

2015

QSR REPORT FOR SOUTH EAST ASIA

Burgers or Brioche?



www.near.co

Overview



225K

Uniques
Analysed

May 2015

Research Period

Executive Summary

This report examines the relevant consumer insights for Coffee Chains and QSRs during the month of May - 2015, in the major South East Asian regional markets of Singapore, Hong Kong, Jakarta, Bangkok, Kuala Lumpur and Manila. QSRs covered by the study include: Jollibee, Pizza Hut, Subway, McDonald's and KFC. Coffee Chains covered by the study include: Starbucks, Pacific Coffee, Excelso, Cafe Amazon, The Coffee Bean & Tea Leaf, Seattle's Best Coffee, Old Town White Coffee and Simplylife.

We analysed over 225,000 unique users during our research, measuring a wide variety of brand preference data across gender, age and economic groups. We also studied peak consumption times for both Coffee Chains and QSRs, collecting data on both peak preference days and peak preference times by region.

The data we collected during this month-long study is presented here in terms of general regional trends, as well as in the form of market-specific demographic data.

Key Findings

The study data revealed trends in consumer preference by region, with some locations strongly favoring Coffee Chains, while other indicated a deep preference for QSRs. A snapshot of some insights are below.

Preferences for Coffee Chains and QSRs proved to be highly correlated across gender lines in each country. This is true in both cities where Coffee Chains were more popular, such as Jakarta, and in countries where QSRs were dominant with consumers, such as Bangkok.



Coffee Chains

While popularity of Coffee Chains was relatively consistent across age groups by region, there are some notable outliers. In Jakarta, the 16-25 age group made up over half (52%) of Coffee Chain visits. By comparison, Hong Kong and Manila only saw 40% participation in the same age group.

In the 26-35 age group, Kuala Lumpur and Hong Kong proved to be the strongest market for Coffee Chains, with 46% and 44% participation respectively. Singapore (26%) and Bangkok (25%) were most popular with Coffee Chain customers aged 36 and older.

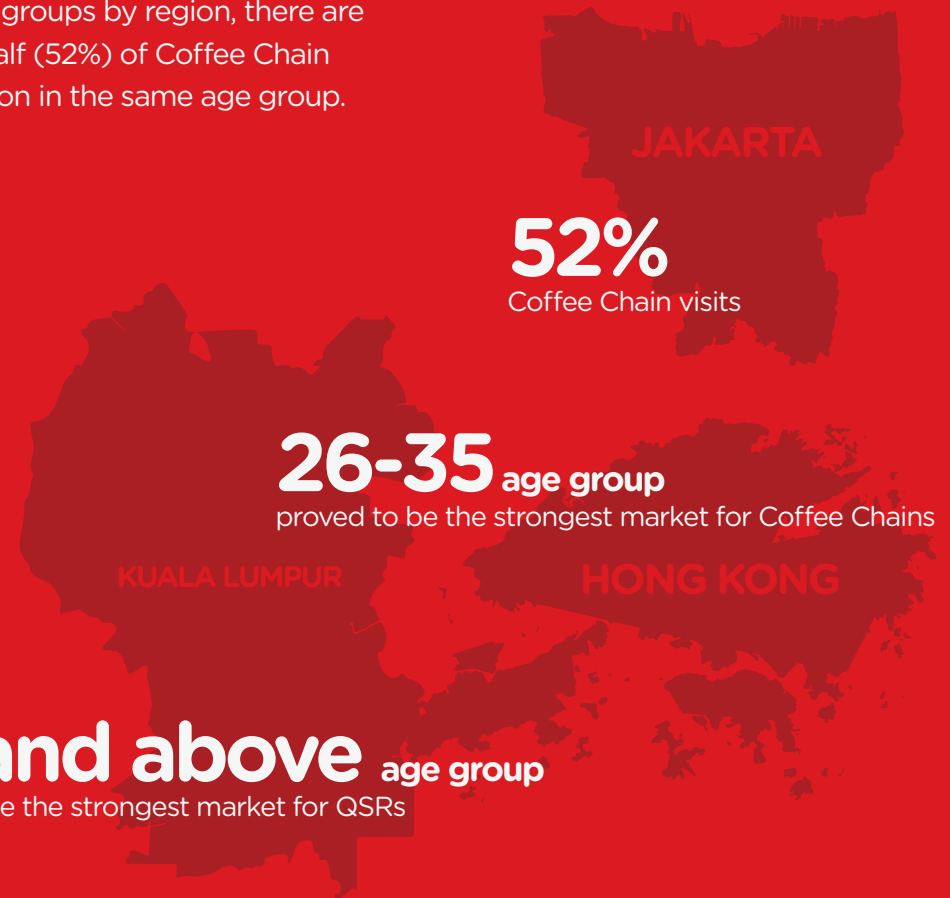
QSRs

Overall customer trends for QSRs were broadly consistent across age groups. In the 16-25 age group, for instance, there was only a 10% difference between the highest participation city of Manila (43%) and the lowest, Singapore (33%).



36 and above age group
proved to be the strongest market for QSRs

The most visible outlier was Kuala Lumpur, which saw a surprising 32% engagement with customers aged 36 and above. This rate is substantially higher than the regional average, and a full 5% above Singapore (27%), the next most engaged city. By comparison, the other four cities studied saw participation rates in that same age group of 20% or less.



Participation By Audience

In addition to age and gender, we also broke customers into five key lifestyle groups across the six cities in the study. These groups were: Affluent, Homemakers, Professionals, Students and Travelers.

Coffee Chains proved to be the most popular with affluent customers in the region, while Homemakers, Professionals and Travelers showed roughly equal preference for coffee chains and QSRs. Students, on the other hand, showed an overwhelming preference for QSRs in every city except for Jakarta, which is consistent with our findings for the coffee chain preferences in the 16-25 age group in that city.

Preferred Days and Locations

Peak footfall traffic for both QSRs and Coffee Chains is well studied, and in the course of our study we saw little variance from established norms.

Coffee Chains saw the most activity in late afternoons and early evenings, with most of this activity happening in the latter half of the week. One interesting variation on this was in Kuala Lumpur, which saw the most coffee-related activity a bit later (1800 to 2100 hrs) on Saturday.

QSRs were most visited in the late evenings, with only minor variations across all six studied cities. Customers were shown to be more likely to patronise QSRs locations later in the week, with the notable exception of Singapore, where the most active time period was Tuesday evenings.



Consumed Content

Mobile-device using customers were observed to favor three broad types of app while at both Coffee Chains and QSRs. These fall into three broad categories: Social, Entertainment and Music.

Frequency of Visit

Manila had over 41% of customers visiting Coffee Chains more than once, the highest ratio in all six studied cities.

Hong Kong saw over 44% customers visiting QSRs more than once, highest being compared to other locations.

QSRs had higher overall repeat customers compared to Coffee Chains.

Conclusion

This six-city study revealed many regional consumer trends in the Coffee Chain and QSRs space, and confirmed many long-suspected market variations. Overall, the trends suggest a broad level of stability among these markets, with major outliers, such as the overwhelming popularity of coffee chains among the 16-25 age group in Jakarta, being at least partially attributable to cultural and demographic differences.

This report provides valuable footfall insights for both QSRs and Coffee Chains. Armed with this data, it is now possible to create more accurate marketing by both segment (age, lifestyle, location) and by region.



Brands Covered



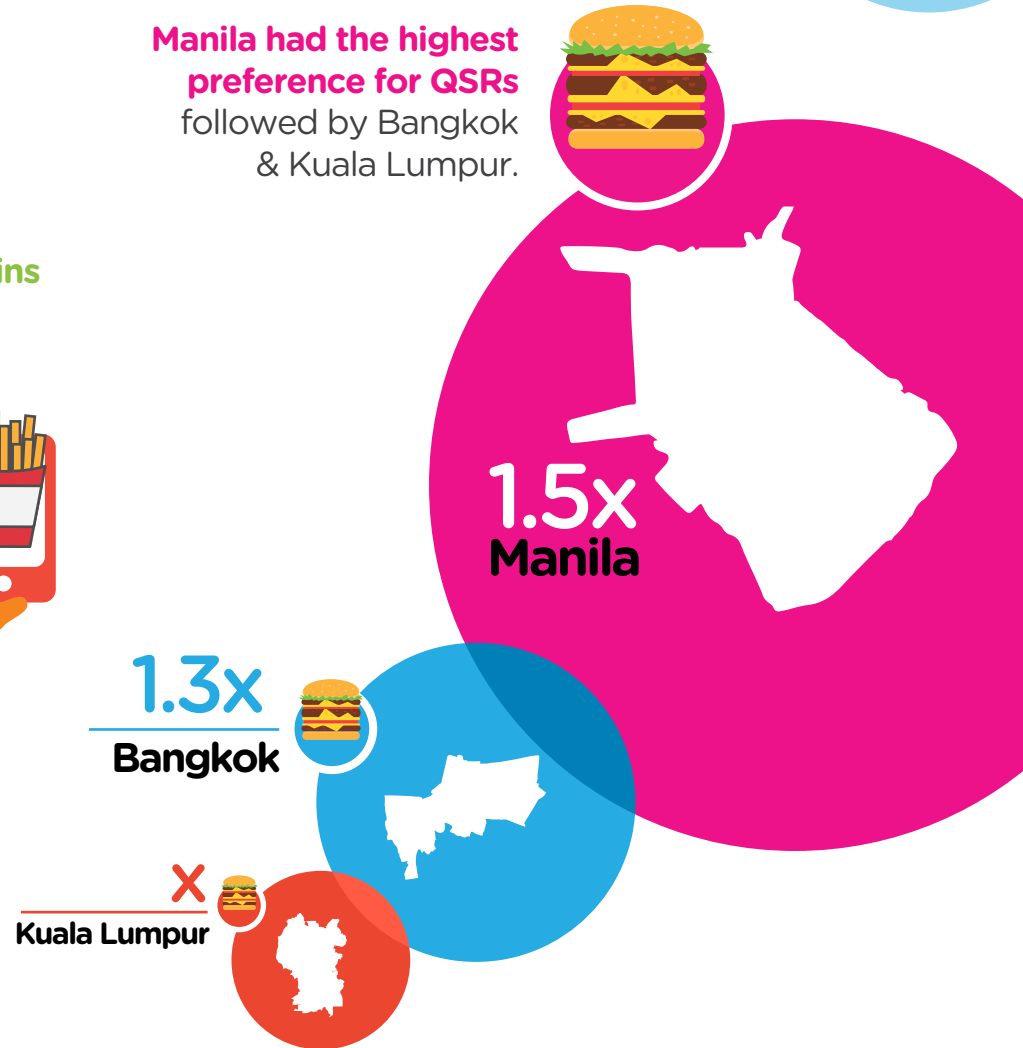
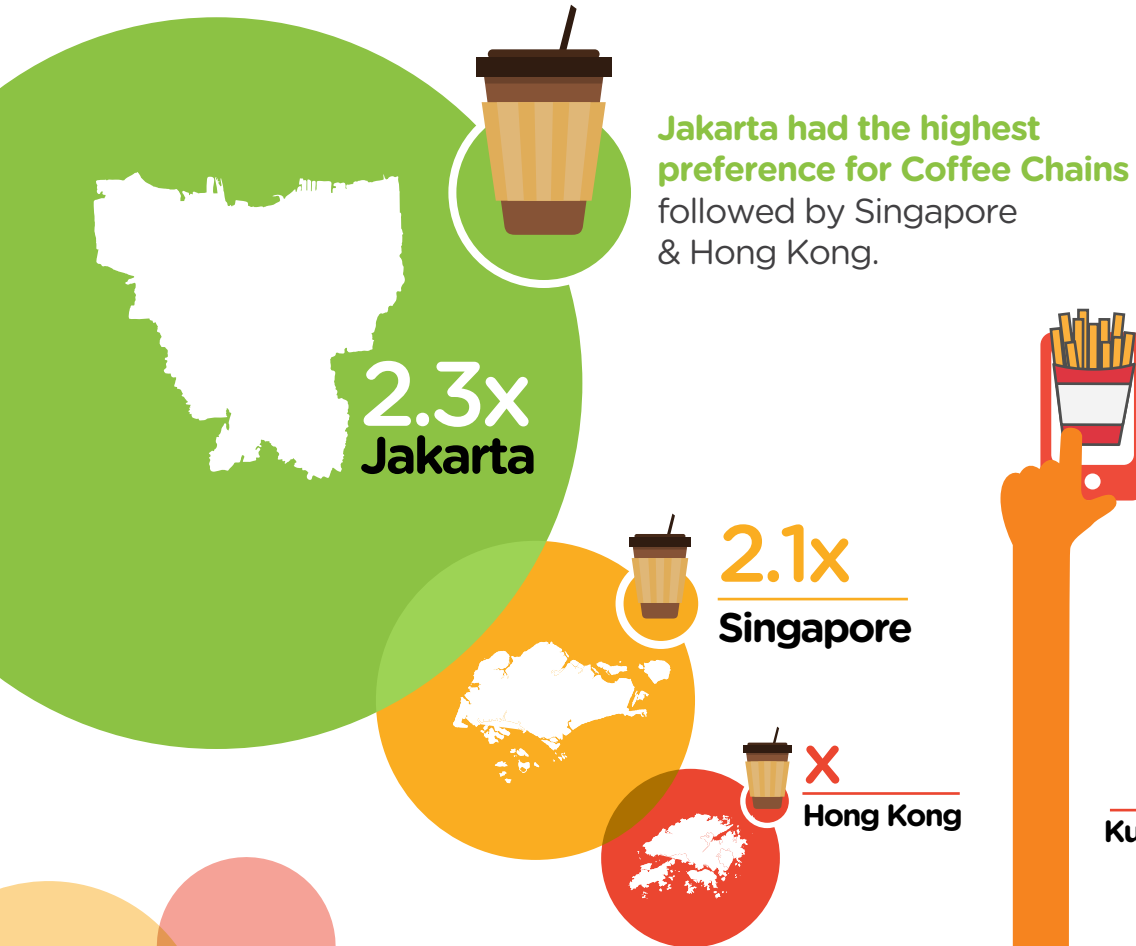
**Quick Service
Restaurants**



