



The OC&C Fundex 2019: How was it for you?

Guests' views on the UK's biggest hospitality
and leisure brands



OC&C
Strategy consultants

uncommon sense

HOW WE DID IT

We surveyed over 40,000 global consumers to discover what they really think of 650 of the world's biggest hospitality and leisure brands and how they use them. The study covered 8 countries; China, France, Germany, Italy, Poland, Turkey, UK, and the US.

By looking at major brands across the wide leisure ecosystem, we have delivered the deepest insights to date on what makes for a winning guest experience.

While it threw up some, dare we say it, 'fun' insights...

- The most fun attraction in the world (or at least in the 8 countries we surveyed) is a French historical-themed amusement park: Puy du Fou
- The French and Germans have the least fun out of all nationalities we surveyed, and the Americans and Chinese have the most
- Fans of theme parks are more fun people in general - even having more fun when doing everyday activities like grabbing a coffee than those that shun rollercoasters
- British and American men claim to have more fun alone than with their partners

...the resulting data has a serious side, as it will help Leisure businesses work out ways to deliver better experiences for their guests. In fact scoring highly on the OC&C Fundex is a better measure of financial success than the industry's go-to metric of Net Promoter Score.

OC&C FUNDEX HOSPITALITY & LEISURE SUB-SECTORS



THE OC&C FUNDEX IS A STRONG PREDICTOR OF BRAND FINANCIAL PERFORMANCE, EVEN OUTPERFORMING NPS AT THE HIGHEST LEVELS

Global revenue performance vs NPS and OC&C Fundex score



1. Average of LTM or latest available
Source: OC&C Fundex 2019, Euromonitor, Mintel, BvD

04 The OC&C Fundex champions

Find out which hospitality and leisure brands are winning in the eyes of their guests.

06 The secret ingredients: how to be a champion

So, how do you get your brand to the top of the leader board? We analysed the characteristics of our champions to find out what propelled them to the top of the OC&C Fundex. The result is a clear recipe to becoming a winning hospitality and leisure brand.

16 Fun as a fundamental - the benefits of being more fun

An engaging and fun experience is an increasingly powerful way to encourage great reviews, helpful word-of-mouth marketing and repeat visits. We look into the ways in which brands can use fun to their advantage, and help us all to have more fun along the way.

Introducing the OC&C Fundex

Asking the right questions

The kids are back from the theme park with their grandparents. Amid the happy faces and souvenir toys, their mother cannot wait to hear about their outing.

'What was your average transaction value?' she asks as she hugs them. 'Would you recommend the service to your friends?'

Strange? Yes. Worrying? Definitely. Yet these are just two examples of the various metrics which businesses often focus on when evaluating leisure and hospitality brands. While these data points are valuable, they do not get to the heart of the industry as much as the simple questions - and the ones we hope our fictional mother actually asked...

"How was it?"

"Did you have fun?"

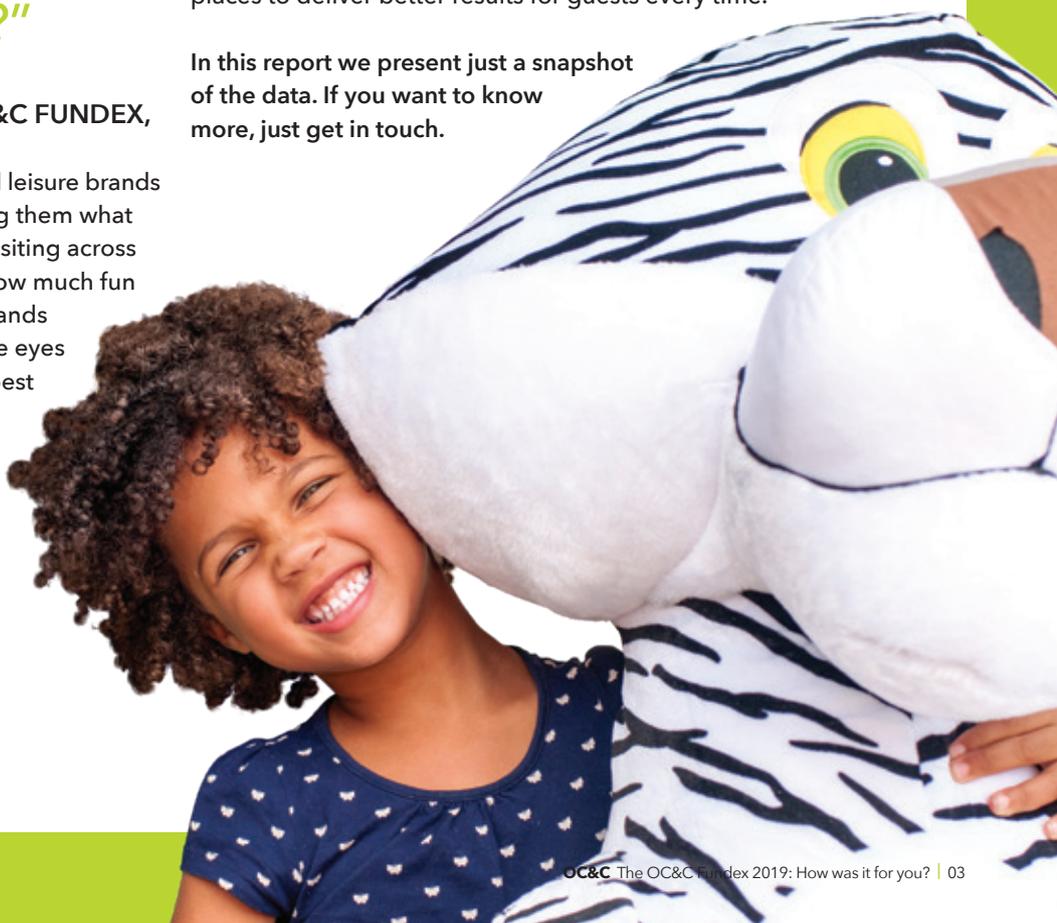
WELCOME TO THE FIRST EVER OC&C FUNDEX, WHERE WE ASKED JUST THAT

We asked visitors to major hospitality and leisure brands around the world "how was it?" by asking them what they really think of the brands they are visiting across a wide range of dimensions, including how much fun they had. We did this to unpick which brands are delivering winning experiences in the eyes of their guests, and what it is about the best brands that make them guest favourites.

Our research tells us that a wealthy fitness fanatic considers a trip to the gym less enjoyable if she has to lug along a towel. Meanwhile, a student on a budget enjoys a no frills workout much more if she is not shelling out for extras. Our two gym goers are united, however, in their dislike of sweaty running machines - lack of hygiene and quality of basic equipment is non-negotiable for both.

