# Autogrill®

## Next Station

## Consumer eating and spending patterns at Roma Termini, Madrid Atocha and Paris Gare du Nord: analogies and differences of the various markets

Rome, February 3 2005

# Autogrill Group at a glance


Avignon Railway Station

- 3.1 billion Euros
- 4.000 points of sale
- 14 Countries
- Airports, Motorways, Stations, Malls, City centers, Ports, ...
- 690 million customers
- 260 million coffees
- 85 million sandwiches
- 55 million pizzas
- ....

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# Strong presence in 5 channels


Toll/Non Toll Motorways

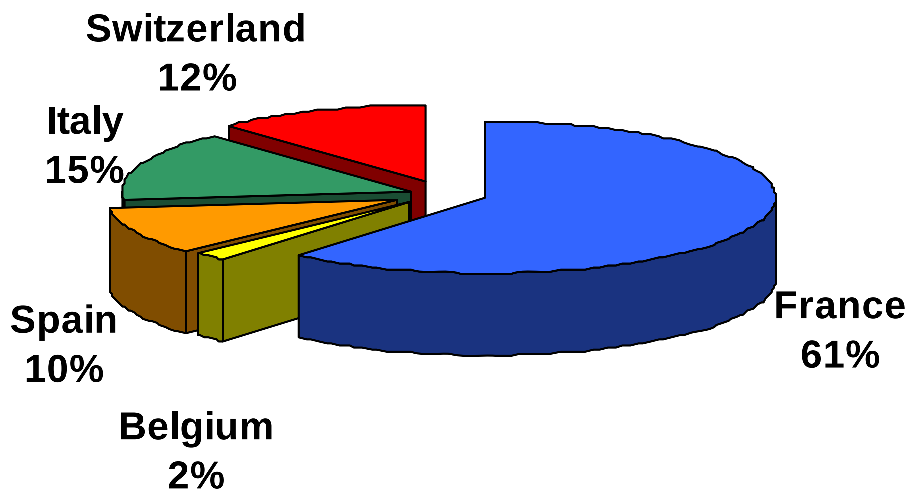
Railway Stations

Airports

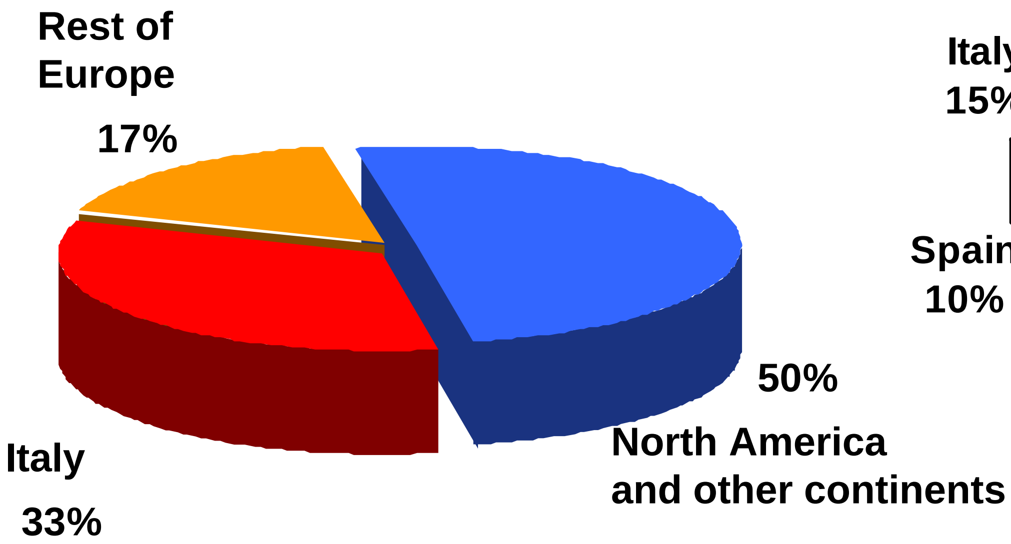

Shopping Malls/City Centers

# Turnover by country

Railway Station




Global




Leadership in ***food&beverage*** and ***retail*** services
for "people on the move"

# Approach of the survey

## Approach:

**1.500 face to face interviews using the P&P method (Paper and Pencil Interviewing) in:**

- **Paris Gare du Nord**
- **Madrid Atocha**
- **Roma Termini**

**Targeted by:**

- **Commuters**
- **Long Distance train travellers**
- **High Speed train travellers**
- **Non travellers**

