

> ECE MARKET RESEARCH NO. 1/2016

The background image shows a multi-level shopping center interior. A prominent feature is a large, curved wooden structure that looks like a modern staircase or a decorative railing. People are seen walking on the ground floor and sitting at tables on the upper levels. The ceiling is high with a grid of lights. The overall atmosphere is bright and modern.

DESTINATION FOOD

Food & Beverages in Shopping Centers



Food and beverages are booming

From 2010 to 2015, food & beverage turnover at German ECE centers grew by

+54%



Food & beverages as opportunities

Why food & beverages in shopping centers make a difference.

Food is playing an increasingly important role in our society. So it makes sense that this trend has also reached shopping centers, which are increasingly evolving from “places to shop” into “places to eat” and thus also “places to be”. In recent years the floor area occupied by restaurants has grown steadily – a development that will accelerate in the future.

Today about 60% of our visitors take advantage of on-site restaurants and snack bars. In fact, 40% choose “their” shopping center on the basis of its food offerings – I think this is an impressively high percentage. They are obviously not doing that simply because they’re hungry. Today people like to enjoy themselves when they go shopping; socializing and a pleasant atmosphere are important. Food is increasingly becoming a key experience in shopping centers – and an essential feature that differentiates shopping centers from the online retail trade.

We took a closer look at this phenomenon for you and conducted a series of studies and analyses that document this trend with facts and figures. We present our results here in a format that is compact and informative, supplemented by our many years of experience and our expertise in developing and managing shopping centers. We’re doing all this so that you can make optimal

decisions and exploit the huge food & beverage potential of our shopping centers. After all, the 4.5 million visitors who come to our ECE centers every day are 4.5 million potential food & beverage guests!



» The food & beverages in shopping centers are becoming a significant feature that differentiates shopping centers from online trade.

ALEXANDER OTTO
CEO of ECE

Facts and figures*

40%

choose a shopping center according to its **range of food outlets**

60%

go to a food outlet **almost every time**

Facts and figures about shopping center customers



55%

of customers appreciate the food outlets in shopping centers because they are **fast and practical**



75%

are satisfied with the food courts in shopping centers (average rating: 2.2)



89%

of the guests at food outlets stay **for more than 15 minutes**

64%

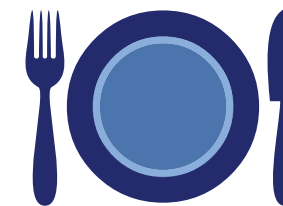
rate the **food court mix** as good or very good

Facts and figures about ECE's food and beverage lessees



€5.70

average value of coupon (range: €3 to €13)



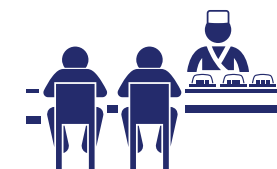
On average,

223

meals are sold daily per food outlet (ranging between 50 and 700)

1,500

food outlets in total in ECE shopping centers



Less than

10 to more than 1,000 m²

of floor area (average: 122 m²)

The bigger picture

ECE operates 196 shopping centers in 14 countries – and food & beverage outlets play a defining role in almost all of them.

ECE has been developing, planning, building, leasing, and managing major shopping centers for more than 50 years. It is the European market leader in the segment of inner-city shopping centers. In its first few years the company initially expanded in Germany, which is still a major focus of operations. Today it manages 143 shopping centers in Germany. Almost 20 years ago, ECE began its international success story, which has resulted in 53 shopping centers abroad. Eight more shopping centers are currently being planned or built in Germany and abroad.

ALL OF THEM HAVE ONE THING IN COMMON: Food & beverages are playing an increasingly important role as a key aspect of shoppers' quality of stay.

+38%

growth of **total floor area of food & beverage outlets** in ECE shopping centers in Germany between 2010 and 2015

The number of **food & beverage contracts** at ECE shopping centers in Germany grew by **+43%**

between 2010 and 2015

196
shopping centers
are operated
by ECE in Europe

COUNTRIES	ECE centers in operation
 Germany	143
 Turkey	12
 Poland	9
 Spain	6
 Austria	6
 Hungary	5
 Russia	5
 Czech Republic	3
 Italy	2
 Slovakia	1
 Bulgaria	1
 Denmark	1
 Lithuania	1
 Qatar	1

CENTERS BEING PLANNED/BUILT	
 Germany	4
 Turkey	3
 Italy	1



// 01

What counts is
quality of stay



TNS Infratest

Slower food

Linger and enjoy: For customers today, eating out is all part of the shopping center experience.