Evidently, delivering a great experience to guests is not straightforward; a great experience means different things to different consumers. Fortunately, the OC&C Fundex can help us to understand why guests rate some brands highly and others less so, unpicking topics such as how they define 'fun', which elements of the experience they can't do without, and what 'great service' really means in different contexts. As a result, it helps brands target effort and investment in the right places to deliver better results for guests every time.

In this report we present just a snapshot of the data. If you want to know more, just get in touch.



The OC&C Fundex champions

Congratulations to our OC&C Fundex champions, the nation's favourite hospitality and leisure brands. Here we introduce the top performers across nine leisure sectors and three individual categories. For a full list of brands in the ranking, (see pages 24-25). In the meantime, meet the UK winners and find out why they topped the list...

Sector winners



wagamama

Best Restaurant **Wagamama**

The pan-Asian restaurant comes top in our OC&C Fundex survey thanks to market-leading food quality, choice and friendly service.

Learn more on page 11.

Runners-up - **Miller & Carter, Nando's**



Best Café & Coffee Shop **Costa Coffee**

A relaxed atmosphere and good quality food and drink propel Costa Coffee to the top of the coffee shop rankings.

Runners-up - **Starbucks, Café Nero**



SUBWAY

Best Fast Food & Food To Go **Subway** (also third globally)

Through fast and fresh food on the go, Subway leads with UK consumers on choice, quality, portion size and speed of service.

Runners-up - **Greggs, Five Guys**



Premier Inn

Best Accommodation **Premier Inn** (also second globally)

Strong ratings on room quality, cleanliness, value and a good night's sleep help strengthen Premier Inn's claim to the top spot for accommodation.

Learn more on page 12.

Runners-up - **Hilton, Warner Leisure Hotels**



Best Cruise **P&O Cruises**

P&O Cruises' guests are delighted by their selection of itineraries, comfortable cabins, on-board entertainment and value for money.

Runners-up - **Royal Caribbean, Cunard**



Best Resort & Holiday Park **Butlin's**

Iconic holiday resort Butlin's ranks number one due to the strength of its team, evening entertainment and great atmosphere making it the most fun family resort experience in the UK.

Runners-up - **Center Parcs, Haven**



Best Theme Park & Attraction **Thorpe Park**

Thorpe Park beats its peers on atmosphere & environment, fun, and quality of food and drink. It also stands out for great value for money.

Runners-up - **Alton Towers, Legoland**



Best Gym & Health Club **David Lloyd Clubs**

David Lloyd Clubs stands out for the quality and range of its facilities, but also rates highly on overall atmosphere and fun.

Learn more on page 15.

Runners-up - **Pure Gym, Virgin Active**



Best Cinema **Vue**

Vue excels for its range of titles and show times, the comfort of its seats, and the convenience of its locations.

Runners-up - **Cineworld, Everyman**

Category winners



Most Fun **Thorpe Park**

Through high-octane rides, Thorpe Park attracts a younger, more experience-seeking customer base than other UK brands. Targeting more fun group occasions, over 70% of trips come from younger families or groups of friends.

Runners-up - **Alton Towers, Butlin's**



Premier Inn

Best Team **Premier Inn**

Premier Inn delivers a great value experience while not skimping on service. Guests are treated to 24/7 concierge service as well as a 'Good Night Guarantee', which appeal to both leisure and business travellers alike.

Runners-up - **Warner Leisure Hotels, P&O Cruises**



Best Value for Money **JD Wetherspoon** (also first globally)

The beloved value-focused pub chain was rated the number one brand in the UK and globally for value for money. The chain buys, and sells, pints at a cheaper price than competitors and strengthens its value position with weekly deals such as its Thursday Curry Clubs.

Runners-up - **Travelodge, Premier Inn**

The secret ingredients: how to be a champion

Our OC&C Fundex champions all very different - operating in different markets, appealing to different guests, with different areas of strength. They are, however, united by a common approach to delivering great guest experiences. By examining the similarities between winning brands, we have uncovered five secret ingredients needed to become a true national champion.



CHAMPIONS ACE THE BASICS

There is no universal formula in Leisure - what matters most to guests varies hugely across our sub-sectors - restaurants must serve good quality food, hotels must deliver a good night's sleep, while theme parks must be fun. Fail to deliver on the core reason your guest is visiting and they will not be back. The champions understand explicitly the foundations on what good experiences are built on and consistently deliver against them. Top dogs consistently get top marks where it matters.

Leisure businesses cannot thrive if they don't get the basics right. It's amazing how many don't.



EVERYBODY LOVES ME, BABY

Our champion brands all stand for something. They have anchored their brand and experience around a core part of the market that they can call their own, whether it be a particular product, occasion or type of guest. But focus is not enough - the true champions have also created a huge breadth of appeal around this core focus. It's a neat trick, but it isn't easy to pull off.

Wagamama has huge breadth of appeal, you see families, groups of friends, couples on dates - all eating in the same place at the same time.



SO YOU THINK YOU'RE SPECIAL...?

Visits to champion brands are distinctive - they really stand out from the crowd. There is something about the proposition which adds a little extra 'magic dust' to the experience - sights, sounds, smells, things to do or explore, or even just the feel of the place. There are many different ways to be more distinctive. Some brands rely on functional components such as great value to set themselves apart, while others play on more emotional elements like fun. By creating an engaging team, atmosphere and décor, by encouraging guests to try new things, or just by providing things to talk about and share on Instagram, being more fun can really help make the experience distinctive, memorable and shareable.

A truly great experience is built around something distinctive, authentic, shareable and memorable.



WELCOME TO THE MACHINE

Putting on a great show requires the right equipment and a well-drilled support crew - and the same is true of would-be leisure champion brands wanting to make the final cut. A fantastic guest experience needs a great operating model to deliver it. This means creating a platform that creates genuine advantage by putting the guest experience at its heart, while making it easier for teams to deliver the experience consistently. And hopefully makes more money in the process.

Many of the winning restaurants and hotels have developed clearly advantaged operating models that deliver great experiences, consistently.



AGAIN! AGAIN!

No brand can survive without customers coming back for more. For cinemas, this might involve a loyalty programme or having the comfiest seats; for restaurants, it could be a constantly evolving menu that feels healthy enough to go every week. While the building blocks for repeatability are to have the memorable, distinctive and consistently delivered experience discussed above, this is only part of the story. Innovation often has a critical role to play in bringing guests back, but so do more fundamental aspects such as good value, accessibility, ease and consistency.

In a world where newer generations are less brand loyal, encouraging repeatability through careful design of the guest experience is more important than ever.