# Objectives
# of the survey

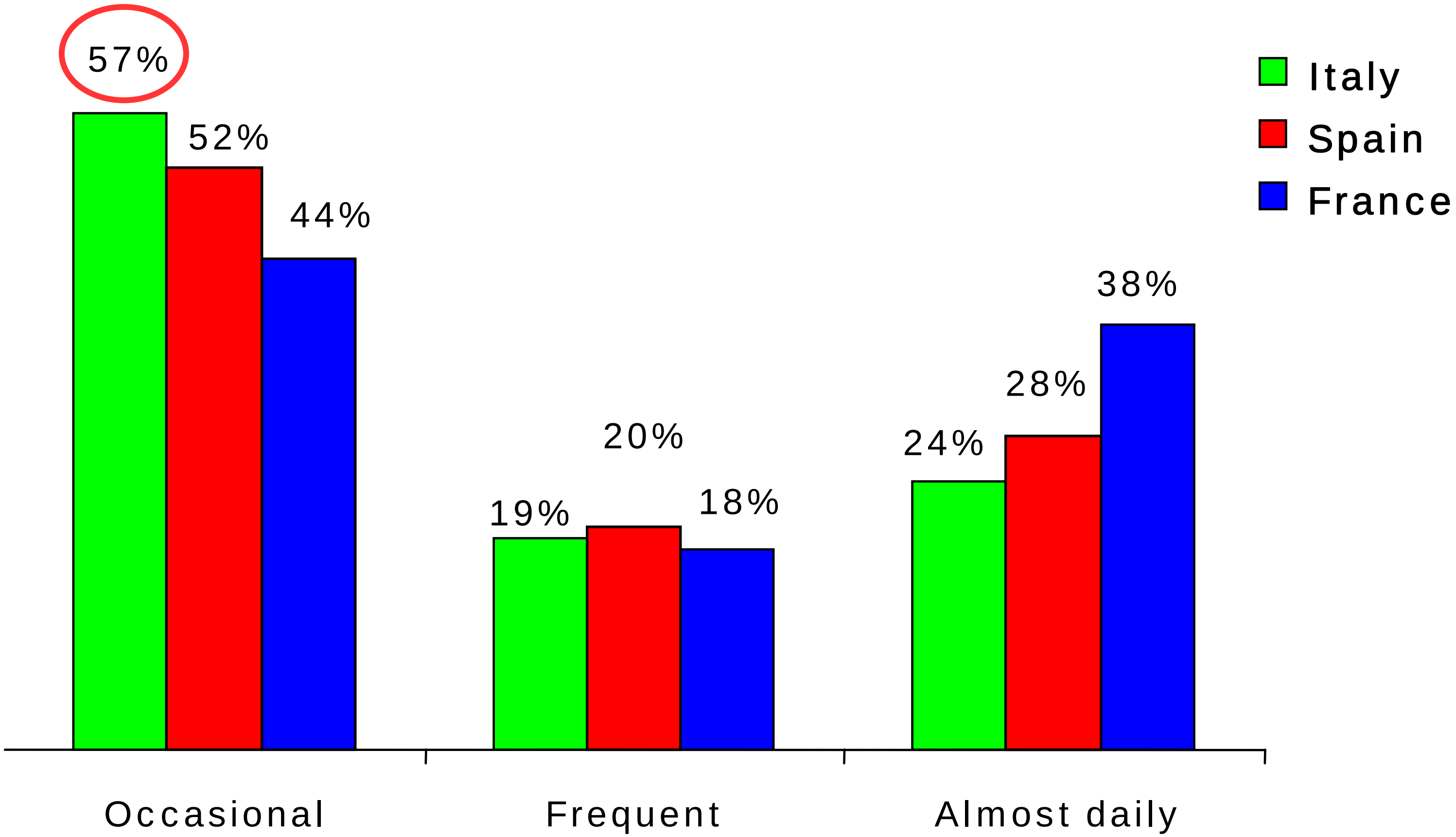
## Objectives:

- Railway station customer profile
- The best used Restaurants products & services in Railway Stations
- The differences/analogies with other Channels

