



The
Happiness
Index

DISCOVER THE SECRETS
TO BRILLIANT
ONLINE REVIEWS



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The Happiness Index



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McCain has teamed up with global research agency 'The Happiness Index', whose scientists use real-time data, neuroscience and AI machine learning to measure happiness on behalf of some of the world's leading brands. Their brief was to uncover what really makes diners happy when eating out (and the role of chips of course) to better understand how that leads to positive reviews.

The research interviewed 1000 UK respondents who have eaten out in the last 6 months using an online survey with fieldwork carried out in January 2020

We unearth the impact of reviews on dining choices and the relationship between British diners and the humble, but oh so important, chip!

Chips are so important to customers when eating out in a restaurant that three in ten diners will actually vote with their feet and leave if the kitchen ran out of chips.

**DELICIOUS, GREAT QUALITY CHIPS CAN
BOOST YOUR STAR RATINGS BY UP TO 26%**



CHIPS ARE THE FIRST FOOD ENCOUNTER

53% of customers would leave a bad review if their chips did not live up to their expectations

A whopping 85% of people admit to stealing a chip from someone else's plate before their meal arrived (cheeky) and 31% said it's always the first thing they try.

Chips are the first food encounter a diner has with a pub, bar or restaurant. The quality sets a precedent for the meal to come and ultimately leaves a lasting impression. In fact, the happiness survey revealed 53% of customers would leave a bad review if their chips did not live up to their expectations so don't cut corners where it matters.

Did you know diners said quality was twice as important as portion size (200-250g) when it comes to chips. Serving better quality, optimum portions make diners happier and more likely to leave a positive review.



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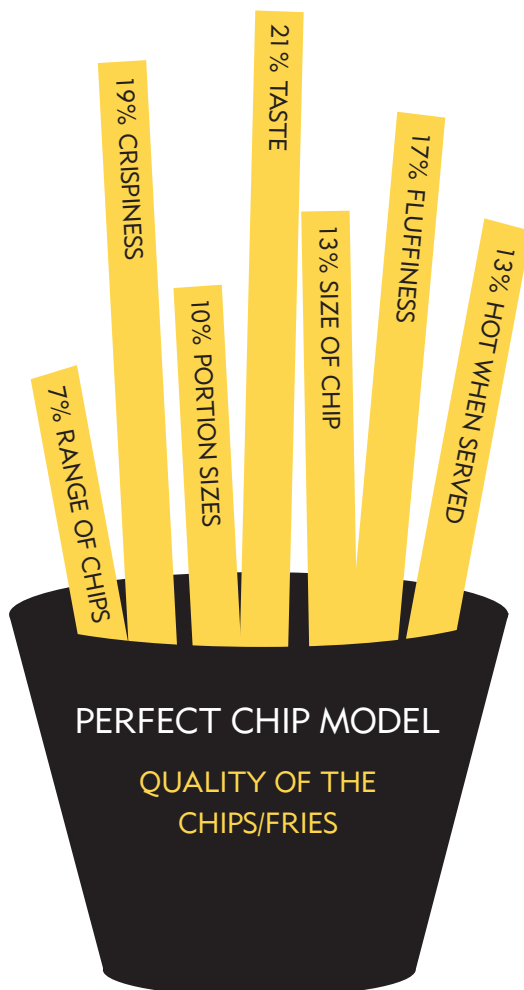
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CHIPS

REALLY DO

MATTER!

With the potential for chips to make or break a meal out, McCain decided to build a model to deconstruct what are the key factors in the perfect chip when influencing an online review.



TASTE generated the most happiness for diners when they take the first bite of the often-stolen chip! Followed closely by CRISPNESS and FLUFFINESS generating high levels of emotion when it came to the chip experience.

In essence, get the taste, crispness, fluffiness and heat right when serving a perfectly portioned side of chips and you're 80% of the way there to total chip perfection. Our research found you can influence against a diner's intention to leave a positive review online with the perfect chip.

Get them wrong at your peril! 40% of diners said they would leave a bad review after a terrible chip experience. They defined a bad chip as tasteless, soggy, greasy and cold with no fluffy potato filling.

