

McDonald's Restaurant  
CSAT: 48% Outlets: 863

Burger King Restaurant  
CSAT: 68% Outlets: 343

Old Wild West Restaura...  
CSAT: 73% Outlets: 257

KFC Restaurant  
CSAT: 73% Outlets: 164



Mar 25 - Mar 26

## Overview

What are the key indicators across different aspects of performance?

### Market Performance Score

In Cafes & restaurants

Mar 25 - Mar 26

100<sup>th</sup> score



A traffic-based performance score

### Performance Peers

Brands with the same performance score

La Piadineria Restaurant

KFC Restaurant

L'Antica Pizzeria da Michele...

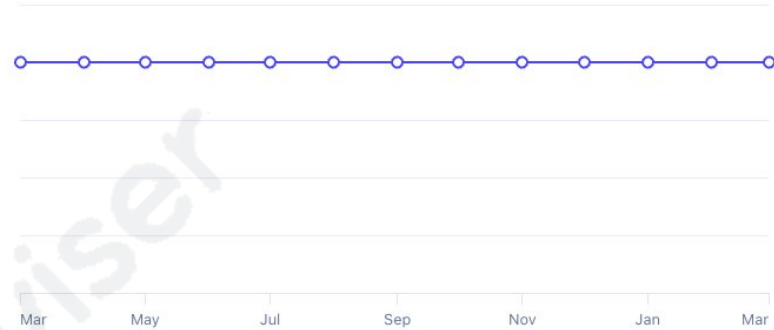
Old Wild West Restaurant

Burger King Restaurant

Autogrill Service Area Venue

### Market Performance Dynamics

In Cafes & restaurants



## Performance Drivers

Customer Satisfaction

48.5% ↑ 0.1pp

Average Check, EUR

13.1 ↑ 6.1%

Number of Outlets

863

Local Traffic Share

Coming Soon

Traffic Win Rate

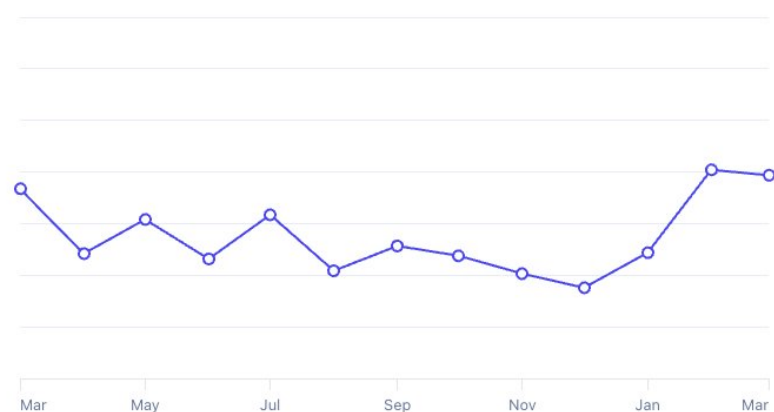
Coming Soon

Cafes & restaurants Mar 25 - Mar 26

### Customer Satisfaction by Geo

| States   | Counties | Cities | Towns                        |
|----------|----------|--------|------------------------------|
| Apulia   |          |        | 63.9% <span>↑ 2.6pp</span>   |
| Lazio    |          |        | 57.8% <span>↑ 2.3pp</span>   |
| Marche   |          |        | 51.9% <span>↑ 3.7pp</span>   |
| Campania |          |        | 50.8% <span>↑ 4.2pp</span>   |
| Calabria |          |        | 49.9% <span>↓ -16.2pp</span> |

### Customer Satisfaction Dynamics



## Customer Overlap

Cafes & restaurants Mar 25 - Mar 26

### Cross-Shopping

Top-5 brands that brand's customers also visit

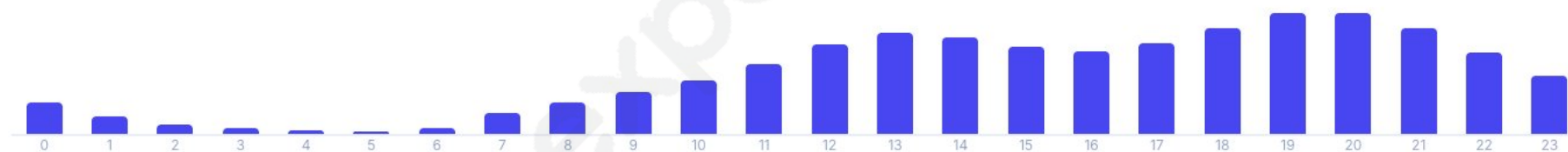


## Activity

Mar 25 - Mar 26

### Traffic Workload by hours

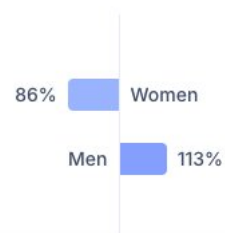
Discover your traffic workload during different times of the day



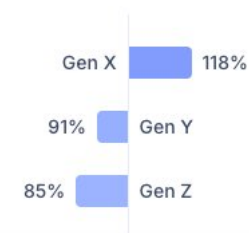
## Consumer Segments

Affinity Index Cafes & restaurants Mar 25 - Mar 26

### By Gender



### By Generation



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Mar 25 - Mar 26

## Overview

What are the key indicators across different aspects of performance?

### Market Performance Score

In Cafes & restaurants  
Mar 25 - Mar 26

92<sup>nd</sup> score  
↑ 2 YoY



A traffic-based performance score

### Performance Peers

Brands with the same performance score

La Piadineria Restaurant KFC Restaurant

L'Antica Pizzeria da Michele...

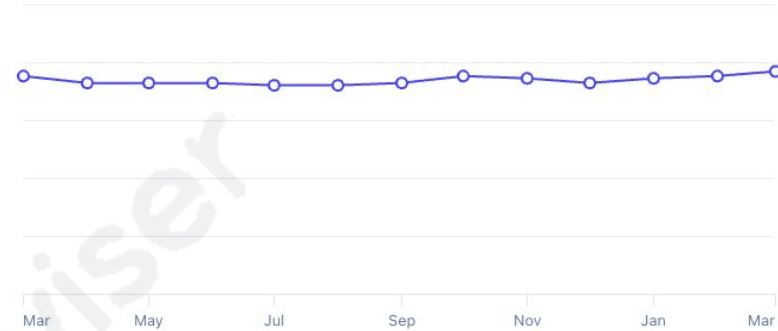
Old Wild West Restaurant

Autogrill Service Area Venue

McDonald's Restaurant

### Market Performance Dynamics

In Cafes & restaurants



## Performance Drivers

Cafes & restaurants Mar 25 - Mar 26

### Customer Satisfaction

67.8% ↑ 2.6pp

### Average Check, EUR

14.6 ↑ 2.8%

### Number of Outlets

343

### Local Traffic Share

Coming Soon

### Traffic Win Rate

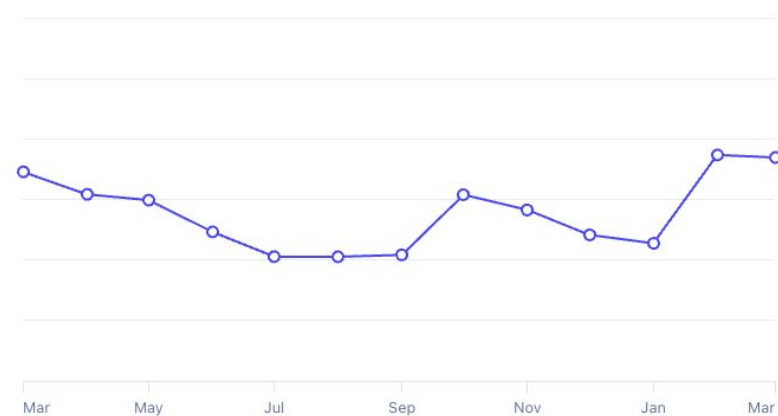
Coming Soon

### Customer Satisfaction by Geo

| States                  | Counties | Cities | Towns          |
|-------------------------|----------|--------|----------------|
| Apulia                  |          |        | 83.1% ↑ 1.3pp  |
| Sicily                  |          |        | 82.8% ↑ 40.8pp |
| Friuli - Venezia Giulia |          |        | 79.4% ↑ 2.8pp  |
| Lazio                   |          |        | 75.8% ↑ 3pp    |
| Abruzzo                 |          |        | 73.6% ↑ 2.5pp  |

