



# Beyond the Slice: Insights into Pizza Excellence

In partnership with:



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## **About the Study**

The Intouch Insight Pizza Study, conducted in partnership with PMQ Pizza, is designed to help pizza restaurant operators elevate their customer experience, both in-store and through delivery. According to Business Research Insights, the global pizza market is projected to reach \$499.5 billion by 2032, and more brands are eager to claim their share of this booming industry.

Today, pizza chains face competition beyond their own industry. Notably, nearly 200 million servings of pizza were ordered from C-stores in the 12 months ending August 2024, according to Circana CREST Consumer Survey Data. Convenience store pizza is no longer synonymous with low quality; it's now a restaurant-worthy meal that consumers recognize and appreciate.

In our inaugural Pizza Study, we go beyond surface-level metrics to deliver in-depth insights. We've analyzed performance data from large and mid-sized pizza chains and compared it to two leading convenience store chains offering pizza, using findings from mystery shopping evaluations conducted across the United States. This data is your toolkit for creating exceptional customer experiences, ensuring your brand stands out in the competitive pizza landscape.

## Methodology

- Mystery shoppers placed both delivery and carryout orders throughout the fall of 2024.
- Orders were placed via phone, app, or website.
- Each shopper purchased one small specialty pizza and removed one topping.
- Orders were placed between Wednesday and Sunday to assess service performance across midweek and peak weekend periods.
- A total of 660 orders were completed across 12 brands.
- The brands included: Five large pizza chains, five mid-sized pizza chains, and two C-stores offering pizza.





## **Brands Evaluated**

For this study, we evaluated the performance of twelve brands across three **Operator Types**.

Large Chains: Pizza Hut, Little Caesars, Domino's Pizza, Papa Johns, Marco's Pizza











Mid-size Chains: Jet's Pizza, Donatos Pizza, Blaze Pizza, MOD Pizza, Hungry Howie's





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**C-stores:** Two leading convenience store brands for which we provide an aggregate comparison rather than listing individual brand results. This approach respects brand preferences regarding data publication.

# Key metrics and how we measured them:

#### **Overall Satisfaction:**

Overall, rate your satisfaction with the experience.

#### **Speed of Service:**

How would you describe your satisfaction with the speed of service?

#### **Order Accuracy:**

Was your order accurate? (Correct size and correct toppings)

#### **Food Quality:**

Was the pizza warm, when you received it? After eating the pizza, please rate the pizza taste.

#### **Friendliness:**

#### **Order-taker friendliness:**

Overall, how would you rate the service received with the employee who took your order?

#### **In-store friendliness:**

Overall, how would you rate the service received with the employee you interacted with when picking up your order?

#### **Driver friendliness:**

Overall, how would you rate the service received with the employee who delivered your order?







# **Shifting Sands of Pizza Excellence**



The pizza industry is evolving beyond its traditional boundaries, facing competition not just from other pizza chains but also from C-stores and restaurants outside of the pizza space. For decades, pizza dominated the delivery market, starting in the 1950s when Los Angeles' D'Amore Brothers pioneered free pizza delivery. By the early 1990s, Pizza Hut made history by selling the first physical product over the internet—a pepperoni and mushroom pizza with extra cheese. Once the trendsetter in delivery, the pizza industry now finds itself in a highly competitive space. The rise of third-party delivery services has opened the market, allowing other types of restaurants to challenge pizza's stronghold. Meanwhile, C-stores have become significant players in certain markets by offering not only affordable options but also tasty pizzas that resonate with today's consumers.

In this increasingly competitive landscape, excellence is no longer defined solely by the product itself. Instead, the entire customer journey—speed, accuracy, friendliness, and the quality of a well-made pizza—has become the foundation of satisfaction and loyalty. In this study, we're slicing the data to uncover key metrics and explore how both the delivery and carryout experiences are evolving. After all, in this battle for pizza excellence, only those who deliver the full package can truly take a bigger slice of the market.



# **Key Takeaways**



#### **Human Connections Significantly Boost Satisfaction**

- Overall satisfaction was 73% higher when the employee interacting with the customer during the pickup experience was rated as friendly and 65% higher during the order-taking experience.
- **Positive interactions** like smiling, greeting customers, and offering parting remarks consistently elevated satisfaction scores.

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#### **Brand Delivery Outperforms Third-Party Delivery**

- Restaurant-employed delivery drivers were 2 minutes and 38 seconds faster than third-party drivers, with overall satisfaction 19% higher for brand delivery services.
- **Fast service** emerged as a critical factor in enhancing customer satisfaction, with brand delivery services outperforming third-party options in both speed and satisfaction.



#### **Temperature Precision Drives Better Experiences**

- Large chains outperformed mid-sized chains in maintaining pizza temperature for delivery orders, as their pizza arrived warm 95% of the time, compared to 80% for mid-sized chains.
- The quality and warmth of the pizza played a key role in satisfaction, and the delivery method had a clear impact. When the pizza was warm, the overall satisfaction was 58% higher.



#### **Automated Phone Systems Underperform**

- Calls handled entirely by automation led to lower satisfaction. When calls were fully automated, satisfaction was 82%, compared to 87% when handled entirely by an employee and 81% when first picked up by automation but later transferred to an employee.
- Over-reliance on automation risks lowering customer experience. Order accuracy dropped from 97% to 88% when calls were fully automated, reinforcing the importance of human interaction in customer service.





# **Customer Satisfaction: The Key Ingredients**

When customers choose a pizza restaurant, their overall satisfaction with the experience plays a key role in whether they'll return or recommend it to others. This means that brands need to ensure they are delivering positive experiences at every stage of the journey—from placing the order to enjoying the last bite.

In this section, we will explore:

- Overall satisfaction by Operator Type
- Key metrics that impact overall satisfaction such as friendliness and food temperature

One of the biggest drivers of satisfaction was the friendliness of staff and drivers. For example, when pickup employees were friendly, satisfaction was 73% higher than when they were not.

#### **Key Takeaways**

To evaluate **Satisfaction with the Overall Experience**, mystery shoppers were asked whether or not they were satisfied with the level of service received.

#### Friendly interactions consistently boosted satisfaction:

- 65% higher when the order taker was friendly
- 73% higher when the pickup employee was friendly
- 32% higher when the delivery driver was friendly

Overall satisfaction was

#### 58% higher

when the pizza was warm, showcasing the critical importance of food temperature upon delivery or pickup.

Satisfaction was

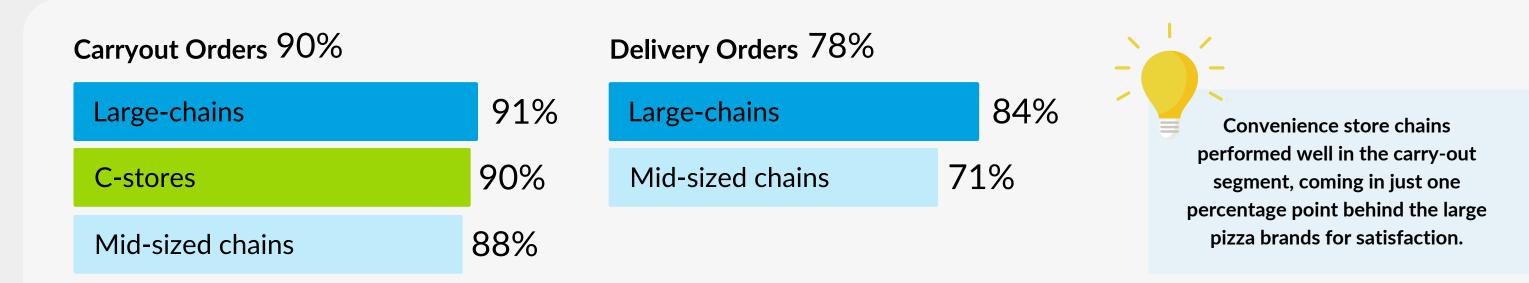
## 19% higher

when the delivery driver worked for the restaurant as opposed to a third-party delivery driver.



## Overall Satisfaction by Operator Type

Looking at the overall results, when shoppers were asked to rate their satisfaction with the overall experience, carryout orders outperformed delivery orders.



