

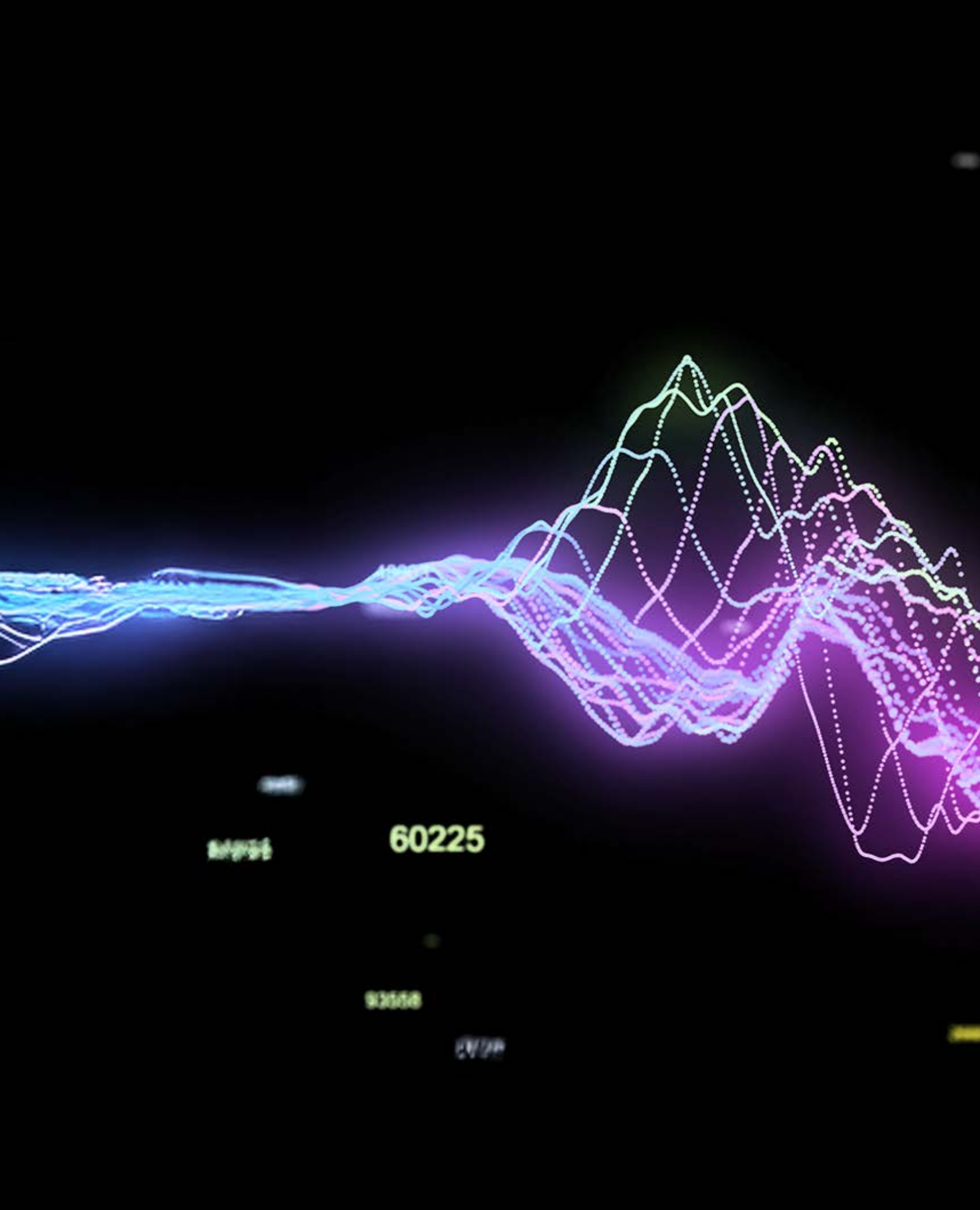
The Noise-to-Market Model

Regain control of your
value-for-money.
Measure your
Noise-to-Market.

