

FOOD INDUSTRY

“The largest manufacturing
sector of Europe”

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Introduction

Eating out is the biggest leisure activity in the European Union. People tend to spend their money by ordering food or dining out at a restaurant. This has made food Industry the largest manufacturing sector in the EU having a turnover of more than 1 trillion euros in 2016, which is even higher than the automotive Industry. As per the “fooddrinkeurope” publication 201-8¹, the food and drink Industry in Europe generated a revenue of 1115 billion euros making it the largest contributor to EU economy and also the leading employer giving employability to 4.51 million people which is the highest in comparison to any other European Industry. The

food and drink Industry in the past mainly used to generate the revenue from dine in restaurants, but in recent years online food delivery has become a leading contributor to the overall revenue. A research forecast from ‘Statista’ shows the current revenue of the online food delivery sector to be 3375 million U.S. dollars which would reach to 5285 million U.S. dollars in 2023 which is quite astonishing. According to a data collected by ‘Statista’² which shows countries all over the world on the basis of the total time spent on eating or drinking, France, Italy and Spain stand at the top where a person spends more than 2 hours in eating and drinking. As all the top three

“In the below ‘Figure 1’, we have visualized a Statista dataset comparing different countries all over the world in terms of the time spent by their people on eating and drinking. As we can see, 4 out of top 6 countries belong to Europe. This gives an Idea that eating and drinking are indeed an important part of the European lifestyle. We have arranged the horizontal bar plot in a decreasing sequence so it becomes easy to interpret. Bar plot has been used so that it would be easy to compare multiple countries in one visualization”

How much time do people spend in Eating/Drinking in different countries?

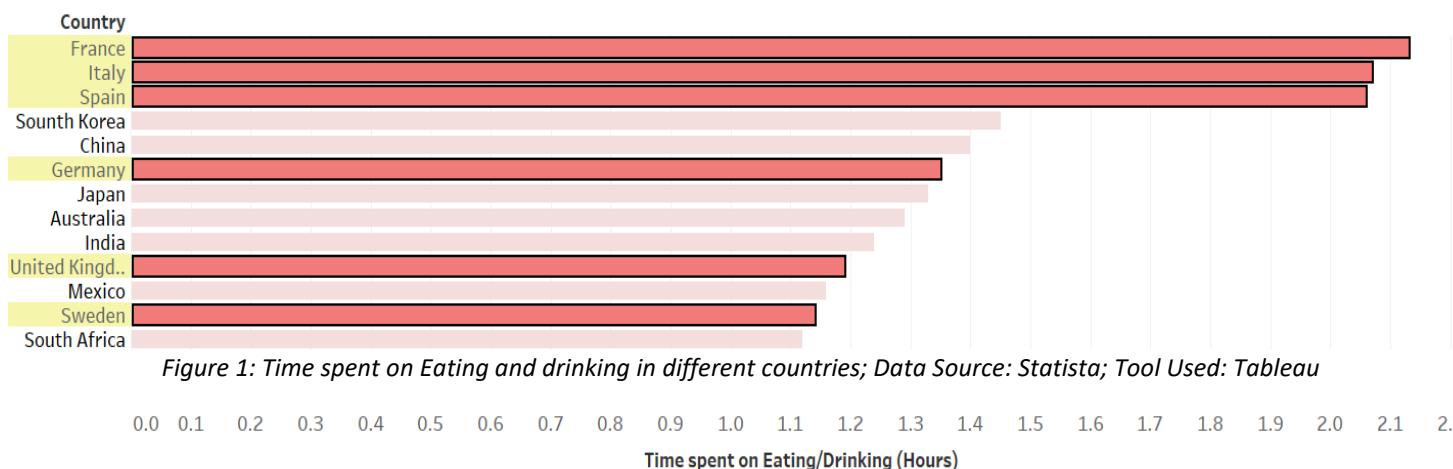


Figure 1: Time spent on Eating and drinking in different countries; Data Source: Statista; Tool Used: Tableau

Sum of Time spent on eating/drinking for each Country.

¹ <https://www.fooddrinkeurope.eu/>

² <https://www.statista.com/chart/13226/where-people-spend-the-most-time-eating-drinking/>



countries belong to the European Union, it shows that people living here do like to spend on food and drinks which directly affects the economy. All the above three countries France, Italy and Spain have the highest number of tourist visitors as well, which increases the food Industry turnover. The soft drinks sector is the world's most innovative food sector and EU's major export is Wine and spirits. This has made EU the largest food and drink exporter in ³the world and second largest in terms of food Imports. All these facts make the food Industry a very important topic to be researched or studied upon in terms of business perceptive. In this report, we would be gathering and analysing food Industry related data from various trustworthy sources and producing different in-depth visualizations to tell a story combining the past, current and the future of European food and restaurant Industry. These visualisations and analysis would serve as an advantage to any organisation who wants to invest in the EU food sector, be it opening a new restaurant or exporting Items worldwide. For this report, we would be using multiple tools for our visualizations such as Python, Tableau, R, QlikView and Power BI

depending on the nature of data. All the visualizations are created keeping 'Andy Kirk's three principals in mind – Trustworthiness, accessibility and elegant. Apart from this, semantically resonant colours have been utilised wherever possible along with colour blindness tests for visually impaired audience.

"One cannot think well, love well, sleep well, if one has not dined well."

— Virginia Woolf, A Room of One's Own

Source : Goodreads.com

³ <https://www.pexels.com/photo-license/>

Industrial Overview

The European Food and drink Industry is the world's biggest in terms of food and drink exports

having 17.9 percent share in global drinks and food exports for

the year 2016 and generated an export revenue of 113 billion. The total food and drinks export has been doubled in the last 10 years. The EU food and drink Industry generated a turnover of more than 1 trillion in the year 2015 and has been increasing even more since then. This has made this Industry the leading employer in the whole EU giving jobs to 4.5 million people. Food and drink Industry currently is the biggest manufacturer in the whole EU with respect to turnover, value added and employability. Food and drink Industry is one of the biggest contributor to the EU economy, contributing even more than other big manufacturing sectors such as automotive Industry. The food & drink Industry is a major contributor towards EU bio-economy. It approximately contributes to half of

"EU food & drink Industry is the biggest exporter in the world!!"

the total bio-economy turnover and one-third of the total value added in the European Union bio-economy. As per 'cordis.europa.eu' the food nutrition security is a major factor when it comes to the future food production and consumption in Europe . To handle the food nutrition security (fns) issue, the European commission will be using research and innovation policy which would secure the future of European food Industry. The annual turnover of the food and drink service Industry has increased by 61 billion euros from 2011 to 2016 which is quite a remarkable progress. As a matter of fact, the food inflation rate has gone higher since 2017 and is expected to maintain an ascending curve. This could be due to the increase in the demand of food and drinks in the EU. In the famous quote, 'Data is the new oil' told by 'Clive Humby', data is compared to oil which is highly expensive. Nowadays, correct data can be used to increase the business of restaurants or food organizations. In the same manner, this visualization analysis report can be used by any organization to better invest in the European food and drink Industry.