Here at McCain we only use the best quality potatoes that deliver consistent all year round flavour. Our Surecrisp™ range stays crispier and warmer than uncoated fries on plate.¹ Stays crispier for longer than the nearest coated branded competitor.¹

In tests consumers agree McCain SureCrisp™ is crispier and more enjoyable on plate when compared to an uncoated fry.²

¹Source: Sensory testing for crispness, Sensory Dimensions – August 2018

²Source: Consumer preference testing, Blue Yonder – April 2019 Products tested was McCain 3/8 cut. Outcome may vary depending on climate

RANGE APPEAL

Increasingly, range is becoming more important to diners as certain chip varieties have become synonymous with key mains.



Skinny skin on with burger



Chunky triple cooked with Steak



Skinny skin off with sandwiches and paninis



Medium cut with fish



Sweet Potato with pulled pork burger



Topped Crisps / unique cut

Offering a good and varied range of chips contributed **7% towards happiness** and positive review intention making a significant contribution to offering the perfect chip experience.

The McCain range allows you to serve the perfect chip with every dish, adding to the overall happiness of your customers and influencing their positive review.

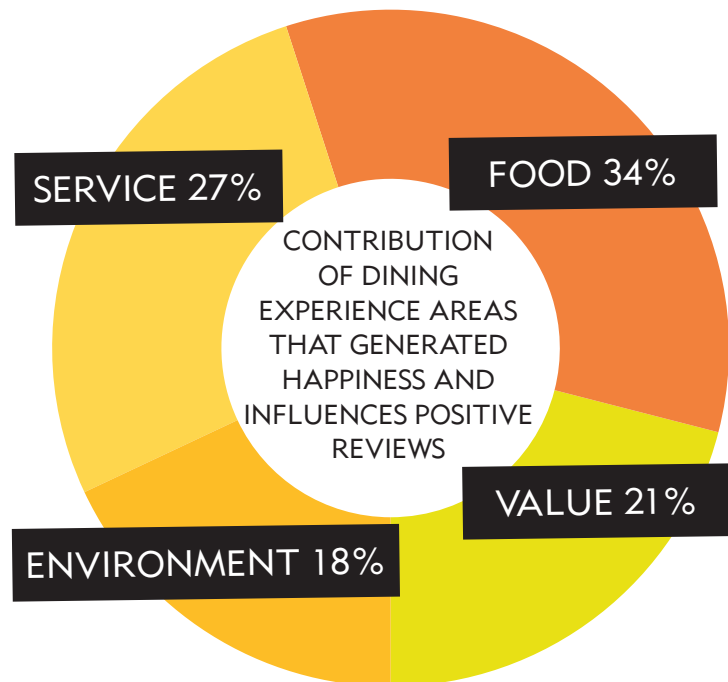
For more information and to contact your local rep visit
mccain.foodservice.co.uk