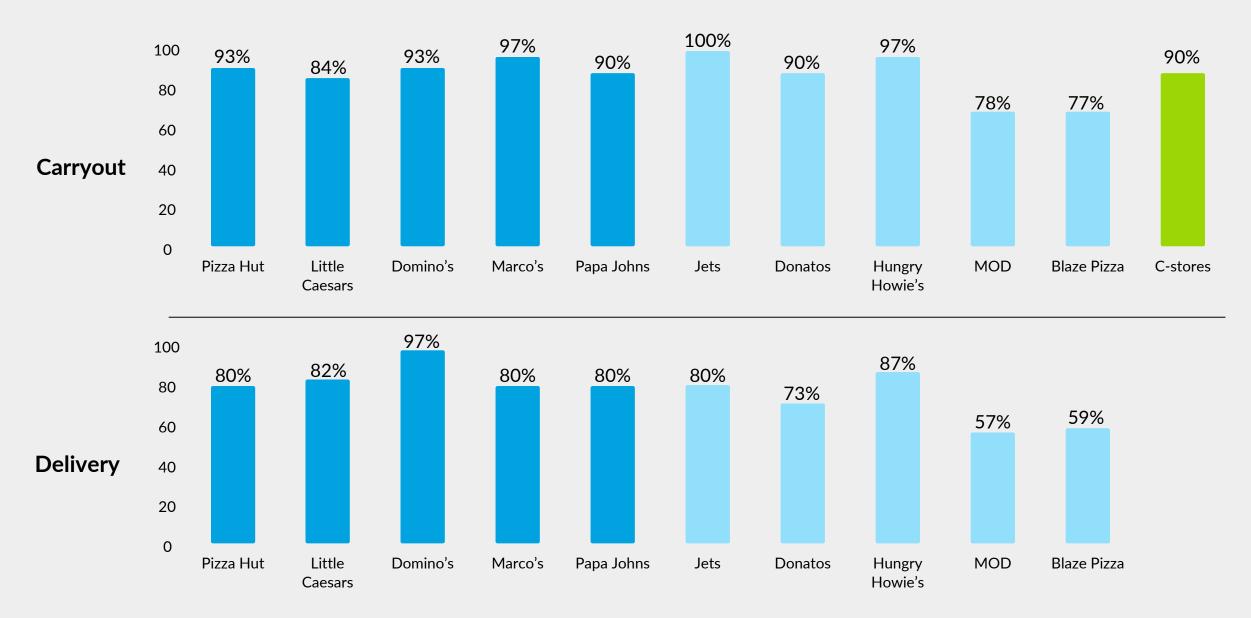
This shows that carryout continues to deliver strong satisfaction across the board while delivery results saw more variance. Like carryout, delivery is shaped by key metrics such as speed, friendliness, and taste, but the decision to have an in-house delivery or involve third-party delivery services can add another layer of complexity. Overall, the satisfaction scores were higher when the driver worked for the company compared to a third-party delivery driver. In fact, orders delivered by an in-house driver scored 19% higher overall satisfaction.

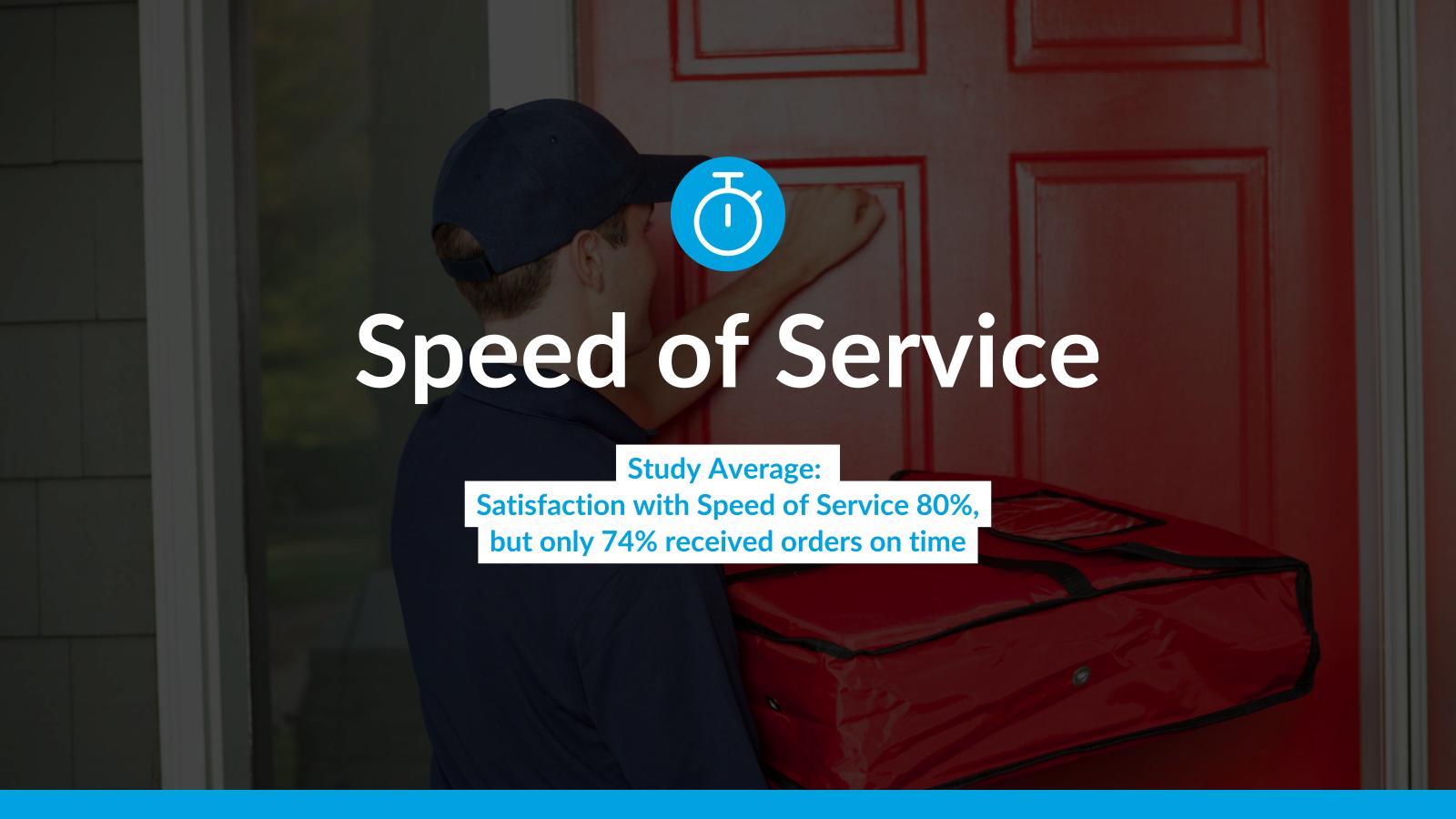
Ultimately, overall satisfaction is driven by how key factors—speed, accuracy, friendliness, and food quality—come together across both carryout and delivery experiences.



# **Overall Satisfaction by Brand**

Among individual brands, the top performers were Domino's, followed by Hungry Howie's. The following chart shows results for orders broken down to carryout and delivery.







# With Great Speed Comes Great Satisfaction

Speed remains a critical driver of satisfaction, with faster service making a big difference in the customer experience. While factors like staff friendliness and ambiance are important, the efficiency of service can have a lasting impact on customer loyalty.



In this section, we will explore three key time-related metrics.

- Satisfaction with the Speed of Service
- Total Order Time
- Adherence to Estimated Times

Comparisons are provided for carry-out vs delivery, as well as by operator type.

Our data shows that large chains led in satisfaction with the speed of service, achieving an 83% satisfaction rate, when looking at carry-out and delivery orders collectively.

#### **Key Takeaways**

Restaurant employees delivered orders

# 2 minutes and 38 seconds faster

on average compared to third-party drivers.

Satisfied shoppers received their orders

13 minutes and11 seconds faster

than dissatisfied ones.

Overall satisfaction was

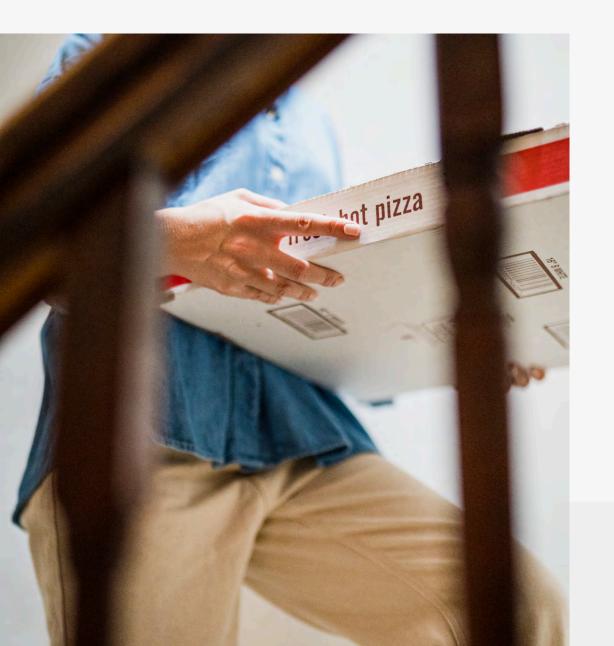
#### 64% higher

when the customer was satisfied with the speed of service.