"The food and drink Industry is the biggest manufacturer in the EU in terms of revenue. In 2016 it had a turnover of 1 trillion euro which is the most by any sector"

"The annual turnover of food and beverage service Industry has increased from 348.7 billion in 2011 to 409 billion in 2016. With the great future prospects the profit curve would keep rising"

Food/beverage & Restaurant Industry turonver trend 2011-2016

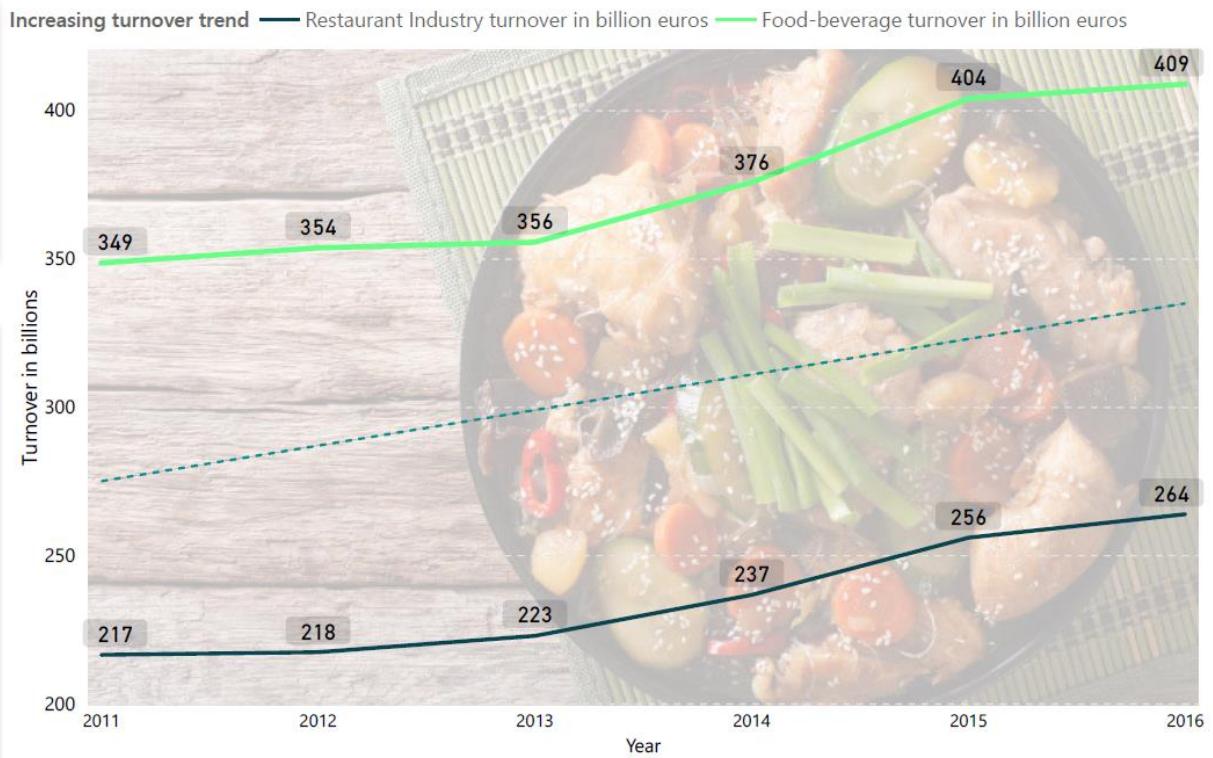


Figure 2 Food/Beverage & Restaurant Industry yearly turnover trend; Source: Statista; Tool: PowerBI;

Food/Beverage & Restaurant Industry growth trend in the last few years

What makes the EU food & beverage Industry so attractive from a business point of view is its growth and development in the last few years. Food industry gives one of the highest ROI and is one of the biggest in terms of adding value in the EU economy. The two main Industries which contribute to the EU food business are Food/Beverage and Restaurant Industry.

The annual turnover data for both Industries show a positive turnover

trend. A turnover increase of 60 billion from 2011 to 2016 is remarkable. This shows why food/drink Industry is the biggest revenue generating Industry in the whole EU manufacturing business. The reason behind this increasing trend would be discussed later in the report.

When the private does well, there's revenue for the public sector.

-- Jim Talent

"In the following visualization, PowerBI has been used to visualize and draw insight from the gathered turnover data. Both food/beverage and restaurant Industry show positive growth trend with increasing turnover every year. Food and beverage Industry had a 60 billion increase in their turnover in a period of 5 years with the most value added to the EU economy. Line graph has been used as line graph work really well in shoeing trends over the years. We have used shades of green to represent the turnover which is semantically significant. The trend line is also added so that the viewers can quickly notice the positive trend"

Which EU countries are generating the highest turnover in food, beverage and restaurant Industry and why?

France, United Kingdom, Germany, Italy and Spain are the countries generating the highest turnover in the EU food/beverage Industry. The remaining countries are significantly lower in terms of total turnover, hence we have highlighted the top 5 countries with highest turnover. Semantically significant colour green has been used for turnover and blue has been used for number of visitors. Both the visualizations has been presented in descending order for better and quick understanding. The top 5 countries with the highest number of tourist visitors are the countries with the highest food Industry turnover as well. A relationship can be found out here that the number of tourists is related with the total revenue the country is generating. As tourist spend a lot on eating and travelling, countries having more tourist are making more turnover apparently. In the discussed visualization we have kept kirks principal in mind. Data has been gathered from Statista and is valid and trustworthy. Column chart(Excel) and horizontal bar plot(Python) has been used to compare the data of same set of countries.