UNDERSTANDING DINER EXPERIENCE

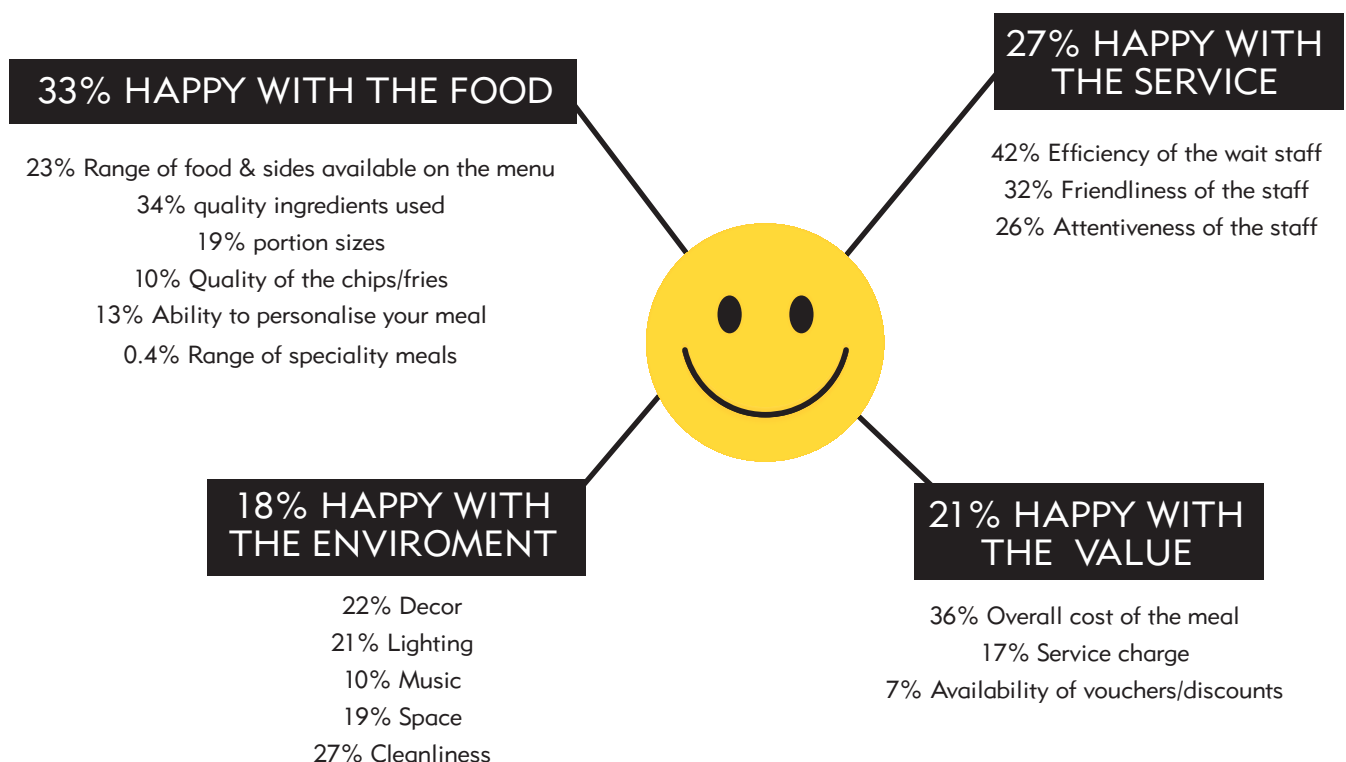
It's, of course, no surprise that food is an extremely important factor when it comes to diner experience. In fact, the Happiness Index report found, food is the most important ingredient of an enjoyable meal out, with 34% of respondents saying it made the largest contribution in generating happiness and influencing positive reviews.

We used some clever math (structural equation modelling) to discover how important each aspect of the dining experience was at driving overall happiness, and the subsequent impact each had on effecting an online review.

We drilled down into each of the four overarching areas to build a Happiness Model that can help operators better understand what areas of their business are directly impacting customer reviews.



EATING OUT HAPPINESS MODEL





QUALITY IS KING

It's no surprise great food quality is THE most important happiness indicator in the mind of the customer claiming. But it turns out size doesn't matter, as much as taste anyway, which makes diners nearly twice as happy than being served a large portion of average quality food.

This demonstrates the increasing demand for quality over quantity. A perfectly portioned side of delicious and crispy chips will deliver greater levels of happiness than a vast serving of average quality chips. This is a great way to reduce waste and make your diners even happier!

Menu range was also a large contributing factor to the overall happiness index, with customers placing this as the second most influential factor that would lead them to a positive review online.

But what does that actually mean? Our research discovered nearly half (47%) of diners experienced decision-making paralysis when it came to ordering off the menu. As we all lead more stressful working lives we are finding it more difficult, or tiresome, to make decisions in our leisure time. This 'stress' moment can have a negative impact on the experience so needs to be considered and avoided.

So, it's a balancing act. Menus need to offer enough choice to make guests happy, but not too much to trigger tension around ordering. A short but varied menu that's well sign posted can ease

ordering tension. Side orders and fries are a great way to add choice without complexity, and also allow for a level of personalisation which is very important (13%) when it comes to achieving customer satisfaction.

Other tactics to combat this negative emotion include training staff to recognise decision paralysis and offer recommendations of signature dishes or the most popular starter / main combinations.

This can do two things. One, easily diffuse a 'stress moment' that can have a negative impact on reviews when diners retrospectively look back at the overall experience. Two, can help operators promote profitable or WOW dishes that showcase the menu brilliantly, always command great reviews and promote social media sharing.

Interestingly the range of speciality meals (e.g. vegetarian, vegan, gluten free) showed almost no correlation with people's happiness with the food and likelihood to leave positive reviews. This can widely be explained by the fact that today customers expect to see these options available, it doesn't make them any happier to see them but take them away and happiness would certainly be impacted.