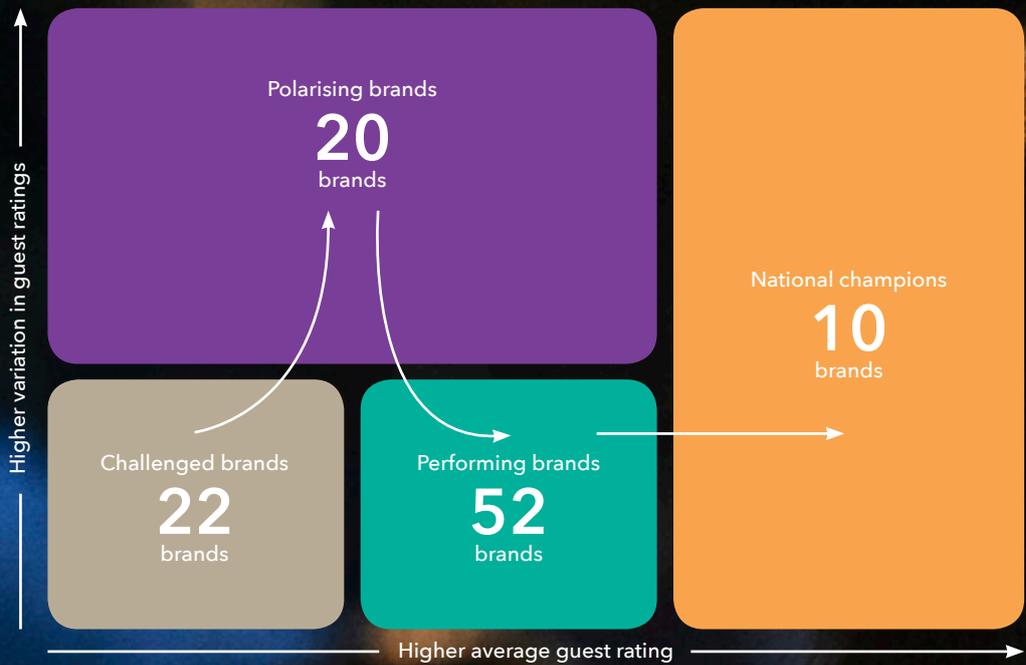


FROM CHALLENGED TO CHAMPION

By looking at the overall brand ratings, it becomes clear that some brands are excelling while others are disappointing their guests. The OC&C Fundex helps determine how guests feel about a brand today in order to plot a new course to move from challenged to champion.

「 The OC&C Fundex helps to plot a new course to move from 'challenged' to champion 」

THE OC&C FUNDEX HELPS TO UNDERSTAND BROAD CUSTOMER SENTIMENT TOWARDS A BRAND IN ORDER TO PLOT THE BEST PATH TO FUTURE GROWTH



BRAND STRATEGIC ROADMAP

Challenged	Polarising	Performing	National champions
<ul style="list-style-type: none"> Consistently rated as below-average by guests - letting customers down on the basics Often have no clear centre of gravity and a small and shrinking set of loyal customers 	<ul style="list-style-type: none"> High-variation in how different guest groups feel about the brand Often have a core set of loyalists who 'get it' but struggle to broaden the appeal beyond this group 	<ul style="list-style-type: none"> Brands that are consistently rated around or above the average Typically don't lead where it really counts, and often lacking distinctiveness 	<ul style="list-style-type: none"> Universally loved brands - excelling in the key areas which matter most Distinctive, broad appeal, repeatable and operationally excellent
 <ul style="list-style-type: none"> Reinvent the brand's centre of gravity Deliver on the basics Be brave, bold, and ruthlessly focused 	 <ul style="list-style-type: none"> Re-engineer the experience to broaden appeal... ...but don't lose sight of what makes the brand special to some Ensure consistency of execution 	 <ul style="list-style-type: none"> Invest carefully to exceed expectations in the right areas Develop a more distinctive and authentic experience 	 <ul style="list-style-type: none"> Don't rest on your laurels - many of today's challenged brands were yesterday's champions Continue to innovate and evolve, and learn from international champions



Wagamama has an efficient operating model built around common ingredients and batch cooking - helping the brand to deliver great food, consistently

Distinctive dining

Best Casual Dining Restaurant

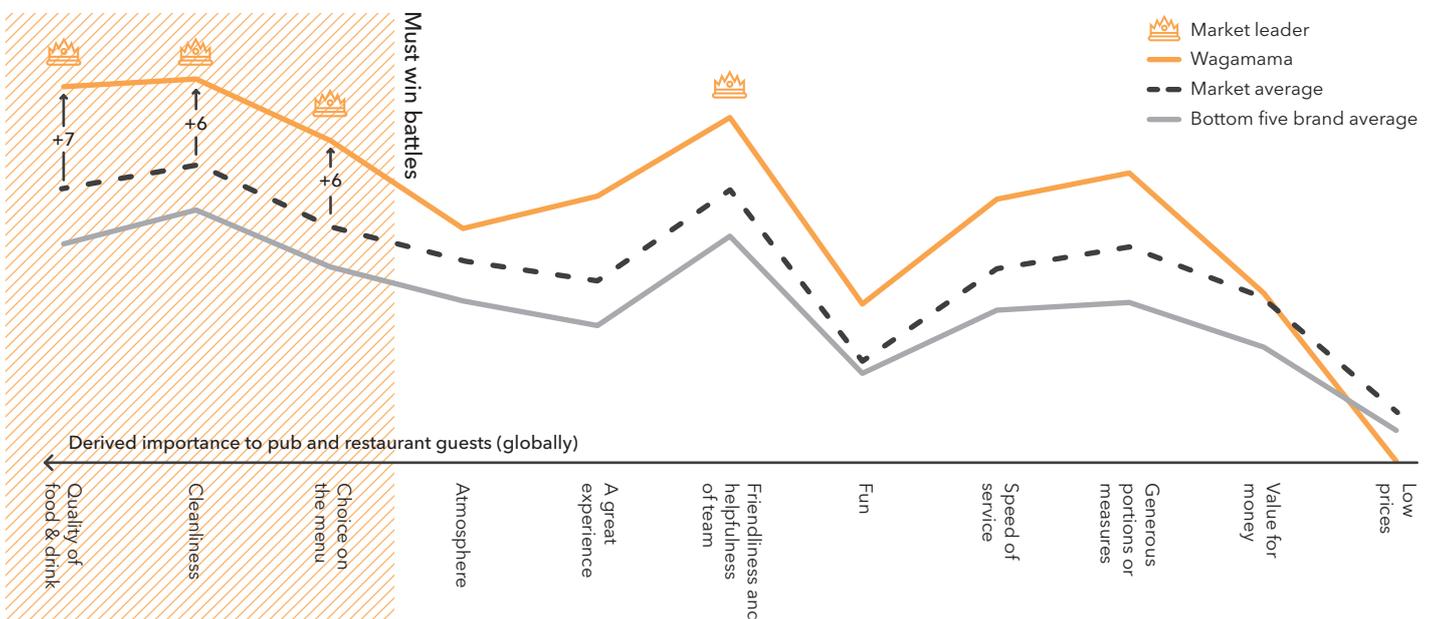


The data shows that in each sector there are a set of “must win” battles if you are to be a Champion. High quality food - as expected - is the single most important thing to restaurant goers, and Wagamama not only came top for quality, but also for other key elements such as menu choice and cleanliness. These strong ratings are supported by a friendly and helpful team and an efficient operating model built around common ingredients and batch cooking - helping the brand to deliver great food, consistently.