1 / 4 >

### Customer Satisfaction Dynamics



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Mar 25 - Mar 26

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What are the key indicators across different aspects of performance?

### Market Performance Score

In Cafes & restaurants

Mar 25 - Mar 26

89<sup>th</sup> score  
↑ 4 YoY



A traffic-based performance score

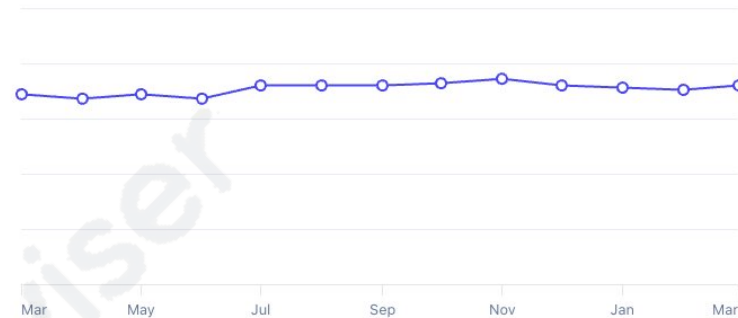
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Brands with the same performance score

- Roadhouse Restaurant
- La Piadineria Restaurant
- L'Antica Pizzeria da Michele...
- Autogrill Service Area Venue
- Burger King Restaurant
- KFC Restaurant

### Market Performance Dynamics

In Cafes & restaurants



## Performance Drivers

Customer Satisfaction

73% ↑ 2.1pp

Average Check, EUR

22.4 ↓ -4%

Number of Outlets

257

Local Traffic Share

Coming Soon

Traffic Win Rate

Coming Soon

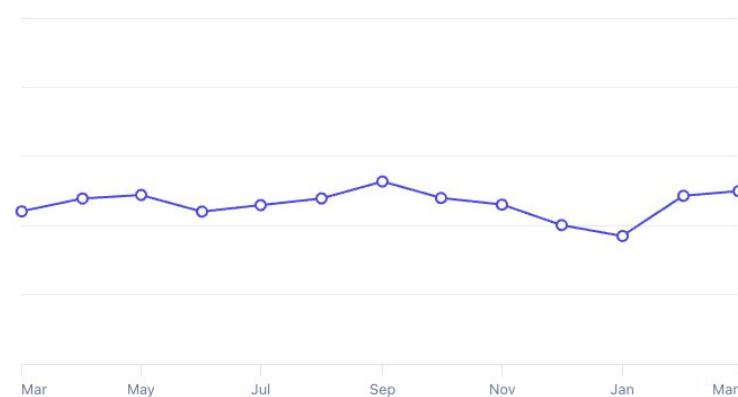
Cafes & restaurants Mar 25 - Mar 26

### Customer Satisfaction by Geo

| States   | Counties | Cities | Towns          |
|----------|----------|--------|----------------|
| Sicily   |          |        | 79.5% ↓ -3.8pp |
| Marche   |          |        | 78.1% ↑ 3.6pp  |
| Lombardy |          |        | 78% ↑ 3.8pp    |
| Lazio    |          |        | 78% ↑ 4.5pp    |
| Piedmont |          |        | 77.2% ↑ 8.6pp  |

1 / 4 >

### Customer Satisfaction Dynamics



Customer Overlap

Cafes & restaurants Mar 25 - Mar 26

Cross-Shopping

Top-5 brands that brand's customers also visit

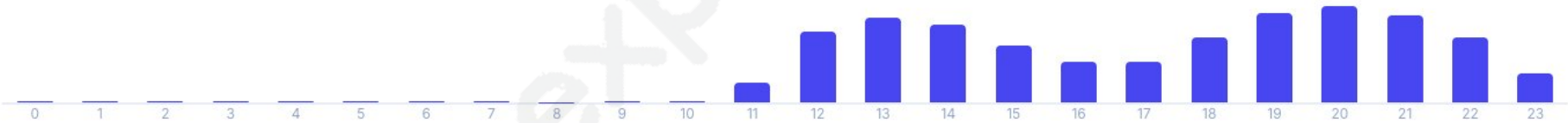


Activity

Mar 25 - Mar 26

Traffic Workload by hours

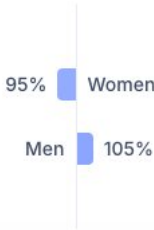
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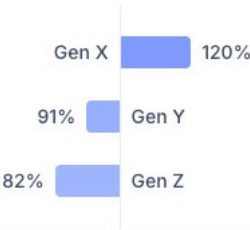
Consumer Segments

Affinity Index Cafes & restaurants Mar 25 - Mar 26

By Gender



By Generation



## Benchmarking

All Segments

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Mar 25 – Mar 26

Audience

## Brand Perception

Absolute

YoY Change

What attributes do consumers clearly associate with the brand? [Learn more](#)

### Topic Explorer

Search

#### Overview

- > Assortment
- > Food and Drinks
- > Location
- > Place
- > Pricing
- > Service
- > Staff

-10 Strongly off association -6 Moderately off -3 Weak 0 Moderate 3 Clear 6 Strong association 10

| Attributes                | McDonald's Restaurant | Burger King Restaurant | Old Wild West Restaurant | KFC Restaurant |
|---------------------------|-----------------------|------------------------|--------------------------|----------------|
| Great Assortment          | -2.1                  | -1.8                   | 1.8                      | -3.2           |
| Delicious Food and Drinks | -2.5                  | 0.9                    | 2.1                      | 1.8            |
| Great Location            | 0.8                   | -0.2                   | 1                        | -1.7           |
| Great Place               | -0.6                  | 0.7                    | 0.9                      | -1.1           |
| Fair Pricing              | -2.6                  | -1.4                   | 0.7                      | -1.6           |
| Excellent Service         | -2                    | -0.4                   | 0.4                      | -0.3           |
| Friendly Staff            | -1.5                  | 1.4                    | 2.1                      | 1.8            |

## Benchmarking

All Segments

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Mar 25 – Mar 26

Audience

## Willingness to Pay

Pinpoint which CX attributes add the most value at each price segment.

