

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

Guests' views on China'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 Chinese and Americans 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
- Chinese couples have the most fun when hanging out with their partners despite not spending a lot of time with them compared to other countries, while British and American men claim to have more fun alone than with their partners

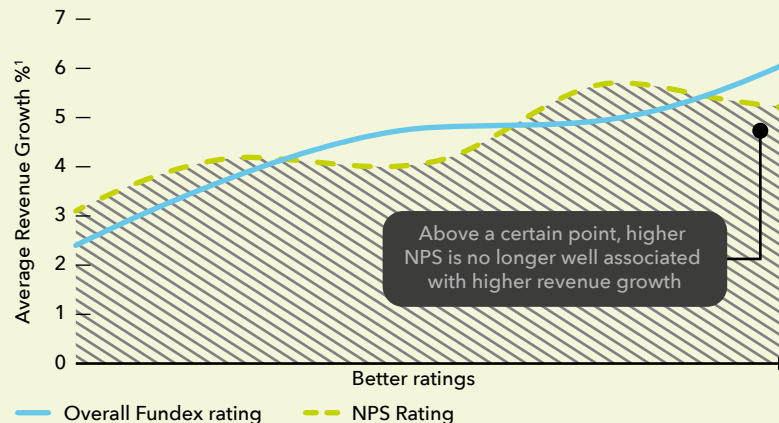
...the resulting data has a serious side, as it will help Leisure businesses work out ways to deliver better experiences for their guests. In fact scoring highly on the OC&C Fundex is a better measure of financial success than the industry's go-to metric of Net Promoter Score.

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 & 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, China's favourite hospitality and leisure brands. Here we introduce the top performers across eight leisure sectors and three individual categories. For a full list of brands in the ranking, please see pages 24-25. In the meantime, meet the nation's winners and find out why they topped the list...

Sector winners



Best Restaurant **Dong Lai Shun & Wang Steak**

The Beijing-based Halal restaurant Dong Lai Shun comes up top in our OC&C Fundex survey with outstanding performance across almost every aspect of customer purchasing criteria. In contrast, high-end steakhouse Wang Steak is able to lead the table by focusing on acing across the basics with market-leading food quality, wide choice on the menu and cleanliness.

Learn more on page 11.

Runners-up - **Dadong, Hai Di Lao**



Best Café & Coffee Shop **Starbucks**

Starbucks offers a relaxed atmosphere with comfortable seating suited to different group sizes and needs, along with a vigorous pursuit for cleanliness, propelling it to the top of the coffee shop rankings.

Runners-up - **UBC café, Zoo Coffee**



Best Fast Food & Food To Go **KFC**

Across fast food on the go, KFC leads with speed of service as well as a fun dining experience.

Runners-up - **Country Style Cooking, Lihua Fast Food**



Best Accommodation **Hilton**

Hilton topped the accommodation market with its strong ratings on room quality, cleanliness and a good night's sleep. Also, good hotel atmosphere, exceptional hotel facilities and dining quality help strengthen its claim to the top spot.

Learn more on page 12.

Runners-up – **Westin, Shangri-La**



Best Cruise **Royal Caribbean**

Royal Caribbeans' guests are delighted by their selection of itineraries, comfortable cabins, on-board entertainment and unforgettable fun experience.

Runners-up – **Dream Cruises, Norwegian Cruise Line**



Best Theme Park & Attraction **Disneyland**

Disneyland beats its peers on atmosphere, environment, fun, shows and entertainment as well as rides and attractions. It also stands out for team friendliness and helpfulness.

Learn more on page 15.

Runners-up – **Chimelong, OCT**



Best Gym & Health Club **Super Monkey (also third globally)**

Super Monkey stands out for cleanliness and range of its facilities, but also rates highly on overall atmosphere and value for money.

Runners-up – **Hosa Fitness, Tera Wellness**



Best Cinema **Wanda Cinema**

Wanda Cinema excels in the comfort and relaxation its atmosphere brings, the quality of its screens and sound, and convenience of its locations.

Runner-up – **China Film Stella Cinema**

Category winners



Most Fun **Disneyland**

With a dream-like atmosphere and a neat environment, Disneyland targets an experience-seeking customer base with wider age range than other Chinese brands. It attracts not only young families and groups of friends, but also a substantial number of middle-aged and elderly customers.

Runners-up – **Chimelong, OCT**



NORWEGIAN
CRUISE LINE®

Best Team **Norwegian Cruise Line**

Though providing relatively low prices and good value for money, Norwegian Cruise Line does not skimp on services. Customers are served by friendly, helpful and highly efficient teams.

Runners-up – **MSC Cruises, Royal Caribbean**



NORWEGIAN
CRUISE LINE®

Best Value for Money **Norwegian Cruise Line**

Unsurprisingly, Norwegian Cruise Line also topped the list in this category. The beloved value-focused cruise line regularly launches promotions, such as free unlimited beverages and specialty dining when booking over three nights. The cruise line also targets value-seekers by offering up to 200 USD on-board credit on select last-minute cruises.

Runners-up – **Princess Cruises, MSC Cruises**

The secret ingredients: how to be a champion

Our OC&C Fundex champions are 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 developed a list of simple 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 is 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.

Wang Steak 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 Weibo/Wechat, 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 fundamentals 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.

