

**Study**

# 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 restaurant chains 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....

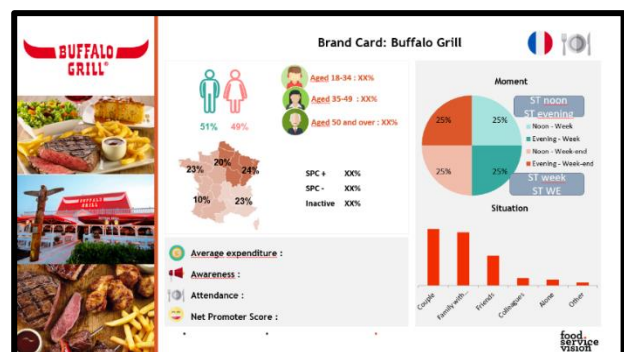
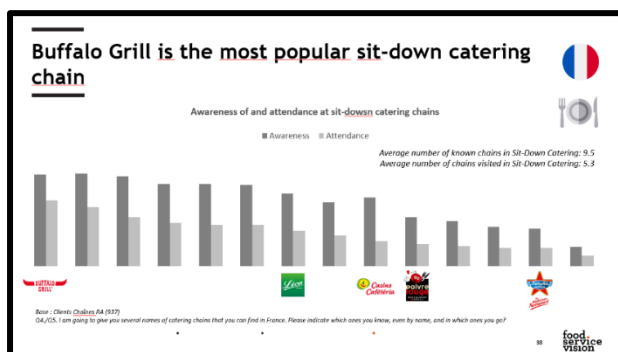
**"How can I identify promising concepts for the future or make concepts evolve to make them more attractive?"**

**"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 <sup>\*Fictional figures</sup>



## 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...*)

Attractiveness of  
catering chains

# Winning restaurant chains in Europe

## 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				



## Order Form

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

[v.alberola@foodservicevision.fr](mailto: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

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Street Address, City, and Zip Code:

Signature of Authorized Person and Official  
Stamp:

Acting On behalf of:

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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.

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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 .

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