In addition to nailing the basics, the brand excels at being distinctive. Communal tables, food that arrives when its ready, friendly team that write on placemats. Give most diners these three clues and they would be able to name Wagamama as the restaurant in question. The regular introduction of new dishes, such as miso cod ramen, keeps the menu interesting for the regulars, although they know they can always fall back on old favourites like the katsu curry.

WAGAMAMA GUEST RATINGS

Average proposition rating (/100)



Source: OC&C Fundex 2019

Winning the pillow fight

Best Accommodation Brand



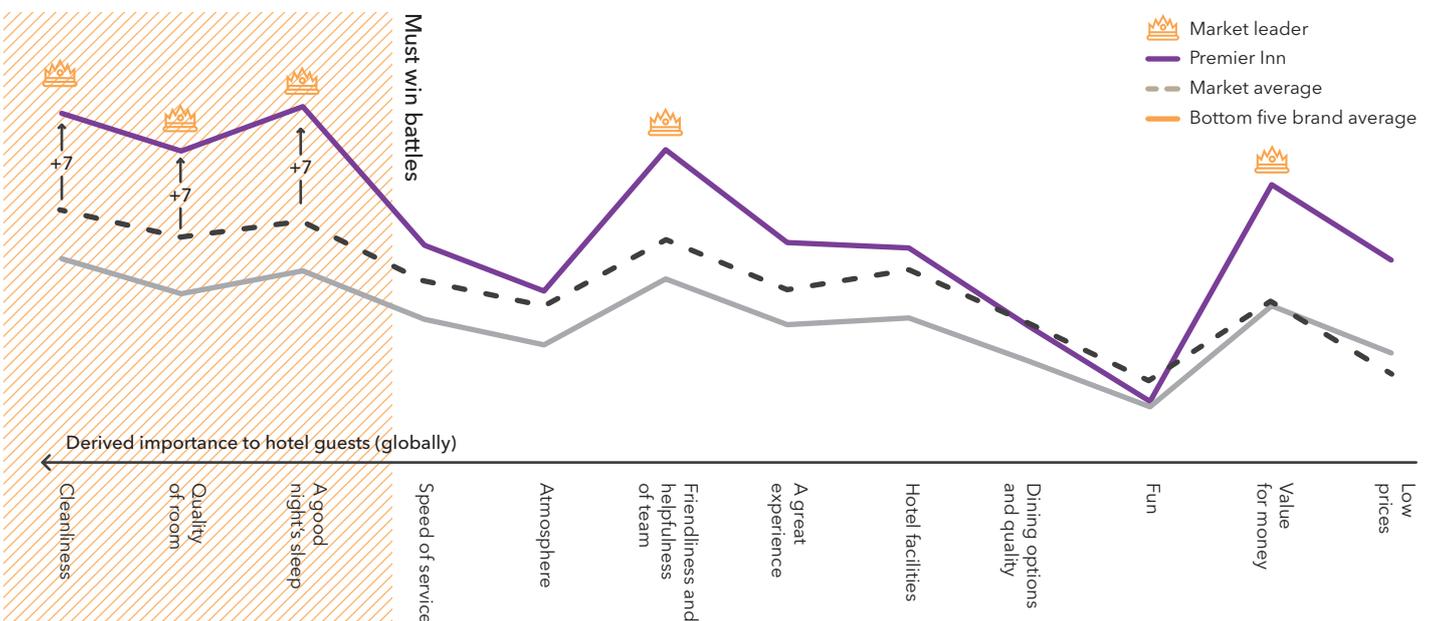
Despite its budget prices, Premier Inn is extremely well rated, even beating more premium hotel brands in the areas of the experience most critical to guests. It does this by delivering on what matters most to its guests. In particular, the brand knows that a good night's sleep is vital to the guest experience, and delivers it through initiatives such as its 'Good Night Guarantee', luxury Hypnos beds and personalised pillows.

Premier Inn does all of this at low prices thanks to a streamlined experience that de-prioritises elements of the hotel-stay experience that its budget-conscious guests care less about. Scale, standardisation and discipline elsewhere in the business also help to create significant savings for the chain, resulting in very attractive commercial performance.