As shown by a TNS Infratest study that was commissioned by ECE and is representative of Germany as a whole, the importance of food and beverages in shopping centers is backed up by hard data. Almost 66 percent of customers visit a food and beverage outlet during their visit to a shopping center. And for as many as 33 percent, eating at a café or restaurant is a firm ritual. These figures are even higher abroad, but Germany looks certain to close the gap in the near future.

The ECE study "Food and beverages in shopping centers" reveals which types of cuisine are favored by customers and what aspects enhance the experience for them. We all know the need to take a short break and just watch the world go by. Shopping centers should therefore feature the kinds of cafés and restaurants that fulfill this new need for an oasis of calm away from all the hustle and bustle. That's because today's customers place a greater emphasis on taking the time to linger and enjoy.



Customers want food outlets with a pleasant and relaxed atmosphere away from the hustle and bustle.

JOANNA FISHER
ECE, Managing Director Center Management

Almost
40%
of customers choose their shopping center on the basis of the **cafés and restaurants** it offers

Something for every taste

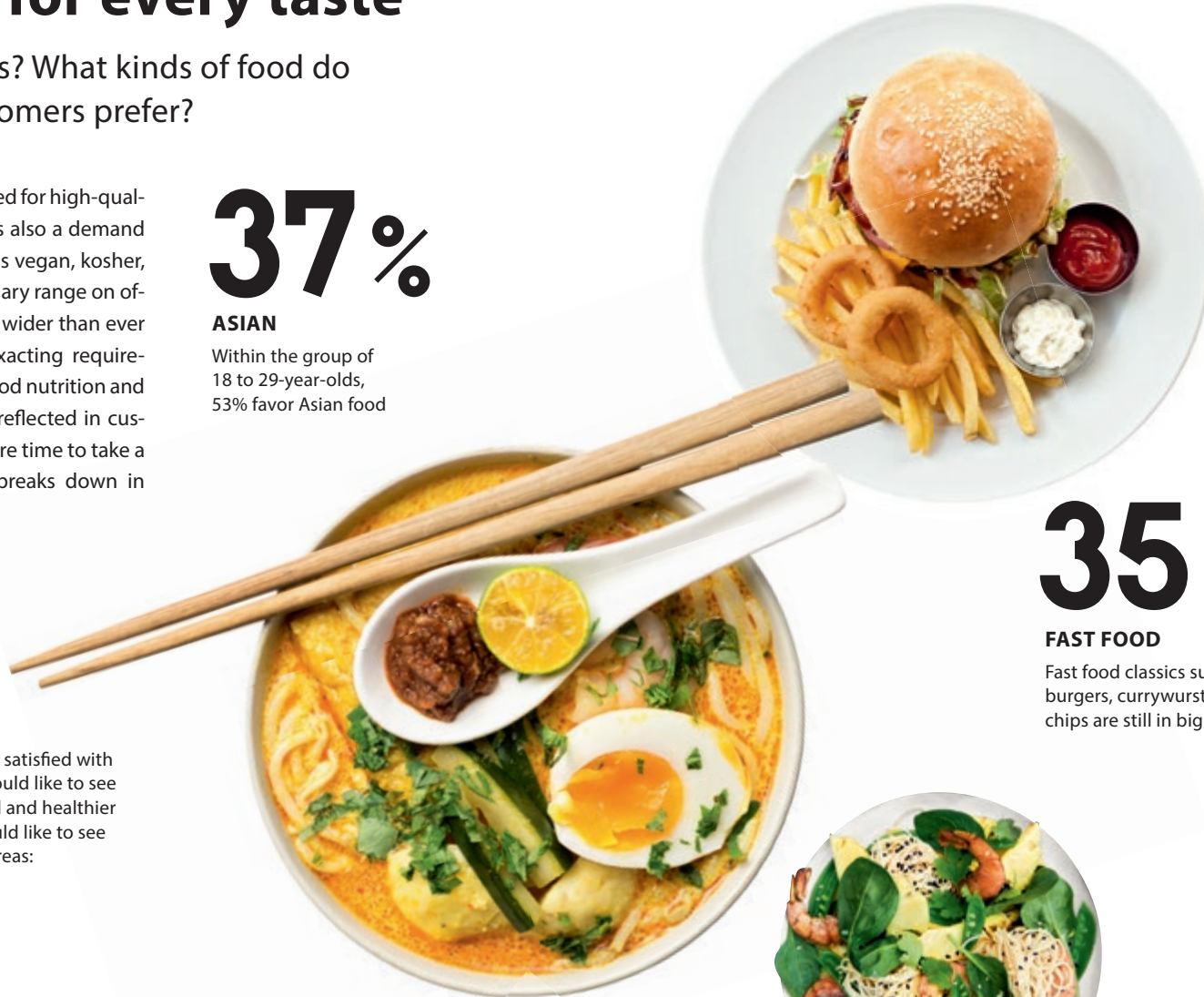
Asian cuisine or wraps? What kinds of food do shopping center customers prefer?