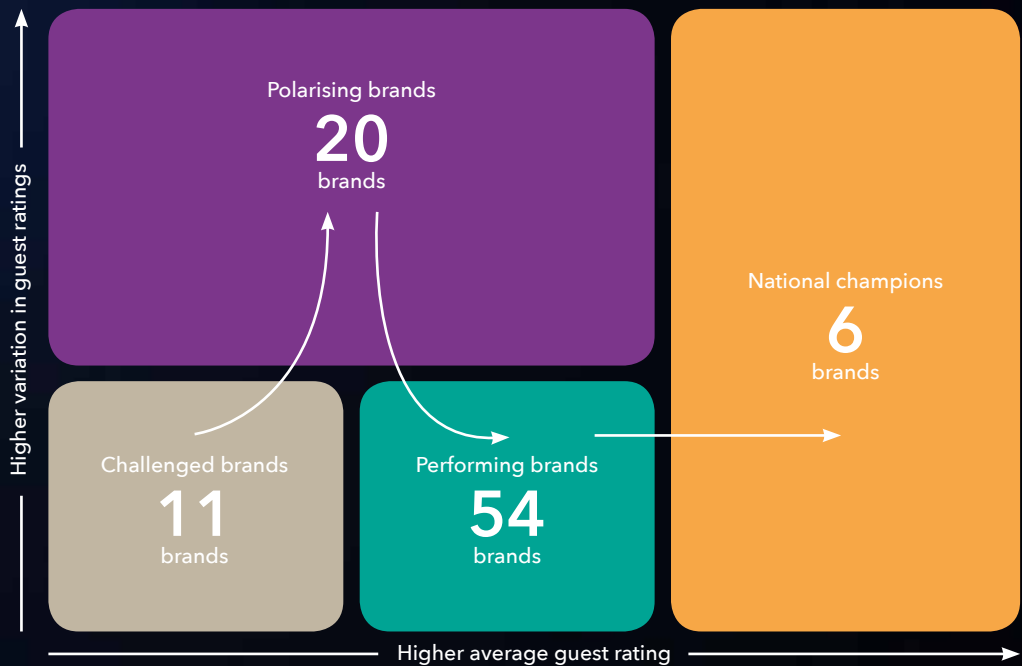


FROM CHALLENGED TO CHAMPION

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.

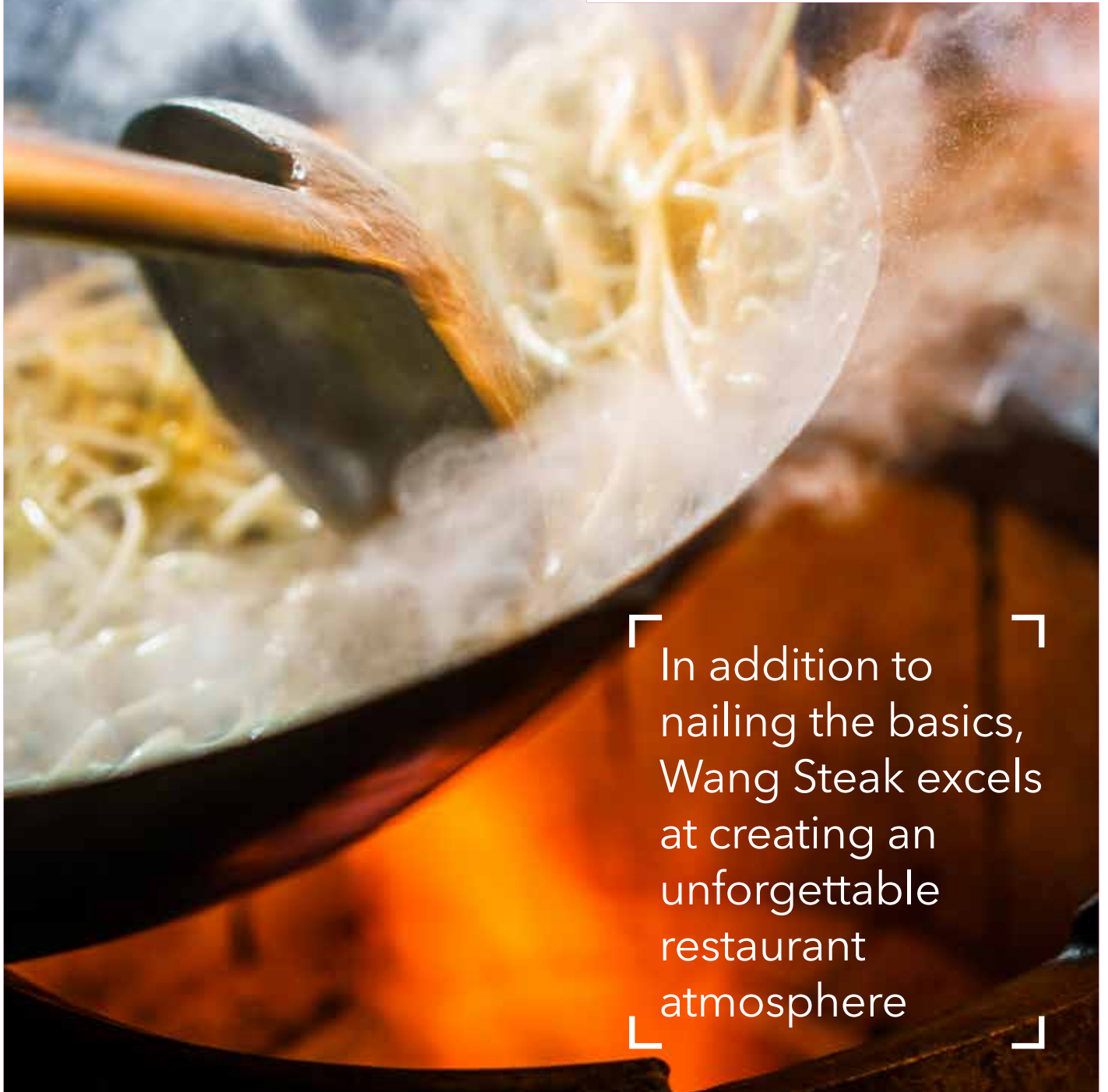
The OC&C Fundex helps to plot a new course to move from 'challenged' to champion

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



In addition to nailing the basics, Wang Steak excels at creating an unforgettable restaurant atmosphere