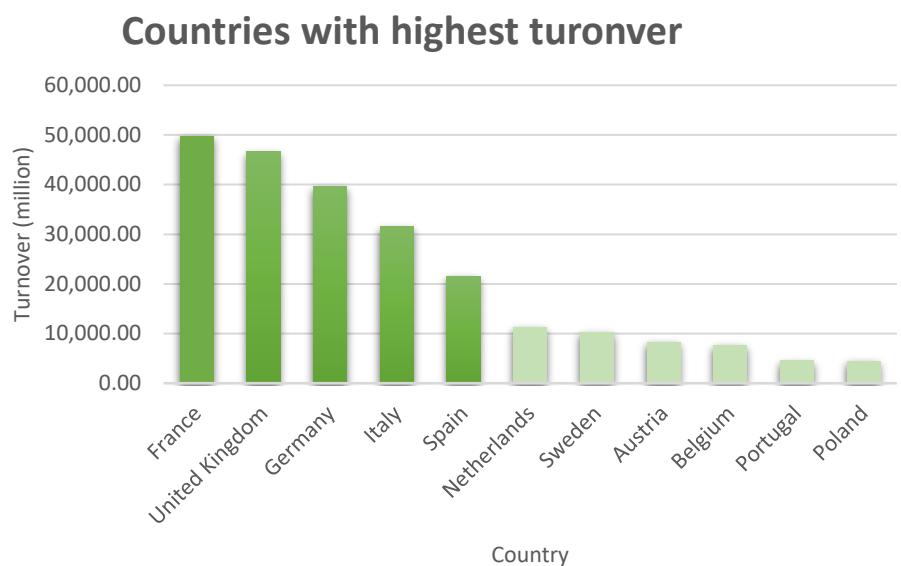


Figure 3 EU countries with highest food Industry turnover; Source: Statista, Tool: Excel

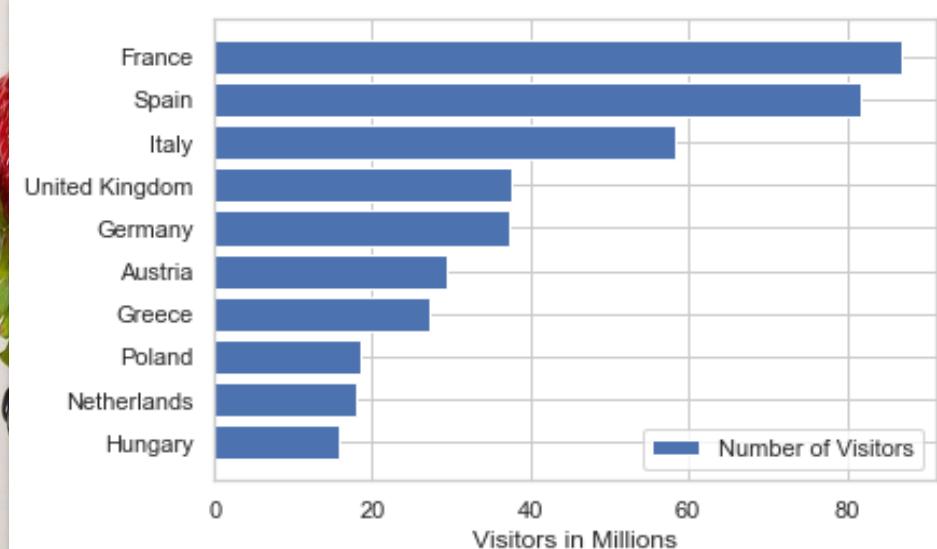


Figure 4 EU countries with highest number of tourists; Source: Statista, Tool: Python Spyder(Matplotlib)

⁴ <https://www.pexels.com/photo-license/>

Now you know where to open a new restaurant !!

"In the visualization we have taken both 'kirks' and 'Tufte's' visualization principals into consideration. The data-ink ration has been maximized using Area chart. Area chart has been preferred as we needed to perform comparison and composition and had 3 different data variables for same set of countries. All variables Visitors, Restaurants and Reviews had different measures so we have used overall percentage to plot all the variables in one chart. This saves a lot of space and ink. Power BI has been used for converting the measures into cumulative percentages. Italy has been found to be the best EU country to open a new restaurant"

⁵EU Restaurant Industry has increased their turnover by 47 billion from 2011-16 which is a huge growth. It is one of the best Industries to invest in at the moment. If you want to invest, you must know which

Spain are the leaders of this Industry, However, one thing to notice is that Italy has got the least number of restaurants in the top 5 countries, but on the contrary has the highest count of restaurant reviews and third highest

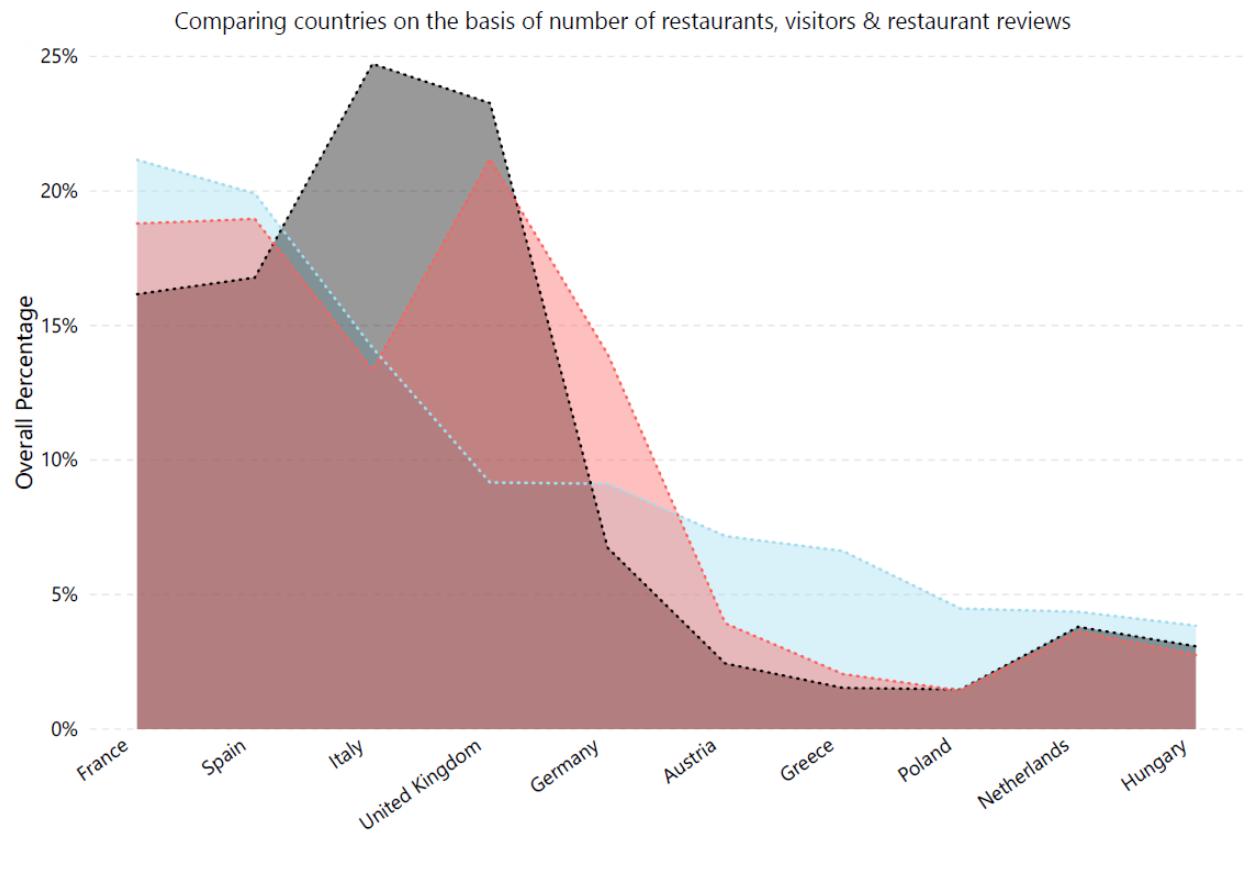


Figure 5 Finding the best EU country to invest in Restaurant Business; Tool: Power BI

country would be the best to open a new restaurant. As from the previous visualizations it is clear that countries like France, UK, Germany, Italy and

in terms of tourists. Thus, Italy would be the most suitable country having less restaurants and more demand with high visitors and reviews.