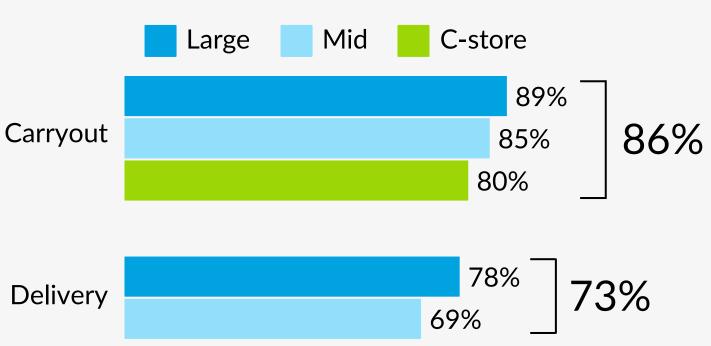


# Satisfaction with Speed of Service by Operator Type

Similar to the Overall Satisfaction metrics examined in the previous section, carryout orders outperformed delivery when it comes to Satisfaction with the Speed of Service.



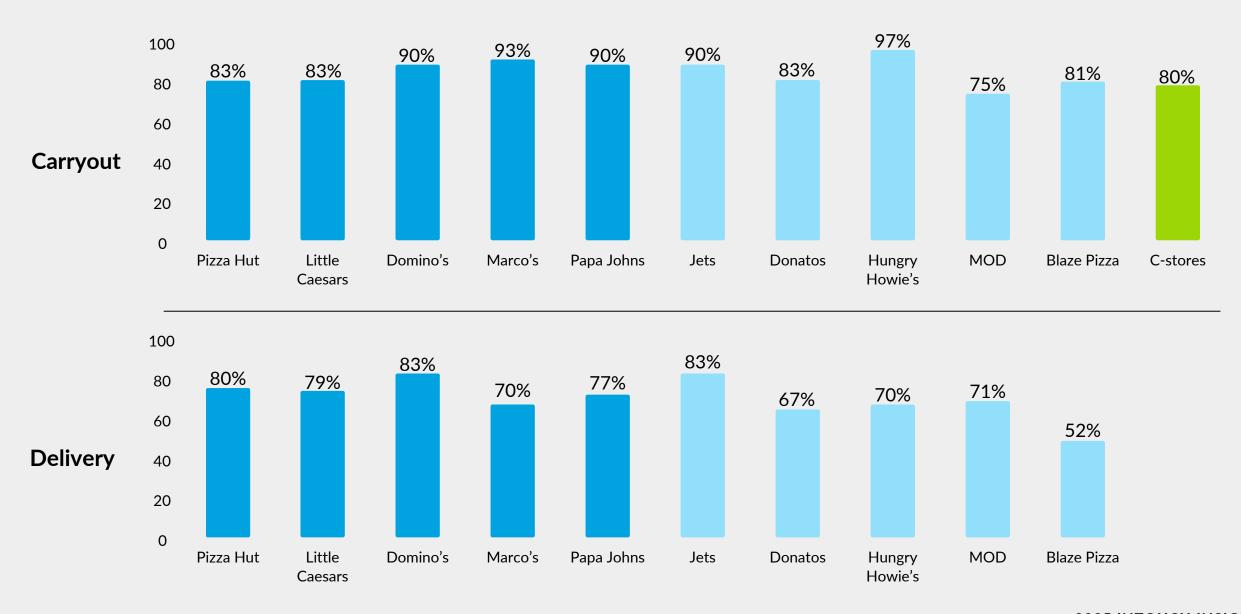






# Satisfaction with Speed of Service by Brand

Among the top-performing brands, Jets and Domino's stood out in delivery satisfaction, each earning 83% for speed. On the carryout side, Hungry Howie's claimed the highest satisfaction score at 97%, followed by Marco's at 93%. Papa Johns, Domino's, and Jets rounded out the top performers, each scoring 90%.





# **Total Time by Operator Type**

Back in the 1980s, Domino's guaranteed customers that their pizza would be delivered within 30 minutes of ordering or it would be free. This bold move inspired other brands to adopt similar rules—and even made its way into pop culture. Who remembers Spiderman getting fired because he was unable to deliver 8 extra-large deep-dish pizzas across town within the 30-minute mark?

It is safe to say that the promise of 30-minutes or it's free is no longer being met consistently; our data shows that the **average delivery time today is 36 minutes**.

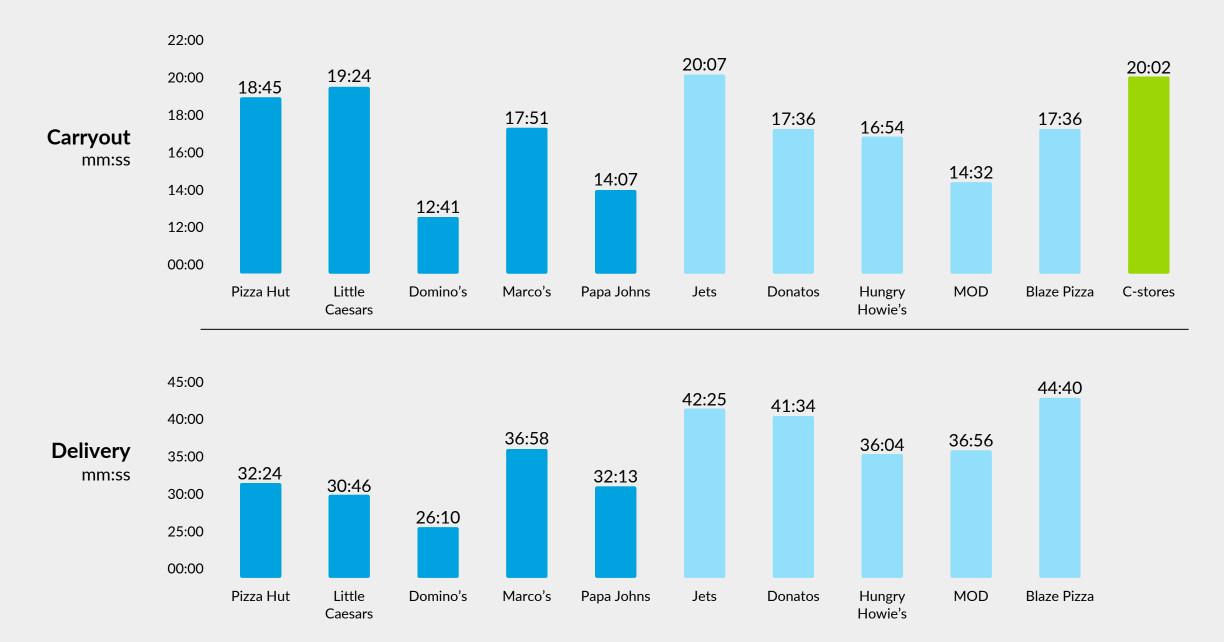


	Large chains	Mid-sized chains	C-store
Carryout Avg. Time: 17 minutes and 28 seconds	16 minutes and 36 seconds	17 minutes and 18 seconds	20 minutes and 3 seconds
Delivery Avg. Time: 36 minutes and 1 second	31 minutes and 43 seconds	40 minutes and 21 seconds	



# **Total Time by Brand**

The fastest brands for delivery were Domino's, at 26 minutes, and Little Caesars, averaging 30 minutes.



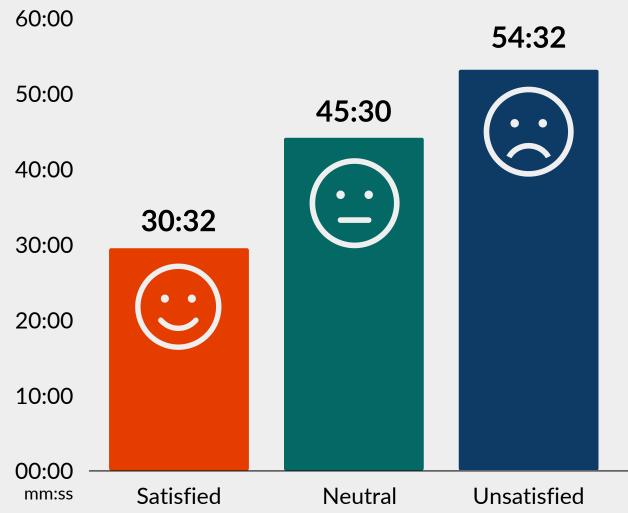


# How Long Is Too Long? Identifying the Speed Satisfaction Cutoff

While delivery expectations have shifted since the days of the "30-minutes or it's free" guarantee, speed remains a critical factor. Customers who were satisfied with speed received their orders in an average of 30 minutes and 32 seconds, while those who were neutral experienced an average wait of 45 minutes and 29 seconds.