**Coffee
Chains**

Key Findings

Top 3 Countries based on footfall

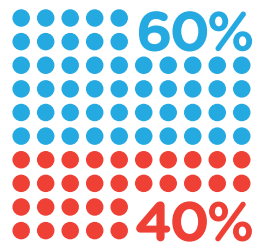


Gender-wise Preference

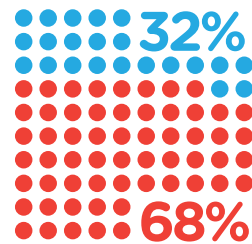
● QSRs
● Coffee Chains



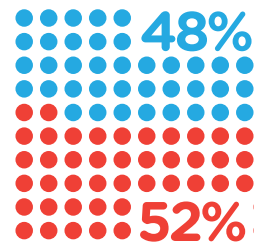
Male



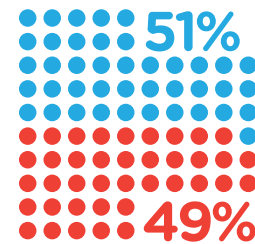
Hong Kong



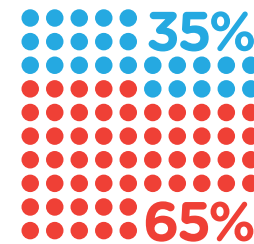
Jakarta



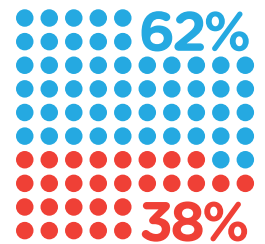
Kuala Lumpur



Manila



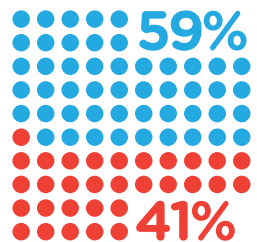
Singapore



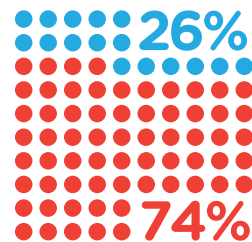
Bangkok



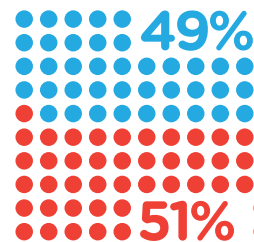
Female



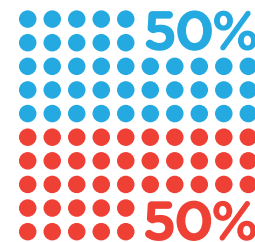
Hong Kong



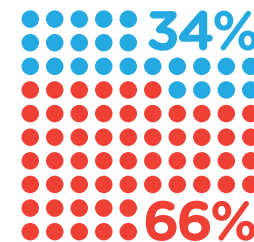
Jakarta



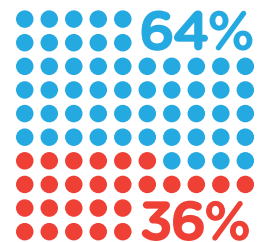
Kuala Lumpur



Manila



Singapore



Bangkok

Both Males and Females in Jakarta preferred Coffee Chains, while their preferences inclined more towards QSRs in Bangkok.

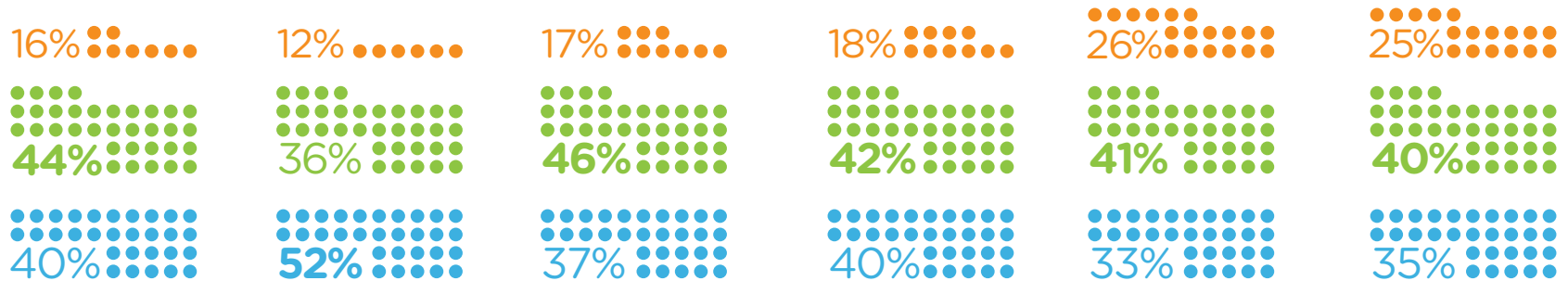
Age-wise Preference



The **16 - 25** age group had higher preference for **Coffee Chains in Jakarta**, while the **26 - 35** age group had higher preference in **Kuala Lumpur**.