# Railway station customer profile

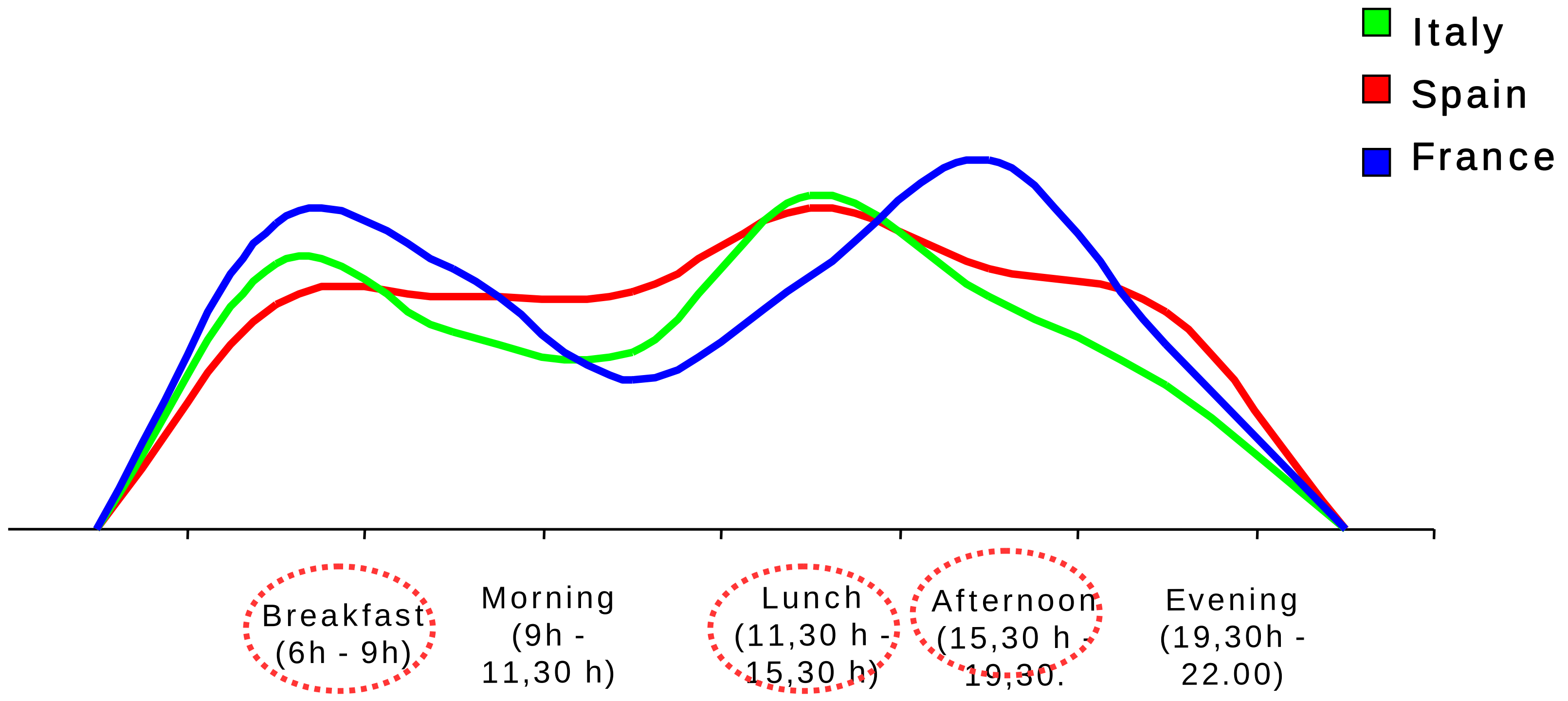
<table>
<tr><th>Base: Total sample</th><th>ITALY (414)</th><th>SPAIN (408)</th><th>FRANCE (392)</th></tr>
<tr><td>• PROFESSION</td><td>%</td><td>%</td><td>%</td></tr>
<tr><td>– Manager/entrepreneur/freelance professional</td><td>11</td><td>7</td><td>17</td></tr>
<tr><td>– Teacher</td><td>4</td><td>3</td><td rowspan="2">31</td></tr>
<tr><td>– White collar worker</td><td>30</td><td>40</td></tr>
<tr><td>– Merchant /shopkeeper (own business)</td><td>2</td><td>2</td><td rowspan="4">20</td></tr>
<tr><td>– Merchant/shopkeeper (employed by others)</td><td>3</td><td>3</td></tr>
<tr><td>– Craftsman/tradesman (own business)</td><td>1</td><td>-</td></tr>
<tr><td>– Craftsman/tradesman (employed by others)</td><td>1</td><td>-</td></tr>
<tr><td>– Manual labourer</td><td>5</td><td>6</td><td>1</td></tr>
<tr><td>– Student</td><td>38</td><td>32</td><td rowspan="4">31</td></tr>
<tr><td>– Housewife</td><td>2</td><td>1</td></tr>
<tr><td>– Retiree</td><td>1</td><td>1</td></tr>
<tr><td>– Unemployed</td><td>2</td><td>5</td></tr>
</table>