### Topic Explorer



#### Overview

- > Assortment
- > Food and Drinks
- > Location
- > Place
- > Pricing
- > Service
- > Staff

| Topics                    | Low<br>1-10 EUR | Mid<br>10-20 EUR | Premium<br>20+ EUR |
|---------------------------|-----------------|------------------|--------------------|
| Great Location            | High            | Moderate         | -                  |
| Great Assortment          | -               | -                | High               |
| Great Place               | Extra High      | -                | -                  |
| Fair Pricing              | High            | -                | -                  |
| Friendly Staff            | -               | -                | Extra High         |
| Excellent Service         | Low             | Moderate         | -                  |
| Delicious Food and Drinks | -               | -                | Extra High         |

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Mar 25 – Mar 26

## Customer Requirements

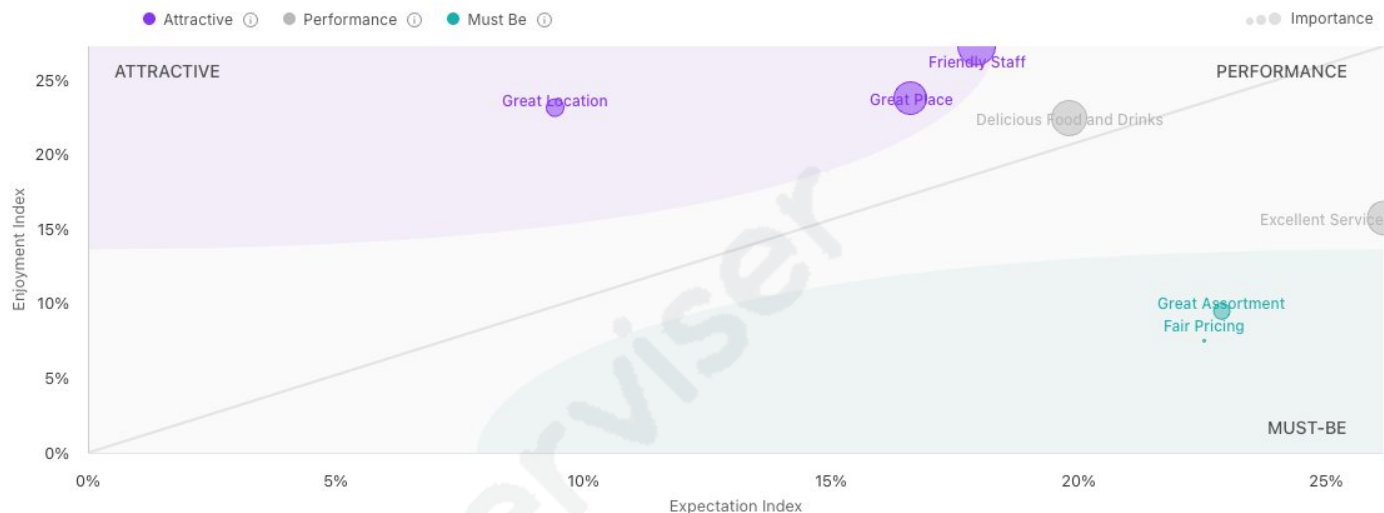
How well does a brand fulfill consumer expectations and meet their needs?

### Topic Explorer

Search

Overview

- > Assortment
- > Food and Drinks
- > Location
- > Place
- > Pricing
- > Service
- > Staff



| Attributes                | Expectation Index ⓘ | Enjoyment Index ⓘ | CSAT ⓘ | Requirements ⓘ |
|---------------------------|---------------------|-------------------|--------|----------------|
| Great Assortment          | 22.9                | 9.5               | 29%    | Must Be        |
| Delicious Food and Drinks | 19.8                | 22.5              | 53%    | Performance    |
| Great Location            | 9.4                 | 23.2              | 71%    | Attractive     |
| Great Place               | 16.6                | 23.8              | 59%    | Attractive     |
| Fair Pricing              | 22.5                | 7.5               | 25%    | Must Be        |
| Excellent Service         | 26.2                | 15.8              | 38%    | Performance    |
| Friendly Staff            | 17.9                | 27.3              | 60%    | Attractive     |

## Benchmarking

All Segments

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+

Mar 25 – Mar 26

## Benchmarking

Report highlights brand strengths and weaknesses compared to competitors across key customer experience topics.

### Topic Explorer

Search

Overview

- > Assortment
- > Food and Drinks
- > Location
- > Place
- > Pricing
- > Service
- > Staff

| Strength        |                         | ↑ CSAT<br>↑ Topic Share | Weakness              |                        | ↓ CSAT<br>↓ Topic Share | Opportunity               |  | ↑ CSAT<br>↓ Topic Share | Threat |  | ↓ CSAT<br>↑ Topic Share |
|-----------------|-------------------------|-------------------------|-----------------------|------------------------|-------------------------|---------------------------|--|-------------------------|--------|--|-------------------------|
| Topics          | All Segments<br>Average |                         | McDonald's Restaurant | Burger King Restaurant |                         | Old Wild West Restaura... |  | KFC Restaurant          |        |  |                         |
| Assortment      | 48%<br>6%               |                         | 29%<br>8%             | 44%<br>5%              |                         | 68%<br>8%                 |  | 50%<br>4%               |        |  |                         |
| Food and Drinks | 71%<br>51%              |                         | 53%<br>38%            | 75%<br>48%             |                         | 77%<br>63%                |  | 78%<br>56%              |        |  |                         |
| Location        | 79%<br>4%               |                         | 71%<br>7%             | 80%<br>4%              |                         | 87%<br>4%                 |  | 80%<br>3%               |        |  |                         |
| Place           | 68%<br>26%              |                         | 59%<br>30%            | 71%<br>29%             |                         | 74%<br>26%                |  | 68%<br>21%              |        |  |                         |
| Pricing         | 41%<br>6%               |                         | 25%<br>6%             | 47%<br>5%              |                         | 41%<br>10%                |  | 49%<br>5%               |        |  |                         |
| Service         | 56%<br>37%              |                         | 38%<br>41%            | 56%<br>38%             |                         | 65%<br>36%                |  | 66%<br>31%              |        |  |                         |
| Staff           | 77%<br>49%              |                         | 60%<br>43%            | 80%<br>52%             |                         | 83%<br>54%                |  | 84%<br>46%              |        |  |                         |

McDonald's Restaurant  
Outlet: Via Rogoredo, 110, 201:

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Last 12 months Apr 25 - Mar 26

Overview

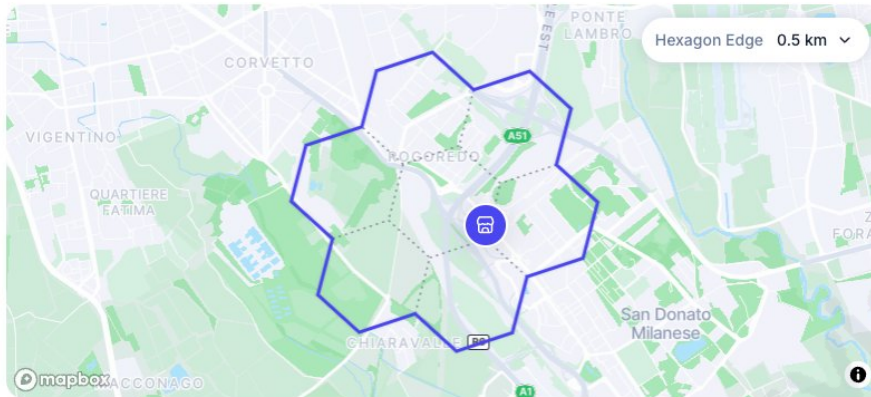
Trade Area

Trade Area Insights

Competitors

## McDonald's Restaurant

Via Rogoredo, 110, 20138 Milano MI, Italia



Category

QSR

CSAT

92% ↑ 47pp YoY

Foot Traffic Share

55% ↑ 24pp YoY

## Trade Area Score

Reflects the overall attractiveness of the outlet's trade area

29 / 100

Low

Low High

+ TIP

Overall conditions are challenging, focusing on efficiency, retention, and alternative demand channels.