Coffee Chains



Hong Kong

Jakarta

Kuala Lumpur

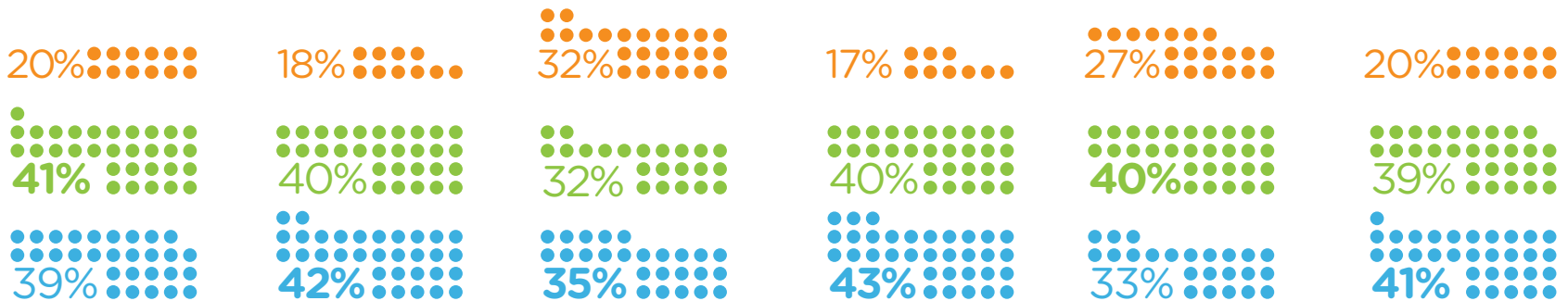
Manila

Singapore

Bangkok

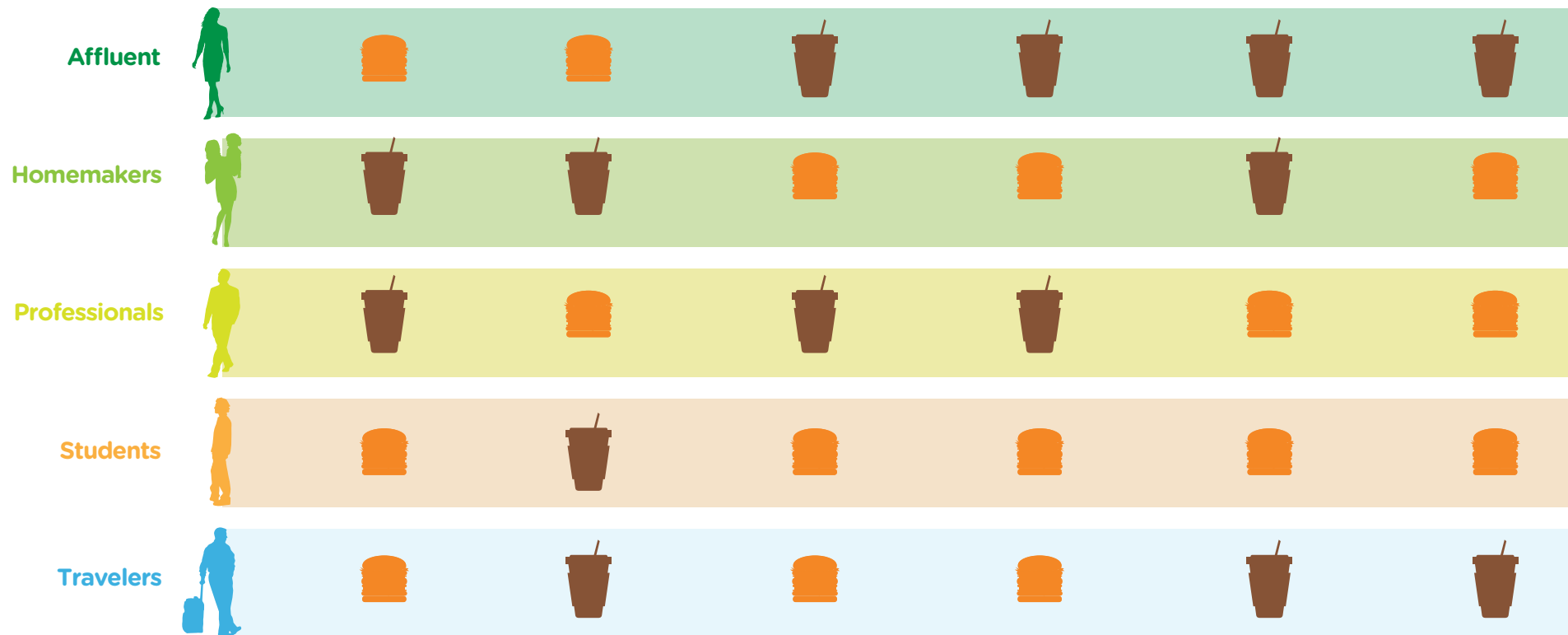


QSRs



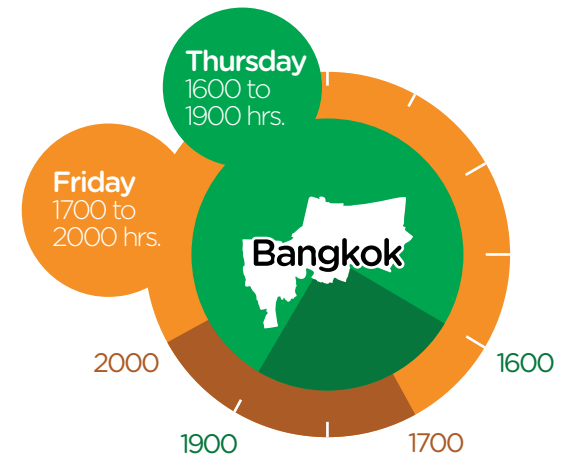
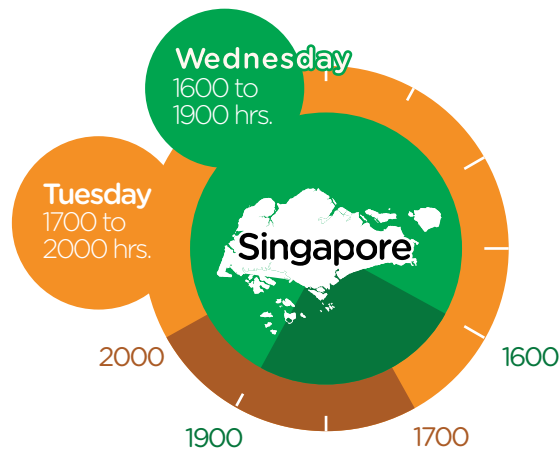
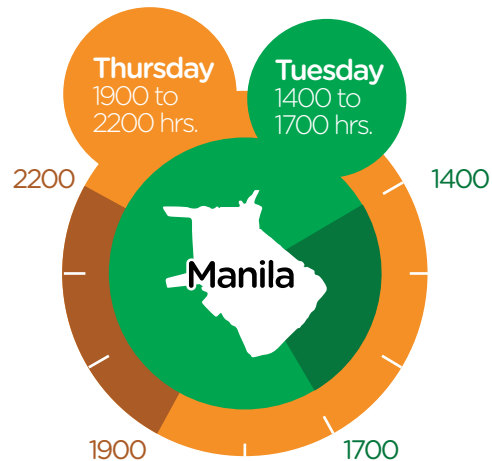
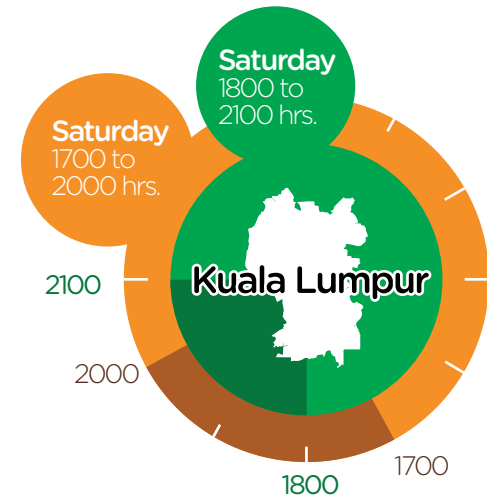
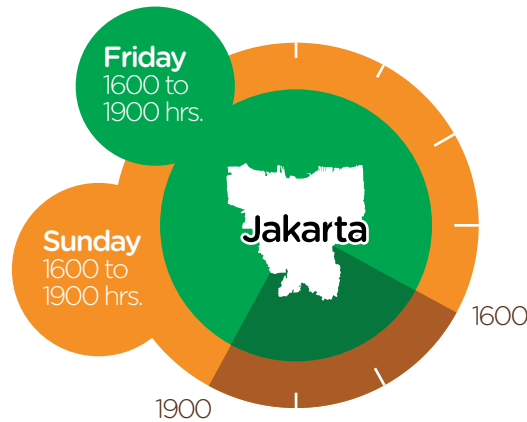
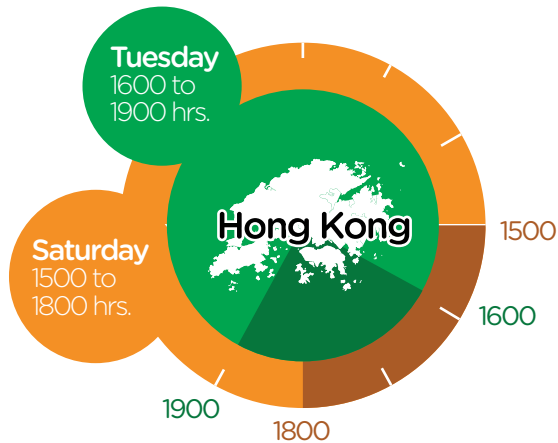
The **16 - 25** age group had higher preference for **QSRs in Manila**, while the **26 - 35** age group Years had higher preference in **Hong Kong**.

Audience-wise Preference



**Affluent, Homemakers & Travelers preferred Coffee Chains,
while Professionals & Students preferred QSRs.**

Preferred Day and Time



Coffee Chains were preferred during late afternoons and early evenings, while QSRs were preferred during late evenings across all cities.

While Tuesday was the preferred day for Coffee Chains, Saturday was the preferred day for QSRs.

Preferred Content



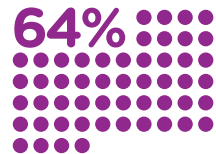
**Top 3 mobile app categories
used across Coffee Chains & QSRs**

Frequency of Visits

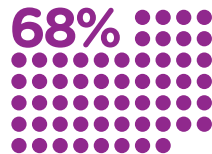
● Once ● Twice ● Thrice ● 4 Times ● More than 4 times



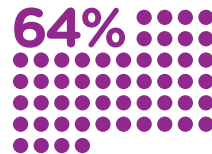
Coffee Chains



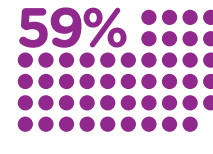
Hong Kong



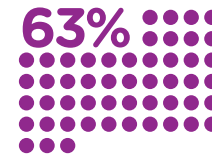
Jakarta



Kuala Lumpur



Manila



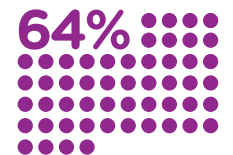
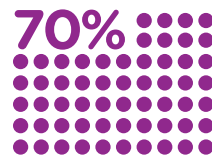
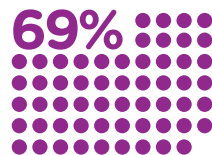
Singapore



Bangkok



QSRs



Frequency of Visits



41%
Manila



Manila had over 41% of customers visiting Coffee Chains more than once, highest as compared to other locations.

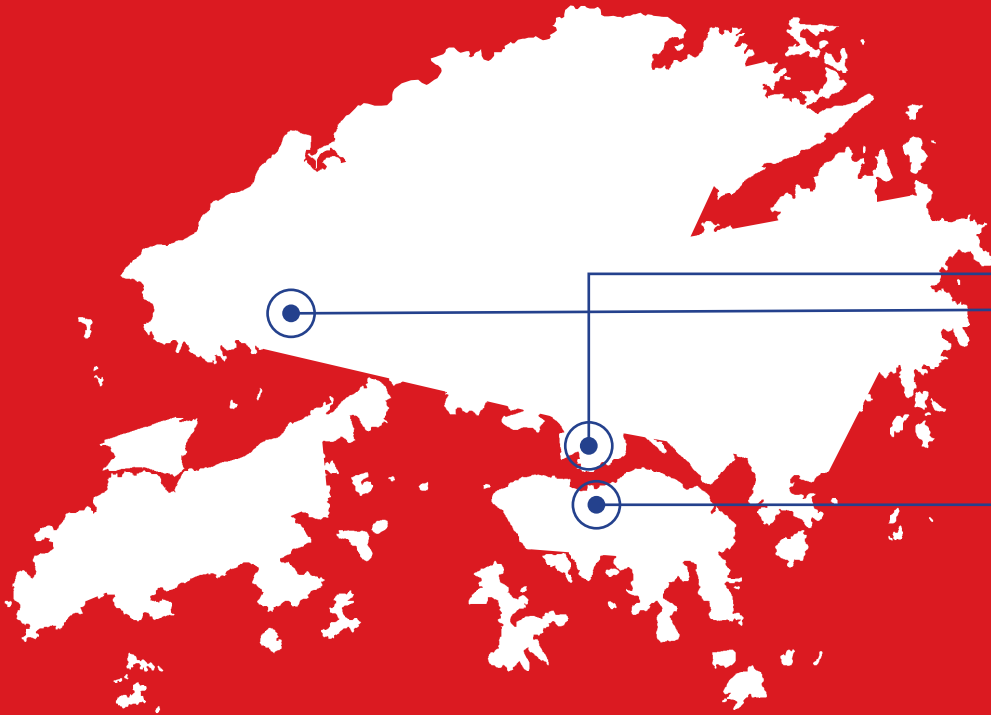
Hong Kong saw over 44% customers visiting QSRs more than once, highest as compared to other locations.



44%
Hong Kong

Over all, QSRs had higher repeat customers compared to Coffee Chains.