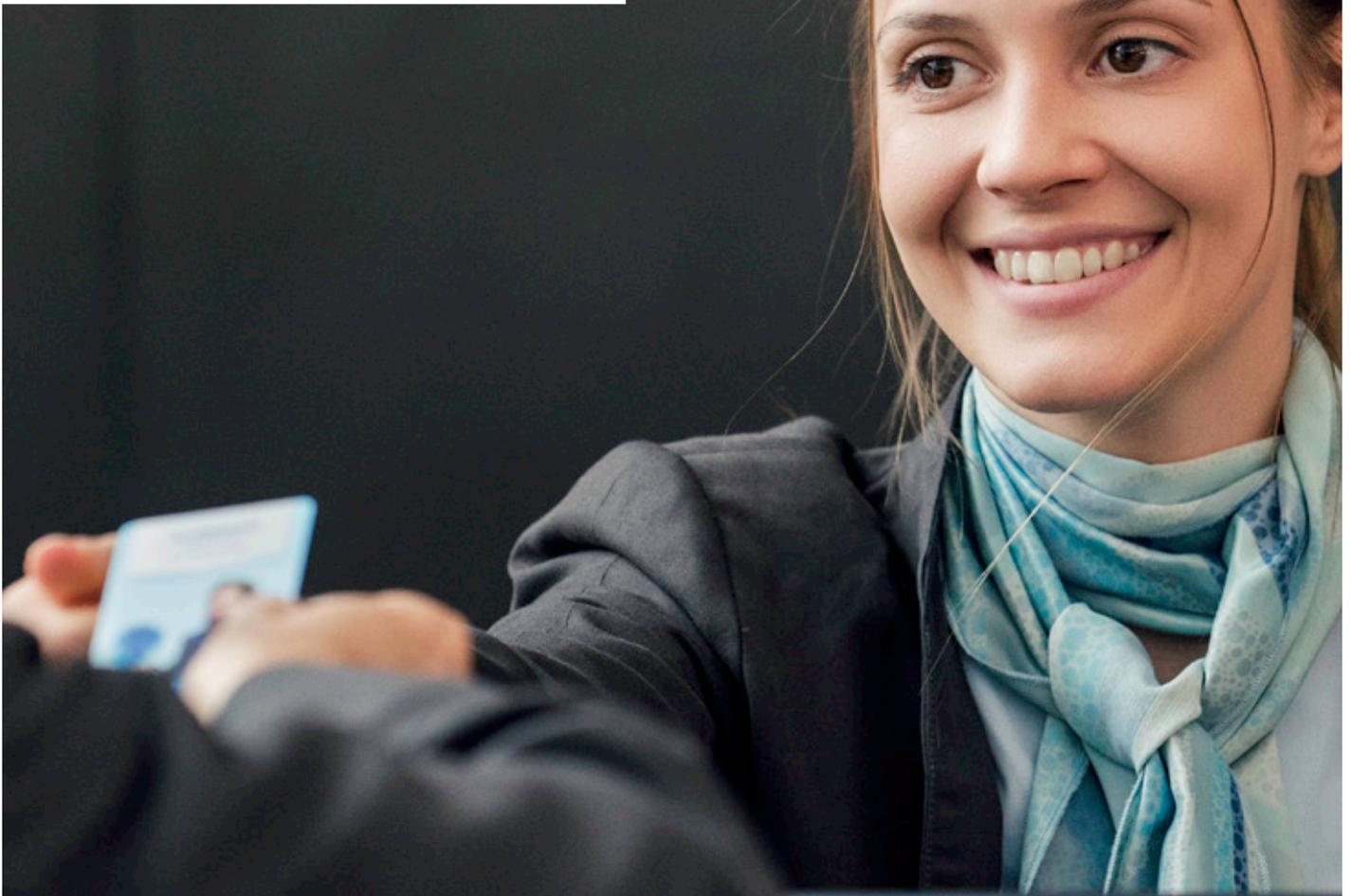
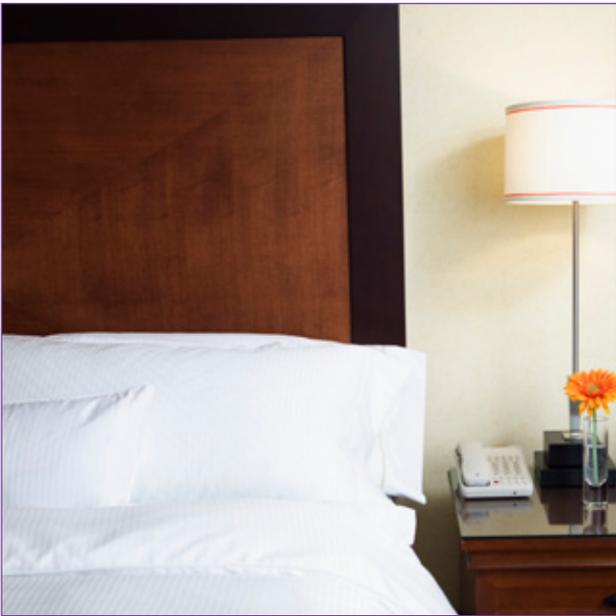
This all adds up to a well-loved brand that appeals to a remarkably broad range of different guests on budget-focused 'just-a-place-to-stay' trips.

PREMIER INN GUEST RATINGS

Average proposition rating (/100)



Source: OC&C Fundex 2019



「Premier Inn knows that a good night's sleep is vital to the guest experience, and delivers it through initiatives such as its 'Good Night Guarantee」



「 David Lloyd Clubs wins no less than six
of the 12 criteria by which gyms and
fitness clubs were evaluated by guests 」

Premium push ups

Best Gym & Health Club

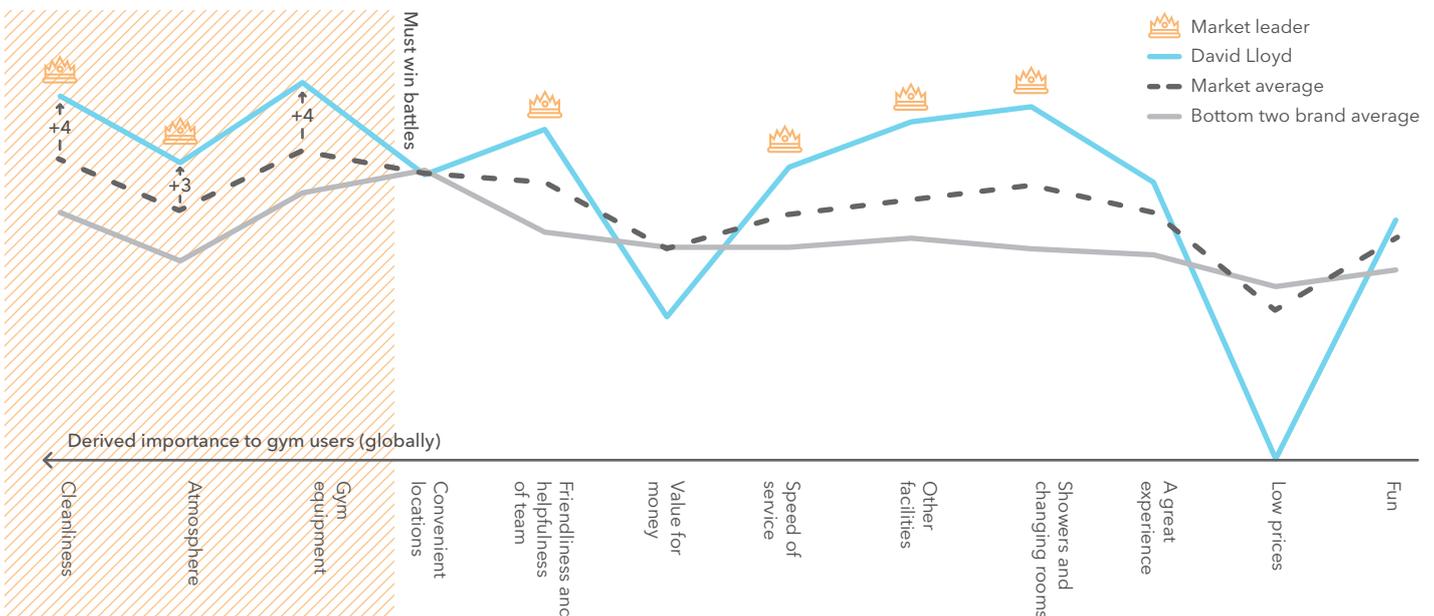


It is no secret that budget gyms have fuelled much of the growth in the gym market recently. It's interesting then that David Lloyd Clubs, positioned at the premium end of the market, wins no less than six of the 12 criteria by which gyms and fitness clubs were evaluated by guests.

Part gym, part social club, David Lloyd offers market-leading breadth and quality of facilities including cafés, swimming pools and racquet courts, within a premium environment. This breadth of offer opens up the opportunity to use the club for far more than just pumping iron - providing a workout space, sports club, and a social space for individuals, couples and whole families. This distinctiveness makes David Lloyd the UK's premium gym chain of choice.

DAVID LLOYD CLUBS GUEST RATINGS

Average proposition rating (/100)



Source: OC&C Fundex 2019

Fun as a fundamental...the benefits

The benefits of being a fun leisure brand are multiple. Fun can be a powerful driver of free word of mouth marketing for a leisure business.