⚡ Insight

## Limited Scale

Outperforming location with above-average foot traffic share (55%) in a limited trade area (score: 29). Growth is capped by market size. Focus on stability and expansion into stronger trade areas.

## Customer Satisfaction Overview

Overview

● McDonald's Restaurant ● Trade Area



## CX Drivers and Barriers

### Top Drivers

Topics Driving Overall Satisfaction the Most

- ↑ Friendliness CSAT 100%
- ↑ Consistency and Professionalism CSAT 99%
- ↑ Helpfulness CSAT 99%

### Top Barriers

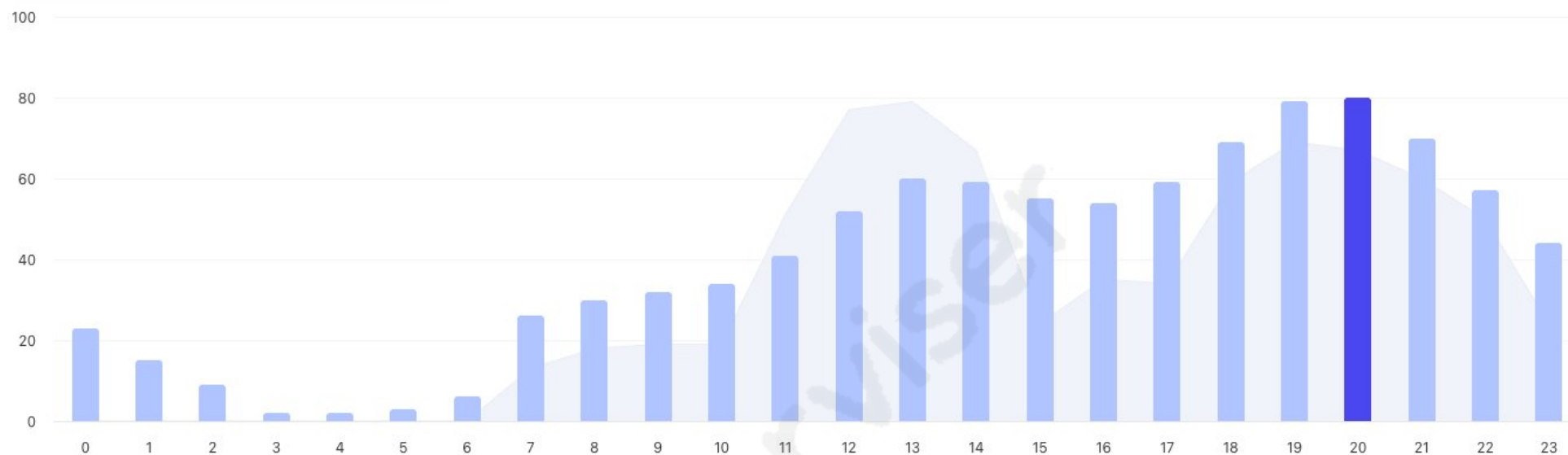
Topics Reducing Overall Satisfaction the Most

- ↓ Accuracy CSAT 30%
- ↓ Dish Families CSAT 73%
- ↓ Speed Punctuality CSAT 83%

## Foot Traffic Intensity

■ McDonald's Restaurant ■ Competitors

Week Mon Tue Wed Thu Fri Sat Sun



## Top Competitors



### Traffic Leader

#### Pizzikotto Pizzeria & Cucina Restaurant

1.1 km · Via Luigi Russolo, 5, 20138 Milano MI, Italia

Foot Traffic Share

**15%** ↑ 1pp YoY

CSAT

**68%** ↓ 12pp YoY



### CSAT Leader

#### Panificio Pasticceria Frusconi | Servizio Catering - Buffet Milano

773 m · Via Privata Monte Palombino 0004 - 20138 Milano (MI)

Foot Traffic Share

**5%** ↑ 0pp YoY

CSAT

**99%** ↑ 2pp YoY

> See All Competitors

### Market Availability

High

A measure of market openness for new businesses and growth in a trade area, considering competitive intensity

Score ⓘ

Index To Market Area ⓘ

Absolute Value

92 /100

1.1

27 competitors

✦ TIP

Limited competition gives you a chance to set the standard in this area. Build early leadership through strong presence and consistent customer experience.

### Retail Density

Low

The concentration of retail establishments within a trade area

Score ⓘ

Index To Market Area ⓘ

Absolute Value

8 /100

0.2

326 outlets

✦ TIP

Actively drive demand through online channels and planned visits rather than relying on surrounding traffic.

### Customer Experience

High

A measure of estimated Customer Satisfaction level in the industry in which your store operates

Score ⓘ

Index To Market Area ⓘ

Absolute Value

85 /100

1.1

85%

✦ TIP

A high service standard is already set in this area, so focus on consistency and selective experience upgrades to turn satisfied customers into loyal regulars.

### Purchasing Power

Low

A measure of estimated consumer spending within a trade area

Score ⓘ

Index To Market Area ⓘ

6 /100

0.2

✦ TIP

Focus on affordable core products, bundles, and promotions to match price-sensitive demand.

Customer Overlap

Cross-Shopping

Top-5 brands that brand's customers also visit



Activity

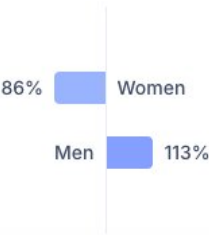
Traffic Workload by hours

Discover your traffic workload during different times of the day

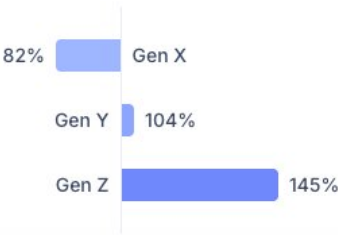


Consumer Segments

By Gender



By Generation



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Mar 25 – Mar 26

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In Cafes & restaurants

Mar 25 - Mar 26

85<sup>th</sup> score  
↑ 5 YoY



A traffic-based performance score

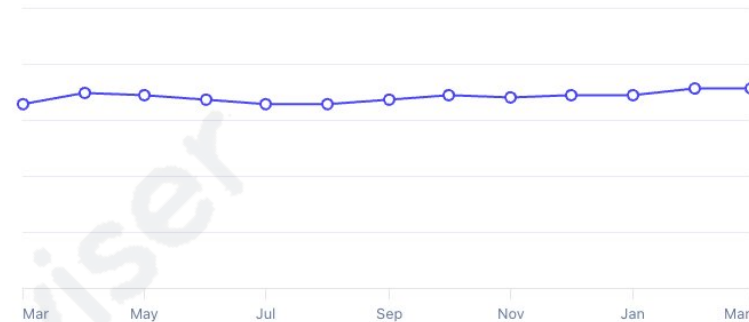
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Brands with the same performance score

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- La Piadineria Restaurant
- L'Antica Pizzeria da Michele...
- Old Wild West Restaurant
- Autogrill Service Area Venue
- Burger King Restaurant