However, when delivery times exceeded 40 minutes, satisfaction started dropping, with those dissatisfied averaging 54 minutes and 32 seconds. This highlights the importance of meeting customer expectations for timely delivery.



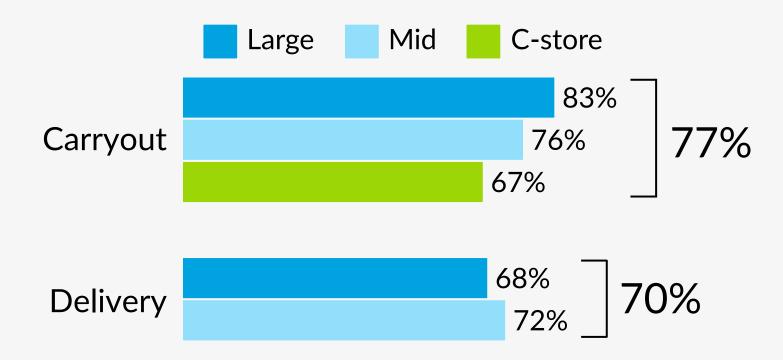




#### **Adherence to Estimated Times**

In today's digital ordering world, expectations for the speed of service are set right up front when the customer places the order, and they are given an estimated time when their order is ready.

As a reminder, all orders in this study—even for carry-out—were placed over the phone or via the brands' website or app. Therefore, one of the metrics that we measure is adherence to this estimated time.

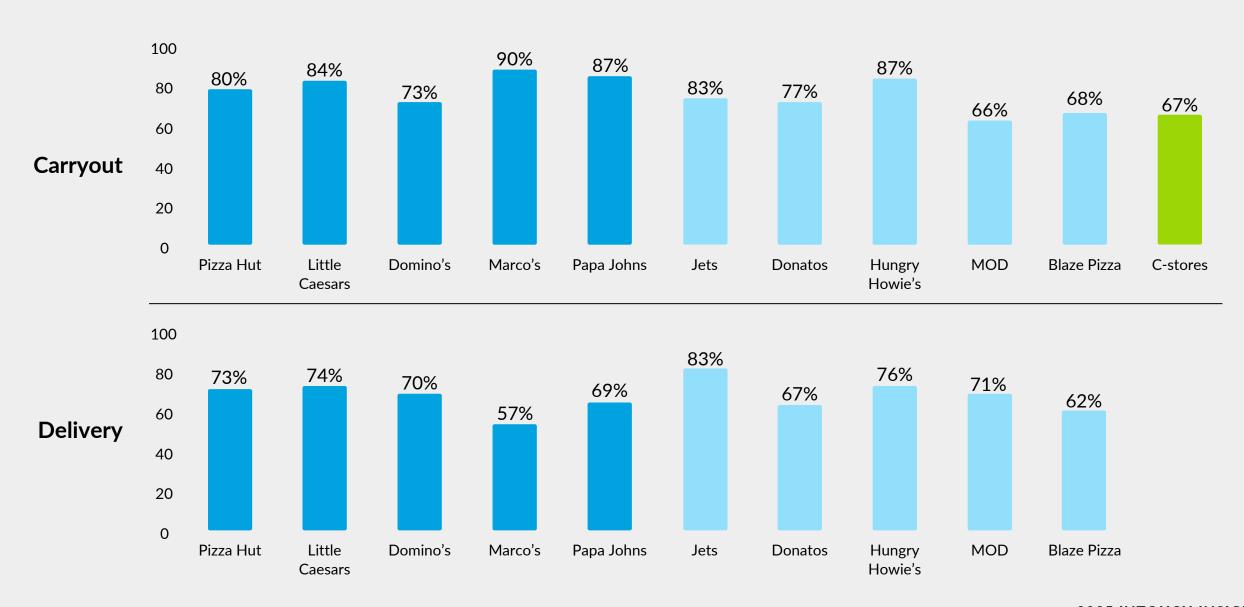






# Adherence to Estimated Time by Brand

For delivery, Jets had 83% on-time orders, compared to 76% for Hungry Howie's and 74% for Little Caesars. In carryout, Marco's topped with 90%, while Papa Johns and Hungry Howie's both hit 87%. Accurate and achievable estimated times are key to building trust, maintaining satisfaction, and driving repeat business.







## **Perfecting Every Order**

Unsurprisingly, getting orders right is vital to customer satisfaction and experience. If the order is incorrect, it can lead to unsatisfied customers, lost loyalty, negative reviews, and - in the long run - lost revenue. For this metric, we asked the shoppers if their order was accurate (correct size and correct toppings).

#### In this section, we will explore:

- Employee Interaction vs. Automated Service: Does interacting with a human employee improve order accuracy compared to automated systems?
- Order Accuracy by Operator Type: How do different types of operators (e.g., large chains, mid-size chains, C-stores) compare in accuracy?

It's worth noting that there is minimal difference in order accuracy between delivery and carryout orders—just 2%, in fact. As such, these comparisons are not the focus of this section.

For this study, shoppers placed orders via app, phone, or website. Similar to carryout vs delivery, the results across order-taking method showed minimal difference:

App and website orders: 96% accuracy

• Phone orders: 94% accuracy

However, there was variability when phone orders were handled via an automated service vs by a human. For this reason, our key takeaways shown here, highlight phone orders, which were handled in one of three ways: fully by an employee, fully automated, or a combination of automation with employee interaction.

#### **Key Takeaways**

Order accuracy peaked at

97%

when calls were fully handled by employees

Order accuracy was

**92**%

when the call was initially picked up by an automated service but transferred to an employee

Order accuracy scored

88%

when the entire call was automated



When it comes to accuracy, large chains stood out in this area, with an average accuracy of 97%, with C-stores scoring the lowest in this area.

#### **Order Accuracy by Operator Type**

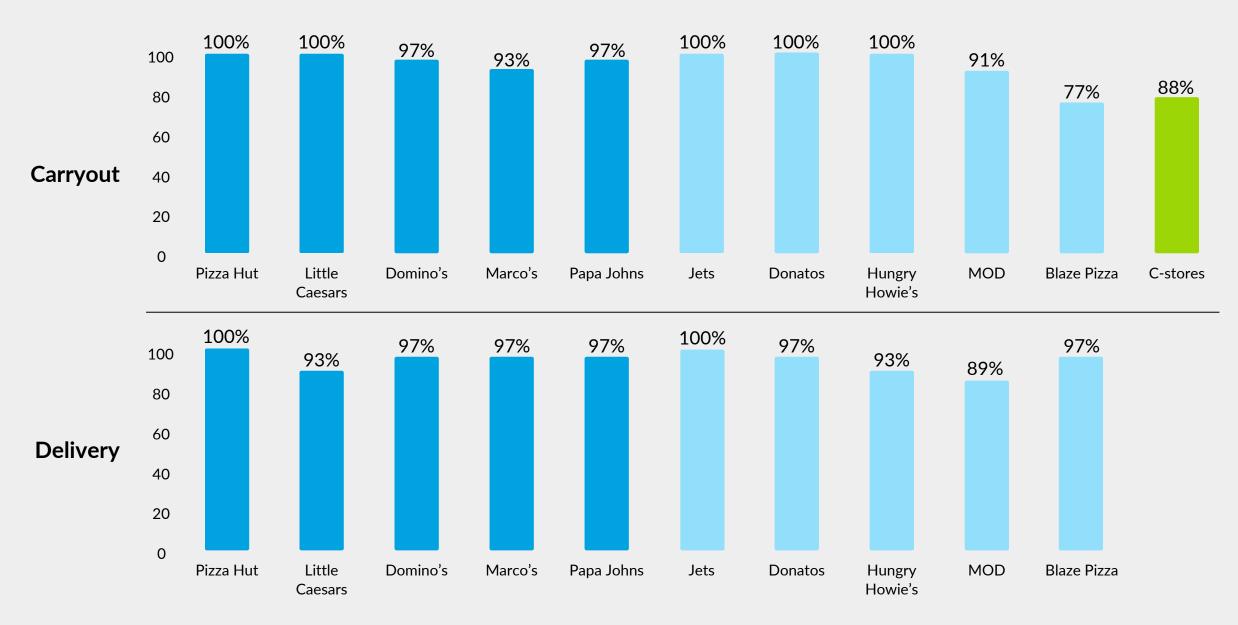
Large-chains		97%
Mid-sized chains		94%
C-store	8	8%