A commercial framework from
Simon-Kucher's Global Center
of Excellence for Restaurants

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Unlocking better growth



When strategy turns into noise

A customer walks into one location of a brand, then into another a few days later, and leaves with **two completely different impressions**. Same logo, same menu, same promise. But it doesn't feel like the same experience.

Some locations consistently **deliver on the brand promise**, while others fall short. And as these differences accumulate across the network, a single brand quietly becomes **hundreds of versions of itself**.

Execution becomes inconsistent, control weakens, and **strategy turns into noise**. Most of this stays invisible, though, and that's exactly what makes it dangerous.

From inconsistency to value erosion

At first, the differences **seem small and harmless**.

One location executes well; another falls short.

A promotion works in one market but goes unnoticed in another. Nothing seems too serious on its own.

But when those differences repeat across the network, **customers start receiving mixed signals**. Expectations become unclear, **value for money weakens**, customer loyalty declines, and operational decisions become reactive.

By the time the impact reaches the P&L, the **damage is already done**: revenue is lost, margins are under pressure, and competitors have gained ground.

Value does not depend on strategy alone, but on executing it consistently, location by location, over time.



From disconnected data to actionable insight

Brand health trackers show one signal, transaction reports show another, and NPS surveys, pricing sheets, delivery metrics, and competitor benchmarks add **more pieces to the puzzle**.

But those pieces rarely connect, that is the real problem. Most foodservice organizations have **more data than ever before**, but it still **sits in silos**. Complexity grows, while clarity remains limited.

Noise-to-Market closes that gap. It connects perception and reality at the level where decisions are actually made: the individual store. The Noise-to-Market Model delivers:

- **Hyper-granular insights**, measuring perception at the individual store level across all key attributes, including product, value for money, atmosphere, staff, speed of service, convenience and delivery, and hygiene.
- **A direct link between perception and reality**, connecting store-level pricing with perceived value for money.
- **Source bias isolation**, identifying the factors that truly drive customer perception, grounded in more than 100 consumer studies conducted annually.
- **Competitive intelligence**, benchmarking performance against each brand's relevant competitive set within its trading area.
- **Continuous tracking**, powered by AI and updated in near real time, transforming perception from a static snapshot into a dynamic metric.

The result is a **single, connected, and actionable view of perception**, turning data into control.



From insights to control

Locations that looked identical on paper start to separate once perception is measured store by store.

N2M groups stores into micro-markets: clusters that share similar challenges, customer perceptions, and competitive dynamics.

These clusters **reveal where execution deviates from positioning** and how much performance is driven by executional factors rather than brand-level decisions. With that view, brands can define the right strategy for each micro-market, isolate what is within their control, and **act with precision**.

Over time, fragmented execution turns into **controlled perception**: value-for-money positioning comes back under brand control, competitive advantage is restored, and the impact reaches the P&L.

The Noise-to-Market framework

The N2M quantifies commercial noise, and is based on two dimensions:

1. **Strategic Coherence:** How clearly the strategy is perceived. Do price, promotion, product, and experience tell one consistent story about the brand? The lack of strategic coherence is commercial noise.

2. **Execution Consistency:** How reliably is strategy applied across channels and markets. Is there one coherent brand, or multiple versions of it? The lack of execution consistency multiplies commercial noise.

N2M Model measures the friction between a Brand's commercial intent and the market's real perception, through multiple consumer KPIs



Source: Simon-Kucher
Noise-to-Market Model

Restaurant selection: ● Coffee & Bakery ● QSR ● Fast Casual ● Casual Dining

Four brand archetypes

For each brand, its noise profile will result in it belonging to one of the following archetypes:

- **In Tune:** Both dimensions are strong. The market hears a clear, credible signal. Clear proposition, well managed, which is the ideal state.

- **Interference:** The strategy is right, but delivery is uneven. The right message gets disrupted along the way.
- **Off-Key:** Execution is solid, but the strategy is misaligned. Confident performance, wrong melody.
- **Full Noise:** Both coherence and consistency collapse. The market hears activity, but no meaning. Fragmented brand, chaos.