### Market Performance Dynamics

In Cafes & restaurants



## Performance Drivers

Cafes & restaurants Mar 25 - Mar 26

### Customer Satisfaction

72.7% ↑ 6.2pp

### Average Check, EUR

12.9 ↓ -22.1%

### Number of Outlets

164

### Local Traffic Share

Coming Soon

### Traffic Win Rate

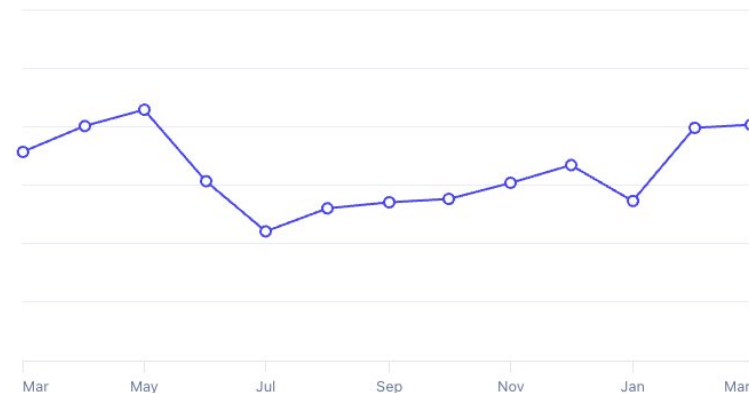
Coming Soon

### Customer Satisfaction by Geo

| States                         | Counties | Cities | Towns          |
|--------------------------------|----------|--------|----------------|
| Calabria                       |          |        | 89.9% ↑ 16.8pp |
| Trentino – Alto Adige/Südtirol |          |        | 89.6% ↑ 1.7pp  |
| Sardinia                       |          |        | 89.6% ↑ 16.3pp |
| Apulia                         |          |        | 89.2% ↑ 14.4pp |
| Umbria                         |          |        | 88% ↑ 15.1pp   |

1 / 4 >

### Customer Satisfaction Dynamics



## Customer Overlap

Cafes & restaurants Mar 25 - Mar 26

### Cross-Shopping

Top-5 brands that brand's customers also visit



## Activity

Mar 25 - Mar 26

### Traffic Workload by hours

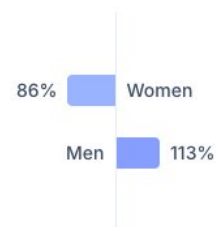
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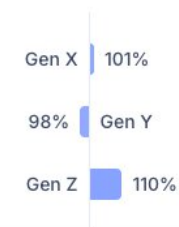
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### By Gender



### By Generation



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Last 12 months Apr 25 – Mar 26

Overview

Trade Area

Trade Area Insights

Competitors

Demographics

Trade Area Health

Chains vs Independents

Seasonality

### Demographics

By Gender

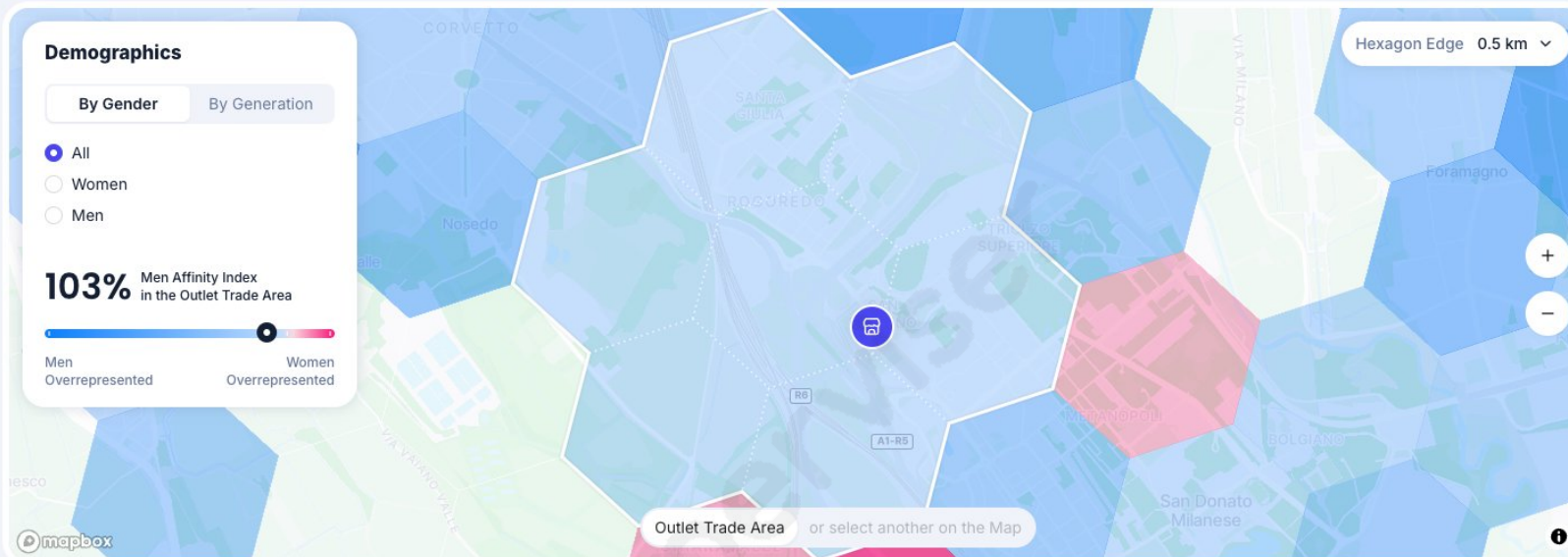
By Generation

- ☒ All  
☐ Women  
☐ Men

103% Men Affinity Index  
in the Outlet Trade Area



Hexagon Edge 0.5 km



### Consumer Demographics

How the trade area audience differs from the Market Area (with 10km radius)

#### Affinity Index

Underrepresented vs Market Area

Overrepresented vs Market Area

Women

96%

Men

103%

Gen X

120%

Gen Y

91%

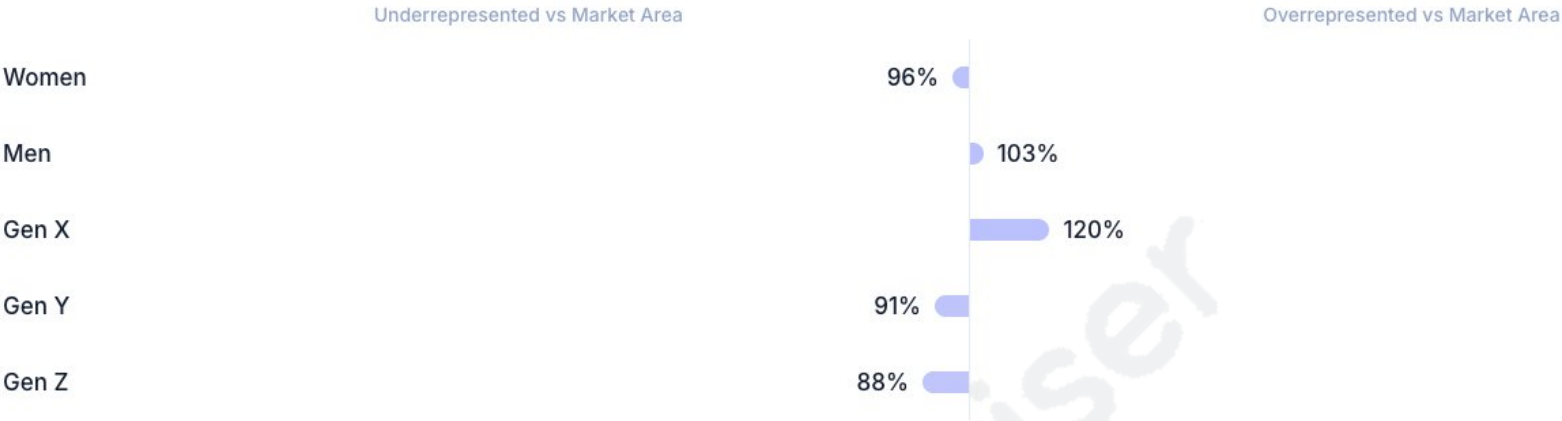
Gen Z

88%

Consumer Demographics

How the trade area audience differs from the Market Area (with 10km radius)