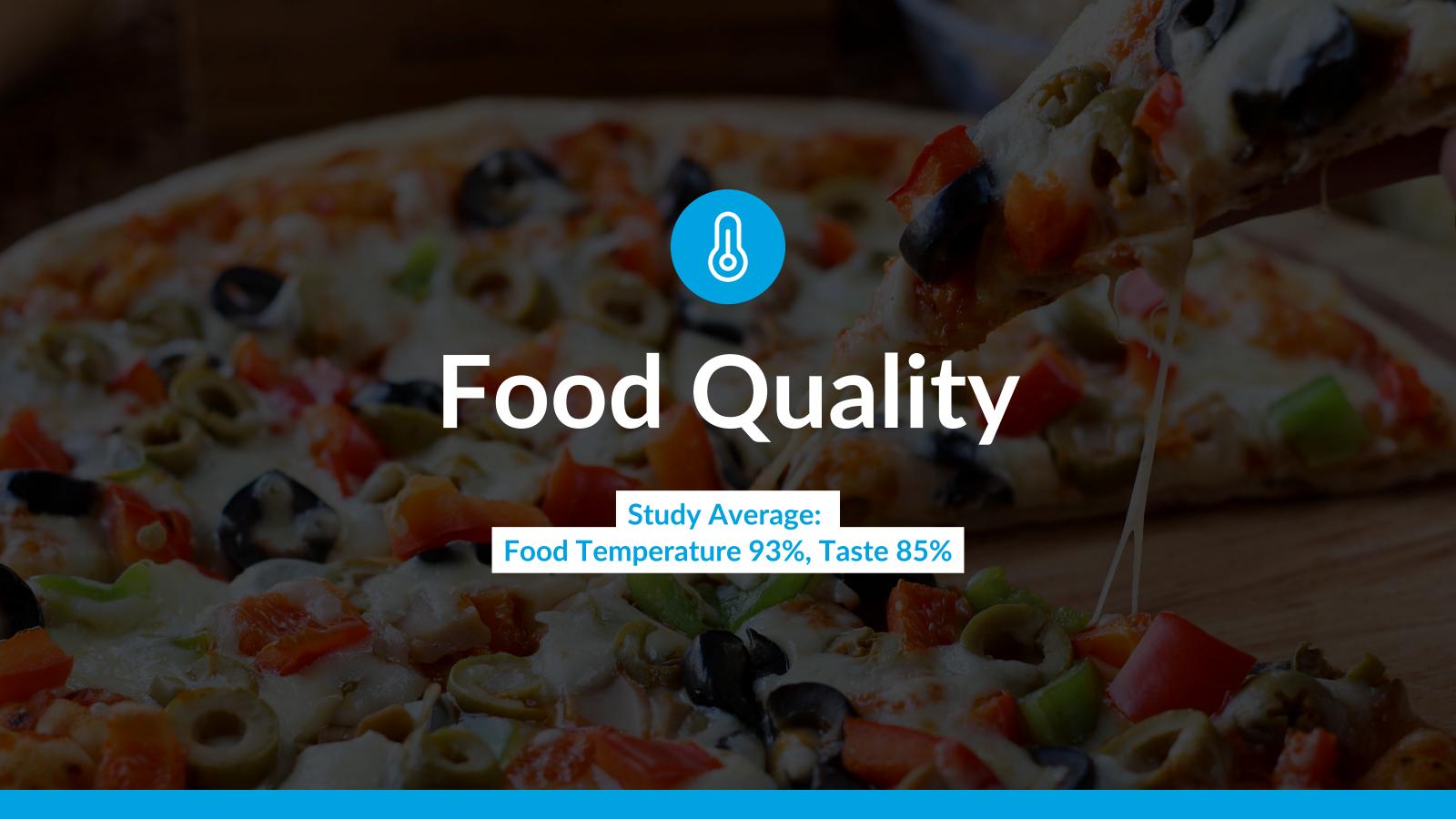
As technology continues to evolve, brands need to keep a close eye on how it impacts accuracy, especially since accuracy plays a key role in customer satisfaction. Making sure orders are right isn't just about the immediate experience—it builds trust and keeps customers coming back. Our data shows that overall satisfaction was 31% when the order was accurate. Measuring the impact of new technology on accuracy is essential for brands to stay competitive and meet customer expectations.





# **Order Accuracy by Brand**







# Hot, Fresh, and Delicious: The Flavour Factor

The foundation of customer satisfaction is food quality. If the meal doesn't taste good, or if it's served or delivered cold, the risk of losing the customer—and potentially damaging the brand's reputation—is high. In fact, the **overall satisfaction was 58% higher when the pizza was warm**.

Food quality is closely tied to the delivery method, which has become even more significant with the rise of third-party delivery services in the pizza industry. While these services expand a brand's reach, they also reduce control over the delivery process.

In this section, we will explore two key food quality metrics.

- Food Temperature
- Pizza Rating

Data shows that C-stores are slightly leading in pizza taste ratings, scoring 86%, compared to large chains (85%) and mid-size chains (83%). C-stores also ranked highest in food temperature, though it's important to note that the study only included carryout orders for C-stores. Large chains, on the other hand, outperformed mid-size chains in food temperature by a 15% margin.

#### **Key Takeaways**

Pizza temperature scored

#### 15% higher

when the pizza was delivered by restaurant drivers as opposed to third-party delivery drivers.

Overall satisfaction was

#### 58% higher

when the pizza was warm and 21% higher when toppings were distributed evenly.

#### Large chains

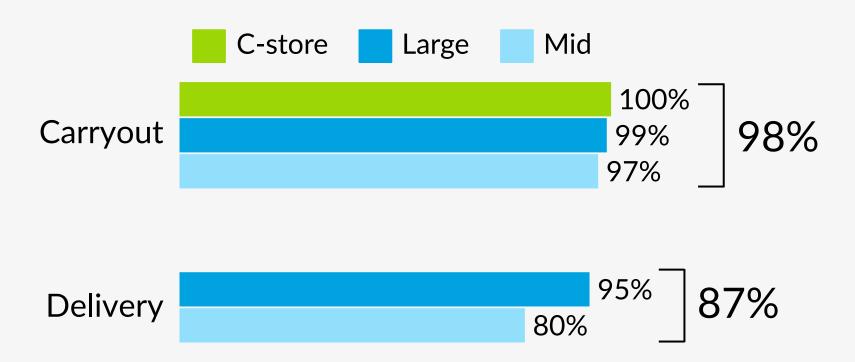
maintained pizza temperature better, scoring 95% vs. 80% for mid-sized chains



# Food Temperature by Operator Type

When looking at temperature, we asked the shoppers if their pizza was warm when they received it. On the carry-out side of things, our two convenience store brands achieved a perfect score of 100%, compared to an average of 98% for the pizza chains.

For delivery, where the average temperature score was 87%, Domino's also achieved a 100% score. They were followed by Hungry Howie's and Papa Johns (both at 98%), with Jets and Marco's close behind at 97%.





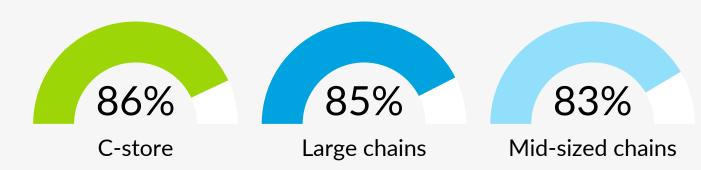


# **Food Temperature by Brand**





# Pizza Taste Rating by Operator Type



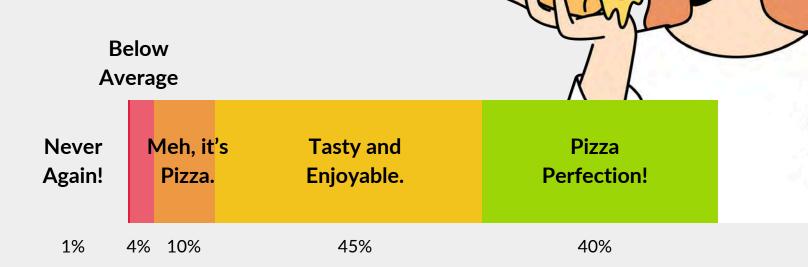
This is alarming for traditional pizza brands, as the data shows that **C**-stores have stepped up their game. They are no longer perceived as the home of low-quality, cheap pizzas. Instead, they are offering tasty, high-quality options that customers genuinely enjoy.

This shift highlights the **growing competition in the industry** and the need for pizza restaurants to focus on consistently delivering excellent taste, maintaining control over the delivery process, and ensuring food quality remains a top priority to stay ahead in this quickly evolving market.