Use cases applied to different brands in Spain

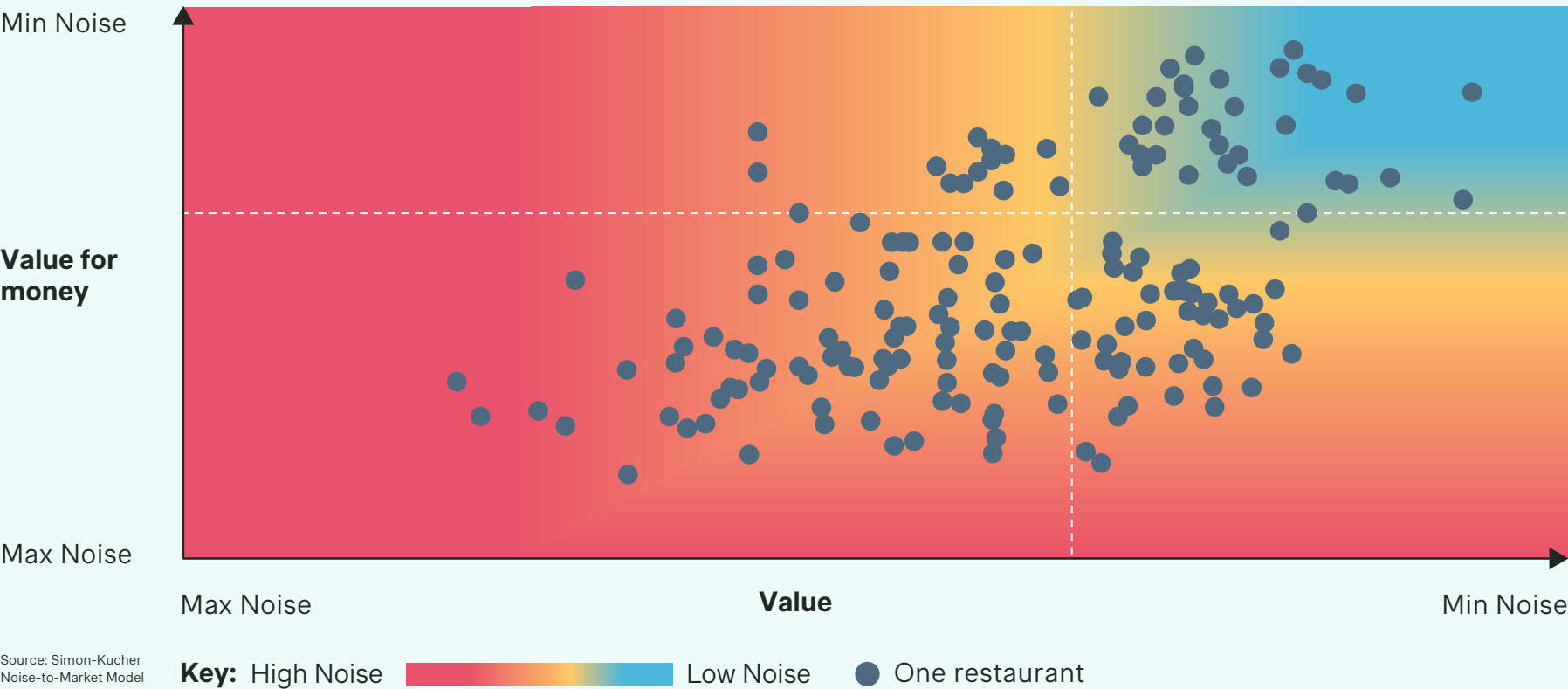
1. Addressing inconsistency where it impacts value

Some restaurants generate low VFM noise and strong value perception. Others, under the same brand, deliver a much less consistent experience. **Yet brand-level averages hide both, making the brand appear more uniform than it is.**

As inconsistency accumulates across locations, the brand fragments and value perception weakens. N2M makes this dispersion visible, identifying where execution breaks down and enabling targeted actions to strengthen value perception.