⁵ Visitors Data Source : Statista

Restaurant, Reviews Data Source : Kaggle

Background picture :

<https://www.pexels.com/photo/brass-round-7-stack-coins-40140/>

McDonald's: With Great Customer Service Comes Great Money

⁶ McDonald was the leader of the food service sales in Europe in 2017 with sales worth 22.7 billion, 15 billion sales ahead of sodaxo who had the second highest sales that year. As McDonald was making such high

the highest 2017 sales and the map shows the Countries having the most number of McDonald restaurant in 2017. As we can see that the dark shaded countries Germany, France, UK, Spain and Italy have the most

"We take the hamburger business more seriously than anybody else"

-Ray Kroc(McDonald)

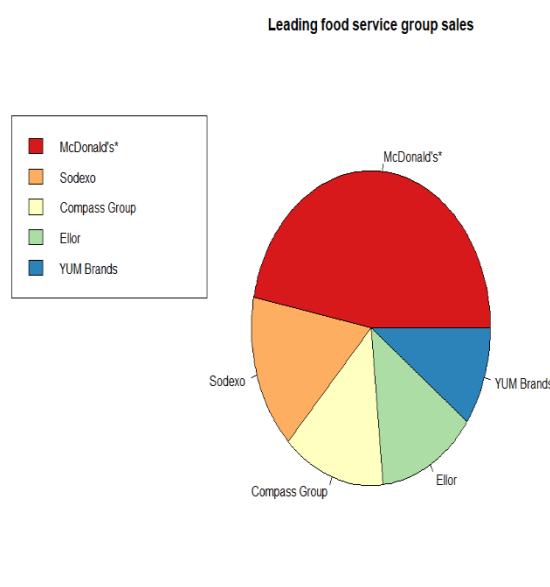
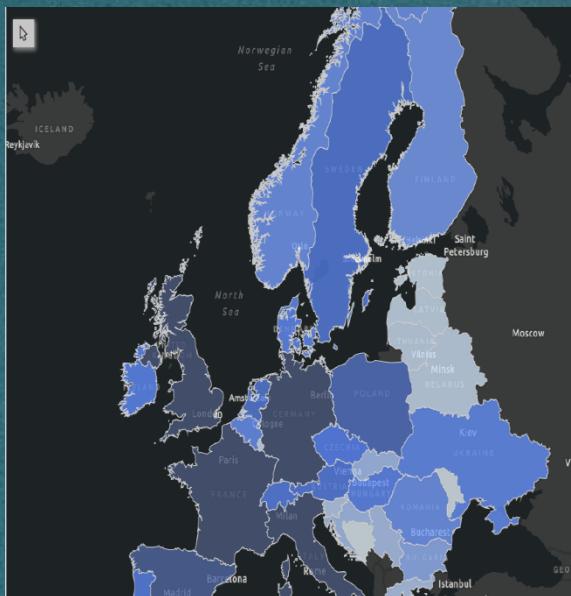


Figure 6 Number of McDonald in different countries and Total sales of different food restaurants; Data: Statista;
Tools: PowerBI and R

revenues, it made it clear that it was one of the high desired restaurants to invest in and countries having more McDonald outlets would have been generating more revenue. The pie chart shows that McDonald made

number of McDonald and Germany being the leader with 1480 outlets in 2017. It can be seen that the countries with the most McDonald stores also got highest turnover in restaurant Industry for 2017.

"In the following visualizations, the emphasis has been laid on McDonald restaurant. The first visualization is made using PowerBI and shows the total number of McDonald in different EU countries. As we had country geographical data, map has been used. PowerBI has been used as it has a beautiful map filter. R had been used for creating a pie plot showing total sales by top restaurant and food service group. As we have taken only the top 5 groups so pie plot has been used. We Semantically significant red colour has been used for McDonald"

⁶ <https://www.pexels.com/photo/mcdonald-drive-thru-road-signage-1858115/>

“The tree chart has been used to visualize the restaurant data from Kaggle. It contained restaurant related data such as name, country, cuisine served, user ratings, online reviews received. Tree chart has been used as the data was hierarchical. The country flag colour has been used for every country to make it semantically significant. Larger the size of the box, more popular the cuisine is. The popularity has been calculated on the basis of number of reviews and number of restaurants. Tufte’s and kirk’s principals have been taken care of and tree map helps helped to put show more data in less ink that is high data ink ratio. The data from Kaggle contained more than 1 lakh rows. R was used to clean and organise the data.”

CUISINE THAT WOULD GROW BUSINESS !!

⁷When it comes to cuisine, everybody has their own preference. To grow a business in restaurant Industry, cuisine it one important game.

popular. However, Mediterranean cuisine is the most reviewed and loved cuisine in Spain, which is surprising. This could be due to high number of