Guests are more likely to give positive reviews, recommend a brand to their family and friends, and share on social media if they had a fun time. Creating a fun experience can also encourage repeat visits, providing a useful way for brands to drive loyalty and habitual use in a world where value-led promotional marketing is becoming less effective and younger generations are more demanding, are visiting a wider selection of brands (becoming less loyal to each) and are seeking more compelling group-led social experiences.

Sure, fun is less important for some brands. Greggs, Premier Inn and JD Wetherspoon for example are all rated highly overall, but don't score highly in the fun stakes. Fun is also on average less important to some sectors, such as Gyms and Fast Food, although even in these sectors brands like Village Gyms and Five Guys are dialling up fun as one of the ways they can stand out a little from the crowd. But for some, outings such as visits to theme parks and holiday resorts, fun can be one of the most important things guests look for when deciding where to visit.

So what is 'fun', and how can you have more of it?

We have delved into the data to understand which brands are delivering the most fun experiences, why certain guests have more (or less) fun than others, and importantly how fun can be used more effectively by brands wanting to create a more compelling and repeatable guest experience.



of being more fun

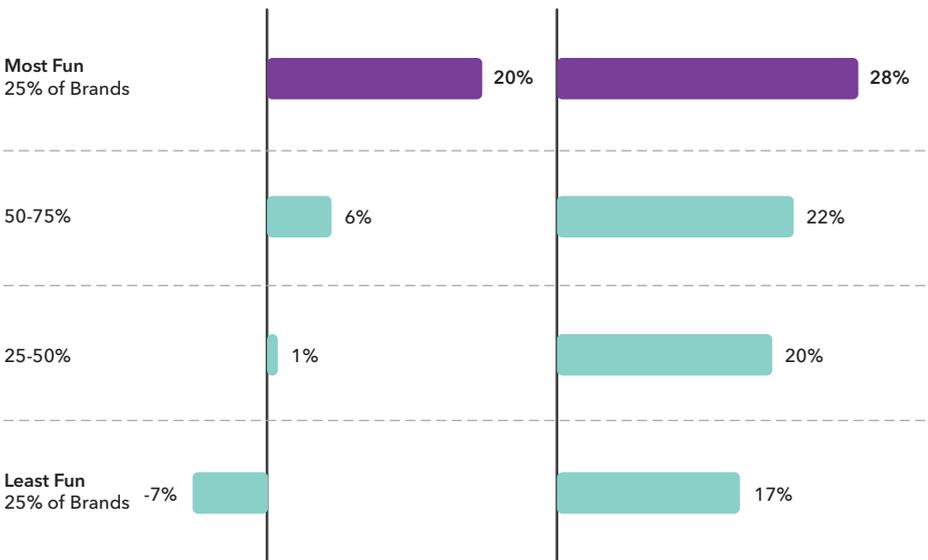
GUESTS OF MORE FUN BRANDS ARE MORE LIKELY TO RECOMMEND THE BRAND TO OTHERS, AND ARE MORE LIKELY TO REPEAT

Average NPS by fun percentile %
All 649 brands in The OC&C Fundex

Guests are more likely to recommend fun brands to friends and family...

Proportion of guests visiting monthly %
Example - UK pubs and restaurants

...and are more likely to return more frequently



Fun can be one of the most important things guests look for when deciding where to visit

THE MOST FUN BRANDS IN THE UK, BY CATEGORY

			
Accommodation	Cruise	Resort & Holiday Park	Theme park
			
			
Gyms & Health Clubs	Cinema	Restaurant & Pub	Fast Food & Food To Go
			

FUN FACT



Five simple ways to be more fun

Fun means different things to different people, so deciphering what people mean by 'fun' can be tricky.





A good place to start is to see what we can learn from the consumers who have the most:



Hang out with the right people (and work on your relationship...)

People who spend time with young children have more fun than any other groups of people, with friends and other family coming in second and third. People spend more time with their partners than any other group, but typically don't have a lot of fun with them (see 'boys just wanna have fun').



Act like a Millennial

Despite reaching the world of work at the height of the financial crisis, Millennials have shaken it off and - according to the OC&C Fundex - are having the most fun. On the other hand, Baby Boomers tend to have the least fun despite being more likely to visit better-rated brands overall.



Take a risk

Those of us open to trying new experiences have more fun than creatures of habit, even having more fun when doing habitual activities like visiting coffee shops and restaurants. We are also more likely to have more fun when visiting places we go less often, like visiting theme parks.



Choose carefully...

Worrying about the bill is a clear fun-killer when on a budget. It is a lot easier to relax and have fun if you are not spending the evening worrying about the cost of that Chablis the waiter recommended. Choosing the right bottle of wine, or even the right place to visit for the occasion is important to having a fun time.



...but don't penny pinch

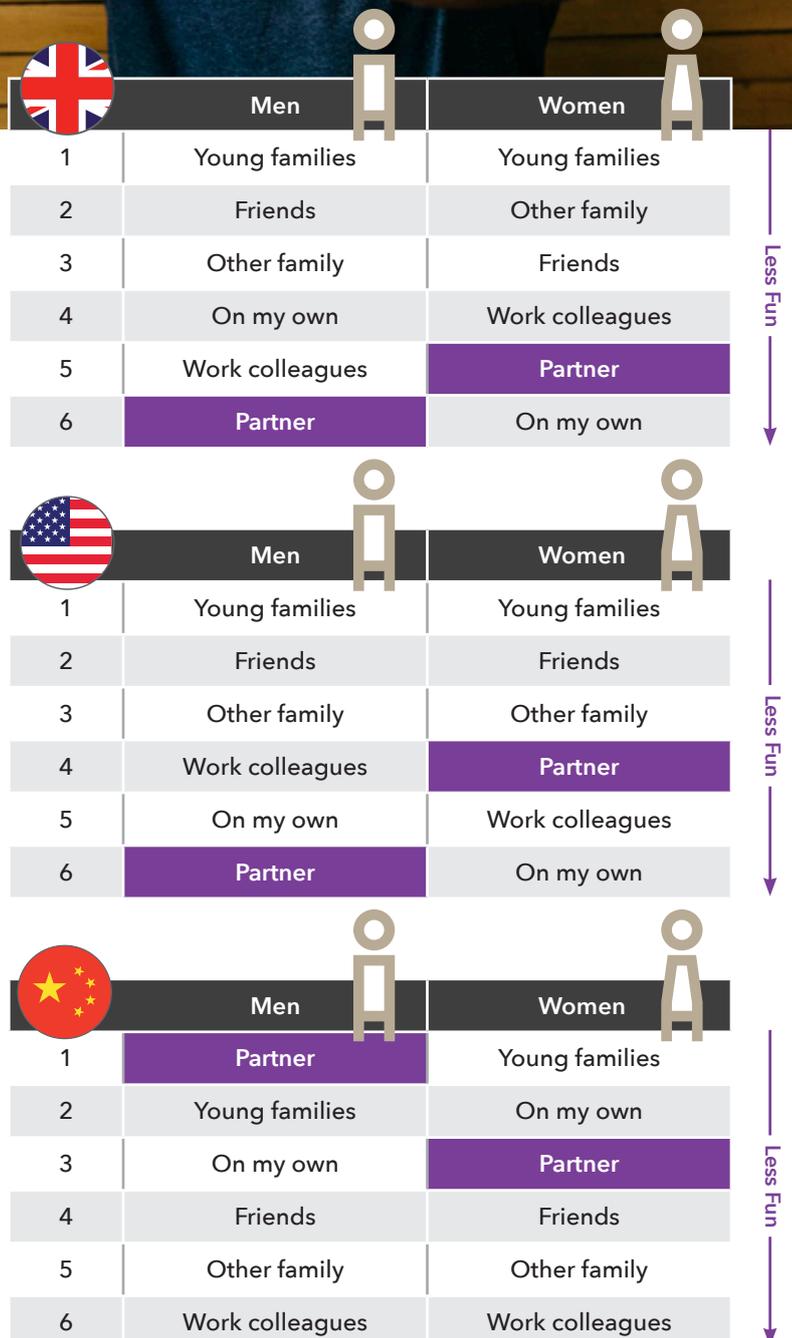
Bargain seekers who are fixated on getting the best deal generally have the least fun, while lazier consumers seeking convenience have a little more fun. Those who are willing to focus on experience have the most.