Above and beyond the general need for high-quality, fresh, and healthy food, there's also a demand for specific types of cuisine such as vegan, kosher, and halal. In other words, the culinary range on offer at a shopping center has to be wider than ever before in order to meet these exacting requirements. A growing awareness of good nutrition and the latest dietary trends are also reflected in customers' specific wishes. It's therefore time to take a closer look at how this variety breaks down in terms of actual customers.

37%

ASIAN

Within the group of 18 to 29-year-olds, 53% favor Asian food



BACK TO THE ROOTS

While over half of all users are satisfied with the range on offer, the rest would like to see more traditional German food and healthier options. Specifically, they would like to see an increase in the following areas:

- 13%** Regional German food
- 9%** Healthier options
- 7%** Mexican
- 7%** Innovative, trendy cuisine

27%

SANDWICHES

Sandwiches, rolls, and wraps for a tasty snack during a break



35%

FAST FOOD

Fast food classics such as burgers, currywurst, and chips are still in big demand



26%

ITALIAN

Pasta and pizza occupy fifth place on the popularity scale

44%

COFFEE

Cappuccino and other coffee drinks are the undisputed food court champions



24% ICE CREAM

24% CAKE, DONUTS

22% KEBABS, FALAFEL

19% SALAD



Source: TNS survey regarding food and beverages in shopping centers, 2016; n = 1,019; multiple responses were allowed

When the food is good, people stay

Customers linger longer in shopping centers with food and beverage outlets.

If the food is good, then so is the shopping center. This simple formula sums up the importance of food and beverage outlets. A look at the length of stay also reveals that customers like to take time over their food: 76% stay up to 30 minutes in a food court, and 24% stay for an hour or more. At the same time, 55% say it's quick and practical to eat in a shopping center. The survey also shows that an offer of free Wi-Fi is a good way to attract regular customers.

75%

rated the **food court** as good or very good

80% of respondents rated the **shopping center** as good or very good



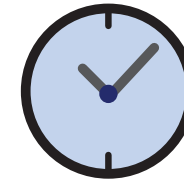
54%

of respondents said the range of **children's meals** was an important factor



51%

say that **free Wi-Fi** is an important factor



76%

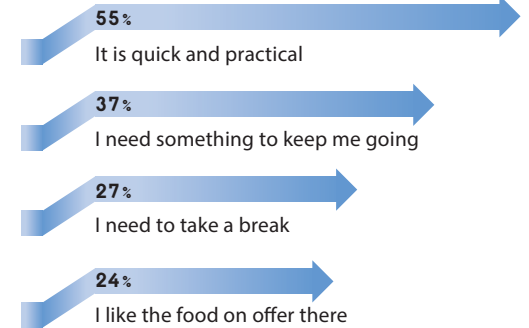
of customers **stay for up to 30 minutes** in the food court