# The Station visiting frequency



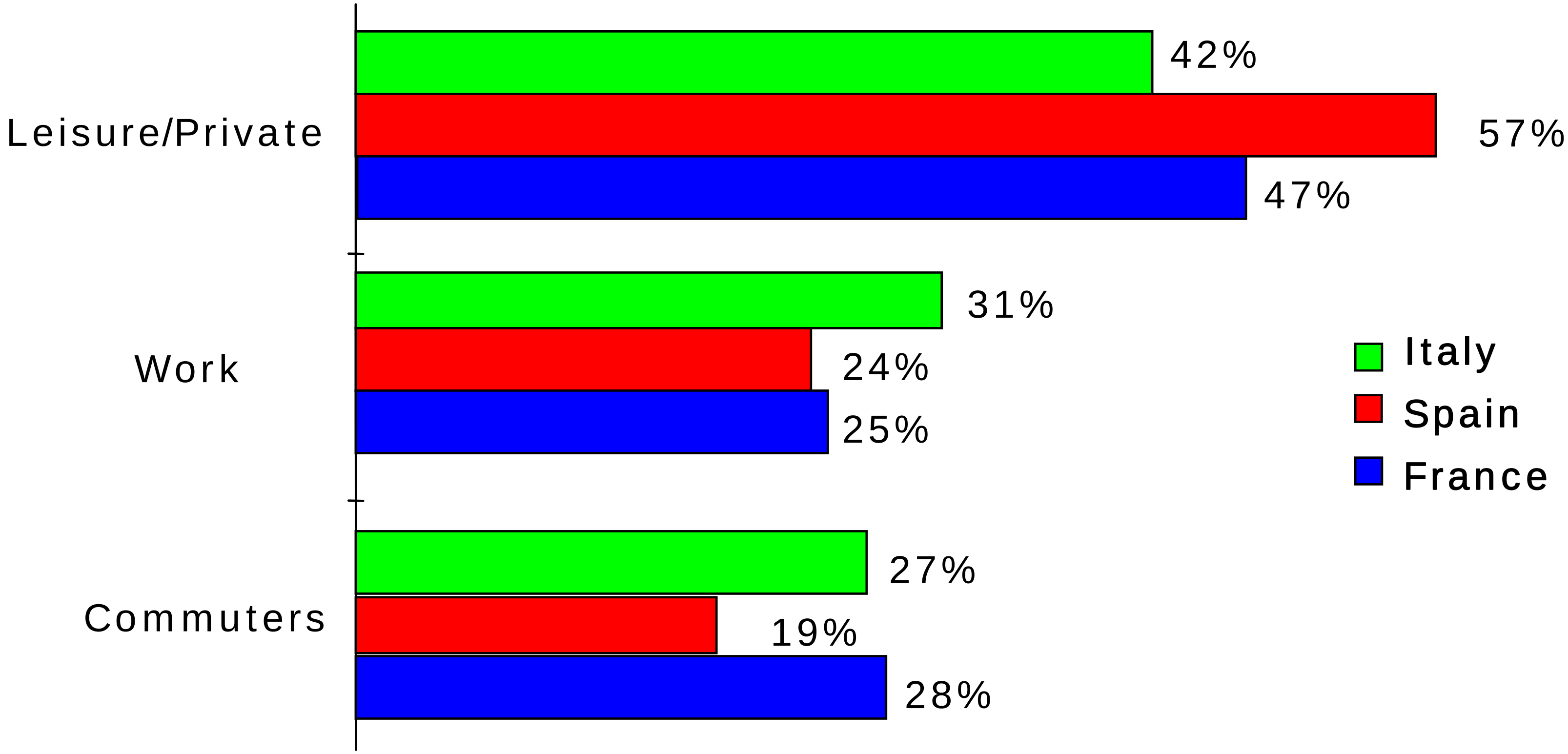

Higher weight of Occasional Visits almost everywhere with a higher weight in Italy

# Time of visit



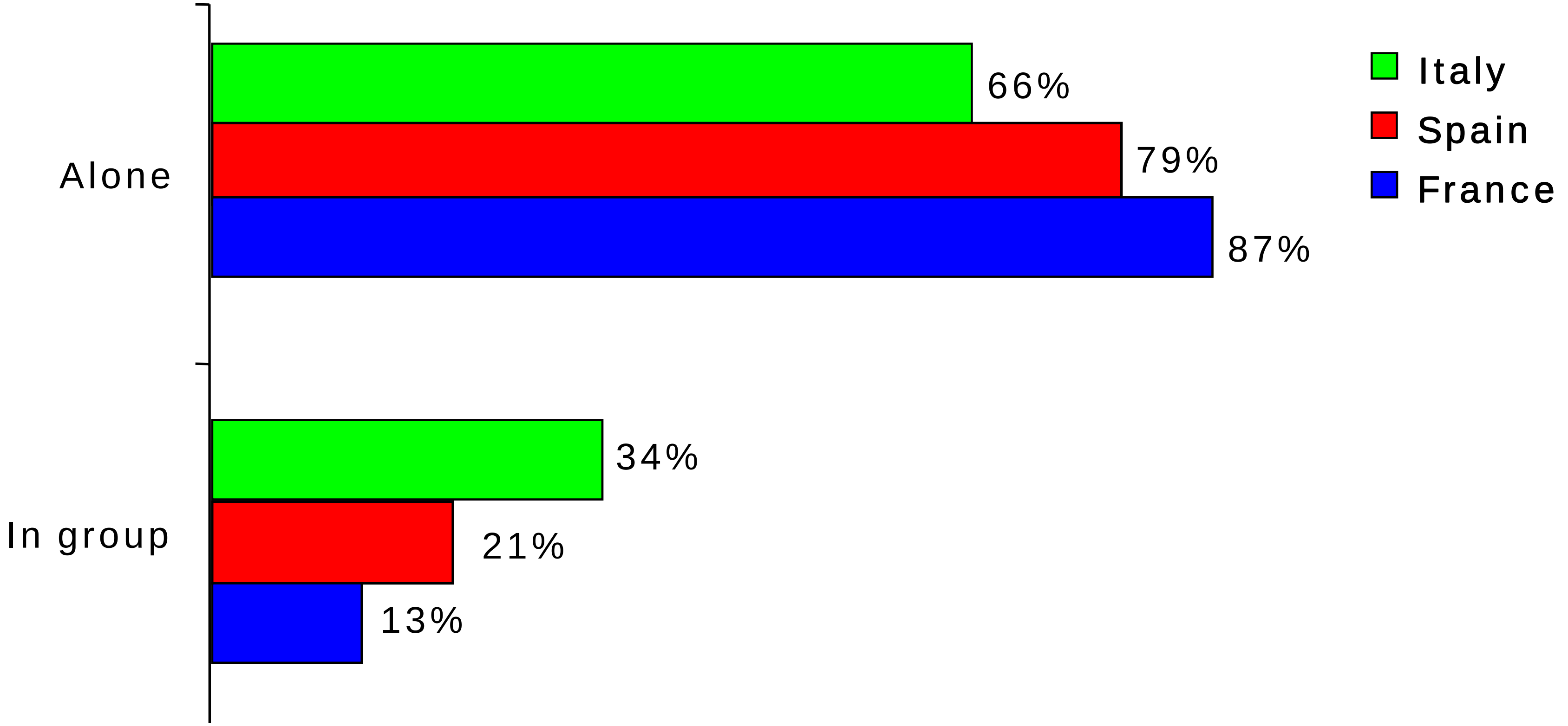

2 peaks overall with higher weight of Lunch usage in I and E, whereas F shows a peak in the afternoon

# Reason to be in the station




Similar behaviour among countries between categories. 50/50 between private and work+commuting