Pursuit for perfection versus acing the basics

Best Casual Dining Restaurant

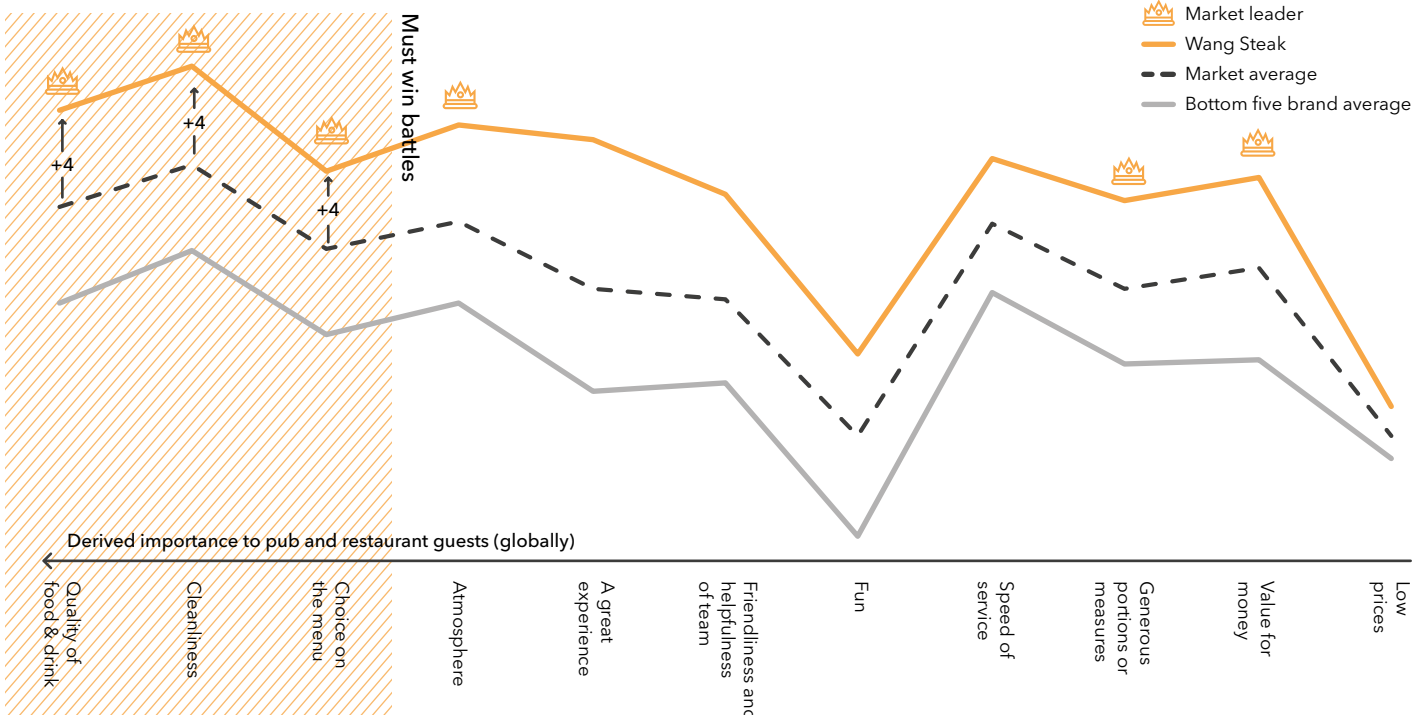


Dong Lai Shun and Wang Steak, are the top two brands on the Pub & Restaurant list. Dong Lai Shun does not spearhead any purchasing criteria. They deliver a highly satisfying level of service to their loyal customer base. In comparison, Wang Steak is well aware of the of the battles they must win in order to become a champion. High quality food - as expected - is the single most important thing to restaurant goers, especially for high-end steakhouses. And Wang Steak not only came top for quality, but also for other key elements such as menu choice and cleanliness. These strong ratings are supported by generous food portions and best value for money.

In addition to nailing the basics, Wang Steak excels at creating an unforgettable restaurant atmosphere. Every five years, they undertake a major redecoration, combining urban sophistication with culture to provide an elegant, warm and comfortable dining ambience, which perfectly complements their cuisine.

WANG STEAK GUEST RATINGS

Average proposition rating (/100)



Winning the pillow fight

Best Accommodation Brand



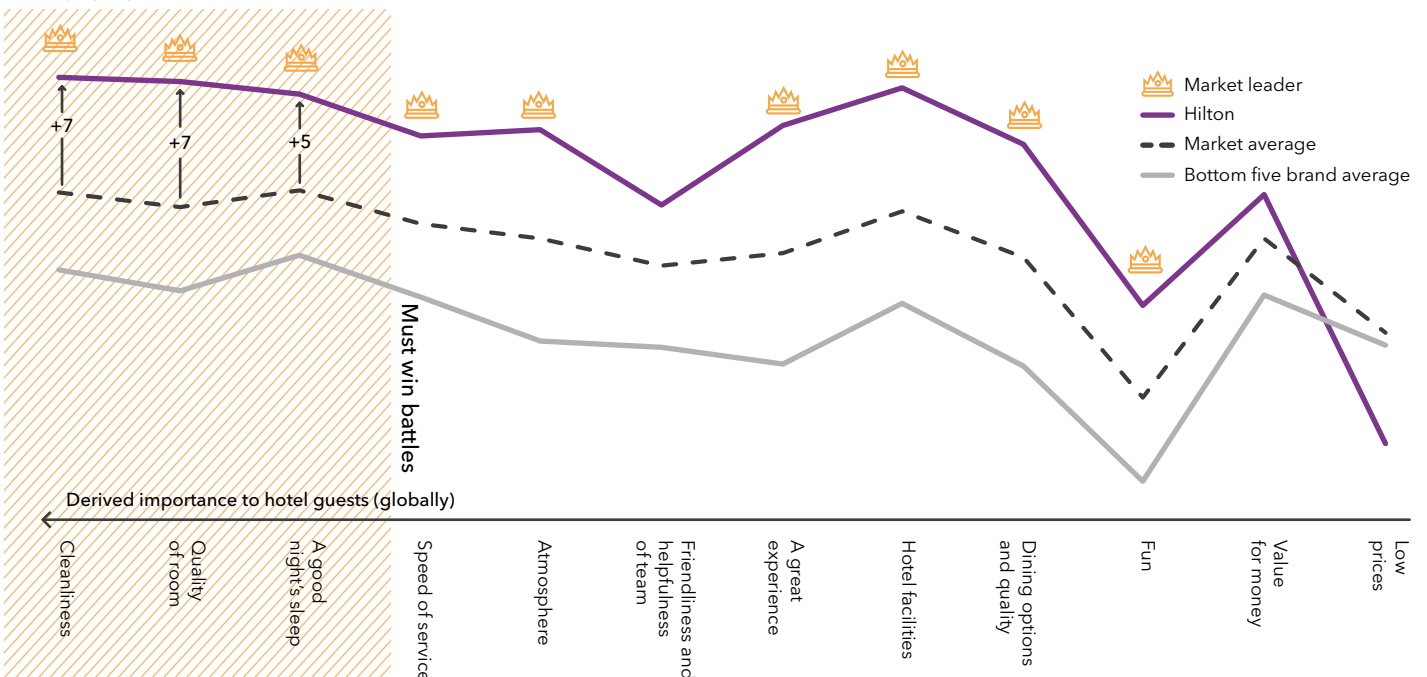
As a premium hotel brand, Hilton offers its guests a second-to-none experience and delivers on what matters most to them. In particular, the brand knows that a good night's sleep and room quality are vital for a great guest experience - they provide exclusive Hilton pillows, custom designed mattresses and exquisite room design.

