



Identification of the Essential Criteria to Remain or Become an Attractive Catering Brand in Europe.

Field of investigation :
October 2018

What are the key concepts for tomorrow?

Winning catering concepts in Europe



Attractiveness of catering chains

Winning catering concepts in Europe

The first European study that helps you understand how to develop your brand attractiveness and create preference among your consumers

In a rapidly changing food service market, the chain market is growing in Europe, but with great disparities between historical brands and new concepts:

Many historical market chains are suffering...

"How can I regain consumer appeal?"

"What are my options to improve my concept with regard to consumer expectations?"

"How can I regain attractiveness among operators and key property players?"

Recent concepts are particularly dynamic...

"How can I succeed not only in creating, but also in deploying an attractive concept?"

At the same time, at a time when shopping centers have never been so numerous, operators, franchisors and key property players are increasingly looking for attractive and differentiating "city center" concepts...

"How can I identify the most promising concepts to attract customers to my area?"

"What are the winning models and key success factors?"

"What are the key expectations of winning chains in terms of differentiation and preference?"

Finally, the catering sector is of great interest to specialized funds....

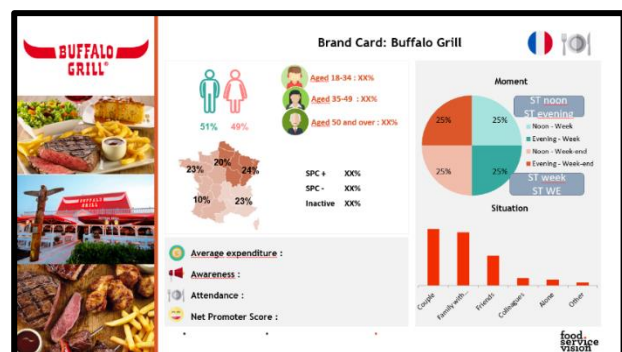
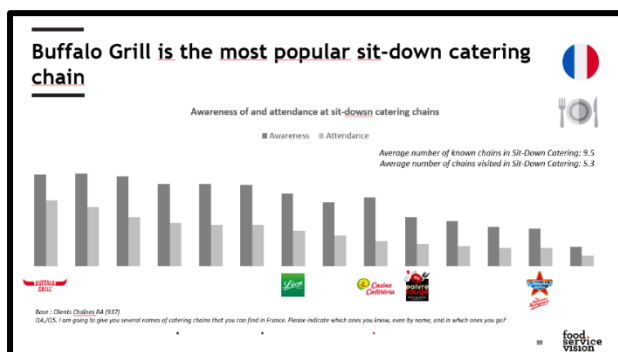
"How can I identify promising concepts for the future or make concepts evolve to make them more attractive?"

"What are the specificities in each country?"

"What are the most attractive chains? And the least attractive ones?"

What are the winning recipes for concepts today in Europe?

Data example *Fictional figures



Attractiveness of
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The first European study measuring and modeling the key
success factors for catering chains

You are managing a catering chain...

Receive a diagnosis of your attractiveness
for consumers

**Measure and prioritize key preference
factors**

- The most promising consumer expectations

Discover the models to succeed

**Secure your future development by
identifying and prioritizing your levers to
act and improve your positioning**

- A diagnosis of your brand against your competitor brands
- Key consumer expectations to work on to reinforce your brand

You are an operator, a key property player, an investor...

**Identify and invest in the most attractive
concept models**

**Make it easier to choose the right mix of
brands for one dedicated area (train station,
airport, commercial center...)**

Methodology

Target:

Among French, Italian and English customers:
representative samples of the population
aged 18 and over

3 countries covered by the study:

France (1,200 interviews): analysis of 44 brands
UK (500 interviews): 45 brands
Italy (500 interviews): 43 brands

Collection method:

15 to 20 minute online interviews with consumers in
October 2018.

Plan

1. Consumption in chains today
2. Key consumer expectations
3. Expectations that have the greatest impact on brand and concept attractiveness
4. Winning models
5. Chain evaluation (*Attractiveness ranking, profile card vs. competitors...*)

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Studied Brands :

NB : The list of brands UK, Italy will be refined following the results and penetration rates