#### How we rated taste?

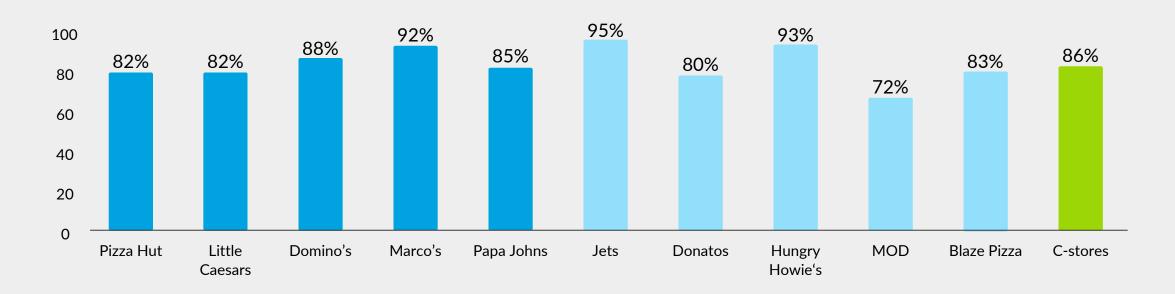
Taste is one of the most important—and arguably the most subjective—factors in the customer experience.

In this study, shoppers rated the taste of the pizza on a 5-point scale. For scoring, customers who rated the pizza a 4 or 5 earned a score of 1 for this question, while those who rated it a 1, 2, or 3 scored 0. This methodology allowed us to calculate overall satisfaction by focusing on the proportion of high ratings.





# Pizza Taste Rating by Brand

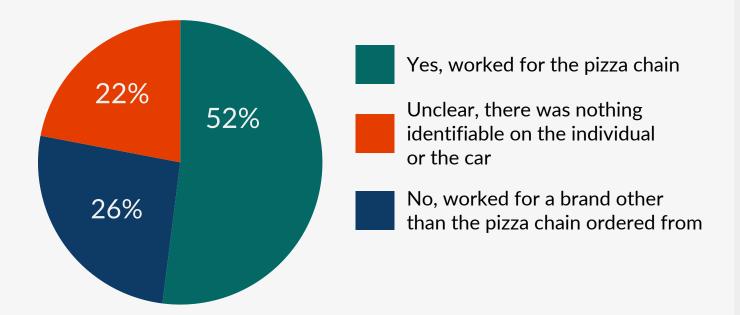


<sup>\*</sup>It's worth noting that there is minimal difference in pizza rating between delivery and carryout orders. As such, these comparisons are not shown here.



# **Third-party Delivery Spotlight**

As part of the study, shoppers were asked if they could identify whether a delivery driver worked directly for the brand or for a third-party delivery partner, based on observable indicators.



Of the 26% of orders that were delivered by a driver who did not work for the brand, 96% of those orders were delivered by a third-party delivery driver.



# The Cost of Convenience and How Third-Party Delivery Measures Up

- Lower Satisfaction: Shoppers rated their experience 19% higher when orders were delivered by a restaurant-employed driver rather than a third-party service.
- **Slower Delivery:** Third-party services took an average of 2 minutes and 38 seconds longer, contributing to an 8% lower satisfaction with speed.
- **Temperature Concerns:** Food temperature ratings were 15% lower when delivered by third-party drivers instead of restaurant-employed staff.

These findings highlight the potential trade-offs of relying on third-party delivery services for pizza brands, which can affect customer satisfaction and overall experience.



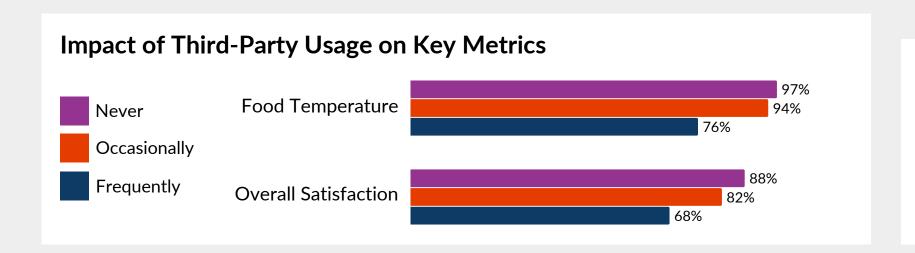
## Impact of Using Third-Party Delivery

Shoppers found that eight of the ten pizza brands used third-party delivery at least some of the time, though not always consistently. Some brands relied on it more heavily, while others used it rarely or never.

To understand how third-party delivery impacts the customer experience, we grouped brands based on what our shoppers observed:

- Never observed to use third-party delivery
- Occasionally used third-party delivery
- Frequently used third-party delivery

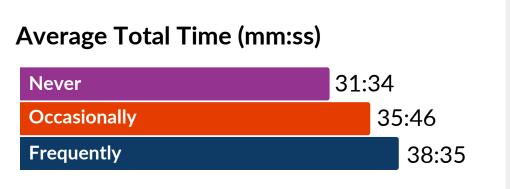
MOD, Blaze Pizza, Donatos and Little Caesars used third-party delivery frequently, while most brands relied on it for less than 30% of their orders. Shoppers did not observe any third-party drivers for Domino's—every delivery they received came from an in-house driver in a branded uniform with a branded delivery bag.