Hong Kong - Scope



Locations

Times Square,
Harbour City &
TMT Plaza

Coffee Chains

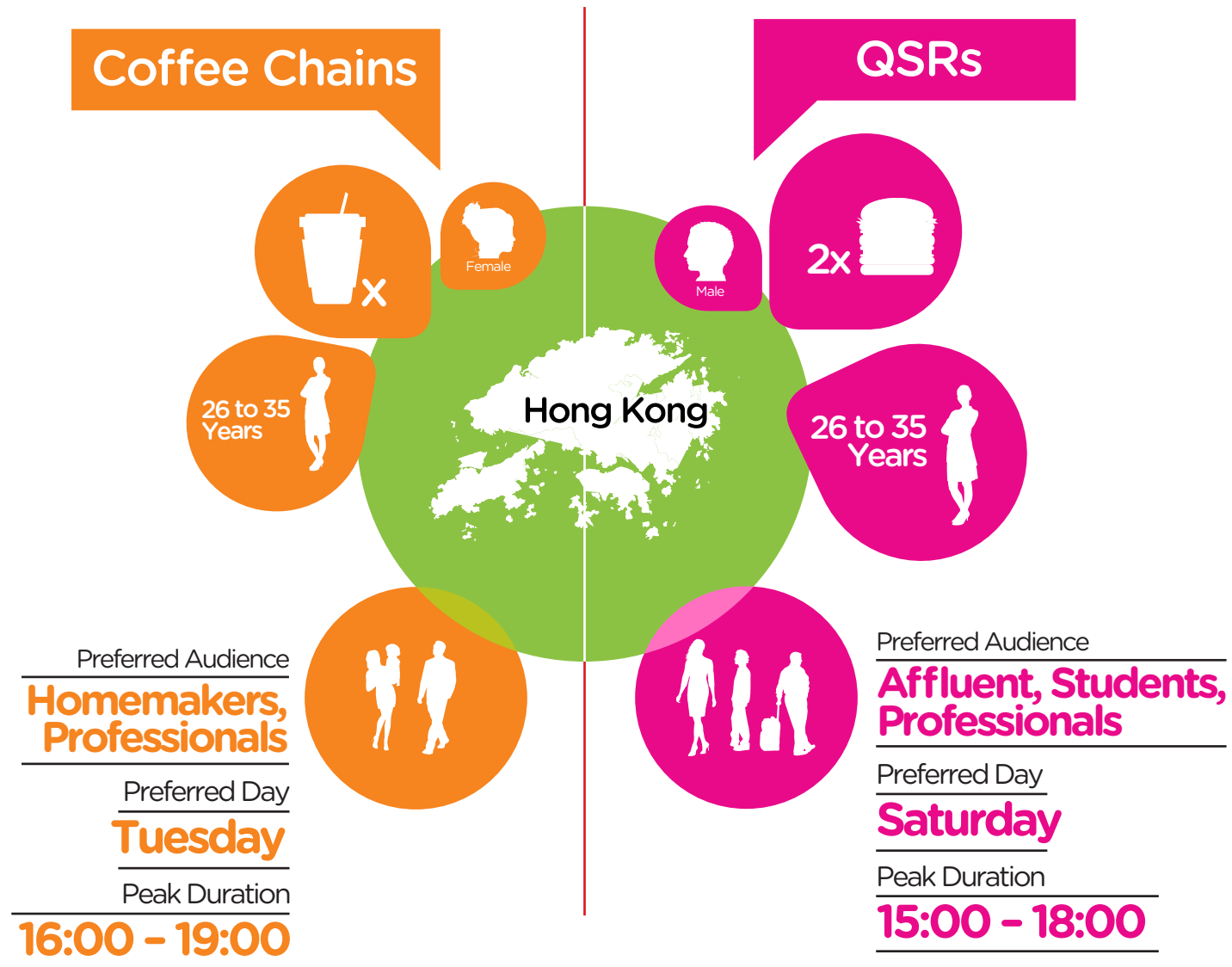
Starbucks,
Pacific Coffee &
Simply Life

QSRs

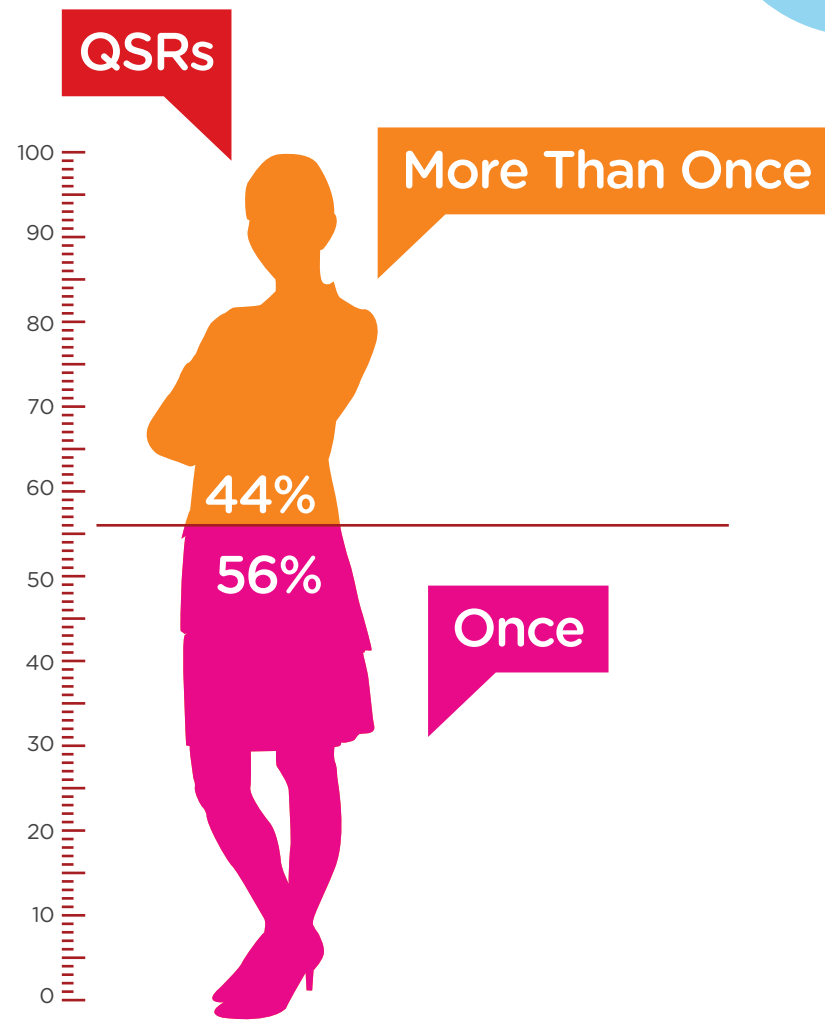
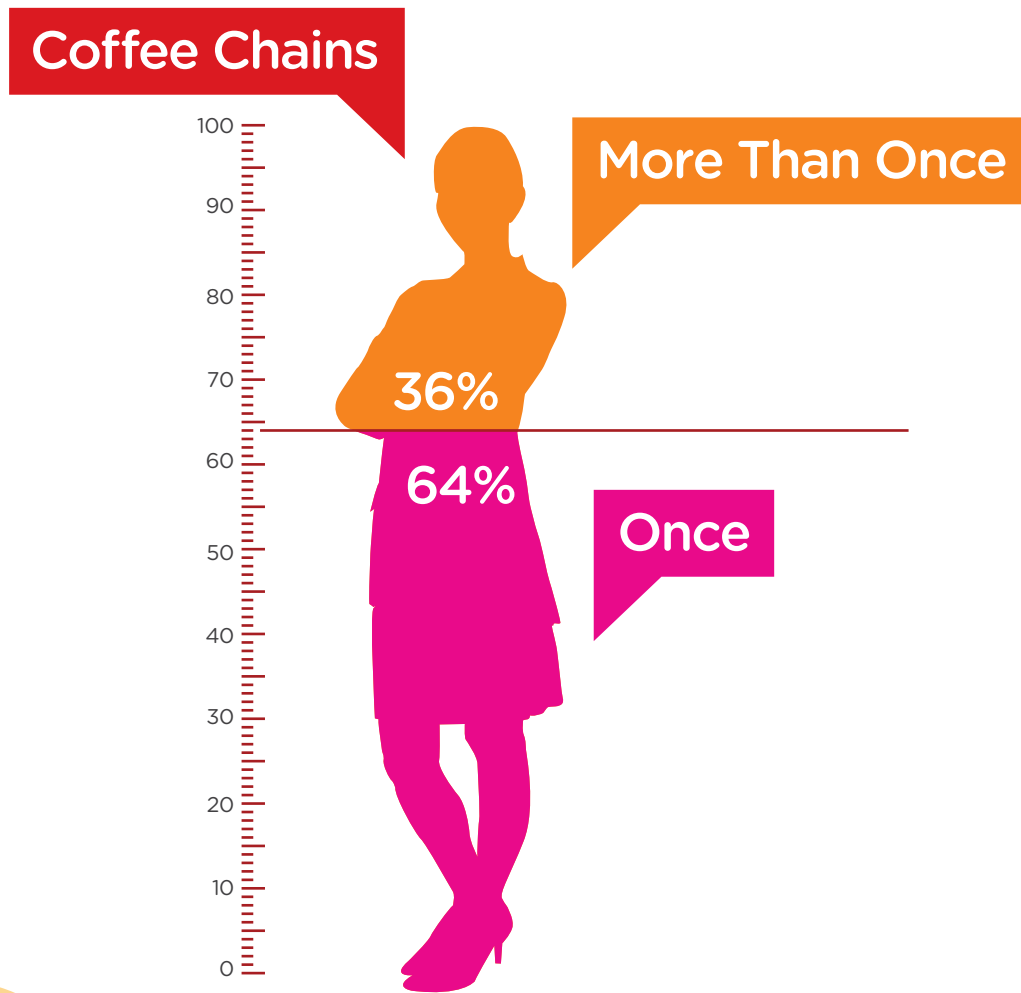
McDonald's,
Pizza Hut &
KFC