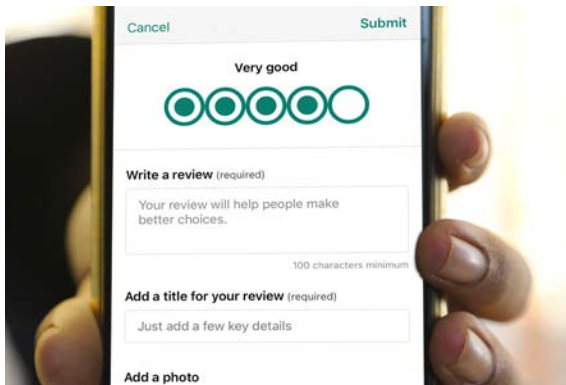
McCain has a range of gluten free chips that allow you to cater for everyone without the worry of listing a second fry. Discover the range.



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NEW VALUE

The happiness model revealed the overall cost of the meal is foremost in customers minds (76%) when they consider the impact of value on a review. But, that doesn't mean the cheaper the meal the happier the customer and the better the review. In fact, the study revealed 65% of diners would happily pay more if they were reassured by a pub, bar or restaurants excellent online reputation. This demonstrates guests are happy to pay for quality and are actively looking for consistency when it comes food quality. The low impact (7%) of discounts and vouchers indicates a good review is less to do with actual cost, and more to do with cost vs perceived quality and overall experience, which is predominantly dictated by food quality.



THE POWER OF REVIEWS

78% of diners say they've left an online review, with around only 20% doing so frequently. This means there's a hard-core set of reviewers out there controlling the agenda. Our research has identified these as the 'organisers' who punch above their weight when it comes to opinion forming.



More diners read reviews than leave them, with 90% checking online reviews and social media to help them pick the right restaurant.

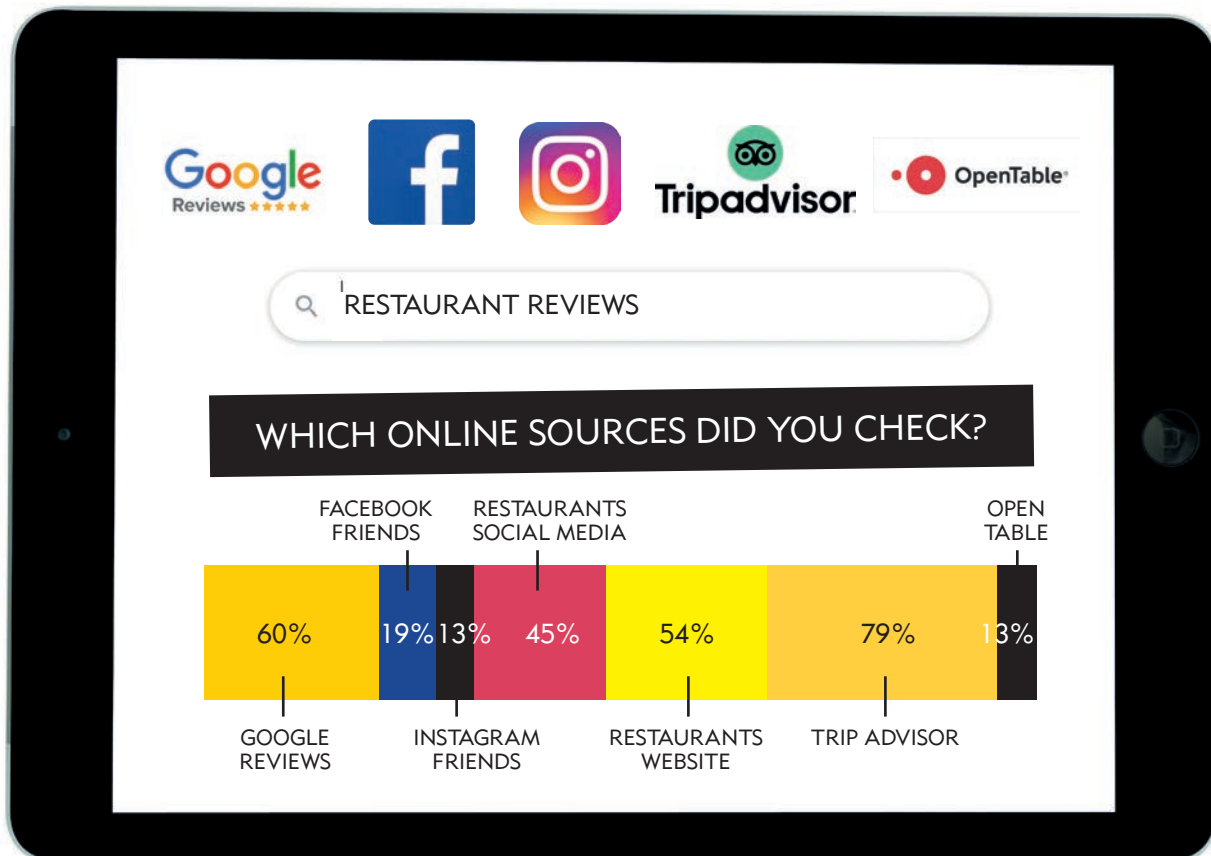
A massive 85% wouldn't even consider a pub, bar or restaurant if it had under 3* rating online. With food quality, closely followed by service, being THE most influencing factor when it comes to leaving positive reviews, it's essential operators regularly walk in their customers shoes. Objectively reviewing the customers journey from booking a table, to evaluating the choices and quality of the food is the most important task as an owner, manager or chef, but often gets pushed aside when day to day business gets in the way.