High dispersion in consumer perception from one restaurant to another within the same brand

Noise at the restaurant level - Example for a Spanish brand



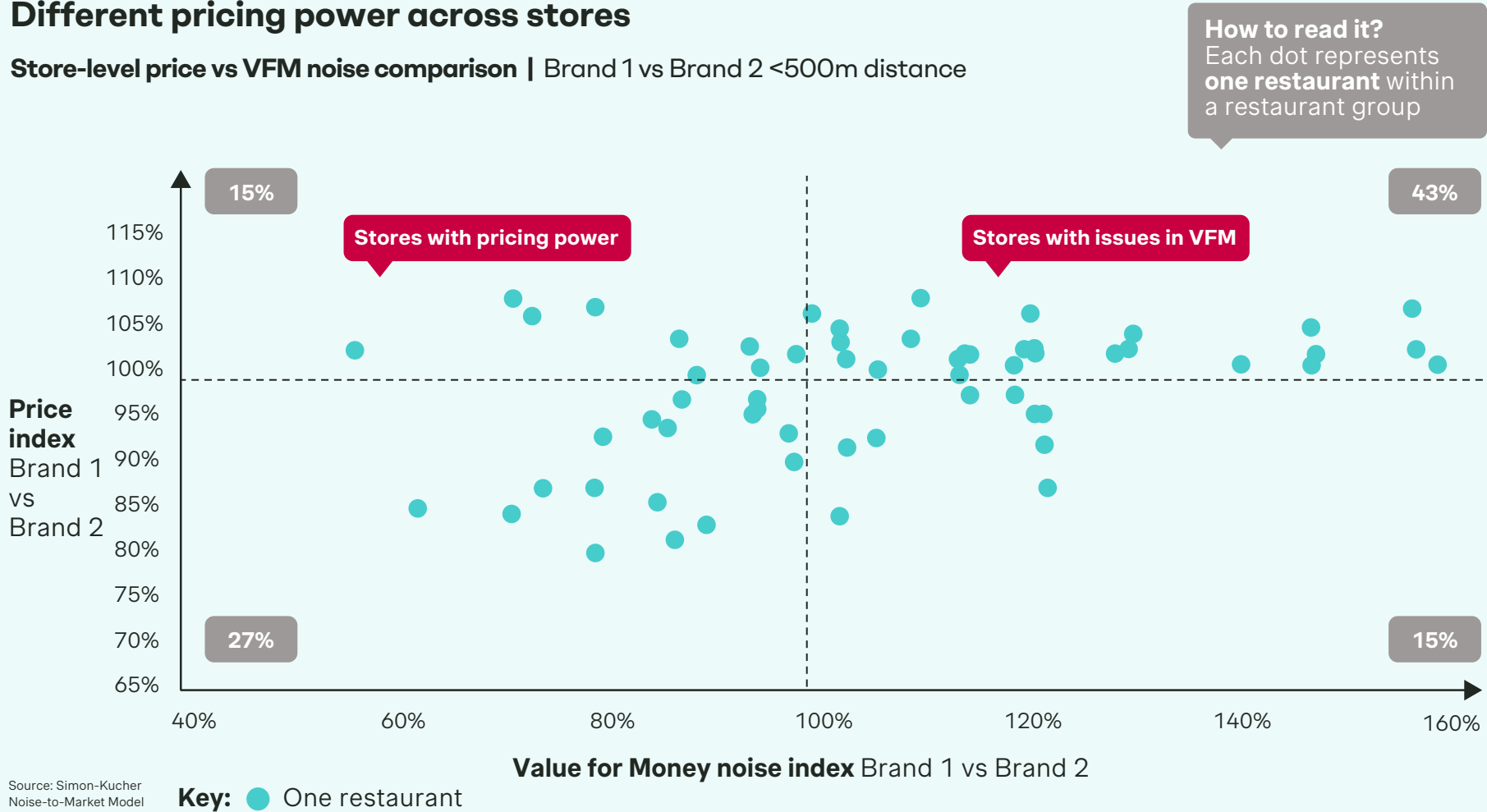
2. Identifying where pricing power can be leveraged

Two stores charge the same premium over the local competition. In one, customers happily pay it as the perceived value justifies the price. In the other, the same premium quietly drives them across the street. **Pricing is set centrally; willingness to pay is local.**

N2M measures pricing power store by store, combining relative price with customer perception, which shows exactly where there is room to capture margin and where the priority is to protect volume.