Besides the basics, Hilton also caters for guests diverse range of demands. Most branches are equipped with business administration lounges, fitness centres and any other amenities and services guests may need, whether they are visiting for business or pleasure.

All of these key factors make Hilton the best-rated accommodation brand.

HILTON GUEST RATINGS

Average proposition rating (/100)





Hilton knows that a good night's sleep and room quality are vital for a great guest experience



「 Disneyland also came up top in ratings, beating its local Chinese competitors and winning seven out of the twelve criteria by which theme parks were evaluated by guests 」

Dreamy fairytale world

Best Theme Park

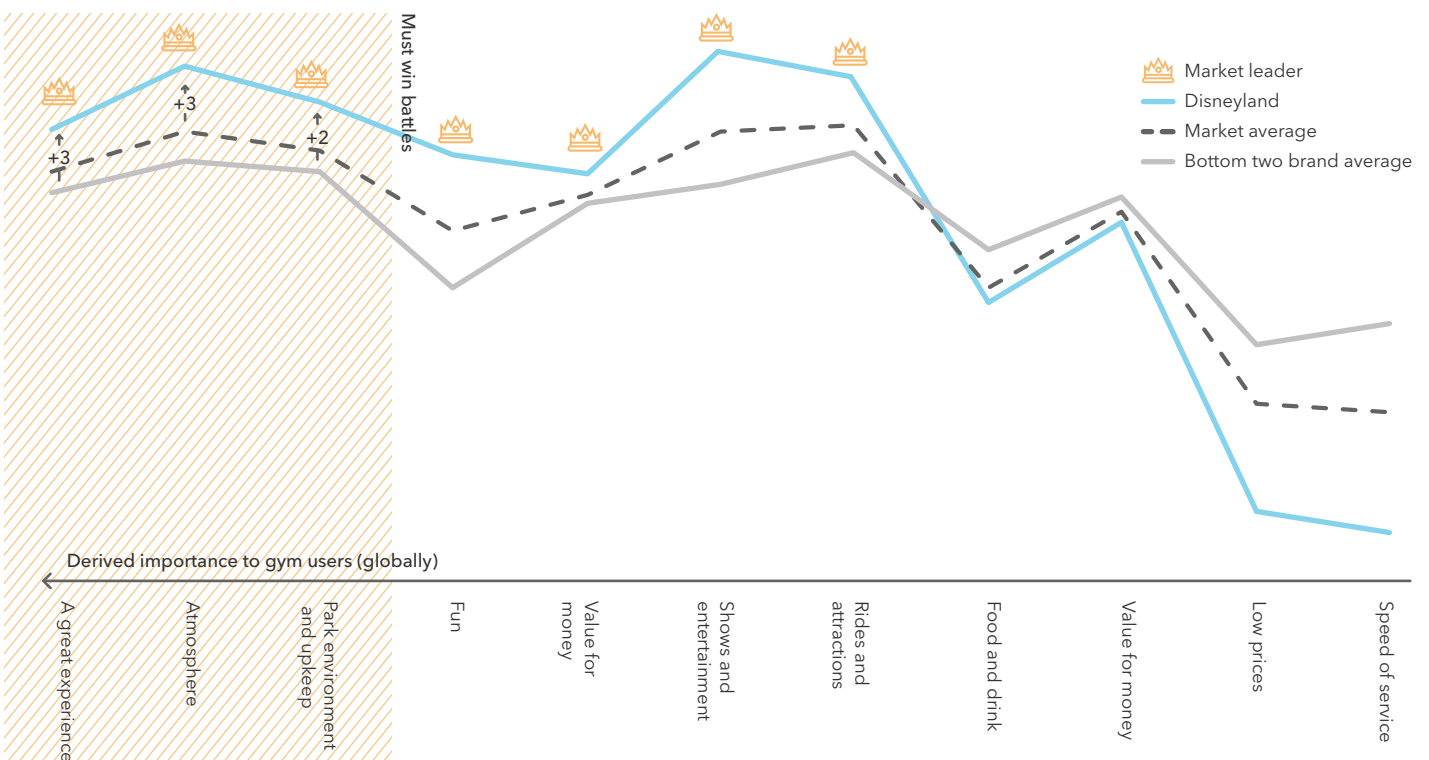


It is no secret that the Chinese theme park industry has been evolving rapidly, with many local brands emerging. But when it comes to theme parks, Disneyland is a top-of-mind selection for Chinese visitors. Disneyland received the highest guest ratings for Best Theme Park & Attraction and Most Fun - beating its local Chinese competitors and winning seven out of the twelve criteria by which theme parks were evaluated by guests.

As a world-famous attraction, Disneyland guarantees that guests' most important demands are met through an excellent park experience as well as exceptional park environment and atmosphere. More importantly, Disneyland has gone far beyond a simple amusement park. The dream-like atmosphere, the friendly cast members and the high-quality shows position Disneyland as a real-life fairytale world for children and adults alike.