REVIEW PLATFORMS

Diners across all ages, predominantly check with TripAdvisor (78%) and/or Google Reviews (59%) before deciding where to eat. The over 60's prefer to check out the pub, bar or restaurants website, whereas the under 30's will access the outlets social feeds before forming an opinion and deciding where to spend their time and money.

Unsurprisingly younger diners are more likely to use image sharing and social media platforms like Instagram (20%) than people over 45 (3%). Facebook is the social media channel of choice for the over 45s who often use their friends Facebook recommendations (26%) as a source of guidance compared with only 15% of diners under 30 who actually fess up to copying other peoples choices of restaurant!



LOCATION TAGGING

57% of diners tag in a location with pictures, that means over half of all your guests are potential advertisers for your brand and EVERY dish you send out is an advert. Presentation is a key performance indicator here with the need for consistency both in terms of taste and appearance.

GET YOUR SOCIAL FEED ON POINT

Happiness also directly impacts on the pub, bar or restaurants own social media, contributing heavily to the number of followers or likes the restaurant receives. 45% of diners said they would actively follow a pub, bar or restaurant if they had a great experience.



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DECISION MAKERS ARE YOUR BEST FRIEND

67% of the happiness index respondents were often or always responsible for deciding on the restaurant where they, or the group will eat. This correlation between active online participants and what we have called 'the organisers' is interesting. Those that organise the eating out occasion are often the reviewer (87%) and therefore have a big influence, not only over their direct network but also the wider audience. It's vital operators train staff to identify the 'organiser' and nurture / reassure them throughout the dining experience as they are more likely to directly influence your reputation online.



SERVICE WITH A SMILE

Service can have the second highest impact on happiness and positivity when it comes to reviews. Efficiency (42%), being the primary need of diners who now expect the average dining experience to take an average of 20 minutes*. Reassuringly, friendliness (32%) was also important emphasising the need for human connection moments still having a role to play when ordering food and delivering your brands ethos and story.

DÉCOR TO DIE FOR

Cleanliness (27%) as standard right! But décor is commanding high levels of happiness as the second most influential factor (22%) for generating positive online reviews. Unique styles and colour pallets are gaining traction with diners and influencing their reviews online. The link between dining out and fashion is becoming more mainstream, especially playing out with the under 30's who engage more with social sharing platforms such as Instagram and Snapchat.

Filthy and topped fries are a great way to create stand out dishes that are vibrant and insta worthy for your social feeds.



<https://www.instagram.com/palmvaults/>



MATCHY MATCHY

Dressing to coordinate not only with your dining destination but even your food is now a thing! Diners are now going to extreme lengths to match their clothing to the food and the interior of a restaurant.

Palm Vaults, recently named 'London's most Instagrammable café' is famous for its pastel shades, pot plants, retro prints and food to match. Diners are now dressing to compliment the heughs of their meal to make the whole experience totally Insta-worthy - even bringing their coordinating pets to match!



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*Source: average dining time research TBC



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