# Ways to travel



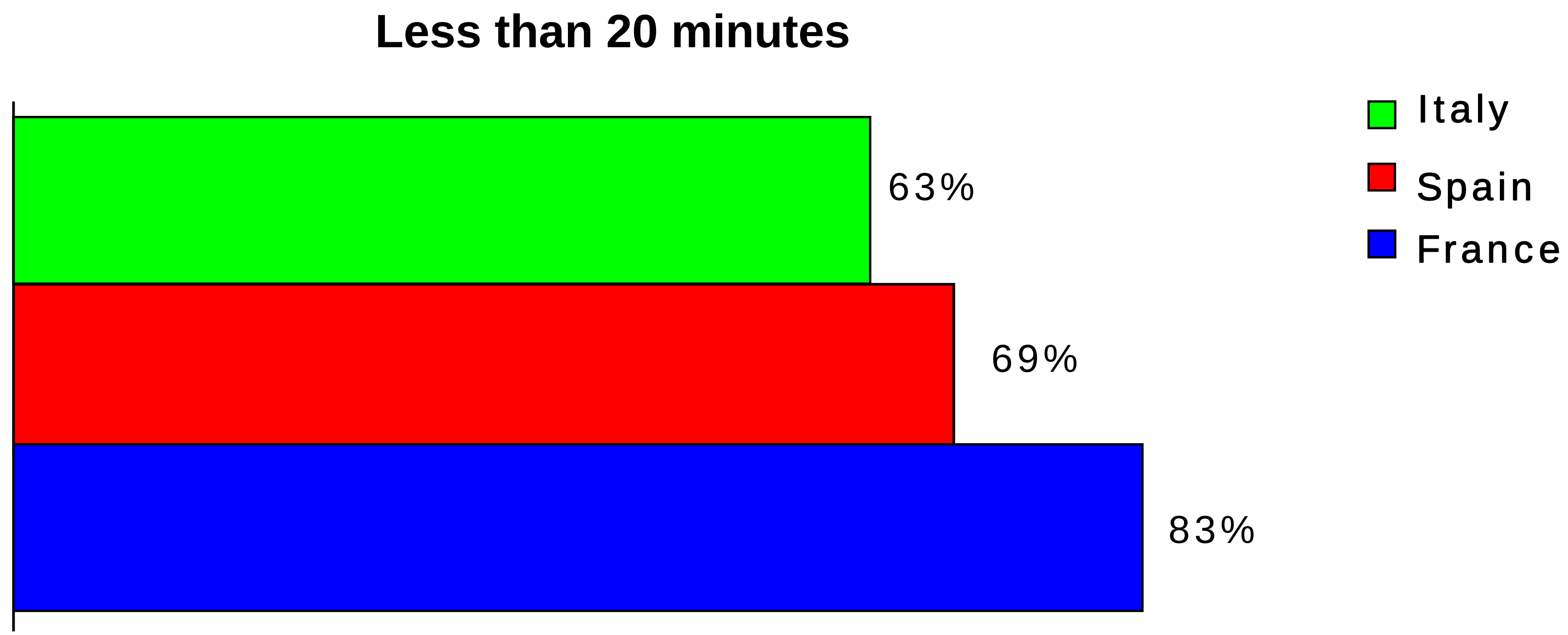

Mainly “lone” visitors

# Non buying: reason why

| | Italy | Spain | France |
|---|---|---|---|
| • "I have no time" | 33% | 23% | 24% |
| • "I eat my own sandwich" | 12% | 3% | 9% |
| • "I miss the opportunity" | 10% | 8% | 2% |

Main reasons is "time connstraint"

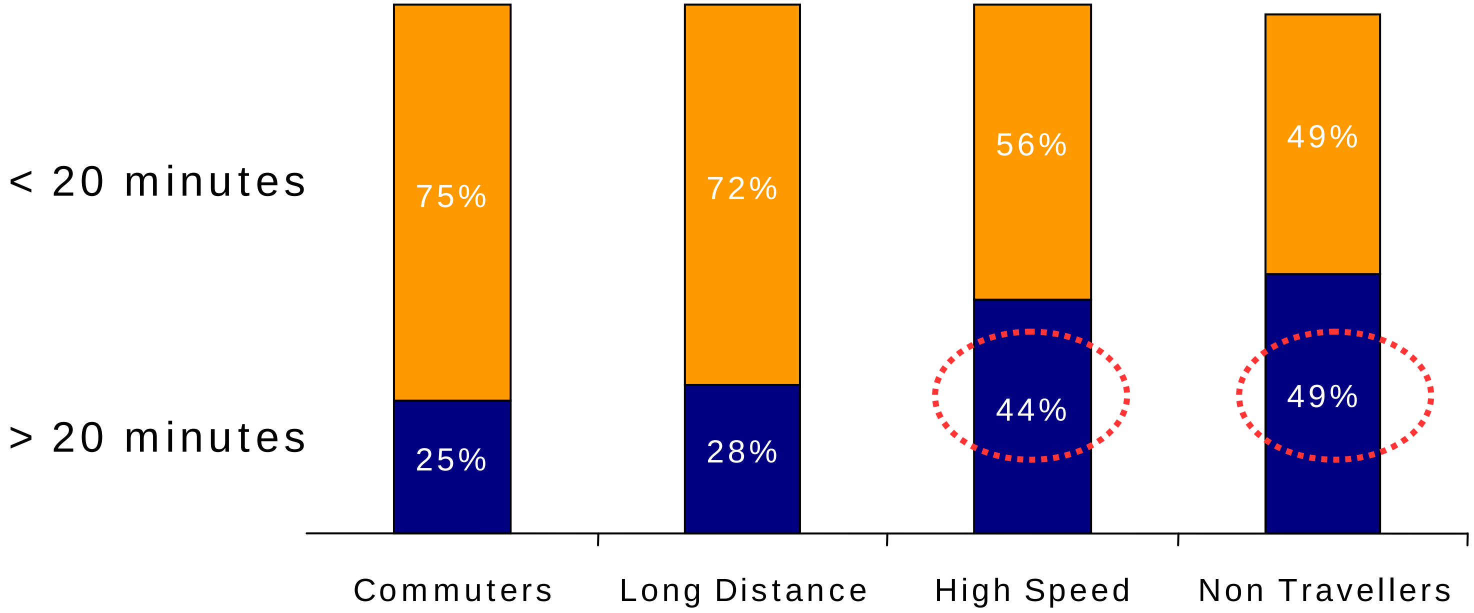
# Dedicated Time to eating and drinking (1/2)




