



# DESTINATION FOOD COURT

Facts. Success factors. Insights.



# Market places and comfort zones

+100% 

The number of customers using the dining options at food courts has risen over the last 10 years: Customers enjoy food courts.<sup>1</sup>

The combination of dining and retail corresponds to the human basic needs of exchange and inspiration. Today, modern food courts are popular points of attraction in shopping centers for customers to spend time together. ECE has experienced an absolute food court boom in the last few years and provides capable support in development and implementation, while taking into account tenant needs as well as current success factor analyses.

  
24%

of the visitors stay an hour or more in the food court, and 90% at least a quarter of an hour: Food courts are popular rest areas.<sup>2</sup>

  
40%

About of the visitors also choose their shopping center by the dining options available: Food courts are customer magnets.<sup>2</sup>

# Over 20 food courts

*"Food courts are very important for the 'feel-good factor' of a shopping center.*

*Customers can enjoy themselves here according to their own interests, as long as the offers and the atmosphere are right."*

JOANNA FISHER,  
ECE, Managing Director Center Management

have been opened by ECE in the past 11 years; 50% were set up in the past three years.



**Impressive footfall magnet:**  
Floors with food courts often have the highest footfall in shopping centers.

Food Court Floor



## Visitor magnets and creators of synergies

Not only operators benefit from successful food court concepts, but also the other tenants in the centers, through

- **Synergy effects.** Food courts are important sales drivers and enhance the services of a shopping center.
- **Image benefits.** Food courts are locations with a high quality of stay and as such provide a highly attractive environment.
- **New target groups.** Attractive dining options attract a wide range of target groups and offer new marketing opportunities.



Source:  
1 ECE Customer Survey 2004 and 2014  
2 TNS survey regarding food and beverages in shopping centers 2016, n= 1,019

# Food court success recipes made by ECE

There is no such thing as a single success factor. When designing and planning a food court, many aspects have to be considered and brought into a coherent **overall concept** which is tailored to each center. In doing so, ECE relies, among others, on a **scoring model** that evaluates the decisive criteria and provides an important basis for the actual potential analysis.

## CATCHMENT AREA

The higher the percentage of visitors with more than 30 minutes of travel time, the better: the center will then increasingly be used as a culinary meeting place. A large number of offices or work places in the surrounding area is also beneficial.

## TENANT MIX

The decisive factor is diversity: the more choice in a food court, the better for all retailers. The competitive situation is also crucial. Regional concepts and large system providers complement each other perfectly.

## ATMOSPHERE

Interior, noise level, music concept: everything has to be sensitively coordinated in order to offer the guest the highest possible quality of stay. If you feel comfortable, you want to stick around – and consume accordingly.

## LOCATION

The food courts in shopping centers should be quickly accessible and easy to find. In addition, they should provide visitors with pleasant views.

## QUALITY

For every dining concept, the offer has to be right. Quality has always been one of the most important success factors. Customers also increasingly emphasize sustainability when dining.

63%

of the surveyed customers value a special architectural design.

ECE Customer Survey 2015  
regarding food court use, n = 2,598



## SATISFACTION PROVIDER

These factors are indispensable for food-court success:<sup>1</sup>

- Fair value for money
- Short waiting time
- High seating capacity
- Friendliness and cleanliness
- "Cashless payment" option

<sup>1</sup> ECE Customer Survey 2015  
regarding food court use, n = 2,598,  
factor analysis leading to overall  
customer satisfaction



# 17 million

visitors per year in all food courts – three times as many as at Oktoberfest



# 12,000 m<sup>2</sup>

total leasable area of all food courts - equals about 61 tennis courts



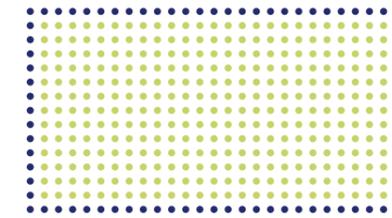
# 2/3

lunch visits in food courts (on average)<sup>1</sup>



# 400

seats per food court (on average)



# 50%

of food court visitors are under 30 years of age (on average)<sup>1</sup>



## ECE food courts in facts

In recent years, ECE has conducted numerous analyses on the subject of "food and beverages in shopping centers". A strong basis of knowledge, which is supplemented by center-individual considerations and potential analyses. All with the target of implementing lasting and successful concepts for food court operators and tenants.



# Food court

# Analysis

## Annual turnover

of a food court corresponds to that of a fashion store with a shop space of at least 1,500 m<sup>2</sup> (on average)<sup>2</sup>



### Results from the ECE Customer Survey 2016 (n=62,970):

Around 80 % of customers visit the food court at least occasionally.

Food court visitors spend about 50 % more time in the shopping center and are also more satisfied with the services available.

Furthermore, the more frequently the food court is visited, the higher the satisfaction with the center!