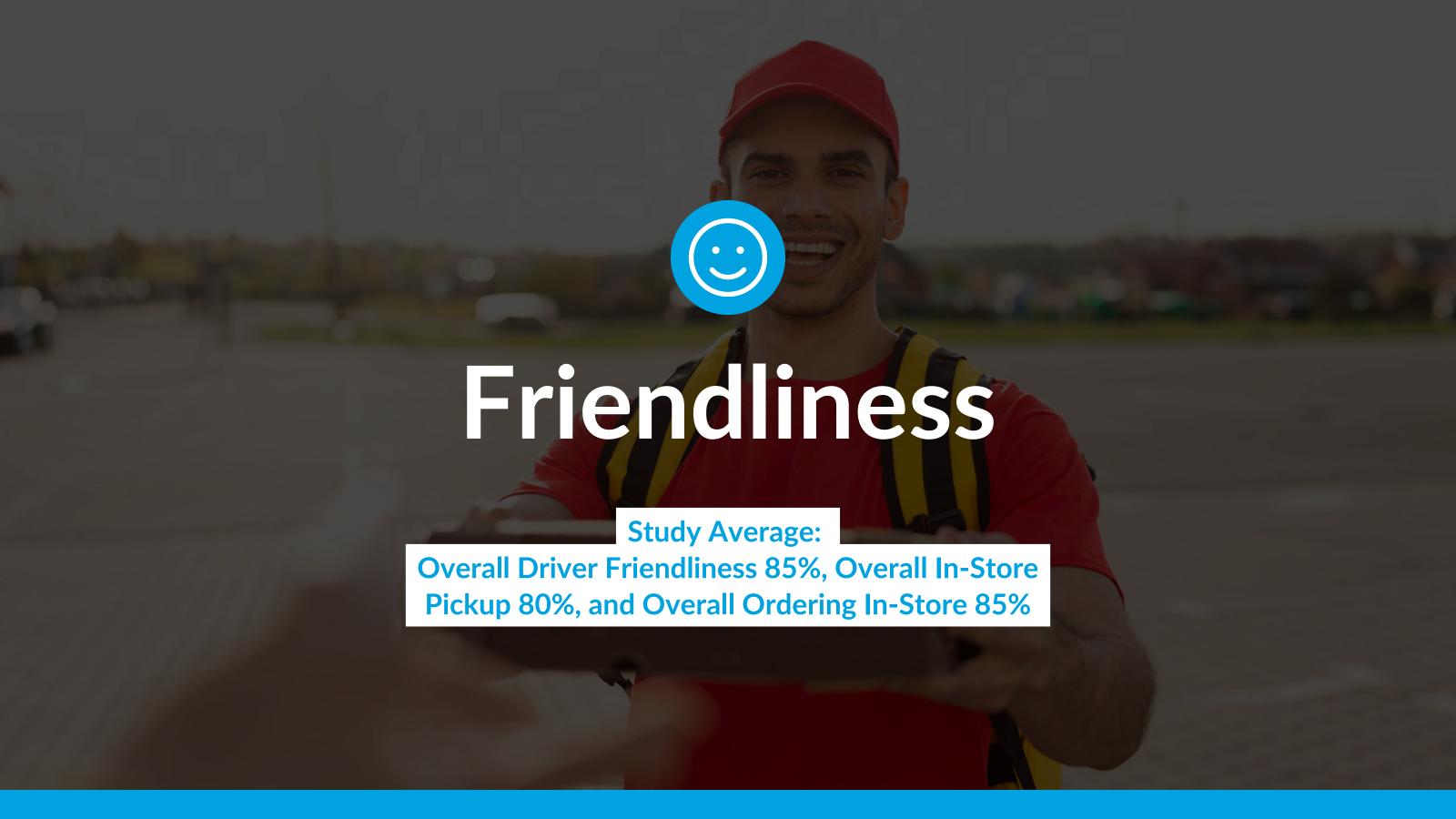




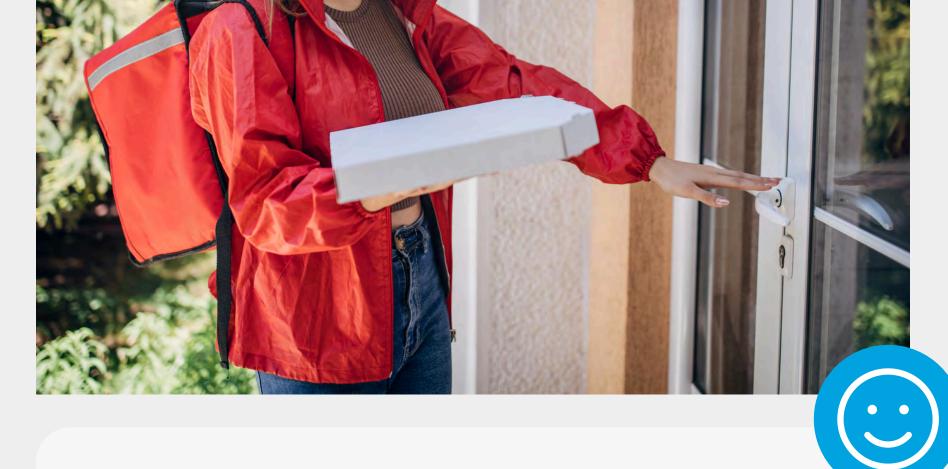












# The Impact of Hospitality

Positive customer interactions, whether in-store or during delivery, are key to elevating customer satisfaction and fostering loyalty. Small gestures, like smiling, acknowledging customers, or offering a friendly remark, can make a big difference in how customers perceive their experience.

In this section, we explore:

- In-store friendliness and how staff attentiveness influences friendliness ratings.
- On-the-phone friendliness comparing the customer experience when interacting with an employee versus an automated system.

# **Key Takeaways**

Carryout friendliness was

#### 78% higher

when staff members were attentive.

Carryout customers greeted when entering a restaurant reported

40% higher friendliness.

Delivery driver friendliness was

#### 67% higher

when drivers smiled, highlighting the importance of positive and engaging interactions during delivery.





#### **Driver Friendliness**

For delivery, driver friendliness was the same for large and mid-size chains, with both receiving 85%.

#### **How to Improve Driver Friendliness**



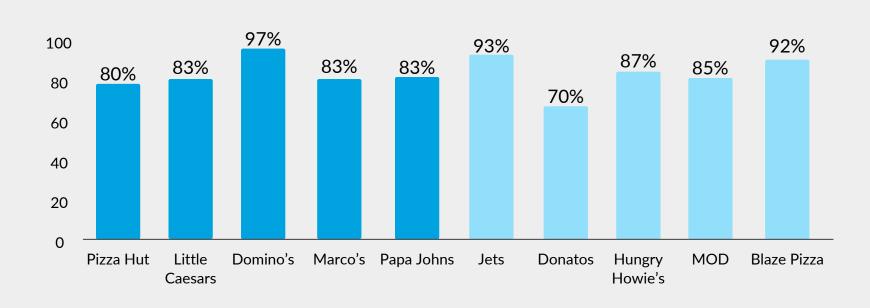






#### **Driver Friendliness by Brand**

For brands, Domino's had the friendliest drivers (97%), followed by Jet's (92%) and Blaze Pizza (92%).





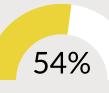


## **In-store Friendliness**

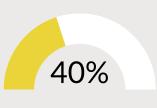
Similarly, staff in-store also played a significant role in shaping the customer experience.

#### **How to Improve Staff Friendliness**

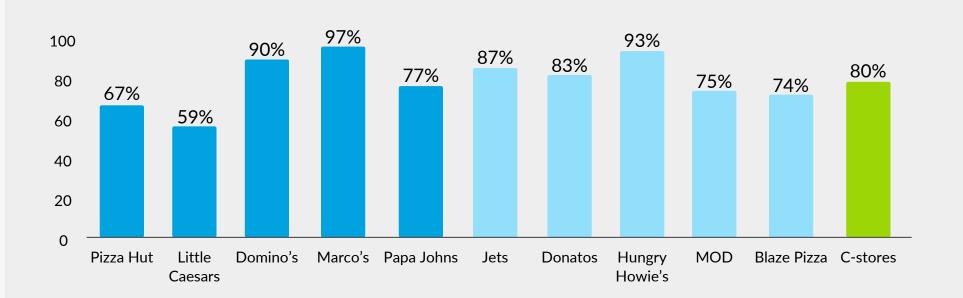








#### **In-store Friendliness by Brand**



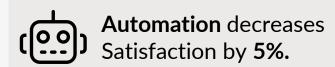




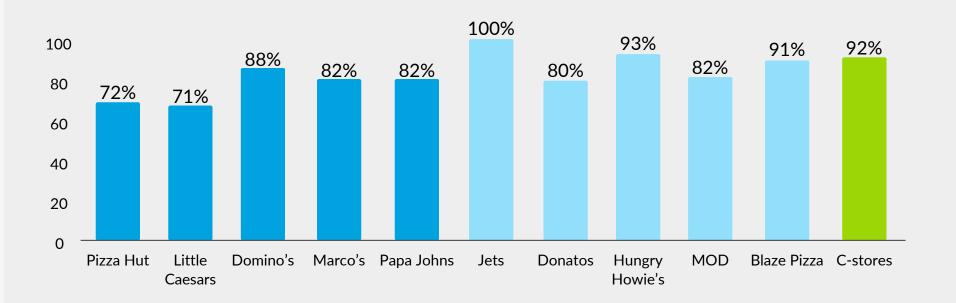
# **On-the-phone Friendliness**

Overall satisfaction is higher when the entire call was taken by an employee.

**Impact on Satisfaction** 



#### **On-the-phone Friendliness by Brand**





# Breaking Down Performance: Industry Benchmarks

With the shifting competitive landscape, pizza chains are hungry for data to help drive operational improvements and grab a bigger slice of the proverbial pie. In this section, we'll take a closer look at how large and mid-sized pizza chains performed across key areas and dive into specific operating standards comparing how these operators performed. These insights will help you benchmark your performance and identify opportunities to enhance the customer experience.



#### **Large Chains**

Large chains excelled in order accuracy, with Pizza Hut leading the way in this category. When it came to speed, they came closest to estimated delivery times, outperforming C-stores by more than 10% and mid-sized chains by 2%. While Domino's iconic "30-minutes or it's free" guarantee from the 1980s is no longer in effect, and today's average delivery time sits at 36 minutes, large chains still lead the pack in this area. However, their performance in friendliness was less consistent, highlighting an opportunity to improve customer interactions.

While their delivery friendliness matched mid-sized chains, with Domino's coming close to the perfect score, they fell short in in-store interactions and phone-ordering experiences. This highlights a key gap: although large chains are efficient and accurate, they're missing the mark on friendliness and attentiveness—areas where competitors are stronger. This is a recurring theme that we have seen with other studies where regional chains outperform national ones when it comes to delivering friendly experiences.











#### **Mid-Sized Chains**

Mid-sized chains shined in their employee friendliness, particularly during in-store interactions. Hungry Howie's stood out for their attentive and welcoming staff, creating memorable customer experiences. Despite their strong interpersonal approach, mid-sized chains struggled to compete in food temperature and taste, where both large chains and C-stores gained an edge, suggesting room for growth in kitchen-to-customer operations.

MOD Pizza, one of the mid-sized chains included in this group, has experienced some operational challenges this year, including ownership changes and store closures. While it's difficult to determine the direct impact on customer experience, these transitions are an important factor to keep in mind when looking at the overall performance of this category.