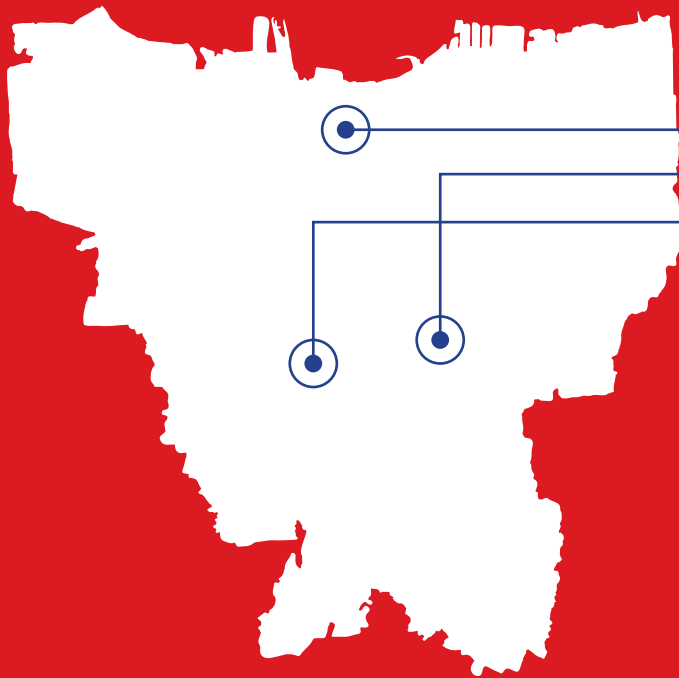
Hong Kong



Hong Kong



Jakarta - Scope



Locations

Kemang
Menteng
Kuningan

Coffee Chains

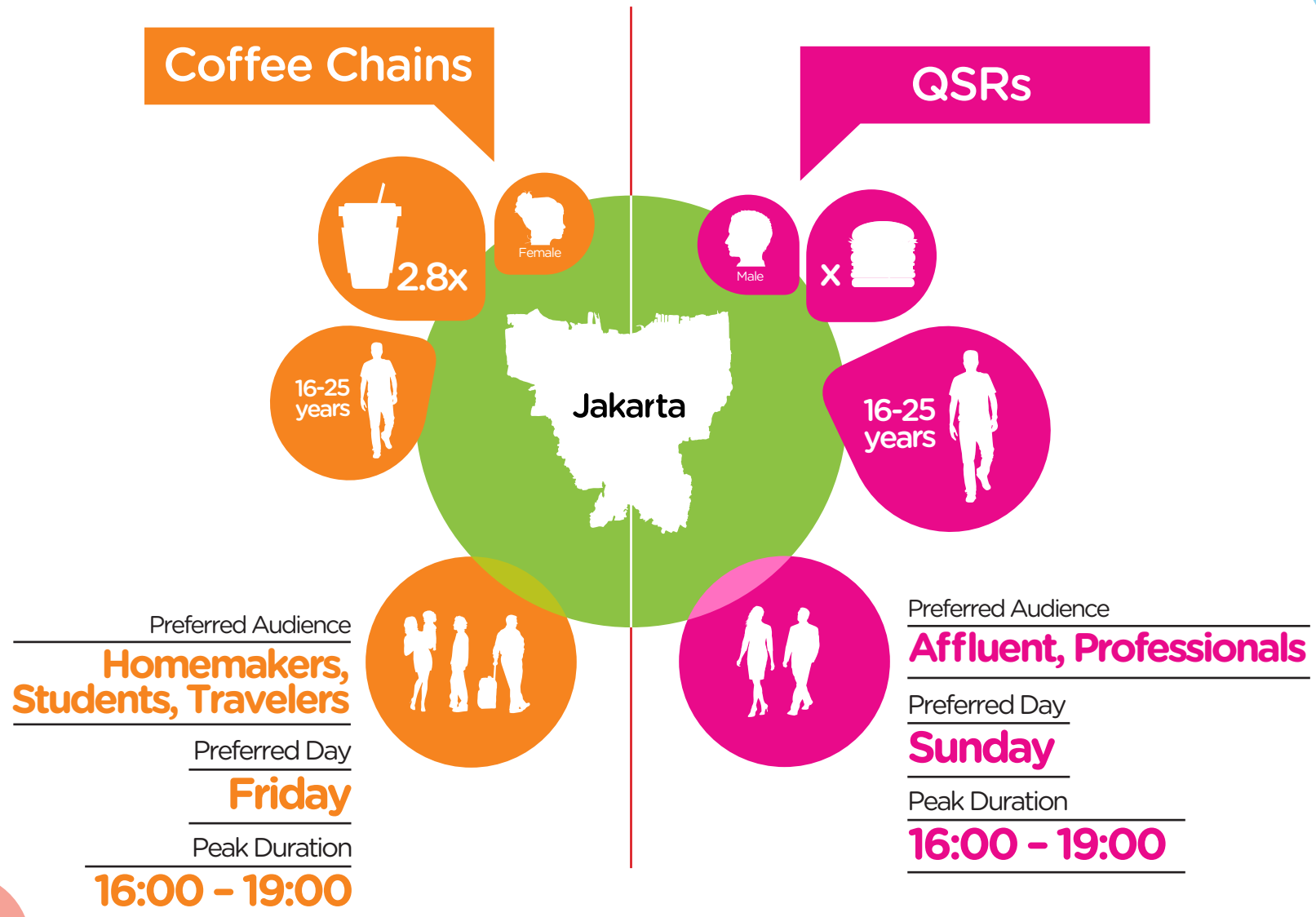
Starbucks,
Excelso &
Coffee Bean

QSRs

McDonald's,
Pizza Hut &
Subway

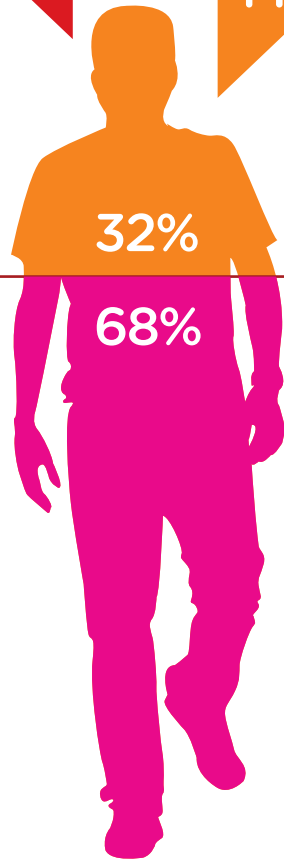


Jakarta



Jakarta

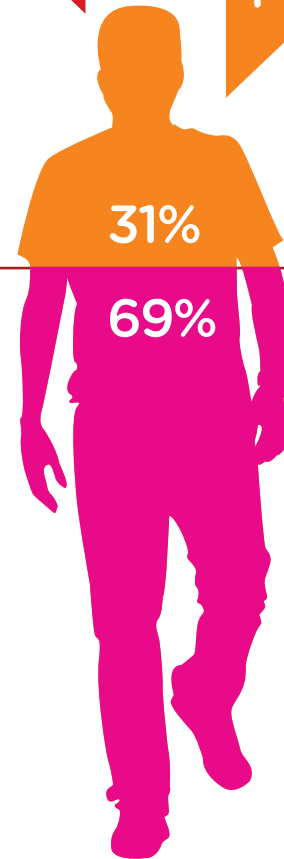
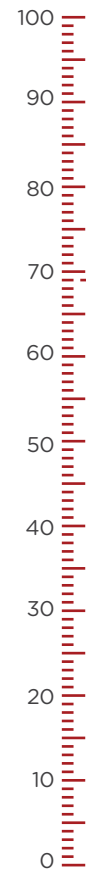
Coffee Chains



More Than Once

Once

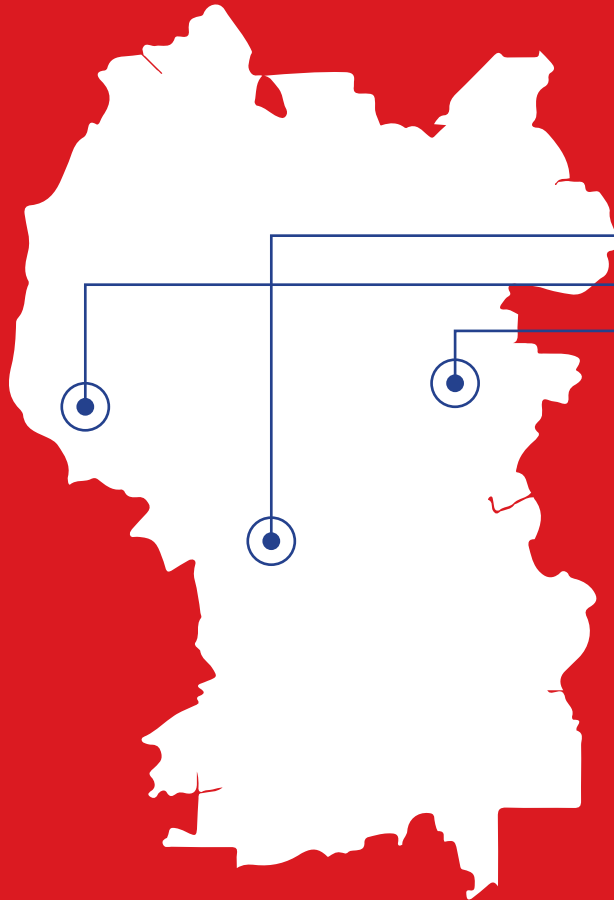
QSRs



More Than Once

Once

Kuala Lumpur - Scope



Locations

Mid Valley,
One Utama &
KLCC

Coffee Chains

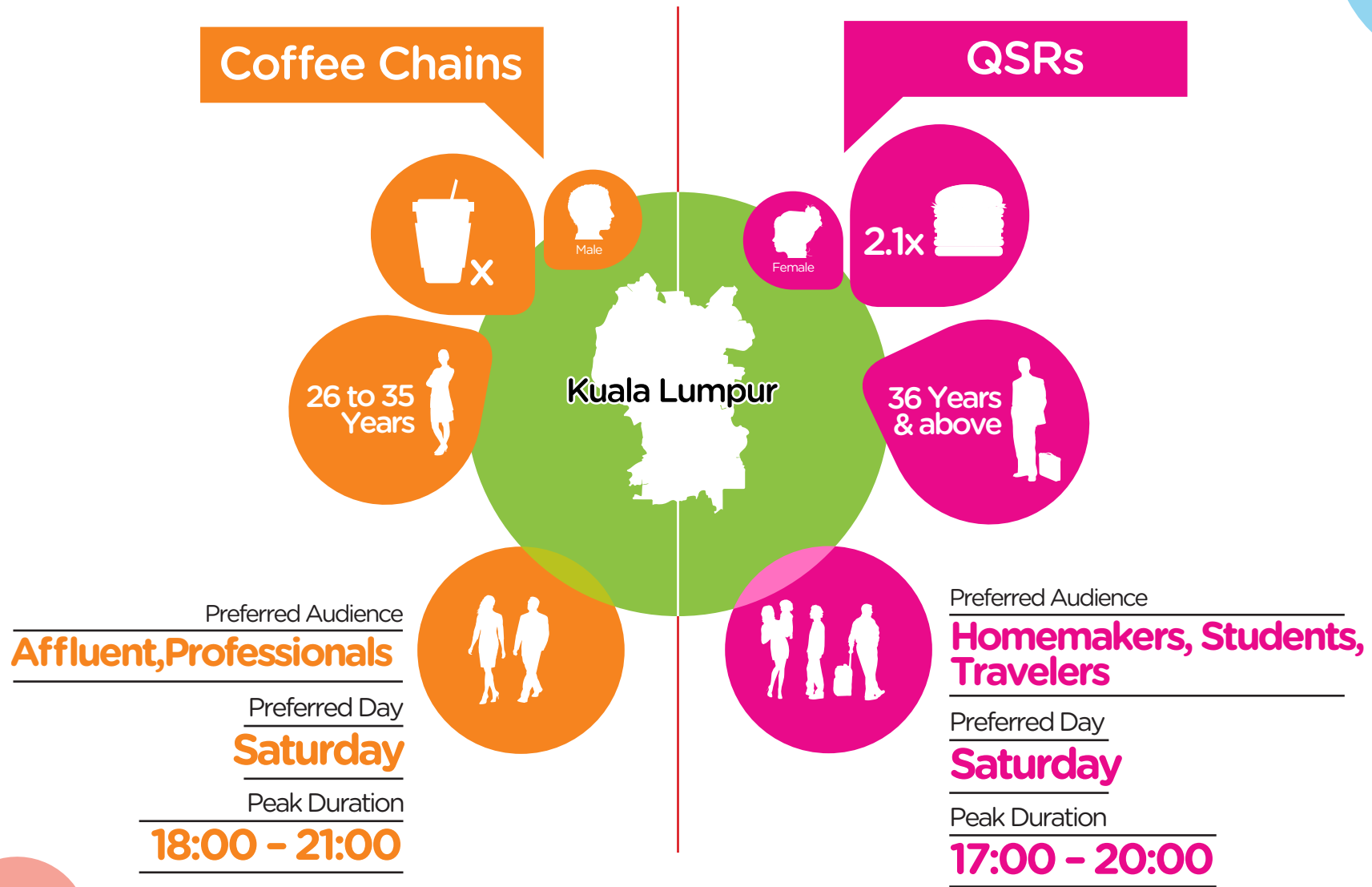
Starbucks,
Old town white coffee &
Coffee Bean