Everywhere few time dedicated (available?) for E&D

# Dedicated Time to eating and drinking (2/2)

**Less than 20 minutes**




**Time differences by category:**

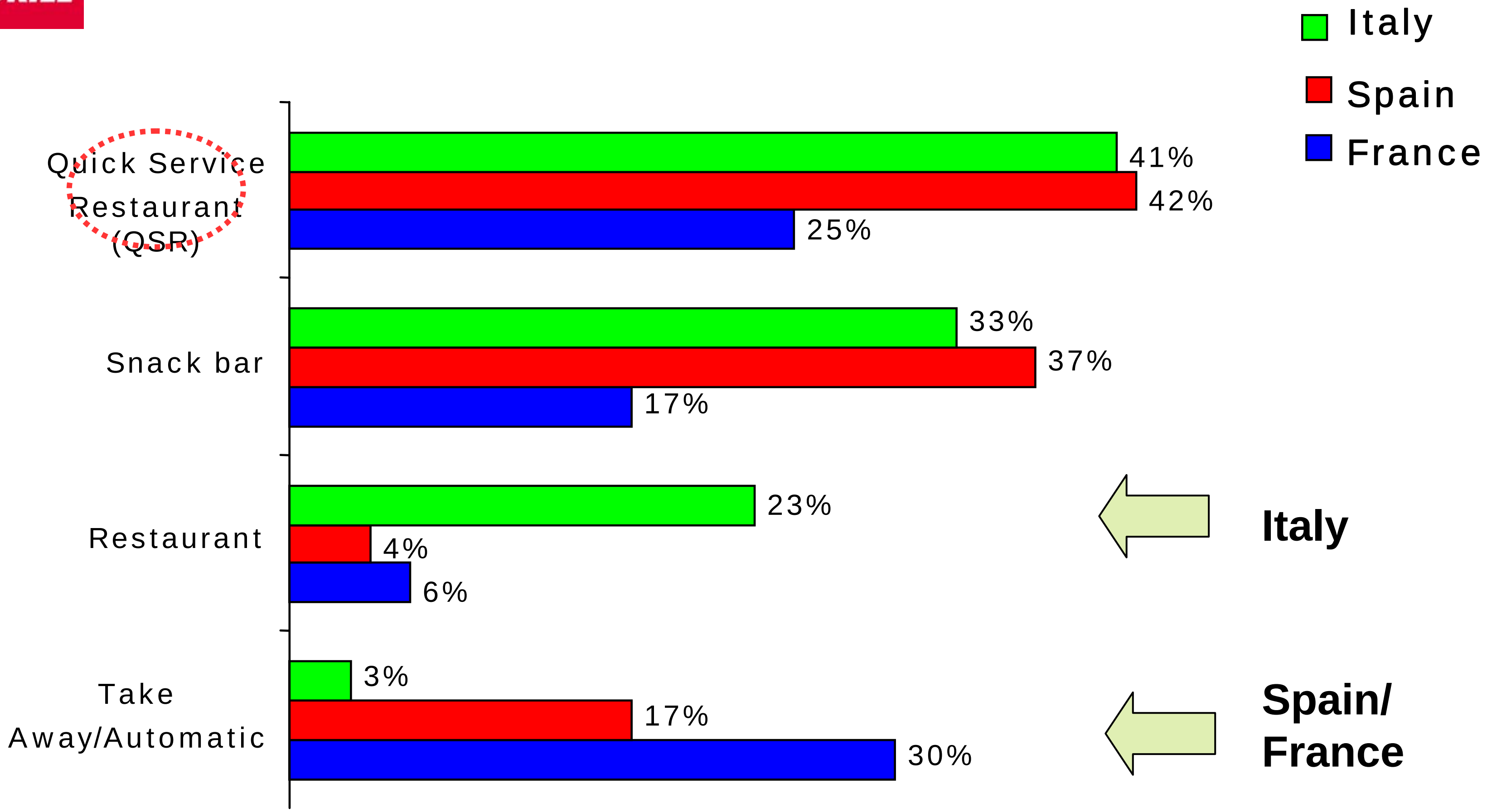
**More time available for non-commuters, probably due to different consumer attitudes (buying power?)**

# Products to buy (today)

| Always | Probably Yes | Probably No |
| --- | --- | --- |
| • Water | • Chips | • Ethnic food |
| • Breakfast | • Salad | • Fish |
| • Coffee | • Hot Dog | • Wine |
| • Sandwiches | • Bakery | • Alcoholic |
| • Juices | • Cookies | |
| • Soft Drinks | • …. | |
| • Ice Cream | | |
| • Convenience Market | | |

"Basic" products mantain the majority of preferences/needs (in every Country)