Different pricing power across stores

Store-level price vs VFM noise comparison | Brand 1 vs Brand 2 <500m distance



3. Prioritizing action across micro-markets

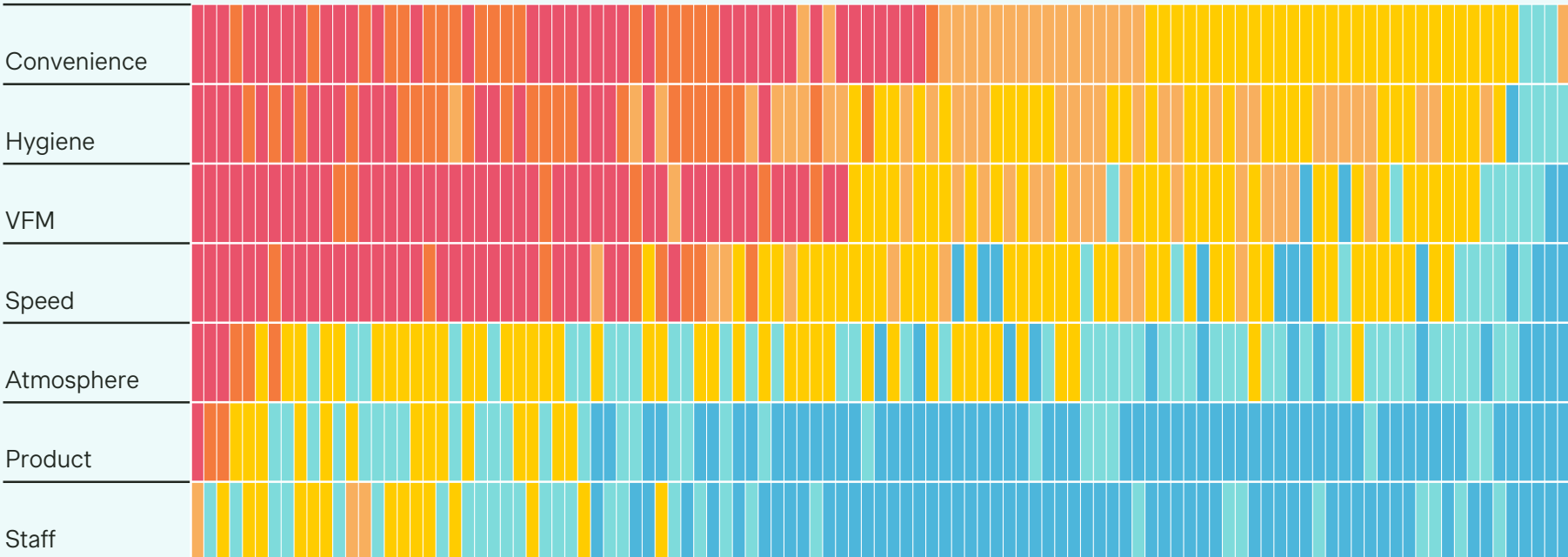
Faced with weakening perception, most teams try to fix everything at once (value, product, service, atmosphere) everywhere, with the same urgency. The result is diluted effort and slow progress. N2M clusters stores into micro-markets that share the same dynamics and the same underlying issues, turning a scattered problem into a clear set of patterns.

Resources go where they move
perception most, and nowhere
they don't.

Restaurants within the same restaurant group are segmented into clusters according to the main shared drivers of perception noise

How to read it?
Each column represents **one restaurant** within a restaurant group

Issue based store classification



Source: Simon-Kucher
Noise-to-Market Model

Key: High Noise Low Noise

From noise to signal

Knowing where the noise is matters.

Knowing what to do about it matters more.

Turning perception into a decision lever: N2M provides a clear view of where value is created and lost across the market, including true competitive position, key sources of noise, store-level performance, and continuous benchmarking.

Enabling targeted, fact-based action: Where to act, which levers to prioritize, and how to adapt strategy to each micro-market with precision.

Sequencing the right decisions: Not just identifying issues, but determining what to move first, where, and by how much to drive measurable results.



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