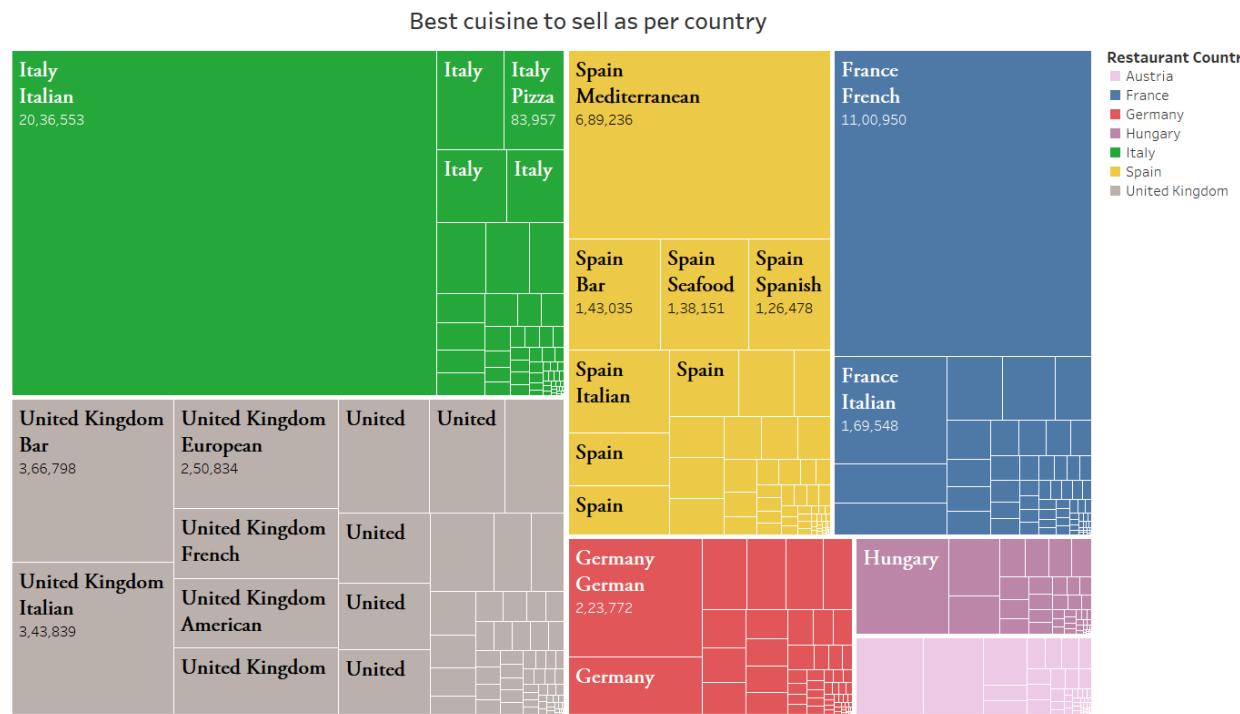


Figure 7 : Best cuisines as per country, restaurants and reviews; Data: Kaggle; Tool: Tableau

changing factor. The tree chart shows hierarchical structure of countries, restaurant, cuisines and reviews. Colours are chosen as per the country's flag. In Italy, France & Germany, local cuisines are the most

immigrants present. Multi-cuisine menu is more famous in the UK due to people from different origins. Now we know which cuisine to set for which country and its people.

PRICE THAT WOULD MAKE YOU FALL FOR!!



Figure 8: Categorizing price range according to high rated restaurants;
Data: Kaggle; Tool: Spyder python (Seaborn)

What is the best price range for a new restaurant in different EU country?

Price range is an important factor when it comes to sales of a restaurant. Attractive price range offers more sale thereby increasing business. All over the EU, 'average' has been categorised as the most preferred price range. The high rated successful restaurants are the one with average price range. The

data has been taken for top rated (>3.5) restaurant only.

Milk products are ruling the food market !!

⁸About 20 percent of the overall food market revenue share belong to milk product. Bread, Bakery and meat products come after that.

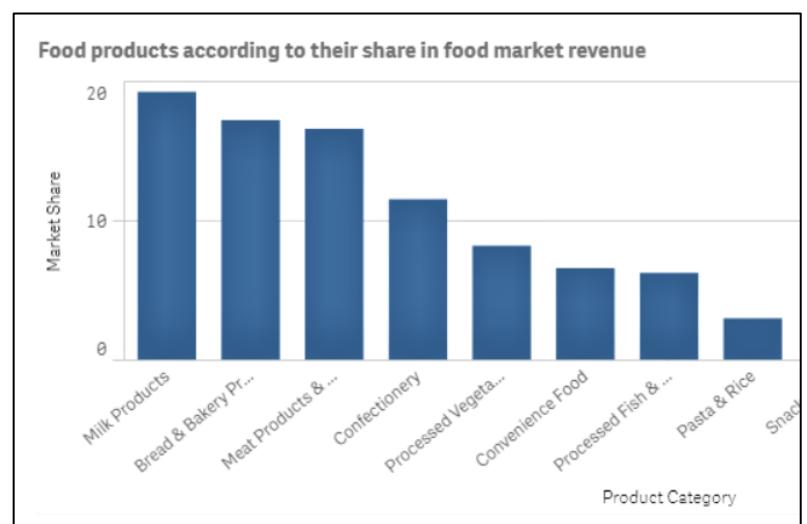


Figure 9 Top selling food products; Data: Statista; Tool: Qlikview sense

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<https://www.statista.com/forecasts/759182/seg>

[ment-shares-in-total-market-revenue-of-the-food-market-in-europe](#)

"About 8-10 percent of males are colour blind. However, only 0.5 percent of women are colour blind."