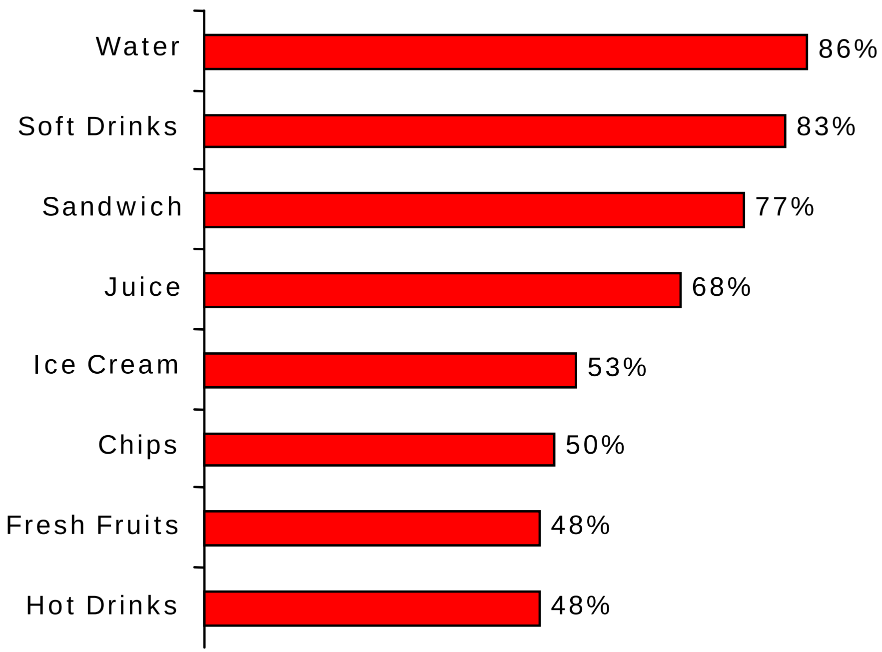
# Services to buy



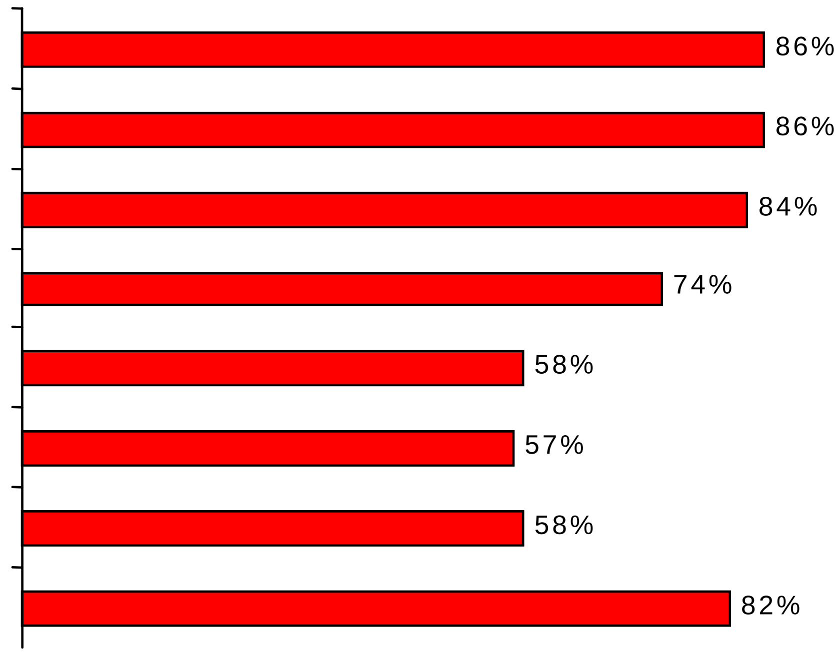

Quick-Service Restaurant (QSR) + take away from 44% (I) to 55% (F).
Opportunity for Take Away in Italy (3% vs 17% in E and 30% in F)