QSRs

McDonald's,
Pizza Hut &
Subway

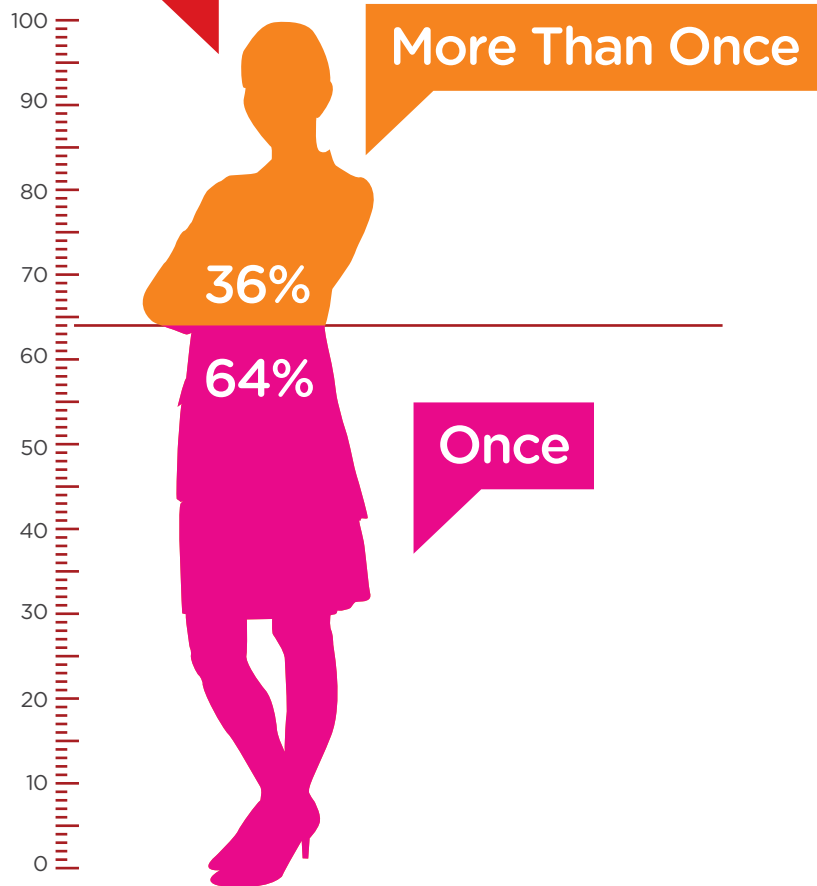


Kuala Lumpur

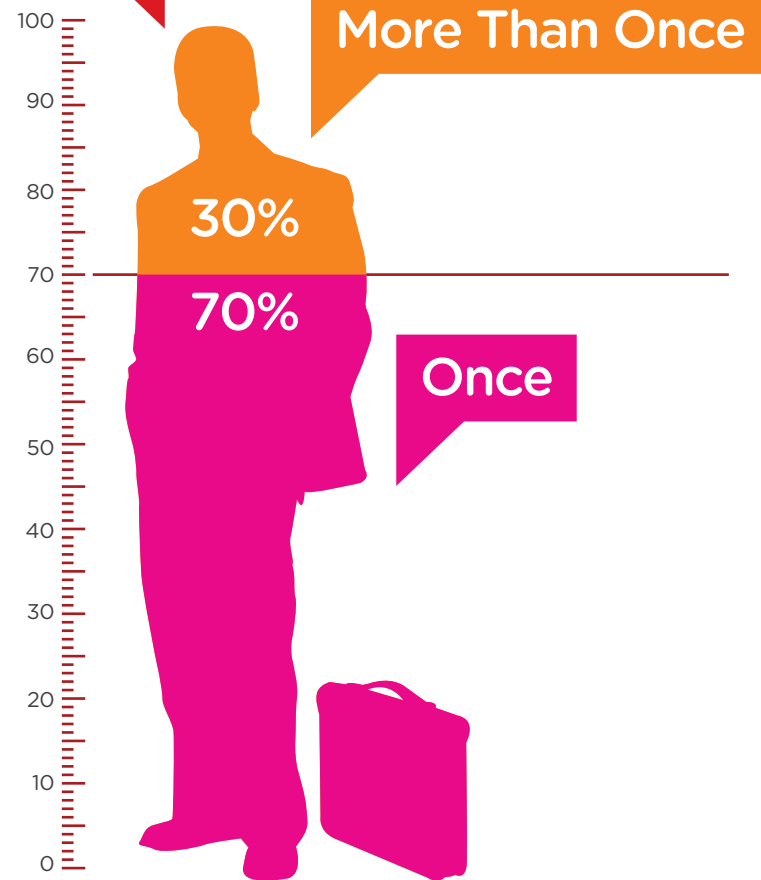


Kuala Lumpur

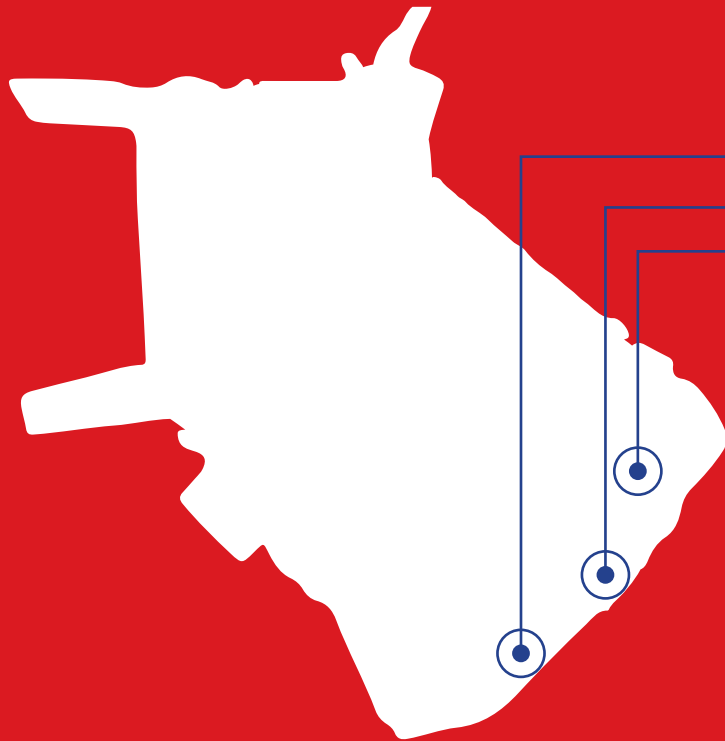
Coffee Chains



QSRs



Manila - Scope



Locations

Makati City
BGC
Ortigas Center

Coffee Chains

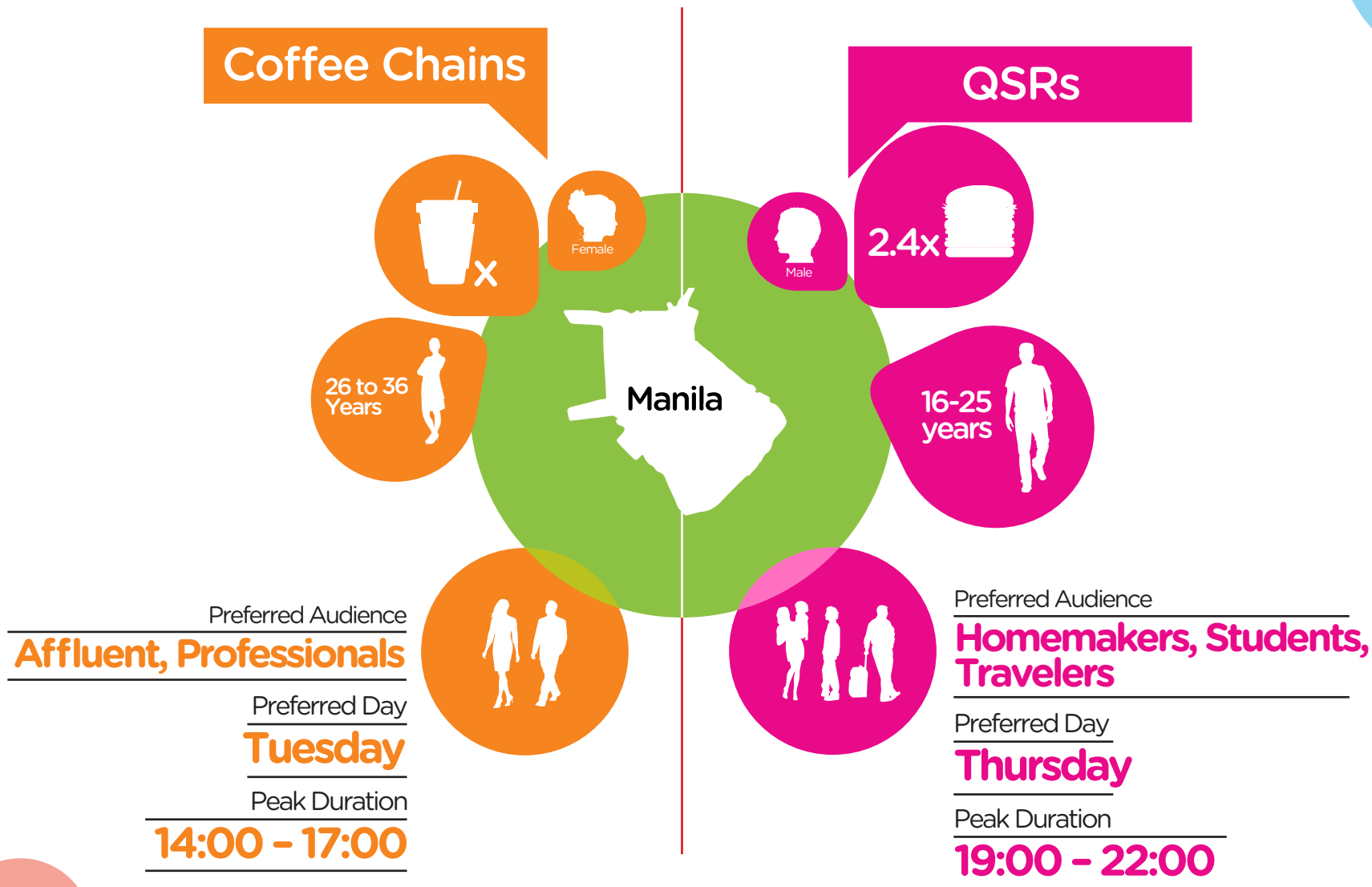
Starbucks,
Seattle's Best &
Coffee Bean

QSRs

McDonald's
Jollibee &
KFC

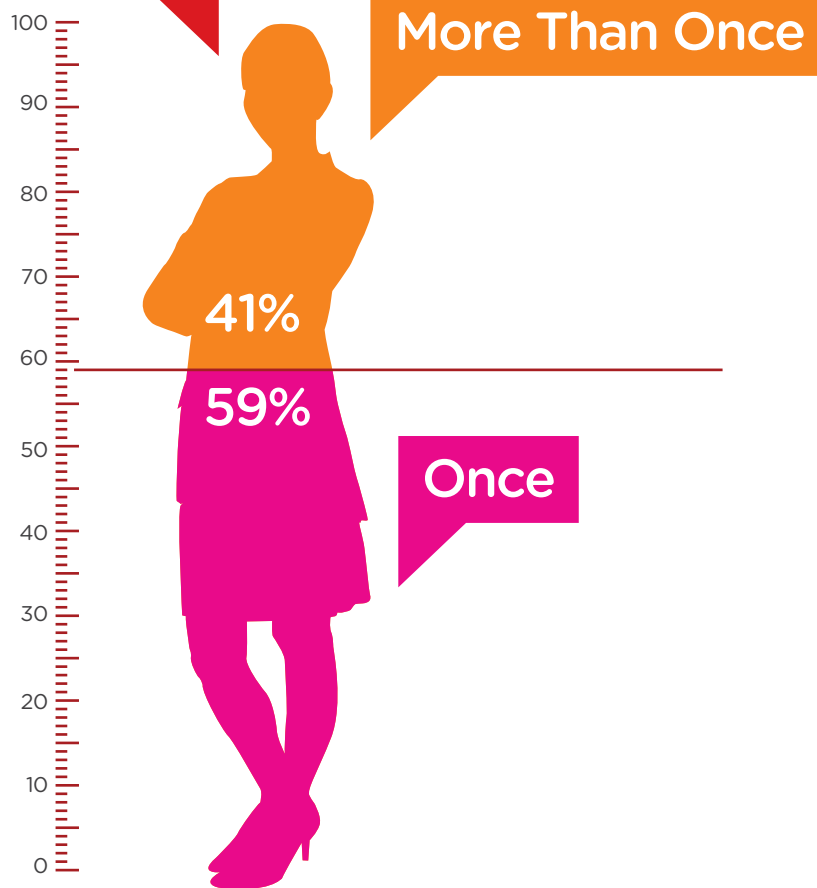


Manila

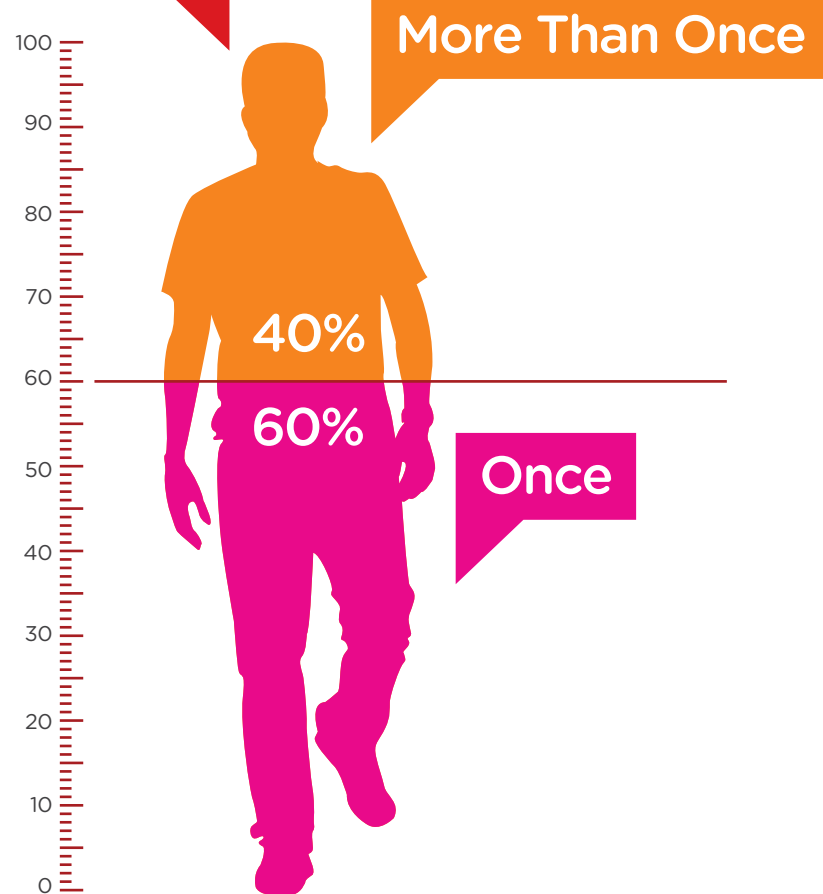