**DONATOS** 

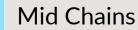


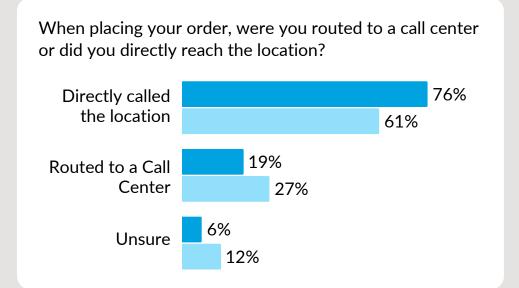


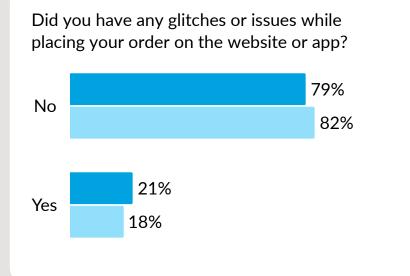


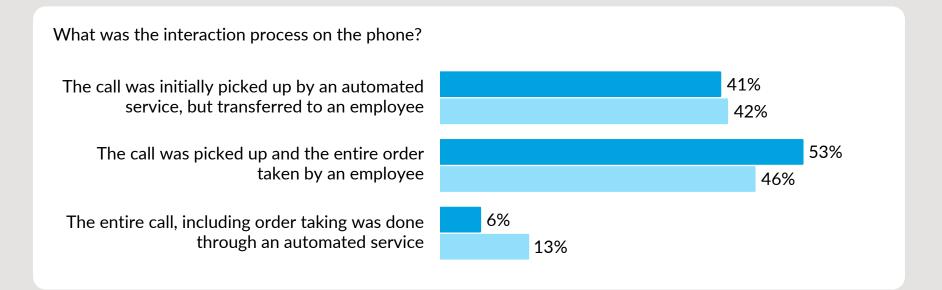
## Ordering Experience Operational Benchmarks













Want to benchmark your performance, collect tailored data, and elevate your customer experience?

Discover how our mystery shopping programs can help you stay ahead.

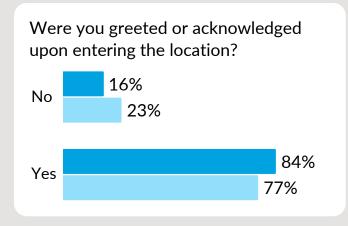


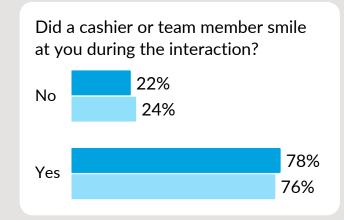
Contact us: letschat@intouchinsight.com

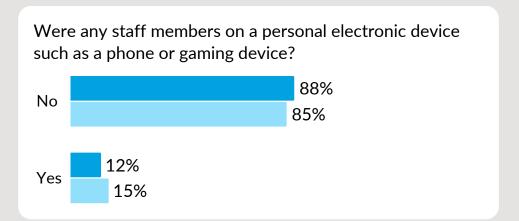


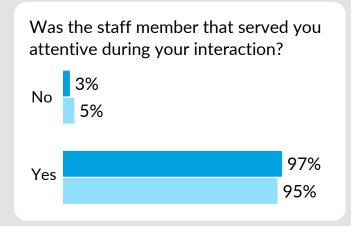
## Pick-up Experience Operational Benchmarks



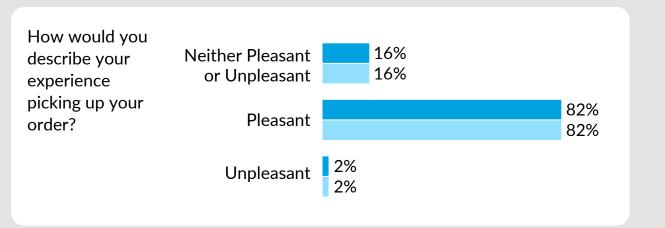






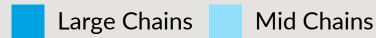


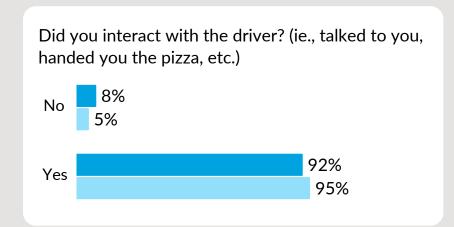


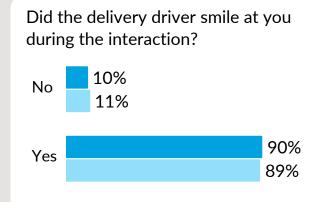


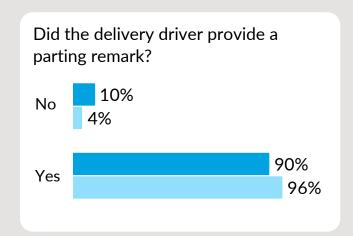


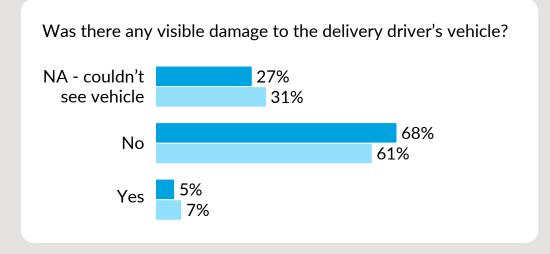
# Delivery Experience Operational Benchmarks Lar





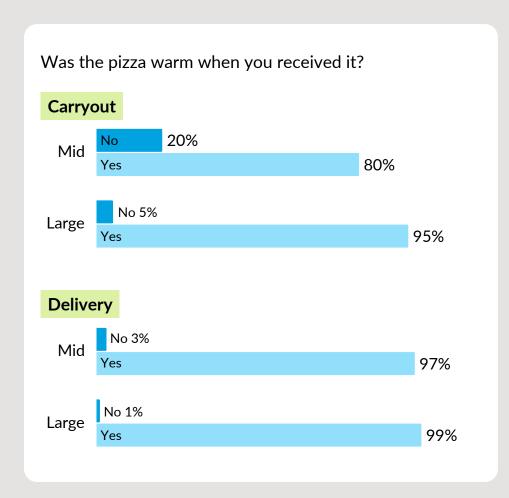


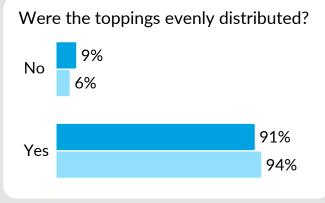


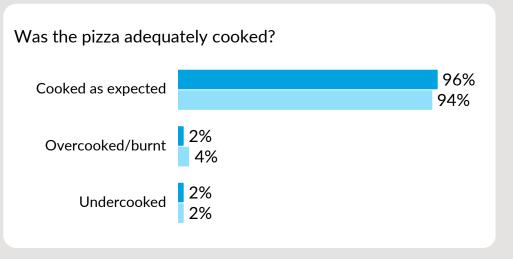




#### **Quality Operational Benchmarks** Large Chains Mid Chains









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## What does this mean for Operators?

To stay ahead in a rapidly evolving industry, pizza chains must focus on what matters most—**delivering exceptional customer experiences**. Competition is intensifying, not just from other pizza brands and restaurants. C-stores are improving their pizza offerings but also from grocery stores, which are stepping up with high-quality hot meal replacement options and inviting in-store dining experiences that mimic restaurant settings. Meanwhile, the frozen pizza market continues to expand, growing by nearly 7% per year through 2030, as consumers seek convenient meal solutions. With so many choices available, expectations for quality, speed, and consistency are higher than ever.

Success in this landscape requires finding the right balance between innovation and operational excellence. While brands must embrace technology, refine delivery systems, and enhance employee training, they cannot afford to overlook the fundamentals—ensuring product quality, efficient service, and a seamless ordering experience. Online ordering and third-party delivery are here to stay, but how well brands manage these channels will define their long-term success.

At the same time, rising costs, staff retention challenges, and shifting consumer preferences add further pressure. To remain competitive, operators must not only meet expectations but exceed them by focusing on the elements that drive customer satisfaction.

At the core of a great customer experience is consistency—from product quality to service interactions. Mystery shopping programs, measurement tools, and actionable insights help operators identify gaps and refine their operations to meet evolving customer expectations. A seamless experience across all touchpoints builds loyalty and keeps customers coming back.



# About Intouch Insight

At Intouch Insight, we specialize in helping multi-location brands achieve operational excellence, exceed customer expectations, and build long-term customer loyalty, and we are proud to deliver growth solutions to over 300 of the world's most beloved brands.

Our solutions are designed to streamline operations, maintain brand standards, and provide actionable insights to help our clients enhance their CX. With over 40 years of CX expertise, we excel in providing our clients with top-notch CX, customer surveys, mobile forms, mystery shopping, as well as operational and compliance audit solutions.

#### Offices

Ottawa (HQ)

400 March Road Ottawa, ON, Canada K2K 3H4 Toledo

1690 Woodlands Dr #103 Maumee, OH

43537

Atlanta

4555 Mansell Road, Suite 300 Alpharetta, GA

30022

www.intouchinsight.com letschat@intouchinsight.com 1 800-263-2980