24%

stay for an hour or more

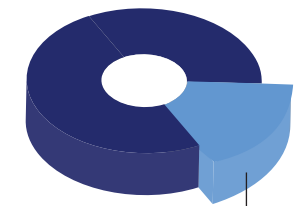
QUICK AND PRACTICAL

Customers say why they visit the food and beverage outlets in a shopping center



NON-USERS

The proportion of visitors to ECE shopping centers who do not make use of the food courts



83% regular users
Only 17% non-users

Of those, around **33%** prefer to eat at home

More than

80%

visit food and beverage outlets at least **occasionally**

60%

go to a food and beverage outlet **almost every time**





Food outlets must be part of the overall planning concept

According to corporate consultant Axel Weber, food and beverage outlets can be a key revenue driver for shopping centers



AXEL WEBER

The corporate consultant (Axel Weber & Partner) oversaw the market launch of Starbucks in Germany. Together with Gretel Weiss, he is head of the Foodservice Forum of the Hamburg trade fair Internorga.

Food and beverages can generate increased footfall for shopping centers. To what extent is this potential already being exploited?

In Germany too little attention is paid to the positive impact that food and beverage outlets can have on shopping centers. On average, less than ten percent of floor area is given over to restaurants and cafés. That's much less than in England. Yet studies show that we are spending more and more money on eating out. Today's shopping centers offer an all-round experience. And food and beverages are an important part of that.

To what extent can shopping centers and the food and beverage trade stimulate each other?

Food and beverage outlets have a big influence on whether shoppers opt to make their purchases in a shopping center or not. If you take this factor a little further, then a key issue is the quality of the cafés and restaurants. Service is important, too. And people prefer a good location. This means that the top locations in a shopping center should be reserved for cafés and restaurants. People like to sit where it's light and where there's a good view. Shopping centers need to incorporate all this into their food and beverage strategy.

You repeatedly emphasize the need for "integrated planning". What do you mean by that?

Planners and architects need to devise a concept that enables synergy between retail, on the one

hand, and food and beverages on the other. For example, cafés and restaurants should have access to a terrace for use in fine weather. That means locating food and beverage outlets at the entrance and exit or right by a roof terrace.

What kind of tools and information do operators need in order to make the right decisions?

Market knowledge is most important of all. The retail market is in a state of flux. There's a clear trend towards greater quality. And that applies to the total shopping center experience – that is, to the quality of not only the shops but also cafés and restaurants. Social factors also play a role. Lots of people go to a shopping center to meet up with friends. That requires space. For operators, this means allocating the top locations not only to the biggest-selling retail outlets but also to cafés where people can meet up.

Doesn't that discriminate against the big-selling tenants?

No, they benefit from that. Take for example a spectacular roof terrace as a visitor attraction. That increases footfall and generates a synergistic contribution to the creation of extra value from which the shops also benefit. Anyone who's interested in target groups should take a closer look at demographic trends in Germany. The customers of the future are over 50 and place a priority on quality in all areas of life.



Up to ten percent of floor area in English shopping centers is given over to cafés and restaurants. In Germany it's a maximum of seven percent.

// 02

Guests love food courts when...



The communal enjoyment of food has a long tradition

From bustling marketplaces to modern food courts.

The link between eating and shopping has a long history. And no wonder. After all, it corresponds to a basic human need. As long ago as ancient times, the marketplace was the “go to” place to pick up the latest fashions, exotic ingredients, and new culinary tips. A visit to the market was always more than a mere shopping trip. In addition, it provided inspiration and a sense of shared experience – the very thing that people find so attractive about today’s food courts.

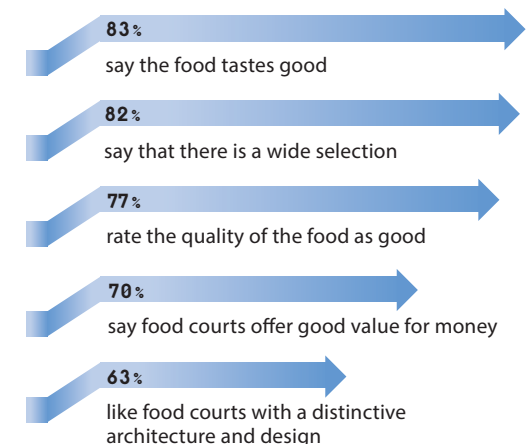
Yet the success of food courts – as demonstrated by their rapidly growing share of floor area – also has other roots. For a start, food courts fit in well with today’s lifestyle and its shifting priorities. Time is short, and more and more people eat out. Yet functional food is not the answer, since meal-times should still be opportunities to unwind and enjoy.