DISNEYLAND GUEST RATINGS

Average proposition rating (/100)



Source: OC&C Fundex 2019

Fun as a fundamental

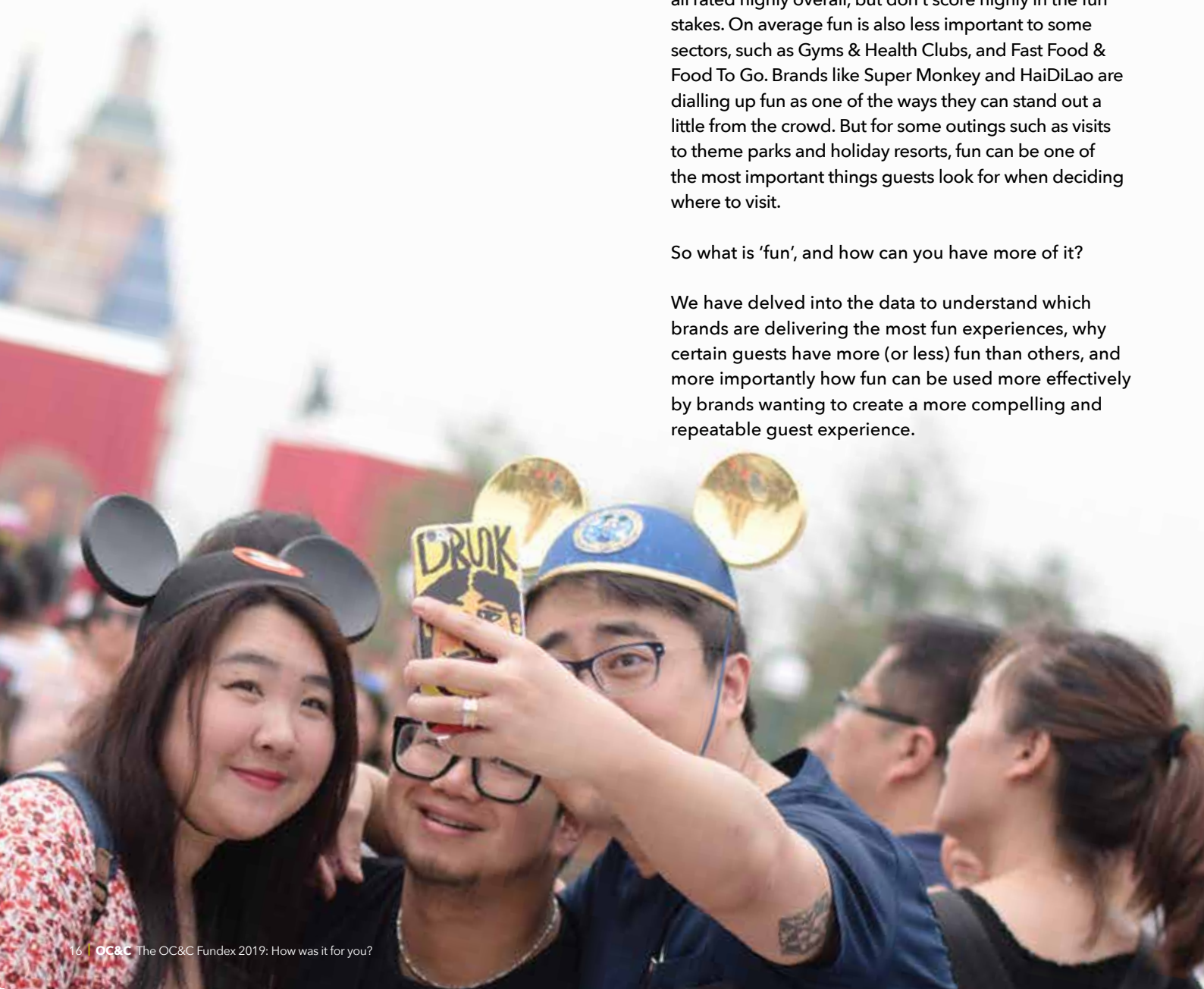
The benefits of being a fun leisure brand are multiple. Fun can be a powerful driver of free word of mouth marketing for a leisure business.

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. Younger generations are more demanding. They visit a wider selection of brands (and are becoming less loyal to each). They are also seeking more compelling group-led social experiences.

On the other hand, fun is less important for some brands. Crowne Plaza, Sheraton and UBC Cafe for example are all rated highly overall, but don't score highly in the fun stakes. On average fun is also less important to some sectors, such as Gyms & Health Clubs, and Fast Food & Food To Go. Brands like Super Monkey and HaiDiLao 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?

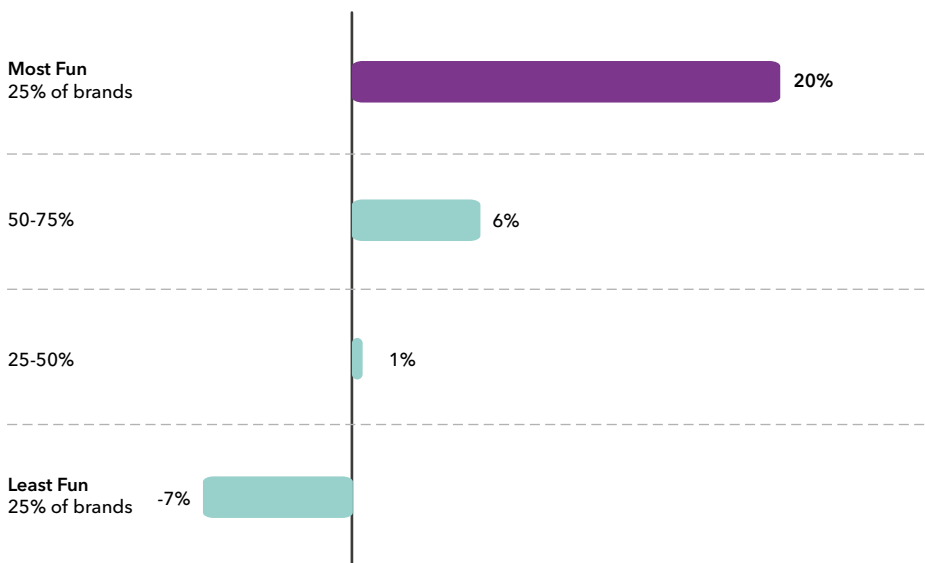
We have delved into the data to understand which brands are delivering the most fun experiences, why certain guests have more (or less) fun than others, and more importantly how fun can be used more effectively by brands wanting to create a more compelling and repeatable guest experience.



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...