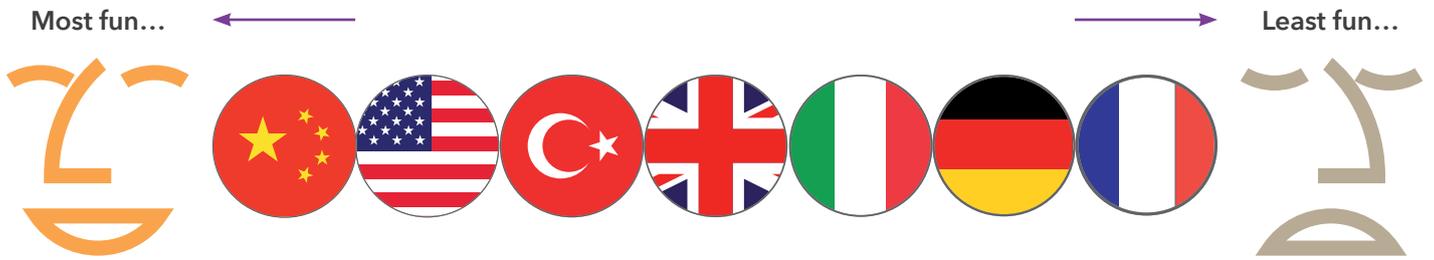


Boys just wanna have fun (on their own)

The OC&C Fundex allows us to delve deep into people's attitudes to fun and sometimes throws up some surprising insights into our relationships:

- Our UK respondents spend more time with their partners than any other group including: friends, family with young children, family without young children, others (including colleagues), and on their own. However, trips with partners only came a mere fourth in the fun ranking compared to the other groups.
- Men generally have less fun than women when spending time with their partners. China is an outlier here where men claim to have more fun with their partners than vice versa.
- British and American men even claim to have more fun alone than with their partners.





And the most fun country is...

The OC&C Fundex not only reveals who is having the most fun, but also which countries. The data can help explain why the French and Germans appear to have a lot less fun than Americans and the Chinese:

Along with Germany and the UK, the French are a nation of bargain hunters. Meanwhile, the Chinese seek out better or more convenient experiences rather than the best deals.

Then there is the question of who they spend time with. The French have less fun spending time with their partners than any other country, despite spending the most time with them. The Germans spend more time on their own, and don't have fun when doing so. Conversely, the Chinese find hanging out with their partners more fun than any other nation, although they do this the least - perhaps this is the secret!



Unlocking the power of fun

So fun is important. But what should you do if the OC&C Fundex reveals that your brand is lacking the fun factor? The following steps are a good start to developing or resetting a 'fun' strategy.



Keep it fresh

Guests typically have more fun if they can get away from more mundane, everyday experiences and try something new. Brands can use this to their advantage by encouraging guests to be a little more adventurous in their choices. Innovation in the offer has a strong role to play in this, but how options are priced and presented to guests can make a big difference too.

Royal Caribbean are the cruise line of choice for the more fun and adventurous – an on-board Flow Rider, a wide choice of places to eat, adventure tours for adrenaline junkies.

Make it shareable

Although there is no single way to create fun, much of it comes from how you interact with the people you are with. Fun brands understand this, and provide an environment and offer that brings people together and gets them talking (and Instagramming). The guest experience will often be scattered with 'fun-hooks', all designed to keep the conversation going.

Wing roulette, unlimited house sauces and the PERi-ometer – just a few of the ways that Nando's gives guests fun talking points across the table.

The most fun brands have strong committed teams that are fully bought-in to what the brand represents



Fun is a team sport

The most fun brands have strong committed teams that are fully bought into what the brand represents. This has to be genuine; you cannot make up for poor service with gimmicks. Whether the team are creating the fun or merely facilitating it, the experience is written into the DNA of the team and how they interact with guests.

Even the housekeeping team at Warner Leisure Hotels are encouraged to stop and have a chat with guests.

Beware of the fun-killers

Our research suggests there are some clear fun killers. Very slow service, poor or inconsistent standards or poor value for money are just a few. It is hard to expect your guests to have fun if they are queuing for ages at the bar, worrying about the bill or having to visit dirty toilets. Fail on just one of these and the fun can evaporate.

Are you guilty of these fun failures?



Poor value for money

Your restaurant serves great tasting food, but your pricing doesn't communicate good value for money.



Speed of service

You run one of the fastest roller coasters in the world, but the queues are dull and last two hours.



Hygiene

Your gym boasts the latest fitness technology, but the changing rooms smell.

The UK OC&C Fundex 100

Below is a just a snapshot of our OC&C Fundex results, organised in order of overall rating. We have also given an indication of how much fun guests had when visiting them. Get in touch if you would like more information on the UK brands or to see the list of international brands.