Food courts can meet this need, and thus they will provide shopping centers with an important edge over online retail. They will also play a major role in the transformation of the shopping center from a “place to shop” to a “place to be.” This evolution is well under way. As ECE surveys show, customer satisfaction among food-court visitors is already high and rapidly turns into genuine delight when the variety, quality, and ambience of the food court are all of the highest standard.



For more and more people, ECE food courts are the place to meet up and hang out with friends.¹

FROM A “PLACE TO SHOP” TO A “PLACE TO BE”
How customers rate food courts²



¹ Based on customer surveys in 2004 and 2014
² ECE customer survey on food court usage, 2015; n = 2,598



Food courts are for everyone

Who visits food courts? And when?
At lunchtime, or after work?
And with what expectations?

The variety of food offered by food courts in shopping centers is mirrored by the variety of the people who visit them. There is no such thing as the classic food court guest. Food courts are for everyone: teenagers who want to grab a burger (over 20% of respondents); mothers who have tempted their offspring to come along with the promise of an ice cream; businesspeople who come for a quick cappuccino before their next meeting; and senior citizens who take advantage of the lunchtime special and tend to prefer Asian cuisine (46% of respondents).

The ECE survey "Consumer behavior in the food court" yielded some interesting insights. Around half of regular food court guests are



under 30 years of age, and two thirds of visitors visit a food court to eat lunch. Breakfast and dinner, by contrast, are not important factors as yet.

There is big potential in the provision of added value in the form of extras targeted at groups with specific requirements. In the same way that cafés and restaurants need to be accessible to the disabled and provide high chairs for toddlers, they should also be offering special deals at off-peak times, such as late afternoons. One example would be coffee-with-snack packages for businesspeople in combination with a place to work. Free Wi-Fi and charger points for mobile phones are key features in this connection.

When satisfaction becomes delight

The variety and quality of the food on offer and a pleasant ambience are all key factors.

Once they can guarantee value for money, acceptable waiting times, adequate space, and the requisite cleanliness, it's time for food outlets to start concentrating on the things that ensure that visitors are not only satisfied but also delighted by their experience. Food court visitors are looking for more than just food and drink. They also want a place to relax, switch off, and recharge their batteries. A key factor is the right atmosphere with, for example, subdued noise levels or the right kind of background music. Equally important is the food on the menu. Recent years have seen a big increase in people demanding a choice that fits in with their individual wishes and dietary requirements. The variety on offer at a food court is the ideal platform to meet these differing needs and to create a well-balanced and attractive mix of "mainstream" and "niche" cuisine.

A **100%** increase in the number of **food court visitors** between 2004 and 2014²

THE DELIGHT FACTORS¹

- High quality and a wide choice of food
- Relaxed atmosphere

THE SATISFACTION FACTORS¹

- Fair price for what you get
- Short waiting times, adequate space
- Food court is easy to find
- Friendliness and cleanliness

¹ECE customer survey on food court use, 2015 (n=2,598); factor analysis leading to overall customer satisfaction. ²Customer surveys in 2004 and 2014

21%

of all respondents attach importance to **distinctive styles of cuisine** that are not widely available¹

75%

of food court visitors come to eat lunch²

» Increasingly, the food court is the place to meet in a shopping center. Enjoying food together has become part and parcel of the shopping center experience.

INSA KLASING
General Manager,
KFC Deutschland



It's more than just taste

Good service and the right ambience are also vital.

When it comes to food courts, customers have high expectations. As a place for a well-earned break and refreshment, it needs to be not only convenient, with Wi-Fi and a handy coffee bar, but also pleasant, comfortable, and relaxed.