Manila

Coffee Chains



QSRs



Singapore - Scope



Locations

Raffles Place
Orchard Road
Harbour Front

Coffee Chains

Starbucks,
Pacific Coffee &
Coffee Bean

QSRs

McDonald's,
Pizza Hut &
Subway



Singapore

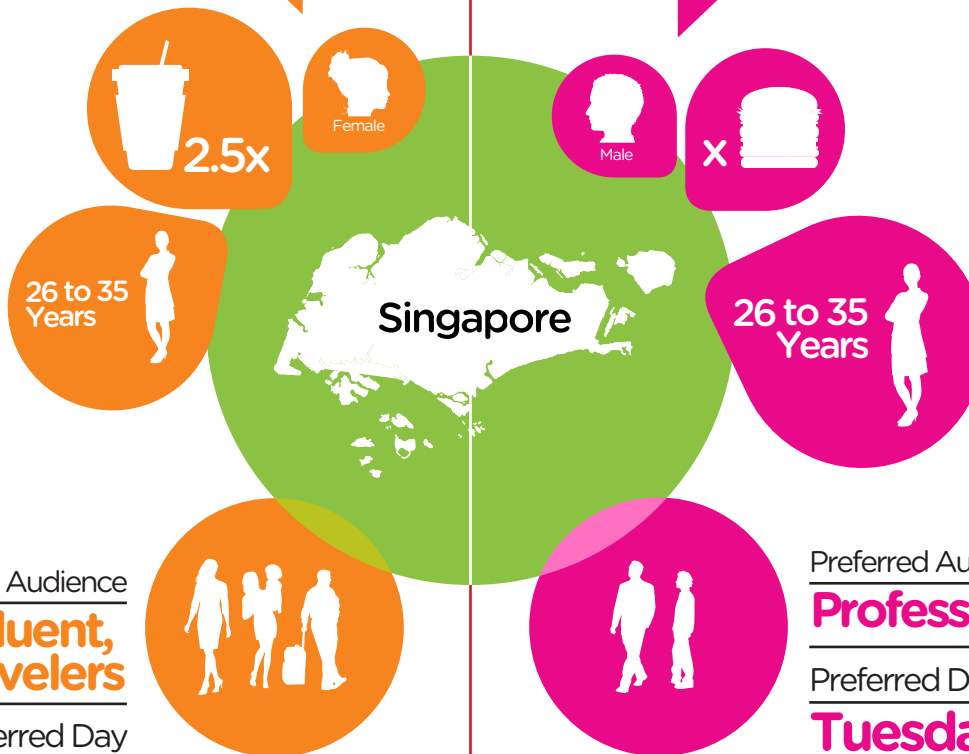
Coffee Chains

QSRs

Preferred Audience
**Affluent,
Homemakers, Travelers**

Preferred Day
Wednesday

Peak Duration
14:00 – 17:00



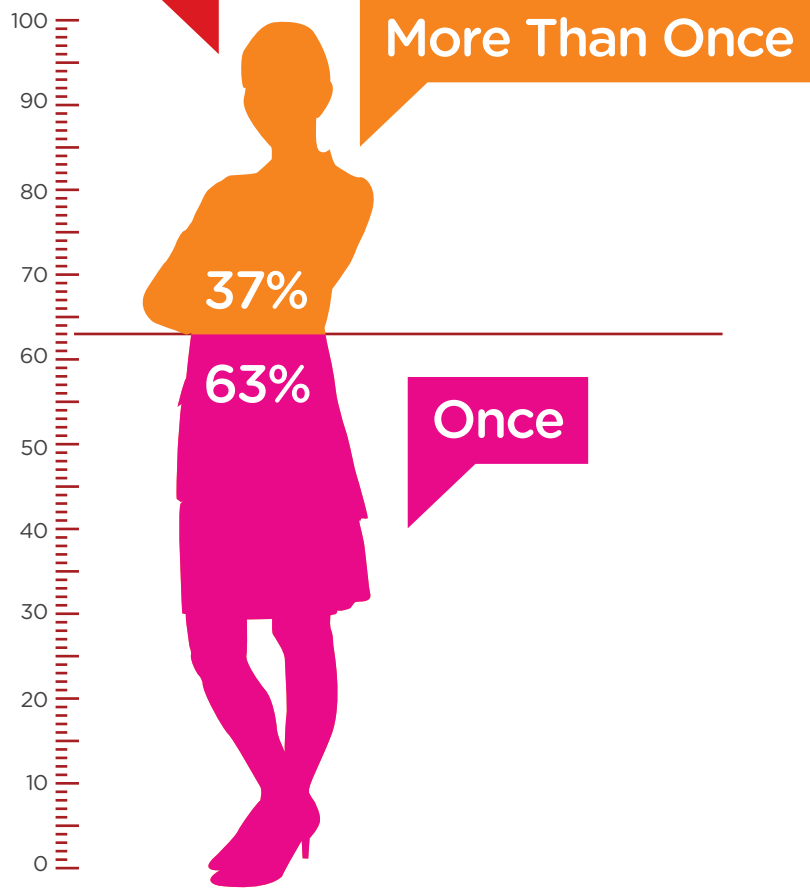
Preferred Audience
Professionals, Students