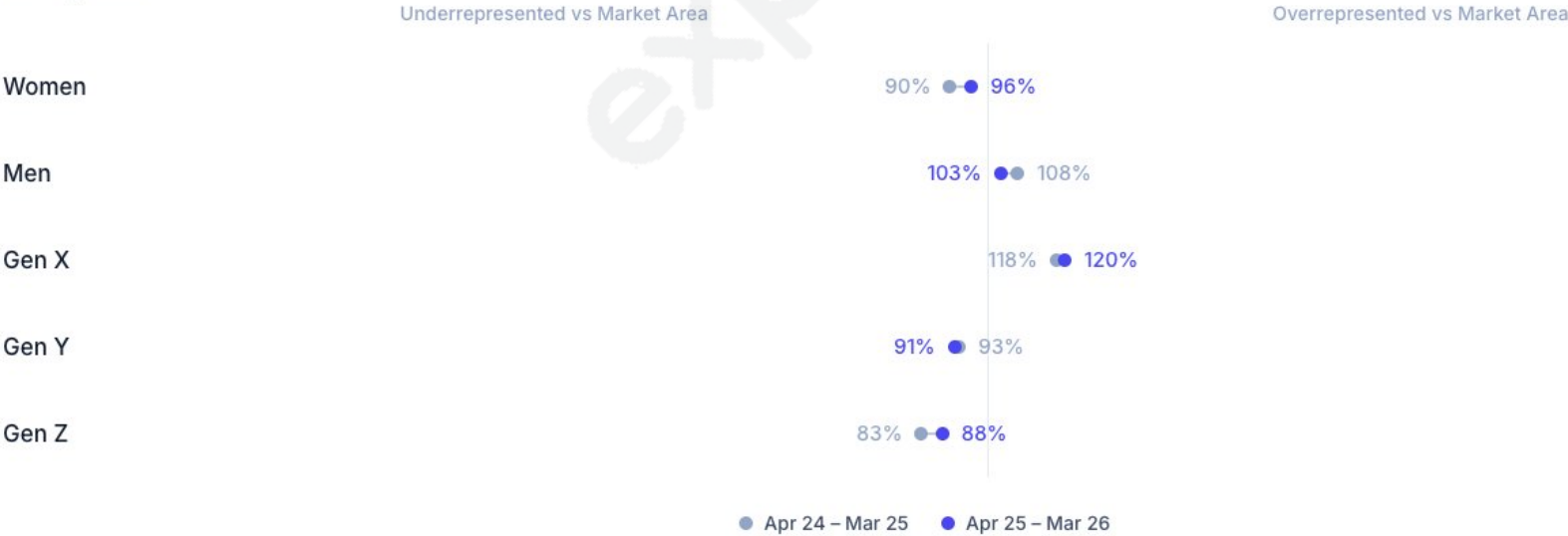
Affinity Index



Consumer Demographics Change

Year-over-year change in each demographic segment

Affinity Index



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Trade Area Health

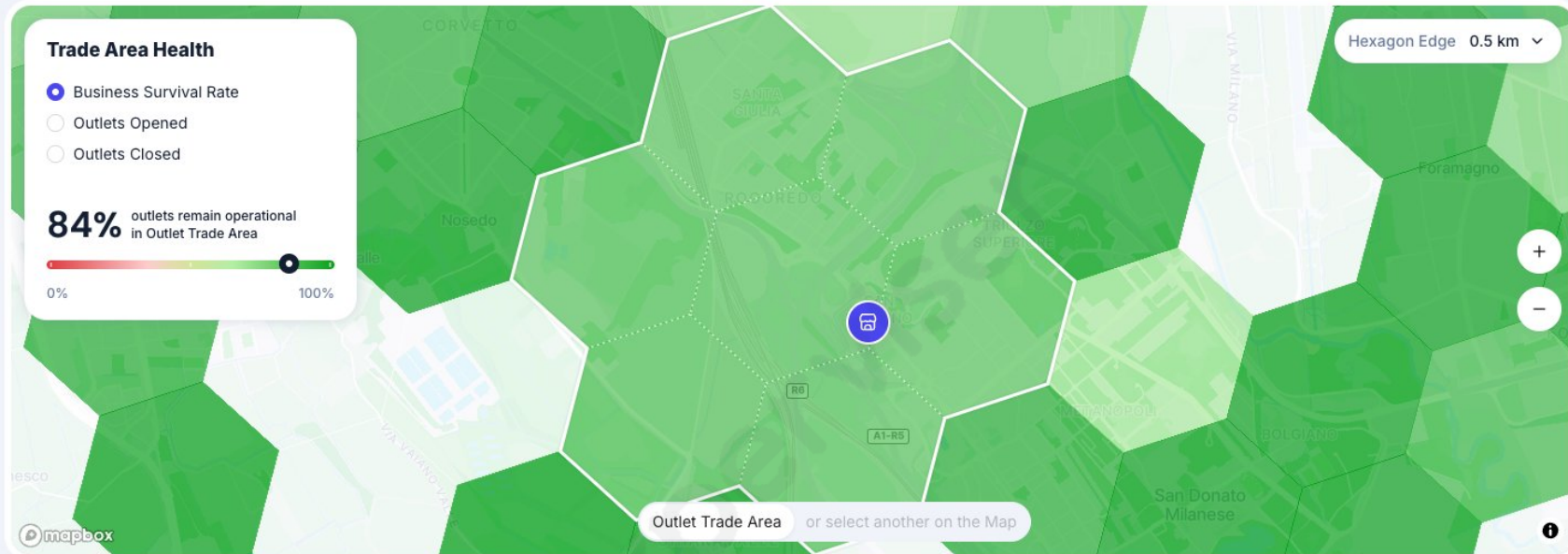
Chains vs Independents

Seasonality

### Trade Area Health

- ☒ Business Survival Rate
- ☐ Outlets Opened
- ☐ Outlets Closed

84% outlets remain operational in Outlet Trade Area



### Business Survival Rate

% of outlets that remain operational over 12 months

Outlet Trade Area

84%

Market Area

88%

### Number of Outlets Change

Outlet Growth Dynamics in Outlet Trade Area



Outlet Trade Area Opened Closed

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Chains vs Independents