WHAT FOOD COURT VISITORS WANT

Enhancing comfort for individual customers and families²



FREE WI-FI



MOBILE CHARGER POINTS



LAPTOP WORKSTATIONS



MICROWAVES FOR PARENTS WITH BABIES



CHILDREN'S HIGHCHAIRS



CHILDREN'S PLAY AREA



LOCKERS

¹ Market Report 2015 ² ECE customer survey on food court use, 2015; n = 2,598

// 03

Tenants are successful in ECE centers when...

Food court success can be planned

A survey of ECE's tenants from the food and beverage sector provides clear recommendations

Food and beverages have a huge potential within a retail environment. An ECE survey of around 100 food and beverage companies made it crystal clear that there are several crucial factors for ensuring success. To begin with, there must be an integrated concept for shopping, food and beverages, and a congruent target group structure. This is a precondition for achieving synergies and generating key added value for customers.

A number of factors contribute to the creation of a feel-good atmosphere. For one thing, the quality of stay can be crucially optimized by implementing targeted construction measures to reduce background noise. Other means of turning the stay at food and beverage facilities into a pleasant emotional experience include the creation of stylish interiors and the use of professional loudspeaker systems for targeted music concepts.

In addition, seating areas should be planned in such a way that the tables are also accessible to wheelchair users and families with strollers.

Another factor that shouldn't be forgotten is that customers like to look around while they eat.

An attractive view is therefore an important added value for them. The following additional features are also desirable in food courts: free Wi-Fi access, mobile phone charging opportunities, playgrounds, a sufficient number of highchairs, and family service stations offering appropriate equipment ranging from microwaves to baby-friendly tableware.



Food services play a crucial role in making shopping more and more into a holistic experience.

KLAUS STRIEBICH
ECE, Managing Director Leasing

80% OF ECE'S FOOD AND BEVERAGE OUTLET TENANTS would recommend their shopping centers to business partners¹

¹Market report 2015

“Benefiting from strong markets”

Tenants can benefit in many ways by locating their business in a shopping center. ECE tenants report on their experiences.



Insa Klasing

General Manager of KFC Germany, tenant since 2004

What are the benefits of a shopping center location?

It enables KFC to ideally address its broad target group and offer the shopping center operator added value as an attractive anchor tenant.

What do you think your customers like?

Our customers often consist of groups of people, and they like our broad range of culinary specialties from all over the world.

Do you notice any synergy effects?

Yes, of course. The biggest synergy effect is that the shared seating area doesn't have to be served itself, but instead is centrally served and cared for.



Insa Klasing,
 General Manager of
 KFC Germany

David Baumgartner

Managing Director of dean & david, tenant since 2011



David Baumgartner,
 founder and
 Managing Director of
 dean & david

What do you think are the three main reasons why a food retailer should locate its business in a shopping center?

The high footfall, the good range of technical equipment and, of course, the synergy effects with other food retailers, who have a similar customer profile and the same requirements.

What do your customers think of the food court?

Their attitude is basically positive. They want shopping to be a holistic experience. Besides the shopping as such, this means having a good atmosphere, to which the food & beverage sector contributes greatly.

What do customers like about your products?

In many shopping centers, dean & david sets itself clearly apart from the traditional food retailers. Many people are increasingly appreciating the fresh and healthy alternative we offer.



Alexandros Fritz Soukas

Managing Director of Bobby & Fritz, tenant since 2016

What do you think a food court should be like?

Good food courts encourage people to enjoy food in company with others instead of sitting at home on the couch and ordering meals online. In the case of a family, the father might eat schnitzel, the mother sushi, and the daughter a salad – all from different food outlets.

Are there any specific success factors?

Because you only have a few moments to convince food court visitors to buy your products, everything has to be just right: the cleanliness, the quality, the brand design, and the appearance of the employees.

What do you think: How important is eating while shopping?

Eating is now an integral part of the shopping experience in Germany! We get many different types of customers: workers from the local area who eat lunch at our establishment, quick shoppers who only want something to eat on the go, and guests who spend the entire day at our place.



Managing
 Directors
 Alexandros Fritz
 Soukas (left) and
 Tim Bobby Koch

Chinh Keyser

Business Developer at asiahung, tenant since 1999

Why is asiahung represented in shopping centers?