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

THE MOST FUN BRANDS IN CHINA BY CATEGORY



Accommodation



Cruise



Cinema



Theme park



Gyms & Health Clubs



Café & Coffee Shop



Pub & Restaurant



Fast Food & Food To Go





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

OC&C Fundex allows us to delve deep into people's attitudes to fun and it is revealed that Chinese have the most fun when hanging out with their spouses or young families and least fun with work colleagues. However, it is not the case with western people. For instance, British and American 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.



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.

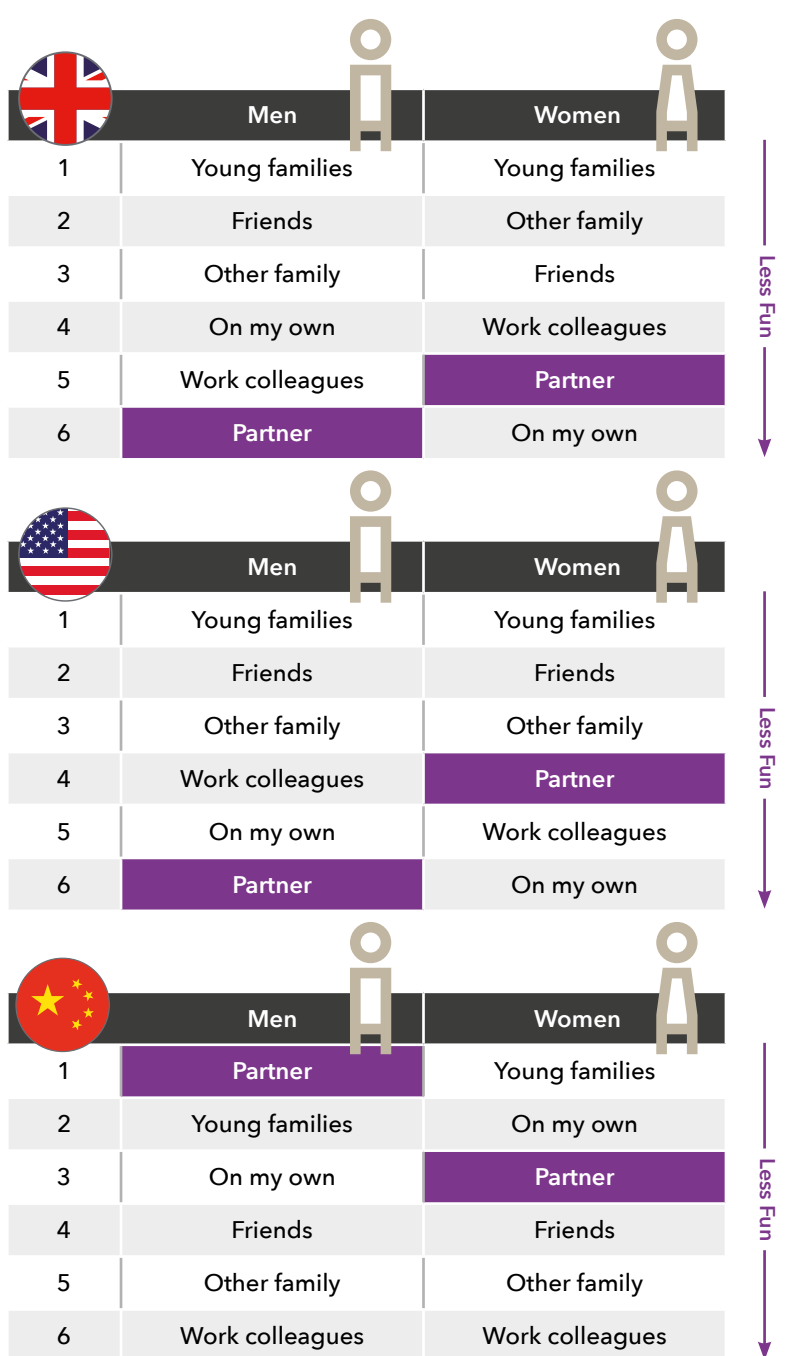


Chinese couples value their time together

The OC&C Fundex throws up some surprising insights into our relationships.

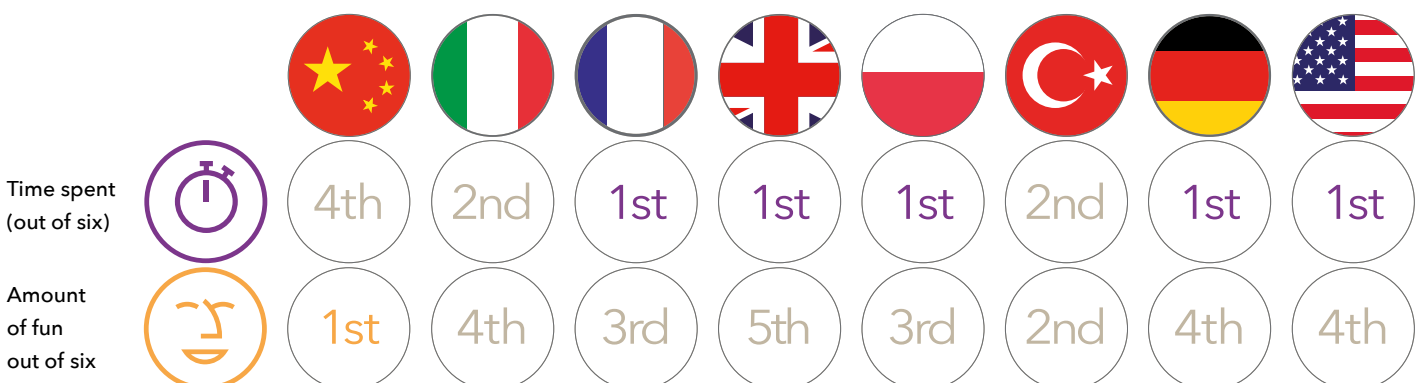
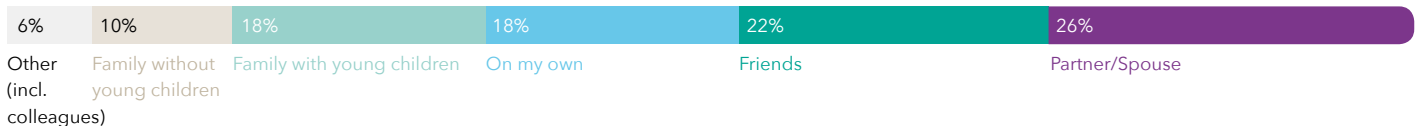
With long working hours and less leisure time as well as the fact that a lot of couples are working in different cities, Chinese people are sadly spending less time with their partners compared to other countries. However, Chinese couples have the most fun when hanging out together and in particular, Chinese men have more fun than women when spending quality time with their spouses.

