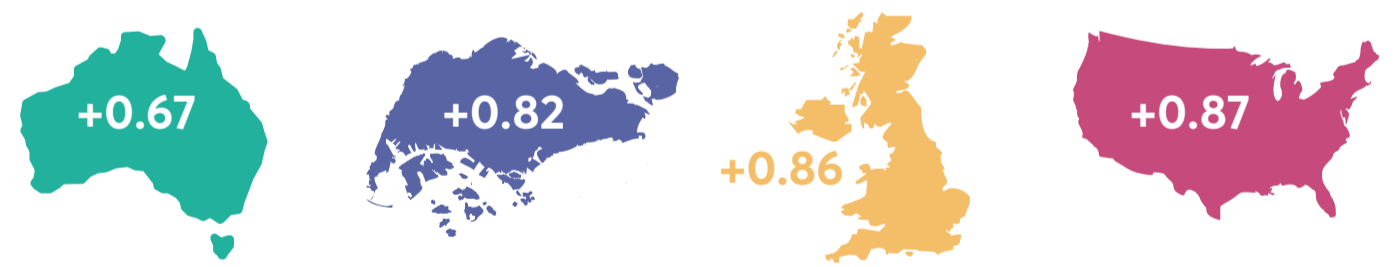


For three out of the five global QSRs, the competition for consumers lies outside of their direct competitor set. Consumers looking for alternative food choices were **more likely to opt for a different genre of food.**



The **burger behemoths** saw the **greatest competition with their own segment**, which underlines the fever pitch of the burger wars.

## Physical scale still appears to be a key factor enabling effective competitor targeting and customer conquering for brands



There was a strong correlation between the number of stores within a competitive segment and the crossover they experienced with a specific retailer within that segment.

## Disruption presents challenges

The plant-based meat market has seen incredible growth, jumping **42%** between 2016 and 2019, to **\$888 million USD**.<sup>1</sup>

- Environmentally conscious
- Plant-based and gluten-free choices

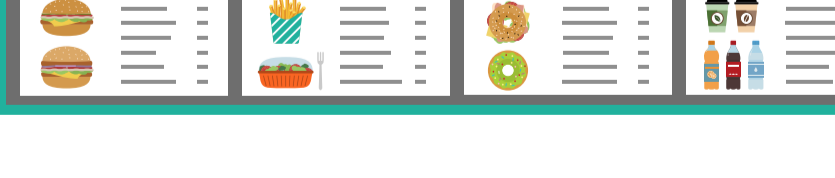
The meal kit delivery market is expected to double over the next five years, reaching **\$14.1 billion USD** by 2024.<sup>2</sup>

The on-demand delivery service market is also expected to grow from **\$2.5 billion** in 2017 to **\$8.94 billion USD** by 2025.<sup>3</sup>

**QSRs** are expected to grow **4.6%** globally by 2022.<sup>4</sup>

<sup>1</sup> www.macleans.ca/news/canada/what-the-skyrocketing-popularity-of-beyond-meat-means-for-our-planet/ <sup>2</sup> www.marketwatch.com/press-release/Meal-Kit-Delivery-Services-Market-Size-will-grow-at-7-CAGR-to-exceed-23400-million-USD-by-2024-2019-04-16 <sup>3</sup> www.hexaresearch.com/research-report/meal-kit-delivery-service-market?utm\_source=referralsutm\_medium=prnewswire.com&utm\_campaign=pr\_13march%0Amealkitdeliveryservice\_rdt <sup>4</sup> www.restaurantdiver.com/news/qsr-to-grow-46-globally-by-2022-bolstered-by-consumer-demand/542996/

## Key takeaways



## Know your audience

Understanding where audiences are currently eating can inform brand and marketing strategies, **nurturing customers to return** to QSRs with tempting products and tantalizing offers that resonate with the people that matter most to them.



## Convenience reigns supreme

Physical scale still appears to be a key factor enabling effective competitor targeting and customer conquering for brands.

## Optimise for your market

In markets where consumers show higher exclusivity, QSRs don't need to adapt far beyond "original" branding. Conversely, where loyalty is lower, global QSRs should **localize their communications to better appeal to consumers** seeking a wider variety.