| France | | UK | | Italy | |
|-------------------|-----------------------|-------------------|-----------------|--------------------|------------------------------------|
| Table service | Fast food | Table service | Fast food | Table service | Fast food |
| Buffalo Grill | Mc Donald's | All Bar One | Benugo | 100 Montaditos | Acafé |
| Léon de Bruxelles | Burger King | Ask | Burger King | America Graffiti | Alice Pizza |
| Del Arte | KFC | Bella Italia | Caffe Nero | BeerCode | Arabian Kebab |
| Courtepaille | Subway | Brewers Fayre | Chicken Cottage | BEFeD Brew Pub | Bottega del Caffè Dersut |
| La Criée | Pizza Hut | Café Rouge | Costa Coffee | Gustami | Burger King |
| Bistro Régent | Paul | Carluccio's | Dixy Chicken | La Sfizeria | Chef Express |
| La Boucherie | Dominos Pizza | Chef & Brewer | Domino's Pizza | Old Wild West | Ciao |
| Hippopotamus | Brioche Dorée | Crown Caveries | EAT | Pizzikotto | Focaccia Ligure |
| Flunch | Starbucks | Ember Inns | Five Guys | Roadhouse Grill | Giangusto |
| Poivre Rouge | La Mie Câline | Fayre & Square | Greggs | Rossopomodoro | Girarrosti S.Rita |
| Pizza Paï | Sushi Shop | Flamming Grill | KFC | Shi's | Illy |
| La Pataterie | La Croissanterie | Frankie & Benny's | Leon | Sushiko | KFC |
| Memphis Coffee | Planet Sushi | Harry Ramsden's | Mc Donalds | Wiener Haus | La Caveja Piadinerie |
| | Pomme de Pain | Harvester | Pizza Hut | Fratelli La Bufala | La Piadineria |
| | Marie Blachère | Nando's | Prêt à manger | Paolino | Lino's Coffee Shop |
| | Speed Rabbit pizza | Pizza Express | Starbucks | Festival | Magnosfera |
| | O Tacos | Prezzo | Subway | | McDonald's |
| | Class'croûte | Sizzling Pubs | Wetherspoon | | Mondadori Café |
| | Columbus | Table Table | Hungry Horse | | Mr Focaccia |
| | Big Fernand | TGI Fridays | | | Panino Giusto |
| | Ange Boulangerie | Toby Carvery | | | Rossosapore |
| | Five Guys | Vintage Inns | | | Segafredo |
| | Boulangerie Louise | Wagamama | | | Spizzico |
| | Bagelstein | Zizzi | | | SKK Mediterranean Restaurant |
| | Prêt à manger | Huxleys | | | Subway |
| | Nabab Kebab | Beefeater Grill | | | |
| | Exki | | | | |
| | Cojean | | | | |
| | Eric Kayser | | | | |
| | Bert's | | | | |

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Order Form

Please fill in this page and send it back to our team at:

v.alberola@foodservicevision.fr

The study "Winning catering concepts in Europe"

2019 Rates

- I would like to receive the study "Winning catering concepts - **France** " (PDF version). Delivery by email - Report in French. Available end of march
One presentation included (value EUR 1,100) excluding travel expenses

France Price: € 4,800 VAT excluded

- I would like to receive the study "Winning catering concepts - **Europe, 3 countries**" (PDF version). Delivery by email - Report in English. Available end of April
One presentation included (value EUR 1,100) excluding travel expenses

Report Europe: France, UK and Italy

Price: € 9,500 VAT excluded

Name:

Email Address:

First name:

Phone number:

Company Name:

Date:

Street Address, City, and Zip Code:

Signature of Authorized Person and Official
Stamp:

Acting On behalf of:

GENERAL TERMS AND CONDITIONS OF SALE:

By validating his/her order, the Principal accepts, without reservation, these General Terms and Conditions of sale.

1 – SCOPE

The purpose of this contract is to define the terms and conditions under which FOOD SERVICE VISION will make the multi-client study available to the Principal. These multi-client studies are based on objective qualitative and/or quantitative data collected by the company. FOOD SERVICE VISION analyses these objective elements in order to develop guidelines mentioned in the multi-client studies.

2 - OBLIGATIONS OF THE PRINCIPAL

It is the responsibility of the Principal to define his/her needs and to find out whether the specifications of the multi-client studies are appropriate, taking into account the objectives he/she pursues. FOOD SERVICE VISION has provided the Principal with any necessary information he/she would need to take any relevant decisions.

FOOD SERVICE VISION grants the Principal a non-transferable right to make use on his/her sole and personal behalf of multi-client studies, and the information they contain, within the sole framework of his/her activity.

The Principal undertakes to use the above mentioned information only for lawful purposes, in accordance with the legislation in force.

Thus, he/she may not transfer to a third party any information provided to him/her, and will be held responsible for any direct or indirect consequences that may arise from the use of multi-client studies or the information they contain that does not comply with these General Terms and Conditions of Sale.

3 - OBLIGATIONS OF FOOD SERVICE VISION

3.1 – Delivery

The information contained in the multi-client studies provided by FOOD SERVICE VISION is transmitted directly to the User by electronic means.

No additional supplies or services are implicitly included.

3.2 – Accuracy of the Information Provided

FOOD SERVICE VISION collects the information contained in the multi-client studies from different sources, and makes all possible efforts to check their credibility.

Nevertheless, and despite all these efforts, FOOD SERVICE VISION cannot guarantee the full accuracy of the content of multi-clients studies. The Principal will therefore knowingly use the information provided FOOD SERVICE VISION .

4 – PRICE

The prices indicated by FOOD SERVICE VISION are given in euros, excluding taxes, to which the current VAT rates apply. All orders, whatever their origin, are payable in euros within thirty days of invoice date. FOOD SERVICE VISION reserves the right to modify its prices at any time. Products are always invoiced on the basis of the prices in force at the time the order is placed.

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FOOD SERVICE VISION is expressly subject to an obligation of means.

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The decision of one of the parties not to invoke a breach by the other party of any of the obligations referred to herein shall not be interpreted in the future as a waiver of the obligation in question.

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In the event of a dispute, both parties undertake to make every effort to resolve the dispute in an amicable way before taking any legal action.

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The present General Terms and Conditions are governed by French law.

In the event a dispute could not be resolved in an amicable way, whether relating to the interpretation or execution of the conditions hereof, and even in case of urgency, the exclusive jurisdiction is attributed to the Commercial Court of LYON whether or not there is plurality of defenders or appeal in warranty.

Should any of the parties take legal action, the winning party shall be entitled to receive refund of the costs and fees incurred.