In contrast, British and American men claim to have more fun alone than with their partners, even though they spend more time with their partners than any other group.

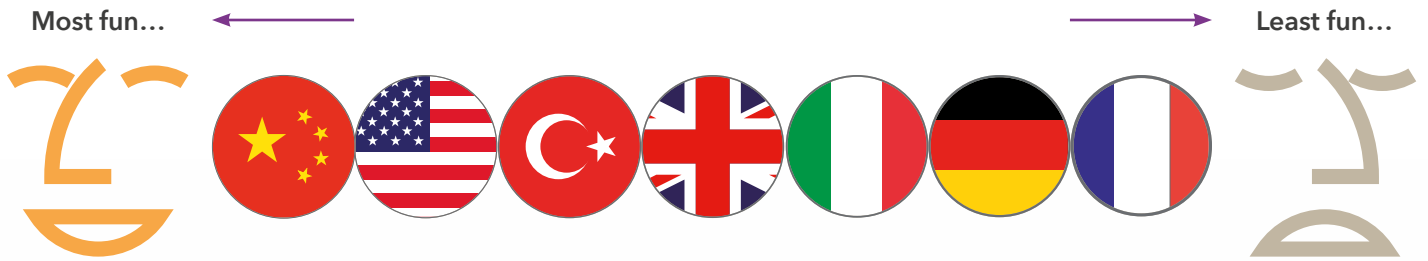


UNLIKE OTHER COUNTRIES, CHINESE PEOPLE SPEND THE LEAST AMOUNT OF TIME WITH THEIR PARTNER YET HAVE THE MOST FUN WITH THEM

All Leisure Trips Globally



Source: The OC&C Fundex 2019

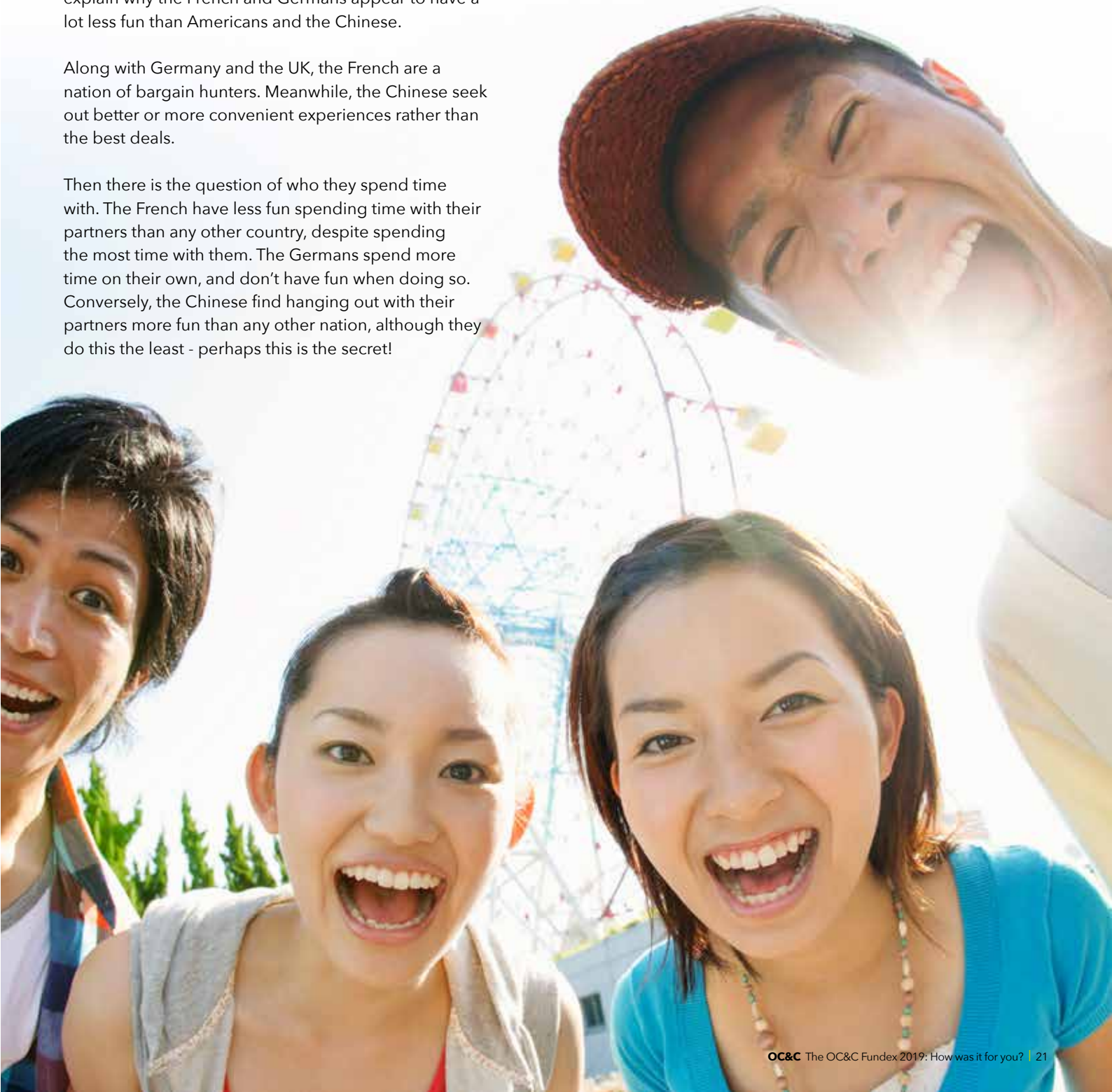


And the most fun country is...