- wearecolorblind.com

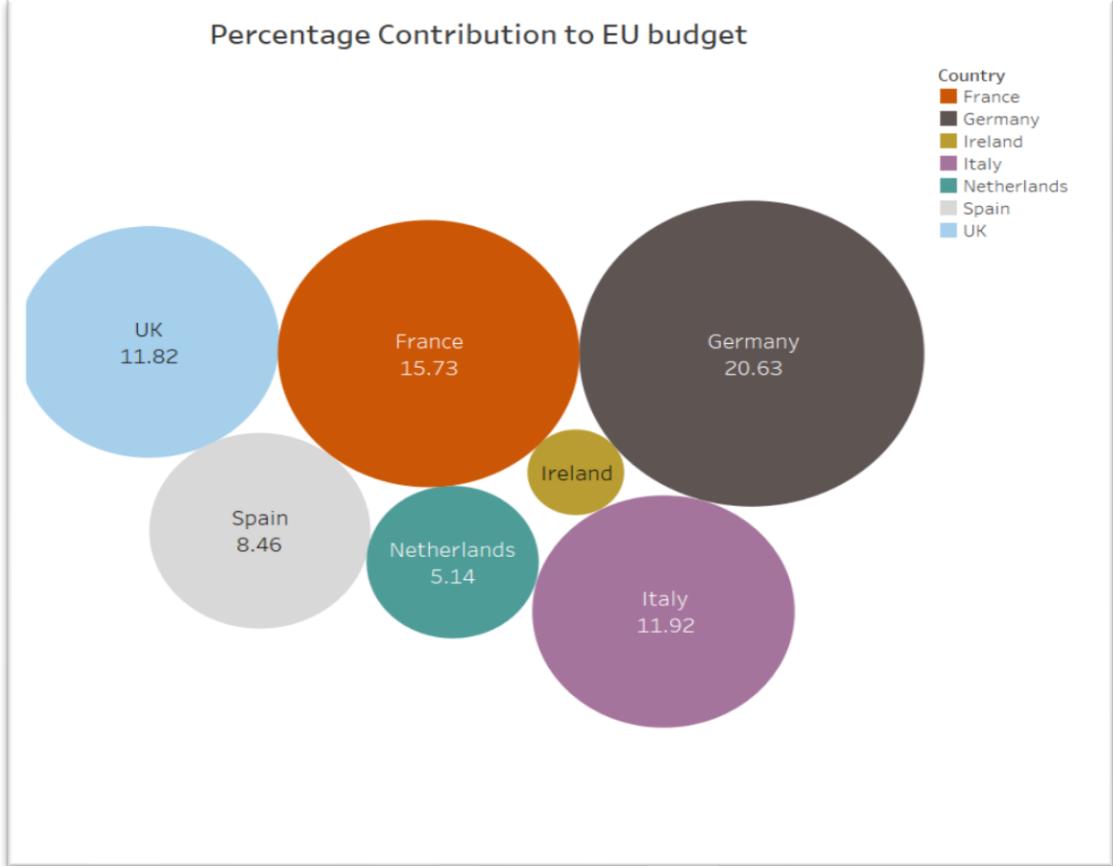


Figure 10 Percentage contribution of different countries in EU budget (Deuteranomaly green)

Bubble chart has been created using Tableau to represent the overall contribution of different EU country in the EU budget. Bubble chart is good for multiple categories to show the area. Colours have been chosen specifically for people having Deuteranomaly or green colour blindness. Other colour blindness test has been added in the appendix

⁹COLOUR BLIND TEST: Colour blind is not Black & White

It is a common misconception that colour blind people only see black and white.¹⁰ 99 percent of the colour blind people see colours but are not able to differentiate between similar shades. Colour blindness test has been performed and attached in the appendix section. Deuteranomaly or green colour blindness is the most common. Germany has 20 percent contribution in the overall EU budget 2017. All the countries

generating the highest revenues also contributed the most.

"Colour Blind designs would help everybody."

Source – wearecolourblind.com

⁹ https://research.tableau.com/sites/default/files/2013-SemanticColor-EuroVis_0.pdf

¹⁰ <https://wearecolorblind.com/articles/a-quick-introduction-to-color-blindness/>

Conclusion

In this visualization we have discussed, analysed and visualized numerous facts and figures of the EU food/beverage and restaurant Industry. EU food/beverage Industry being the highest revenue generating Industry in the EU manufacturing sector and the highest exporter of food/beverage in the world made it a attractive area to study trends upon. European countries were found out at the top of the list of total time spent on eating and drinking activities. The Industry has been showing remarkable growth in the last few years increasing their revenue by 60 billion from 2011-2016. McDonald was the highest selling restaurant making a sale of 22.7 billion in 2017 and it was found out that the countries like Germany, Italy, France, Spain and UK having most number of McDonald outlets also made the most overall food Industry revenue. Thus, McDonald played and important role in the total food turnover of those countries. As the EU food/beverage industry is generating large profits, it is a sector to invest in. The most important questions that come up before investing in the food/restaurant Industry are which country to open a restaurant, what cuisine to set and at what price to sell?

All these answers were found out using trustworthy, elegant and accessible visualizations. Italy would be the best country to open a new restaurant as it has high visitors and high number of positive restaurant reviews but comparatively less number of restaurants. Local country cuisines should be set if opening a restaurant in Germany, Italy or France. Surprisingly, Mediterranean cuisine was found out to be the most desirable in Spain along with multi-cuisine in UK. Average priced restaurants were found out to be the most successful. Milk products were the top selling items overall.

References

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APPENDIX

In this visualization analysis report, food Industry data has been used from 2 sources namely – 1) Statista 2) Kaggle

Statista Data –

- 1) Time spend on Eating –
<https://www.statista.com/chart/13226/where-people-spend-the-most-time-eating-drinking/> Data was added to a csv file manually as it was a picture
- 2) Figure 2a -
<https://www.statista.com/statistics/684180/turnover-of-the-restaurants-and-mobile-food-service-industry-in-the-eu/>
- 3) Figure 2b -
<https://www.statista.com/statistics/>

- [684150/turnover-of-the-food-beverage-service-industry-in-the-eu/](https://www.statista.com/statistics/684150/turnover-of-the-food-beverage-service-industry-in-the-eu/)
- 4) Figure 3 -
<https://www.statista.com/statistics/684185/turnover-of-the-restaurants-and-mobile-service-industry-in-the-eu-by-country/>
- 5) Figure 4 -
<https://www.statista.com/statistics/261729/countries-in-europe-ranked-by-international-tourist-arrivals/>
- 6) Figure 5 –
www.kaggle.com/damienbeneschi/k_rakow-ta-restaurans-data-raw
- 7) Figure 6 first visualisation -
<https://www.statista.com/statistics/256044/mcdonalds-restaurants-in-europe/>
- 8) Figure 6 second visualisation -
<https://www.statista.com/statistics/792751/leading-foodservice-groups-in-europe/>
- 9) Figure 7 : Kaggle dataset as Figure 5
- 10) Figure 8 – Kaggle restaurant dataset
- 11) Figure 9 -
<https://www.statista.com/forecasts/759182/segment-shares-in-total-market-revenue-of-the-food-market-in-europe>

12) Figure 10 -
<https://www.statista.com/statistics/316691/european-union-eu-budget-share-of-contributions/>

VISUALIZATIONS

A total of 11 visualizations have been performed in this analysis report apart from visualizations for colour blind people. A total of 6 different visualisation tools have been comprising of Python(Seaborn, Matplotlib), Tableau, PowerBI, R, Spyder, Excel and Qlikview. Each visualization and tool has been used for specific purpose which has been mentioned in text boxes as well as the appendix. All the data collected has been clearly mentioned in the references and appendix which follows kirks principal of trustworthiness. All the visualisation have been performed keeping both kirk's and Tufte's principals in mind.