# > 200

food court tenants in Germany

# 8,000

seats in total in all food courts - 6 times the size of the largest movie theater in Germany



# 43%

of all food court operators are independent tenants – individuality counts



# 2,200

meals per day in food courts (on average)



# 6 times

seat usage per day in food courts (on average)



# 2/3

of the customers rate the food court with very good or good<sup>2</sup>



Source:  
1 ECE Customer Survey 2015 regarding food court use, n=2,598  
2 ECE Customer survey 2016 (n=62,970)



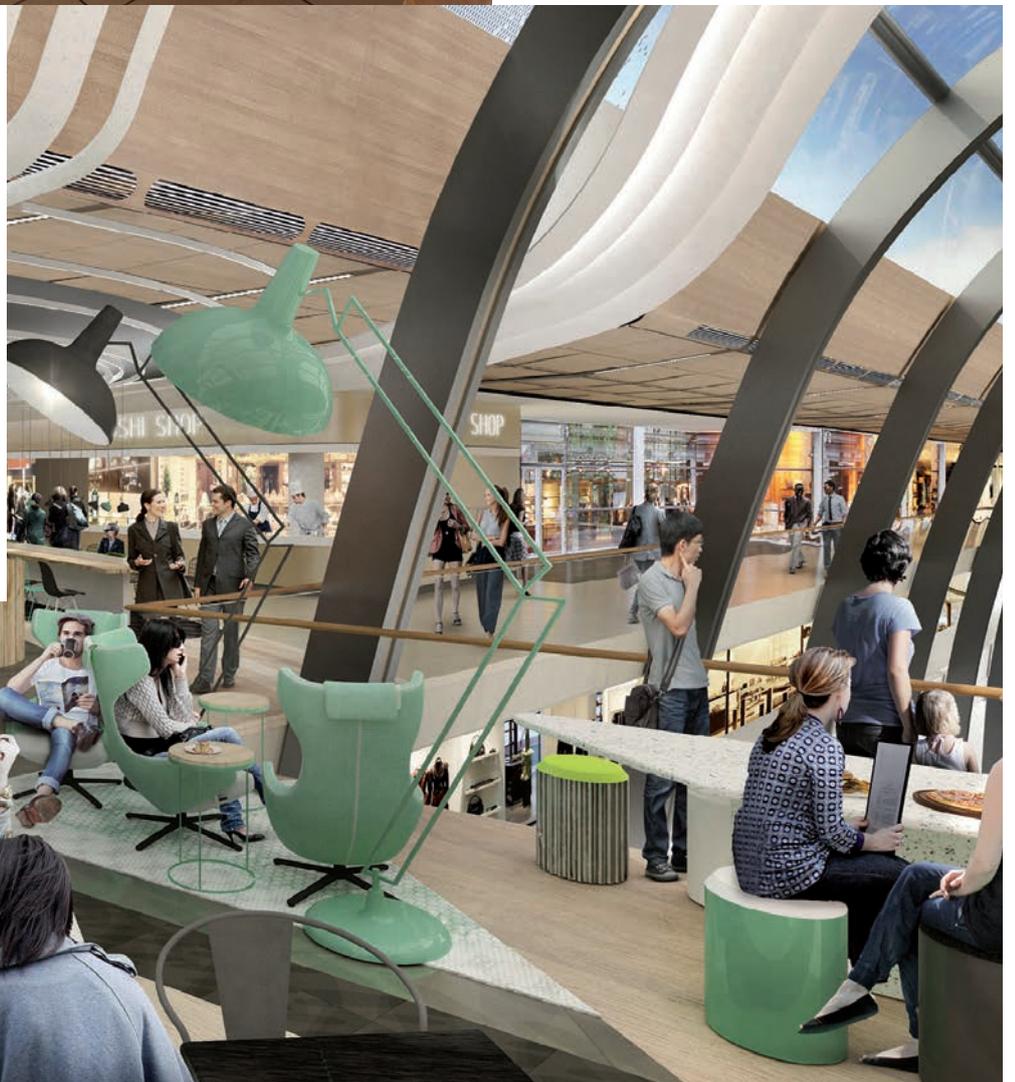
## First-class dining: “Foodtopia” in Frankfurt’s MyZeil

“Foodtopia” in Frankfurt’s MyZeil is an own culinary experience, not a classic food court. 15 individual concepts with local, national and international retailers will redefine the dining options available in shopping centers, starting in 2018.

“Foodtopia” is an inspiring destination for the senses: with breakfast offers in the morning, a “quick lunch” at noon, a three-course meal in the evening and a drink with a view of the Frankfurt skyline. Three outdoor terraces and a cinema will round off the spectacular overall offering in the future, which will be available for visitors from 8:00 a.m. until 2:00 a.m.

## Panorama with flair: “FoodSky” in the Europa Passage Hamburg

Whoever wants to enjoy the culinary charm of the cities of Paris, London, Madrid and Stockholm no longer has to travel there. It is enough to visit the new food floor in the Europa Passage Hamburg. 15 outlets and 5 restaurants form a varied ensemble above the roofs of the Hanseatic city. The seating areas take on the flair of European metropolises, while the view sweeps far over the Alster. A pleasure that visitors can also experience on Sundays and during extended opening hours.





## Detailed analyses as a foundation of knowledge

ECE wants to make strategic decisions on a sound base of knowledge and therefore conducts precise surveys and studies on a regular basis. Another example for this is Germany's largest shopper-type analysis which identified 8 accurately defined shopper types and provided important insights for future, center-individual success strategies.

For more ECE publications go to:  
<http://www.ece.com/en/media-center/publications>



## ECE provides support during development and implementation

As a large food court operator in Europe, ECE provides expert support in the form of a partnership during both the planning and realization phases. The individual needs of the tenant play a major role – and the joint success remains the declared target.

If you are interested in more information or if you have any questions about food court concepts, the Technical Key Account Management is available by phone: **+49 40 60606 – 7608**, or send an e-mail to [shop@ece.com](mailto:shop@ece.com)

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