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 re-setting 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 is the cruise line of choice for the more fun and adventurous featuring an on-board Flow Rider, a wide choice of places to eat and 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 posting). The guest experience will often be scattered with 'fun-hooks', all designed to keep the conversation going.

A nail beauty service, hand pulled noodles, performances, and unlimited snacks and juices while you wait – just a few of the ways that Hai Di Lao's gives guests fun talking points across the table on Wechat.

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.

The staff at Disneyland are proactive - they interact with guests and take photos with them.

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 queueing 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 China 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 Chinese 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	Hilton	Accommodation	Green
2	Royal Caribbean	Cruising	Green
3	Disneyland	Theme Parks	Green
4	Dong Lai Shun	Pub & Restaurant	Green
5	Dream Cruises	Cruising	Green
6	Norwegian Cruise Line	Cruising	Green
7	Westin	Accommodation	Green
8	Shangri-La	Accommodation	Green
9	Costa Cruises	Cruising	Green
10	Chimelong	Theme Parks	Green
11	Princess Cruises	Cruising	Green
12	Wang Steak	Pub & Restaurant	Green
13	Dadong	Pub & Restaurant	Green
14	SuperMonkey	Gyms & Health Clubs	Green
15	Four Points by Sheraton	Accommodation	Green
16	Lavande	Accommodation	Green
17	Hai Di Lao	Pub & Restaurant	Green
18	OCT	Theme Parks	Green
19	MSC Cruises	Cruising	Green
20	Crowne Plaza	Accommodation	Amber
21	Sheraton	Accommodation	Amber
22	Novotel	Accommodation	Green
23	Intercontinental	Accommodation	Green
24	Starbucks	Café & Coffee Shop	Red
25	Seasons	Accommodation	Amber
26	UBC café	Café & Coffee Shop	Amber
27	Waipojia	Pub & Restaurant	Amber
28	Din Tai Fung	Pub & Restaurant	Amber
29	Ibis	Accommodation	Amber
30	XiBei	Pub & Restaurant	Amber
31	Pizza Hut	Pub & Restaurant	Amber
32	Hosa Fitness	Gyms & Health Clubs	Green
33	Element Fresh	Pub & Restaurant	Green
34	Star Cruises	Cruising	Amber
35	Qinma	Pub & Restaurant	Amber
36	Marriott	Accommodation	Amber
37	Chongqing Xiaotiane	Pub & Restaurant	Amber
38	Chamate	Pub & Restaurant	Red
39	DoubleTree by Hilton	Accommodation	Amber
40	KFC	Fast Food & Food To Go	Amber
41	Country Style Cooking	Fast Food & Food To Go	Red
42	Lihua Fast Food	Fast Food & Food To Go	Red
43	Fantawild	Theme Parks	Green

Rank	Brand	Sub-sector	Fun rating
44	JingJiang Capital City	Accommodation	Amber
45	Little Sheep	Pub & Restaurant	Amber
46	Shanghai Min	Pub & Restaurant	Amber
47	Wyndham	Accommodation	Green
48	Tera Wellness	Gyms & Health Clubs	Amber
49	McDonald's	Fast Food & Food To Go	Amber
50	Hehegu	Fast Food & Food To Go	Red
51	BTH hotel	Accommodation	Amber
52	Will's Gym	Gyms & Health Clubs	Amber
53	Lefit	Gyms & Health Clubs	Green
54	Quanjudu	Pub & Restaurant	Red
55	Xiao Wei Yang	Pub & Restaurant	Amber
56	Zoo Coffee	Café & Coffee Shop	Green
57	Jingjiang	Accommodation	Red
58	Wanda Cinema	Cinemas	Amber
59	Papa Johns	Pub & Restaurant	Amber
60	Vienna	Accommodation	Red
61	Hanting	Accommodation	Red
62	Impulse Total Fitness	Gyms & Health Clubs	Red
63	Saizeriya	Pub & Restaurant	Amber
64	Bellagio	Pub & Restaurant	Green
65	Xiabu Xiabu	Pub & Restaurant	Green
66	pizza marzano	Pub & Restaurant	Red
67	Holiday Inn	Accommodation	Amber
68	Costa Coffee	Café & Coffee Shop	Amber
69	Coffee Box	Café & Coffee Shop	Red
70	Pacific Coffee	Café & Coffee Shop	Amber
71	South Beauty	Pub & Restaurant	Amber
72	Malan Noodle	Fast Food & Food To Go	Red
73	Be For Time	Pub & Restaurant	Red
74	Jinjiangzhixing	Accommodation	Red
75	Kungfu	Fast Food & Food To Go	Red
76	Luckin Coffee	Café & Coffee Shop	Red
77	China Film Stella Cinema	Cinemas	Red
78	Yonghe King	Fast Food & Food To Go	Red
79	Rujia	Accommodation	Red
80	GreenTree	Accommodation	Red
81	Yoshinoya	Fast Food & Food To Go	Red
82	Burger King	Fast Food & Food To Go	Red
83	Da Niang Dumpling	Fast Food & Food To Go	Red
84	Dadi Cinema	Cinemas	Red
85	Dico's	Fast Food & Food To Go	Red
86	7 days	Accommodation	Red
87	Ajisen Ramen	Pub & Restaurant	Red
88	Super 8	Accommodation	Red
89	Dezhuang	Pub & Restaurant	Red
90	cnHLS	Fast Food & Food To Go	Red

Next steps: your OC&C Fundex checklist

As well as the broad themes covered in this report, the OC&C Fundex offers actionable business intelligence 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 below would be delighted to hear from you.

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



Pascal Martin

Pascal is a Partner in OC&C's Hong Kong office, specialising in consumer goods, retail and leisure. In Asia for the past 20 years, he has helped a variety of clients address major strategic challenges across these three sectors. As a Frenchman, he enjoys fine dining and "les vacances." Fun and leisure are very important parts of his work life balance.

Steven Kwok

Steven is an Associate Partner in the OC&C hospitality and leisure team in Greater China, with a particular focus on restaurants, gyms, and hotels. Beyond leisure, he is also actively involved in the wine and spirits sector - basically dipping his toes in anything that involves having a fun time.

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.

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