Shopping centers ensure a high quality of stay, due to the broad range of products and services they offer and the strong positioning of food courts. This results in strong footfall that can generate good levels of turnover.

What is the atmosphere like in the food courts?

They offer something for every taste and in every price category. It's important to keep up with the times and meet the customers' expectations. However, I think a food court's location is a far more important issue.

What do customers like about your products?

The clearly arranged menu enables customers to make a choice quickly. They also like the front-cooking area and the fact that the meals are quickly served at a suitable price.



Chinh Keyser,
Business Developer
at asiahung

Robert Jung

CEO of NORDSEE, an ECE tenant for the past several decades

Why does NORDSEE have outlets in ECE shopping centers?

There are several reasons for this. We want to benefit from the large flow of customers and the thematically coordinated sectors in shopping centers. And we want to be independent of the weather as well. Moreover, we greatly appreciate the proactive and professional way in which ECE manages its shopping centers.

How important is it to have a diverse range of food & beverage facilities at one place?

It's very important. As an international, Europe-wide system food retailer for seafood, we benefit greatly from this diversity. In addition, we help create an attractive mix of tenants, thanks to our unique concept.

What do you think your customers like?

Customers are attracted by fresh products and personalized service. They like variety and gladly try out new products. The surroundings and atmosphere are important to them as well.



Here we find a very attractive concentration of shops with large numbers of consumers at central locations.



Robert Jung,
CEO of
NORDSEE



Proprietor Franco Safa in front of a stand of the Happy Donazz chain

Franco Safa

Proprietor of Happy Donazz, tenant since 2013

Do shopping centers offer plannable levels of turnover?

They certainly do. Shopping centers attract more or less plannable footfall the whole year round. This ensures relatively good turnover, which is not always the case at locations outside the center. We've also found out that customers in shopping centers are much more likely to have actual buying intentions.

Are there any synergies? And if so, what are they?

There are often effects that boost turnover. For example, if a customer buys something at the florist's across the way, he or she might afterwards be tempted by our display of donuts and buy a box of them.

What do customers like about your products?

The large selection of donuts, their quality, and the fact that they are freshly baked daily. They aren't meant to still anybody's hunger, but to serve as an especially tasty snack.

Oliver Sasse,
Managing
Director of
Quarkerei



Oliver Sasse

Managing Director of Quarkerei, tenant since 2012

Why did you decide to locate your food outlet in a shopping center?

We offer dessert products such as soft curd cheese and ice cream. That makes our business very dependent on the seasons. We get few customers if the weather is bad. That's why the food court in a mall is the ideal environment for us to sell our products the whole year round.

How do you like the other food retailers here?

The diversity is especially impressive. I think it's great that you can practically travel around the world from a culinary point of view.

Are there any synergy effects between you and the other tenants?

Yes, definitely! We wouldn't be able to exist without the other food retailers. They offer the main course, while we serve the dessert. We complement one another perfectly.

// 04

The design of a shopping-center food court is right when...

The food court as a comfort zone

Well-rounded concepts that appeal to the senses.

The architecture, design, and decor should all follow a clear principle: to provide customers with a pleasant experience while they enjoy their food in an uncomplicated and relaxed atmosphere. The ECE portfolio of innovative architectural concepts provides one of the cornerstones for upgrading food courts from a commodity to a lifestyle, and from the mass market to the premium segment. Drawing on many years of experience and know-how, our own in-house architects develop specific solutions for hybrid and self-service concepts, food pairing, and combined food-and-entertainment packages.

Food courts attract customers throughout the day, but at classic mealtimes these captivating “marketplaces of the moment” become a real magnet. It is therefore crucial to ensure that customers can find their way quickly and easily to food outlets. Ideally, trails should be created for specific target groups. One key trend today is “authentic cuisine.” This can mean showcasing regional ingredients – and potentially their preparation – in a persuasive setting. It’s also important to ensure that the whole family can sit at one table.

Another key consideration at the planning stage is to ensure that food courts are situated in a central, well-lighted, and open space. They shouldn’t be placed too far from the entrance or exit of the shopping center and should offer a good vantage point.