# Opportunity Take Away
# Which products?

Interest in Take Away




Favorite Product




**Take Away Service could merge consumer needs with time requirements ...**

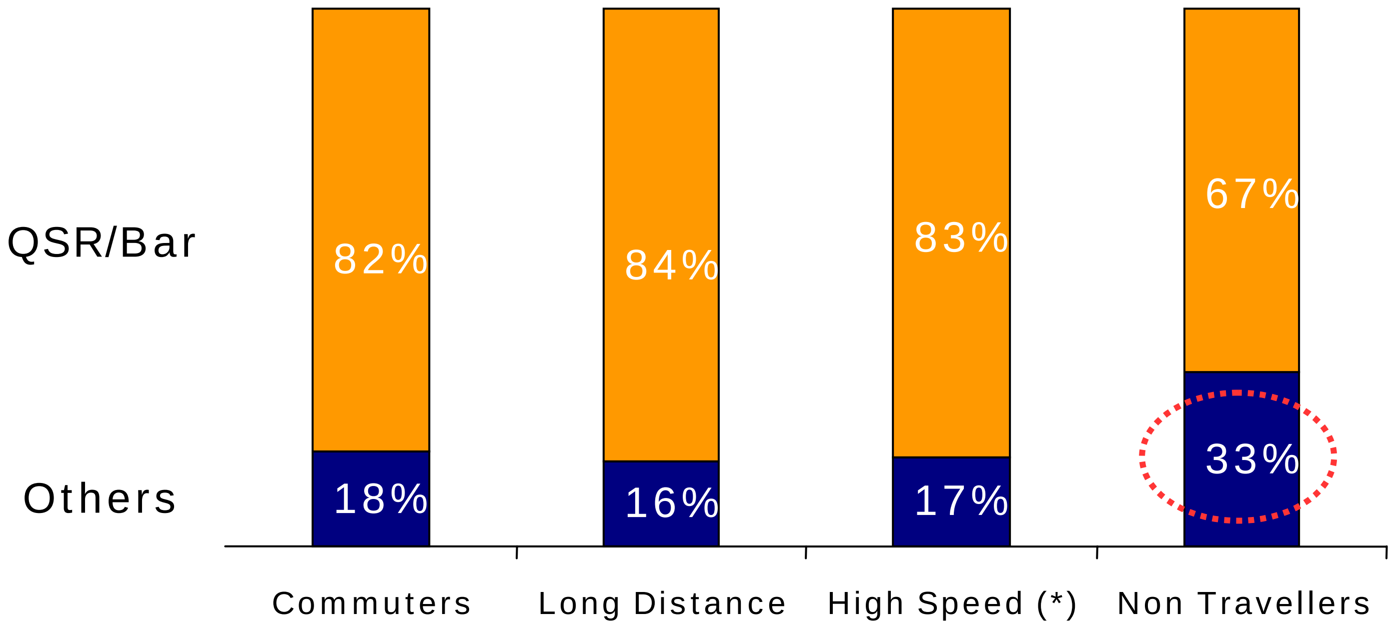
# Opportunity Take Away
# High returns


Take Away Kiosk –

**Sales performance: 26.000 €/sqm (vs average F&B = 3.500 €/sqm )**

**… and offers to the industry partners the highest returns/sqm**

# Services to buy by category (Italy)




.. … non-QSR/Bar services mainly preferred
by non-travellers (e.g. linked to move towards shpping mall model)

*Spain

# Services choice related to available time

| Available Time: | Favorite Service: Italy | Spain | France |
|---|---|---|---|
| ➢ > 30 Minutes | Restaurant | Table bar | Restaurant/ Cafeteria |
| ➢ < 30 minutes | Q.S.R./ Bar | Q.S.R./ Take Away | Q.S.R./ Take Away |

Increasing weight of non-travellers, with higher time available, will ask for new services

# Key elements of service choice

1. **eating time guarantee (be "master of the time")**
2. **comfort (heating/conditioning)**
3. **"easy to find" (i.e. signage)**
4. **"close to platforms" (**only travellers**)**
5. **Timetable close to F&B location (**only travellers**)**
6. **Products  Quality/Freshness as prerequisite**

# Channel Comparison
## Demographics (F&B users)

| | Employee | Manager | Student |
|---|---|---|---|
| Motorway | 25% | 20% | 11% |
| Airport | 25% | 32% | 12% |
| Shopping Malls | 33% | 17% | 17% |
| Railway Stations | 27% | 19% | 31% |

Lower buying power

Relevant group are students/Young people in Railway Stations
(lower buying power vs other channels)

# Channel Comparison
# Available time (F&B Users)

| | Available time | |
|---|---|---|
| | < 60 min. | 60 – 120 min |
| Motorway | - | - |
| Airport | 48% | 36% |
| Shopping Malls | 27% | 38% |
| Railway Stations | 50% | 11% |

Users in Airports and Shopping malls show more available time

# Channel Comparison

## Reason Why to buy/stop

| | Eating/ Drinking | Break | Services | Oil |
|---|---|---|---|---|
| Motorway | 45% | 38% | 45% | 30% |
| Airport | 45% | 16% | 22% | - |
| Shopping Malls | 50% | 32% | 5% | - |
| Railway Stations | 44% | 14% | 7% | - |

Main reason is e&d overall. Shopping malls and Motorways have also "break"/service" reason

# Channel Comparison
## Seasonality
## Weight of the end-of-the week sales

| | Italy | Spain | France |
|---|---|---|---|
| Motorway | 31% | 39% | 36% |
| Shopping Malls | 23% | 29% | - |
| Railway Stations | 18% | 27% | 26% |
| Airport (Business) | 14% | - | 31% |
| Airport (Hub) | 12% | - | - |

Highest weight in Motorways. Railway Stations are between Shopping Centers and Business Airports

# Channel Comparison

## Seasonality

## Weight of the end-of-the year sales

| | Italy | Spain | France |
|---|---|---|---|
| Motorway | 8% | 7% | 7% |
| Shopping Malls | 13% | 11% | |
| Railway Stations | 7% | 9% | 8% |
| Airport (Business) | 8% | - | 7% |
| Airport (Hub) | 7% | - | |

**Shopping Malls reach the yearly peak in December whereas for railway stations, similarly to other channels is below/in average in every country**

# Conclusions

- Current picture shows a role of the station mainly **functional to travelling needs.** <u>Speed of service, take away and traditional offer are a must</u>

- New train services (i.e. high speed) will change the passenger mix/profile and habits but a more dramatic change will be brought by renovation works with the development of new commercial spaces which will move the station towards a more **dynamic "shopping&entertaining" environment**

- **Customer behaviour and needs** will therefore **change** asking for **formats** and **concepts.** <u>Beside traditional QSR/Bar new services like high end bar and table service will be required. Tomorrow's F&B panel will discuss which this new formats will be.</u>

**We aim at being your favorite partner in this ambitious change!**

**Thank you**