Top third for fun
Middle third for fun
Bottom third for fun

Rank	Brand	Sub-sector	Fun rating
1	Premier Inn	Accommodation	Red
2	Thorpe Park	Theme Parks	Green
3	Alton Towers	Theme Parks	Green
4	Butlin's	Holiday Parks	Green
5	Center Parcs	Holiday Parks	Green
6	P&O Cruises	Cruising	Green
7	Hilton	Accommodation	Amber
8	Wagamama	Pub & Restaurant	Amber
9	Haven	Holiday Parks	Green
10	Legoland	Theme Parks	Green
11	Warner Leisure Hotels	Accommodation	Green
12	Sealife	Theme Parks	Green
13	Miller & Carter	Pub & Restaurant	Amber
14	Nando's	Pub & Restaurant	Green
15	Royal Caribbean	Cruising	Green
16	Vue	Cinemas	Green
17	Subway	Fast Food & Food To Go	Red
18	Marriott	Accommodation	Amber
19	Greggs	Fast Food & Food To Go	Red
20	Cunard	Cruising	Green
21	Cote	Pub & Restaurant	Red
22	Radisson Blu	Accommodation	Amber
23	Pizza Express	Pub & Restaurant	Amber
24	Cineworld	Cinemas	Green
25	Chessington World of Adventures	Theme Parks	Green
26	Toby Carvery	Pub & Restaurant	Red
27	Macdonald Hotels	Accommodation	Amber
28	DoubleTree by Hilton	Accommodation	Amber
29	Thistle Hotels	Accommodation	Amber
30	Norwegian Cruise Line	Cruising	Green
31	Princess Cruises	Cruising	Green
32	Celebrity Cruises	Cruising	Green
33	Wetherspoon	Pub & Restaurant	Red
34	Holiday Inn	Accommodation	Red
35	Forest Holidays	Holiday Parks	Green
36	Chiquito	Pub & Restaurant	Green
37	Parkdean Resorts	Holiday Parks	Green
38	Bill's	Pub & Restaurant	Amber
39	Travelodge	Accommodation	Red
40	Everyman	Cinemas	Green
41	Holiday Inn Express	Accommodation	Red
42	David Lloyd Leisure	Gyms & Health Clubs	Green
43	Crowne Plaza	Accommodation	Amber

Rank	Brand	Sub-sector	Fun rating
44	Picturehouse	Cinemas	Green
45	TGI Fridays	Pub & Restaurant	Green
46	Odeon	Cinemas	Green
47	Zizzi	Pub & Restaurant	Red
48	Pure Gym	Gyms & Health Clubs	Amber
49	Ramada	Accommodation	Amber
50	Costa Coffee	Café & Coffee Shop	Red
51	Carluccio's	Pub & Restaurant	Red
52	Hub by Premier Inn	Accommodation	Amber
53	Byron	Pub & Restaurant	Amber
54	Viking River Cruises	Cruising	Green
55	Bella Italia	Pub & Restaurant	Amber
56	Hilton Garden Inn	Accommodation	Green
57	ASK Italian	Pub & Restaurant	Red
58	Gourmet Burger Kitchen (GBK)	Pub & Restaurant	Amber
59	Jury's Inn	Accommodation	Amber
60	Five Guys	Fast Food & Food To Go	Amber
61	Frankie & Benny's	Pub & Restaurant	Amber
62	Pizza Hut	Pub & Restaurant	Amber
63	KFC	Fast Food & Food To Go	Red
64	Las Iguanas	Pub & Restaurant	Green
65	Novotel	Accommodation	Amber
66	McDonald's	Fast Food & Food To Go	Red
67	Mercure Hotels	Accommodation	Red
68	Fred Olsen Cruise Line	Cruising	Green
69	QHotels	Accommodation	Amber
70	Lounges	Pub & Restaurant	Green
71	Domino's	Fast Food & Food To Go	Red
72	Harvester	Pub & Restaurant	Red
73	Prezzo	Pub & Restaurant	Red
74	Village Hotel	Accommodation	Amber
75	Ibis	Accommodation	Red
76	Best Western	Accommodation	Red
77	MSC Cruises	Cruising	Green
78	Park Holidays	Holiday Parks	Green
79	Brewers Fayre	Pub & Restaurant	Red
80	Virgin Active	Gyms & Health Clubs	Amber
81	Pret a Manger	Fast Food & Food To Go	Red
82	Café Rouge	Pub & Restaurant	Red
83	Jamie's Italian	Pub & Restaurant	Red
84	Bannatyne's Health Clubs	Gyms & Health Clubs	Green
85	Burger King	Fast Food & Food To Go	Red
86	Nuffield Health Clubs	Gyms & Health Clubs	Amber
87	Village Gym (at Village Hotels)	Gyms & Health Clubs	Green
88	Hungry Horse	Pub & Restaurant	Red
89	Yates	Pub & Restaurant	Amber
90	Fitness First	Gyms & Health Clubs	Amber
91	Chef & Brewer	Pub & Restaurant	Red
92	Table Table	Pub & Restaurant	Red
93	Beefeater	Pub & Restaurant	Red
94	Starbucks	Café & Coffee Shop	Red
95	Slug & Lettuce	Pub & Restaurant	Amber
96	Caffé Nero	Café & Coffee Shop	Red
97	Giraffe	Pub & Restaurant	Amber
98	Park Inn by Radisson	Accommodation	Red
99	All Bar One	Pub & Restaurant	Amber
100	Strada	Pub & Restaurant	Amber
101	EAT	Fast Food & Food To Go	Red
102	Better	Gyms & Health Clubs	Amber
103	Days Inn	Accommodation	Red
104	Pontin's	Holiday Parks	Amber

Next steps: your OC&C Fundex checklist

As well as the broad themes covered in this report, the OC&C Fundex offers actionable business insights tailored to individual brands.

To find out if you could benefit from this, ask these questions in your next team meeting:

- Do we really know who our customers are and what they find important?
- Are we delivering sufficiently well on the basics?
- Are we investing in the right parts of our proposition and guest experience?
- Is our brand positioning genuinely distinctive? Do our guests agree?
- Is our appeal sufficiently broad?
- Is our operating platform giving us genuine advantage?
- Is our proposition working hard enough to encourage guests to come back for more?
- Are our guests having as much fun as we'd like?

If you've answered 'no' to any of the above - or would just like to find out more about the OC&C Fundex results - our team would be delighted to hear from you.

We'd love to help you become our **next champion!**





David Foster

David is an Associate Partner in our hospitality & leisure team, and is the creator of the OC&C Fundex. He particularly focuses on the Restaurants & Pubs, Holiday Park, and Entertainment sectors. As a former pub manager he likes to think that he knows a thing or two about fun, and is indulging his passion for discovery by trying to visit at least one new pub or casual dining experience each week in 2019.

Alex Birch

Alex is a Partner in our London office and global head of our hospitality & leisure practice. He works with clients across sectors, with recent focus in Food & Drink, Gyms & Fitness, and Gaming. We'd love to say he finds skydiving fun - but we are not sure it is true.

James George

James is OC&C's International Managing Partner and supports leisure businesses across the Coffee Shop & FoodToGo, Accommodation, Cruise, and Travel sectors on their most challenging problems. His fun provokes a Marmite-like response in everyone else: back to back marathons, surfing with sharks in Cornwall, and occasional wrestling with our team.

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