Architecture at ECE combines creativity and good planning to ensure that the food and beverage concepts and the shopping experience are successful together.

MARC BLUM
ECE, Director of Creative Design

63% OF CUSTOMERS SURVEYED attach importance to a distinctive architectural design¹

¹ECE customer survey on food court use, 2015; n = 2,598

A place for pleasure

From mall kiosks to gourmet restaurants.

The food and beverage outlets in a shopping center should be as varied as the customers and their tastes. This is reflected in the size of the premises, which ranges from 10 m² to over 1,000 m². Today's spectrum extends from quick snacks to gourmet meals in high-class restaurants, some even with a Michelin star. In other words, there is no single definitive format for the shopping-center food and beverage outlet. Alongside food courts, ice cream parlors, coffee bars, and bakeries, the variety of concepts on offer just continues to grow:

- **BURGER BARS,**
such as Hans im Glück and Burgerista
- **RESTAURANTS AND BISTROS,**
such as Alex and La Tagliatella
- **CASUAL DINING,**
such as Vapiano, Gin Yuu, ChaCha, Coa, and Balducci
- **FINE DINING,**
such as the Michelin-star restaurant Se7en Oceans

Once again, the same principle applies as for the shops: the right mix is crucial. In order to cater to all customer tastes, a modern shopping center should offer a diversity of food and beverage outlets.



From less than
10 to over
1,000m²,
the floor area
matches the **culinary concept**
in shopping centers

THE BURGER: A CLASSIC REDEFINED

Once a fast-food staple, the modern burger has reinvented itself: high-grade ingredients in creative – even vegetarian – recipes, prepared to order and served up in an attractive ambience. Today's burgers are a favorite food to be celebrated in style.



MALL KIOSKS: A POPULAR TREAT FOR IN BETWEEN

The share of mall kiosks serving snacks is growing, especially in the convenience and "to go" segment, where products such as donuts and ice cream use minimal infrastructure to cater to passing trade. For other fare as well, mall kiosks located on the main drag can offer great potential. For operators, a mall kiosk is an opportunity to rent space right among the top stores, even just for a short period of time, and thereby profit from a high volume of customer traffic.



35% of mall kiosks were serving **food and beverages** in 2015, an increase of **75%** compared to 2013

13m² of floor space: That's the average size of a mall kiosk serving food and beverages

Technical key account management

Information on the benefits,
advice on all questions.

ECE can draw on decades of experience in the development, planning, realization, rental, and management of large commercial properties. This expert knowledge flows into every consultation with its clients. ECE has its own department for Technical Key Account Management (T-KAM). Key services here include advising potential clients on the specific benefits of rented space in a shopping center and helping to draw up the overall technical concept. ECE offers consultation concerning the floor area, location, and integration within the shopping center, as well as all of the client's concrete requirements.

SUMMARY: ECE conducts studies and analyses on a regular basis and provides comprehensive knowledge transfer here and in day-to-day consultation. All of these services ensure that potential and existing clients can make the very best decisions.



- EXEMPLARY T-KAM RIGHT THROUGH TO RENTAL**
- Showing the benefits
 - Assessing all requirements with respect to floor area, corporate identity, and technical systems
 - Drawing up the contractual framework covering all construction and technical aspects
 - Reviewing all available spaces

» We advise clients on all the key issues involved in planning a food & beverage outlet in an ECE shopping center.

KLAUS RETHMEIER
ECE, Director of Key Account Management
Leasing

Expertise begins with a readiness to listen

On the basis of regularly conducted studies, analyses, and trend research, ECE remains firmly focused on the client's wishes.

The demands of clients, tenants, and investors can change, giving rise to new trends and new constructional and architectural possibilities for shopping centers. Behind every successful project to plan and realize a food and beverage concept lie a wealth of experience and the latest know-how. This is why ECE regularly conducts wide-ranging market research among the relevant stakeholder groups.

The fruit of such work includes the present study, "Food and beverages in shopping centers." It is based on our own solid know-how and the results of a range of studies conducted in recent years by ECE with over 2,500 respondents.

IMPRINT

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