Preferred Day
Tuesday

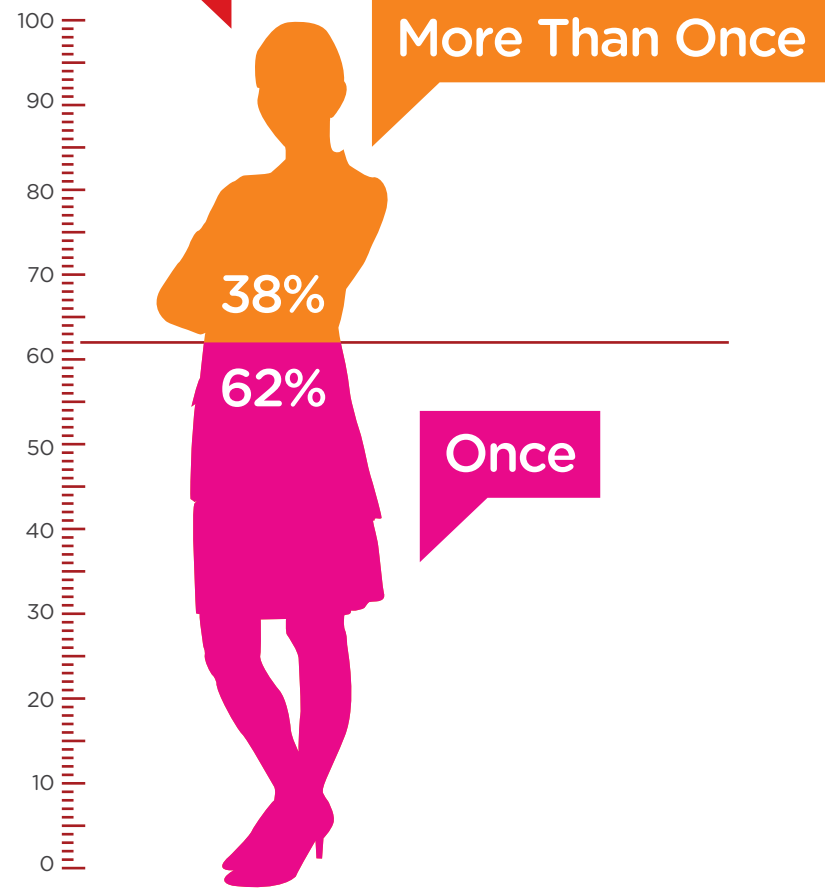
Peak Duration
17:00 – 20:00

Singapore

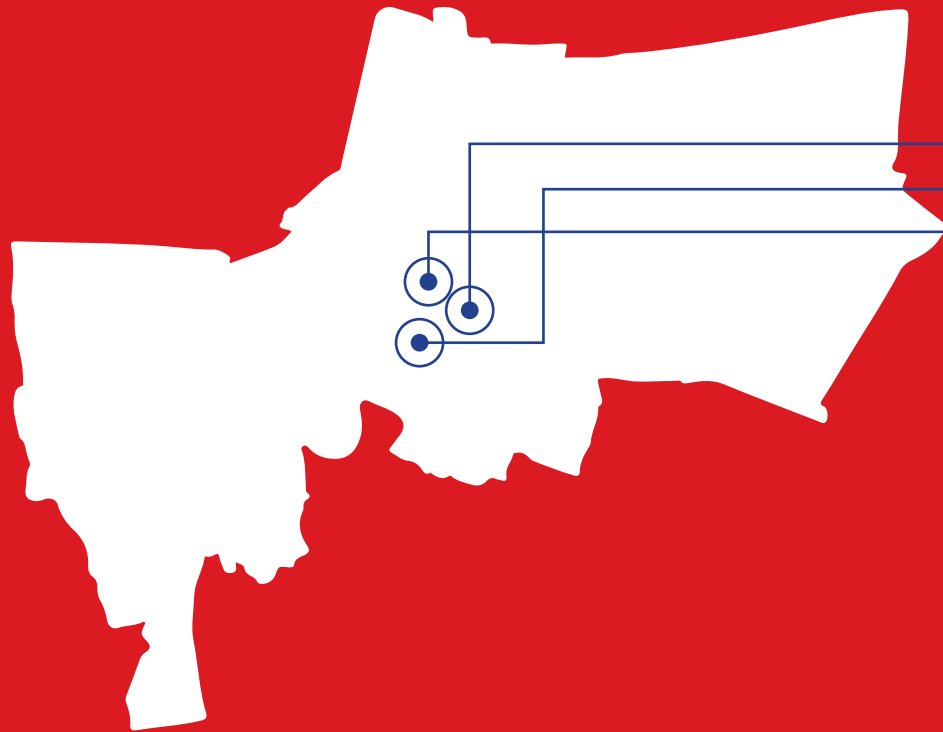
Coffee Chains



QSRs



Bangkok - Scope



Locations

Siam
Silom
Asoke

Coffee Chains

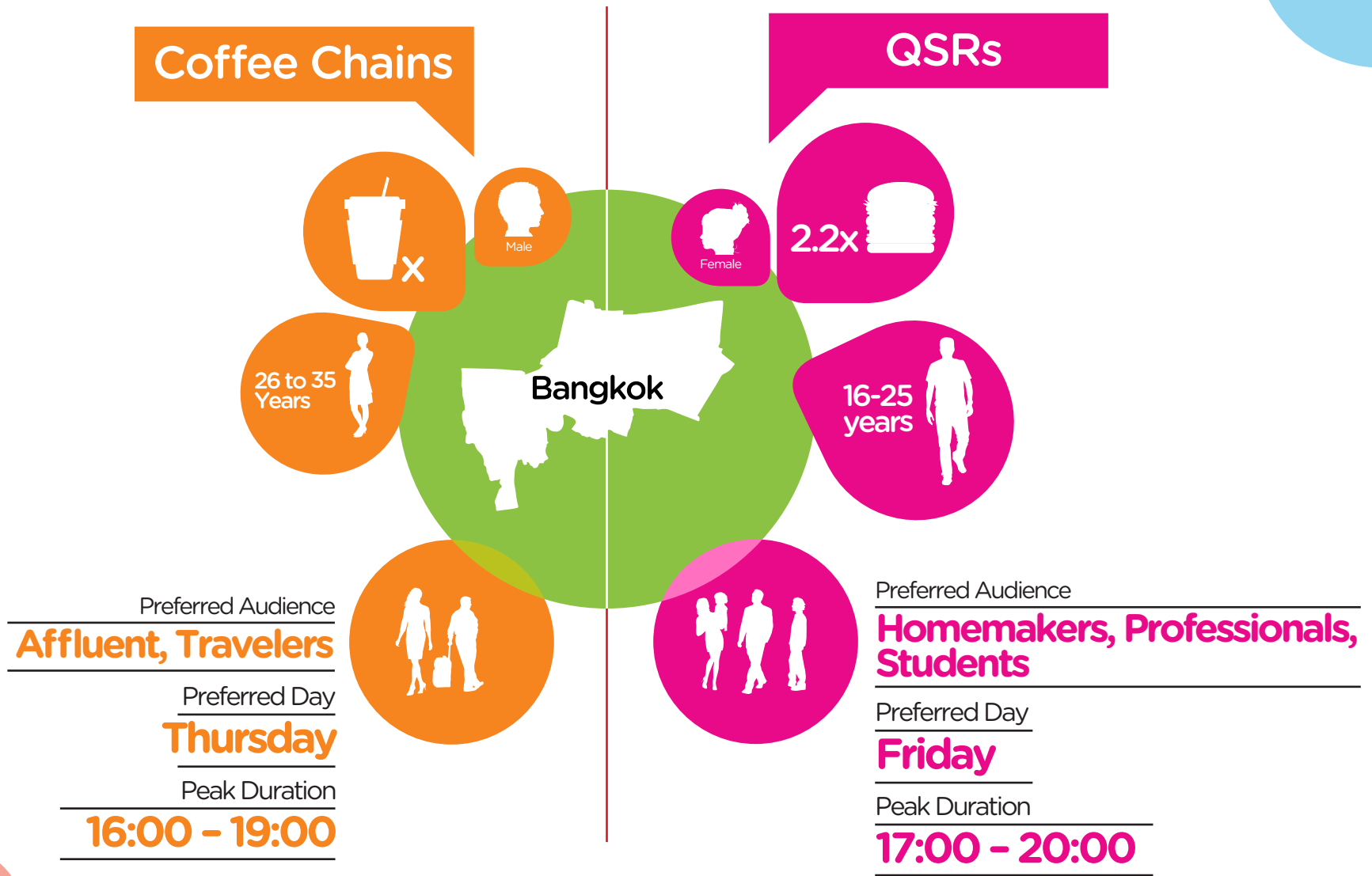
Starbucks,
Amazon Coffee &
Coffee Bean

QSRs

McDonald's,
KFC &
Subway

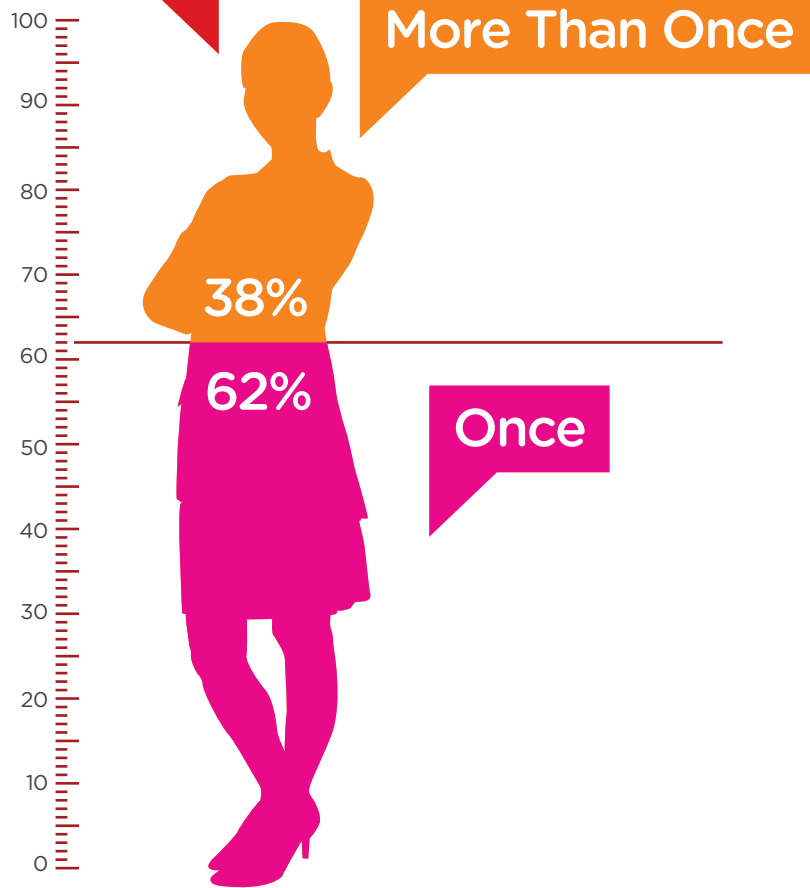


Bangkok

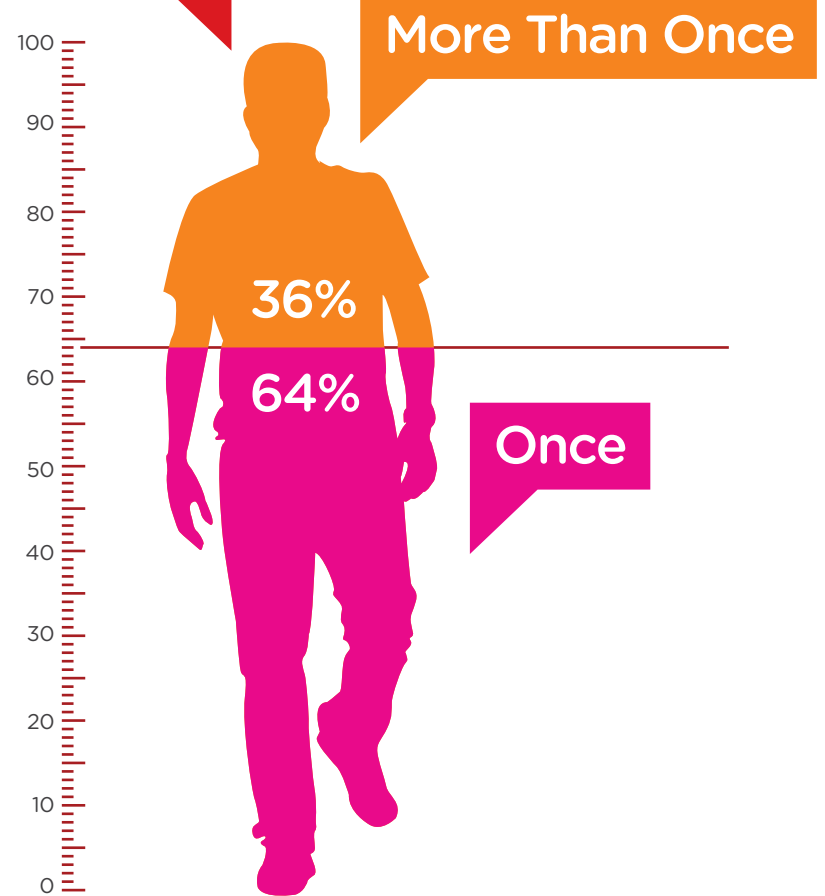


Bangkok

Coffee Chains



QSRs



About Near

Near is the largest location intelligence platform providing real-time information on places, people and products. The Near platform powers its flagship product to leverage historical location and context for data driven marketing.

Founded in 2012, Near is headquartered in Singapore with a presence across Australia, South East Asia, Japan, India and Europe. To date, the company has more than 700 million profiled audiences and has put it to work for marquee brands such as P&G, Coca Cola, Ikea, Audi, McDonald's, Toyota, Nike and Samsung.

Near is backed by investments from leading venture capitalists Sequoia Capital, JPM Private Equity Group, Telstra Ventures and Global Brain Japan.

Visit www.near.co to find out more.