Explanation of Tools/Visualizations Used

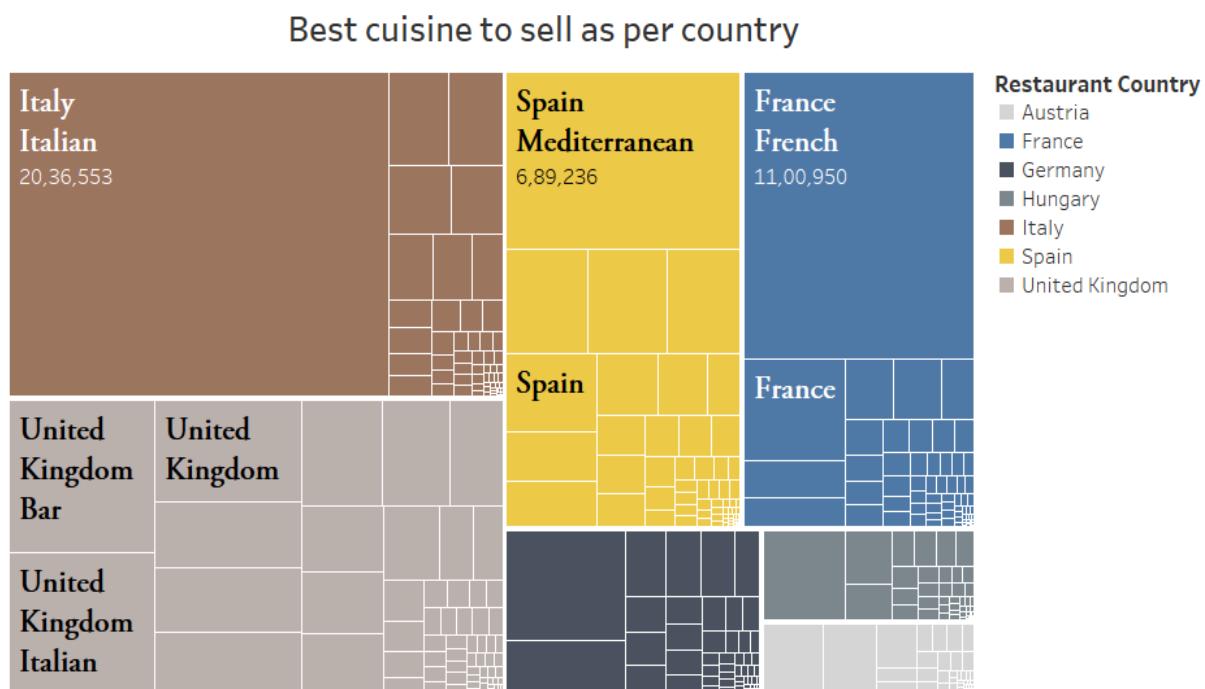
Figure	Tool/ Visualization	Explanation
1	Tableau, Horizontal bar chart	As the data contained different long countries and their respective hours, horizontal bar chart was used. Horizontal bar charts are used when there are multiple categories to compare for the same variable. Tableau gives good graphical horizontal bar plots in required ascending/descending order
2	Power BI, Line chart	We wanted to see the trend of food/beverage & restaurant Industry turnover over the years. Line charts are best for time data to see the trend over the years. Power BI was used as it is very simple to spot trend and generate insight using it.

3	Excel, Column chart	We had very few categories/countries to plot so column chart was used. Excel produces high quality column charts in short time so it was preferred.
4	Python(spyder), Horizontal bar plot	Matplotlib was used in Python to create the horizontal plot as multiple long country names were there. So in order to easily display long names without overlapping horizontal bar plot was used. Matplotlib produces bar plot in very few lines of code, so it was used.
5	Power BI, Stacked Area Chart	Stacked area chart should be used when we want have compositions of multiple variables to show for different categories which in our case was country. The variables were number of restaurant, reviews, visitors. Power BI was used as calculations are simply done using it. Since the parameters of all the three variables were different, we needed to show cumulative percentages of all the three variables.
6a	Power BI, Map	As we wanted to highlight the countries having most number of McDonald outlets, Map chart was used. Power BI has a really beautiful map interface with highlight feature, so it was preferred.
6b	R, Pie chart	Pie chart should only be used when we have very less number of categories. Since we had only 5 categories and we only wanted to highlight McDonald, so pie chart was used. Only 1 line of R code was required to make the pie plot so it was efficient
7	Tableau, Tree map	Tree map is the best used to show hierarchy. As we had hierarchical restaurant data of different EU countries, tree map was used to show the hierarchy between countries, their restaurants, cuisines served in those restaurants and number of reviews for that restaurants. Tree map gave a very beautiful visualisation which helped to find Insights. Tableau has a very interactive tree map with drill down factor. So we were able to use different colours for the countries as per their flag colour.
8	Python(Seaborn), Heat Map	Heat map shows the intensity for a particular variables with respect to another categorical variable. Since we wanted to find out the most preferred price range of restaurants, heat map was perfect as the price range data was categorical. Python Seaborn gives really beautiful heatmap with gradient colours. So it was used.
9	Qlik view sense, Column chart	Qlikview and column chart was used to display food products as per their overall sales. As we wanted to see the top sold products only, column chart was used.

10	Tableau, Bubble chart	We wanted to show the countries and their contribution in the EU food budget. We used bubble size to show countries having more contribution w.r.t to others. Bubble chart is visually easy to understand if categories are less. As we were using colours according to colour blindness, tableau was used as it has variety of shades available.
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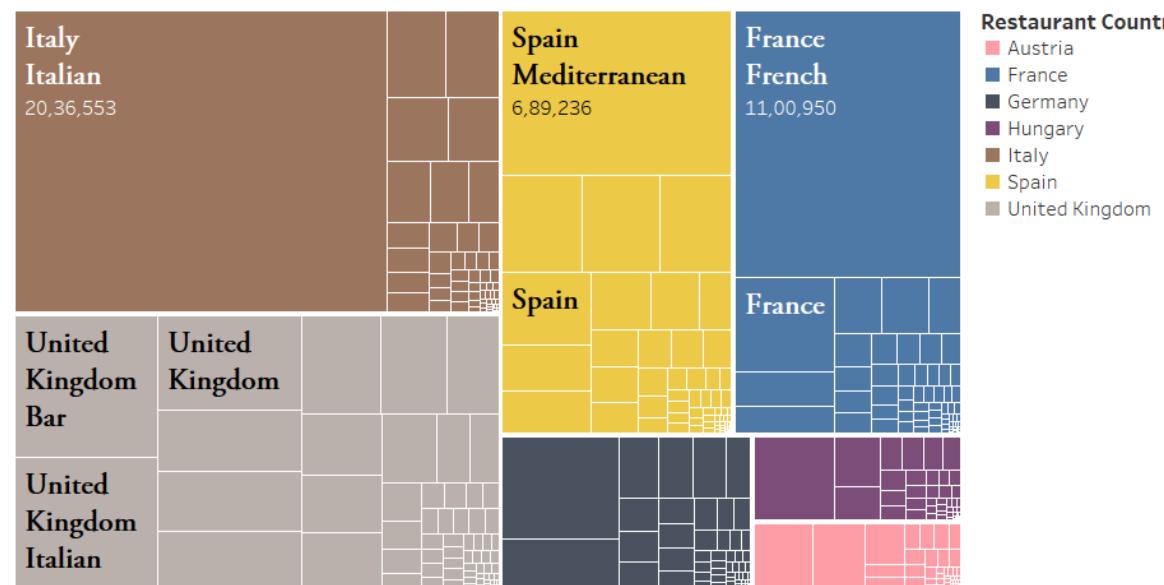
COLOUR BLIND VERSIONS OF VISUALISATIONS