Seasonality

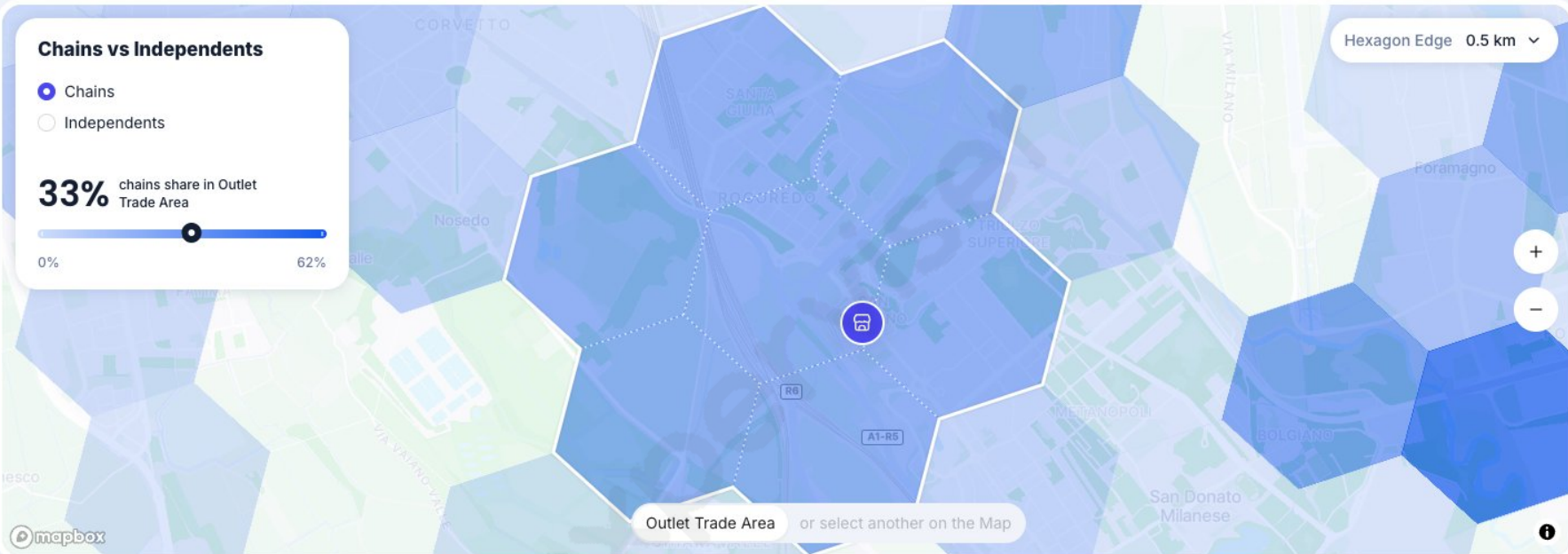
### Chains vs Independents

- ☒ Chains  
☐ Independents

**33%** chains share in Outlet Trade Area

0% 62%

Hexagon Edge 0.5 km



### Chain vs Independent Split

Shows the share of chains vs independent outlets

#### Outlet Trade Area

Chains

33%

Independents

67%

#### Market Area

Chains

20%

Independents

80%

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Demographics

Trade Area Health

Chains vs Independents

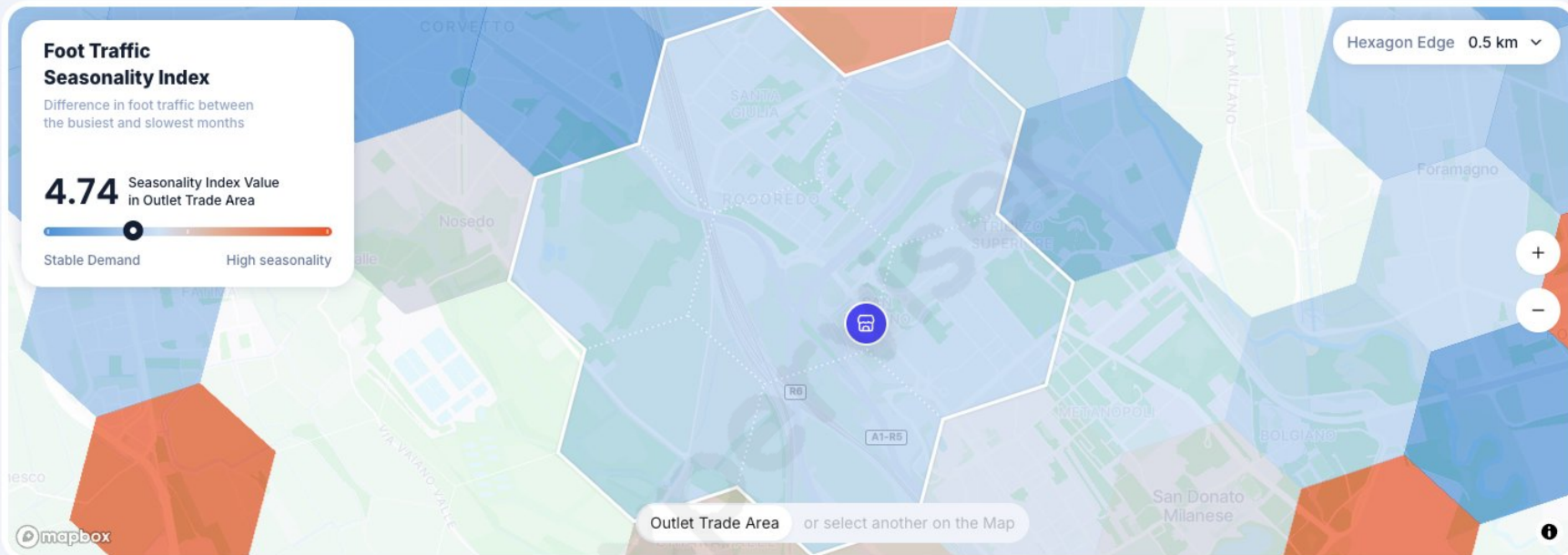
Seasonality

### Foot Traffic Seasonality Index

Difference in foot traffic between the busiest and slowest months

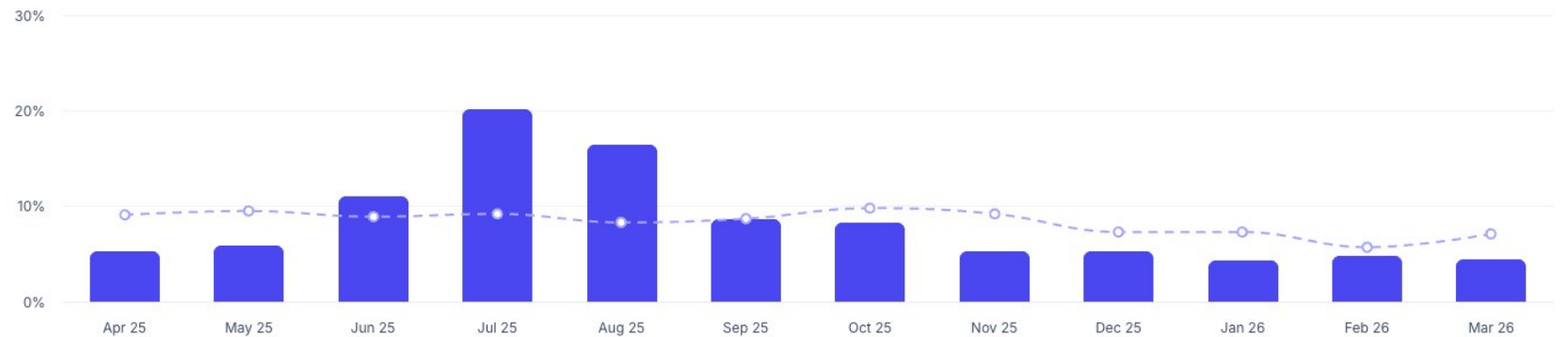
4.74 Seasonality Index Value in Outlet Trade Area

Stable Demand High seasonality



### Foot Traffic Distribution

Monthly customer distribution throughout the year



McDonald's Restaurant  
Outlet: Via Rogoredo, 110, 201:

Burger King Restaurant  
Outlets: 342

Old Wild West Restaura...  
Outlets: 257

KFC Restaurant  
Outlets: 164



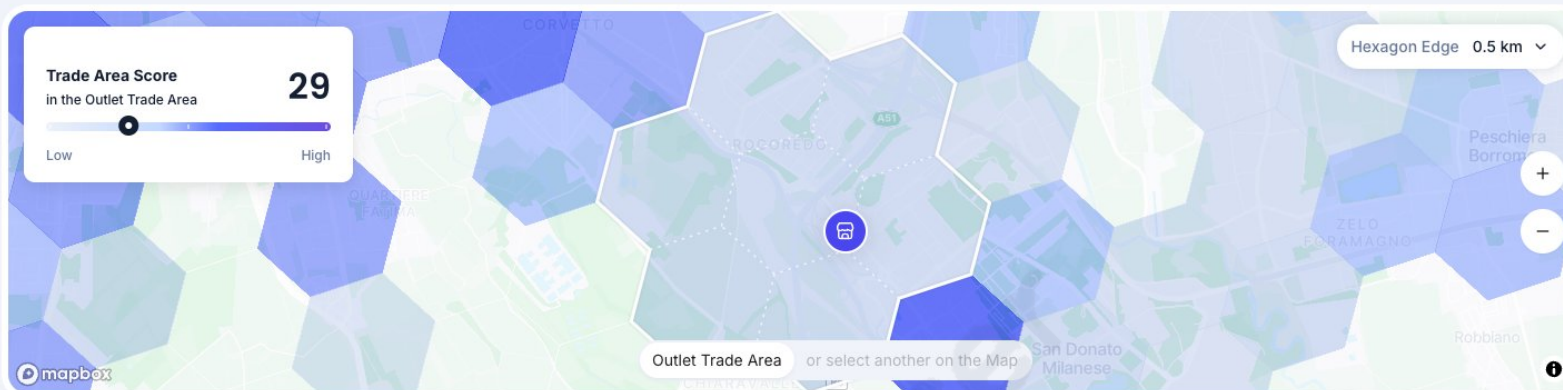
Last 12 months Apr 25 – Mar 26

Overview

Trade Area

Trade Area Insights

Competitors



### Trade Area Score

Reflects the overall attractiveness of the outlet's trade area

29 / 100

Low

Low

High

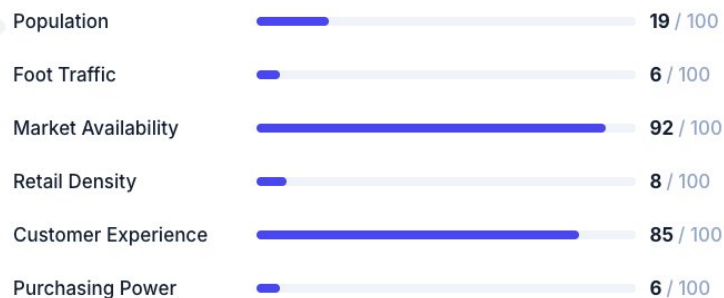


TIP

Overall conditions are challenging, focusing on efficiency, retention, and alternative demand channels.

### Trade Area Score Breakdown

Factors used to calculate the trade area score



### Population Low

The approximate number of people living in this area

Score ⓘ

Index To Market Area ⓘ

Absolute Value

19 / 100

0.3

12.1K people



TIP

The population around your location is below the market area. Focus on drawing visitors from nearby areas by strengthening delivery, online maps, and local partnerships to extend your reach.

### Foot Traffic Low

A measure of estimated foot traffic in the industry in which your store operates

Score ⓘ

6 /100

Index To Market Area ⓘ

0.2

#### + TIP

Give people a reason to pause by clearly showing special offers or popular items and supporting them with simple local activations such as tastings or small events.

### Market Availability High

A measure of market openness for new businesses and growth in a trade area, considering competitive intensity

Score ⓘ

92 /100

Index To Market Area ⓘ

1.1

Absolute Value

27 competitors

#### + TIP

Limited competition gives you a chance to set the standard in this area. Build early leadership through strong presence and consistent customer experience.

### Retail Density Low

The concentration of retail establishments within a trade area

Score ⓘ

8 /100

Index To Market Area ⓘ

0.2

Absolute Value

326 outlets

#### + TIP

Actively drive demand through online channels and planned visits rather than relying on surrounding traffic.

### Customer Experience High

A measure of estimated Customer Satisfaction level in the industry in which your store operates

Score ⓘ

85 /100

Index To Market Area ⓘ

1.1

Absolute Value

85%

#### + TIP

A high service standard is already set in this area, so focus on consistency and selective experience upgrades to turn satisfied customers into loyal regulars.

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## Competitors

29 Outlets · QSR

Select to Compare

By Distance

Outlets

Foot Traffic Sh CSAT

### McDonald's Restaurant

Your Segment

Via Rogoredo, 110, 20138 Milano MI, Italy

55%

↑ 24pp YoY

92%

↑ 47pp YoY

### Panificio

65 m · V. Rogoredo, 113, 20138 Milano MI, Italy

<1%

0pp YoY

N/A

### Tri basei

81 m · V. Rogoredo, 20138 Milano MI, Italy

<1%

N/A

### Turkish kebab pizzeria grill

101 m · V. Rogoredo, 119, 20138 San Donato Milanese MI, Italy

2%

↓ 5pp YoY

94%

↓ 2pp YoY

### SANTA SOFIA PIZZA - KEBAP - GRILL

110 m · V. Rogoredo, 119, 20138 Milano MI, Italy

<1%

N/A

### Locanda 2 orsi

146 m · Via Privata Fidenza, 4, 20138 Milano MI, Italy

<1%

0pp YoY

N/A

### Al Due Orsi

156 m · Via Privata Fidenza, 1, 20138 Milano MI, Italy

2%

↓ 2pp YoY

93%

↑ 7pp YoY

### Bar Trattoria San Martino

252 m · Via Emilia, 34, 20097 San Donato Milanese MI, Italy

<1%

↓ 1pp YoY

46%

↓ 45pp YoY

### 12oz Coffee Shop

436 m · Autostazione di Milano San Donato, Via Giuseppe Impas

2%

↓ 3pp YoY

37%

↓ 4pp YoY

### Ristorante 4420 Simple Street Food

588 m · Via Giuseppe Impastato, 20138 Milano MI, Italy

<1%

N/A

### Kebab

607 m · Via Monte Popera, 6, 20138 Milano MI, Italy

<1%

N/A

### Pizzeria da Omar

608 m · Via Monte Popera, 8, 20138 Milano MI, Italy

<1%

↓ 1pp YoY

86%

↓ 3pp YoY

### Lezzet Istanbul Rogoredo

730 m · Via Freiköfel, 15, 20138 Milano MI, Italia

2%

↑ 1pp YoY

91%

↓ 2pp YoY

### Osteria di Rogoredo

768 m · Via Monte Palombino, 2, 20138 Milano MI, Italia

1%

↓ 1pp YoY

85%

↓ 3pp YoY