Red blind Protanopia:



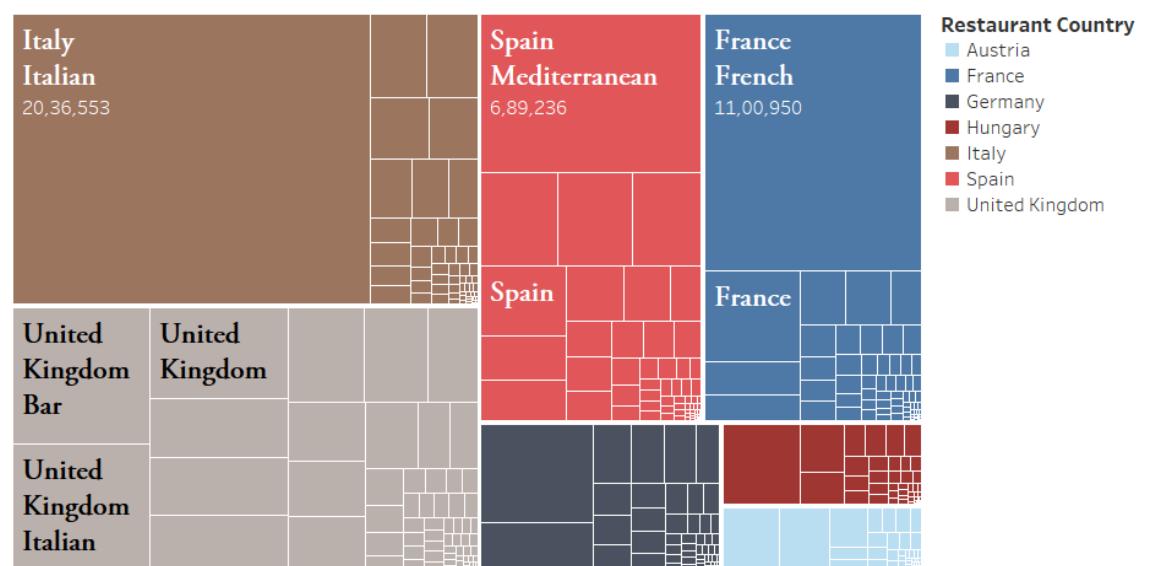
Green blind Deuteranopia:

Best cuisine to sell as per country

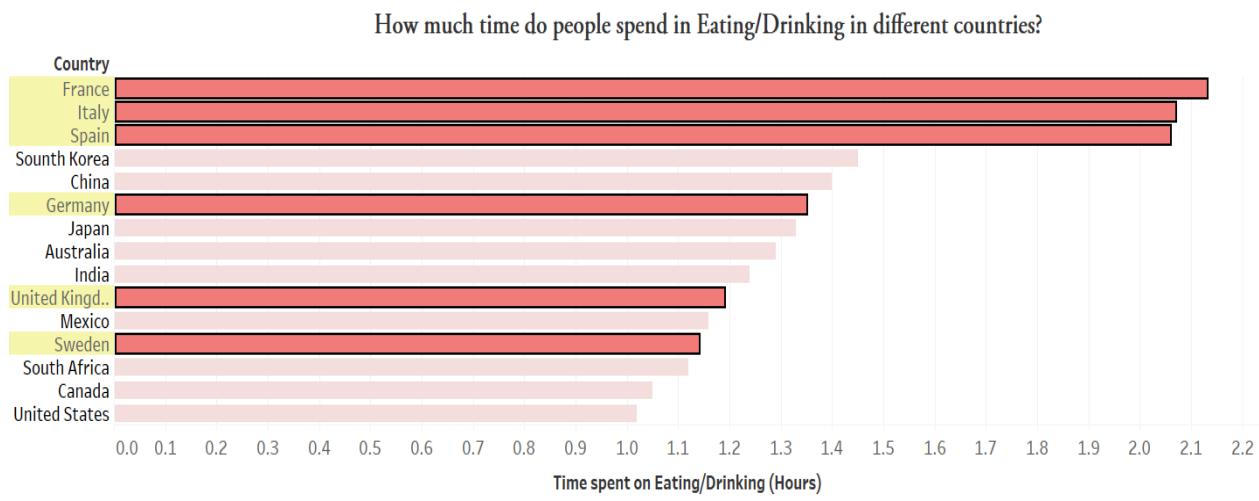


Blue blind Tritanopia:

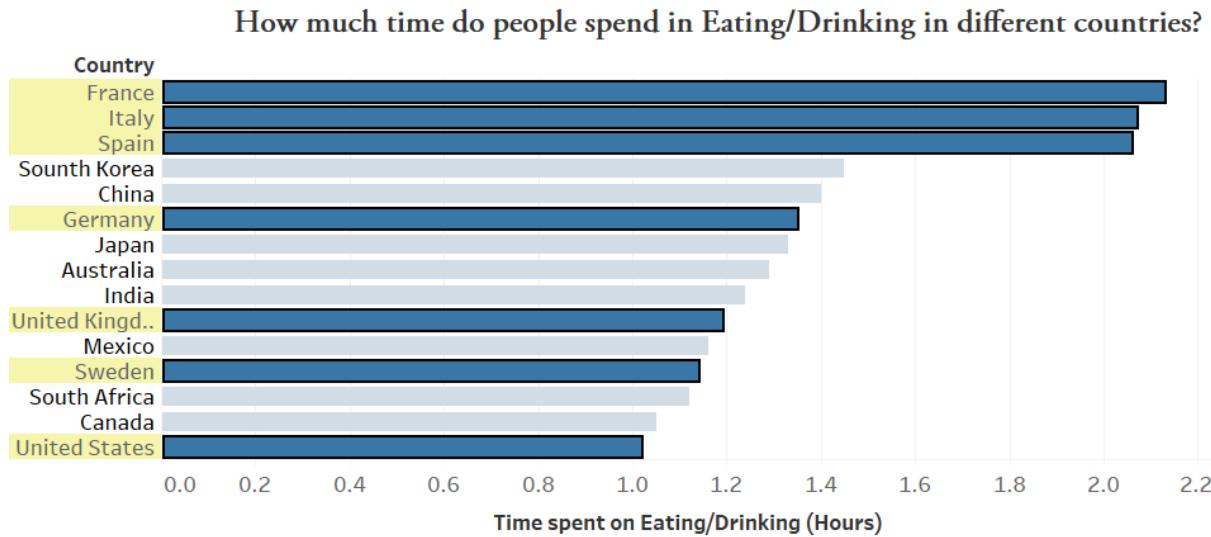
Best cuisine to sell as per country



Blue blind Tritanopia:

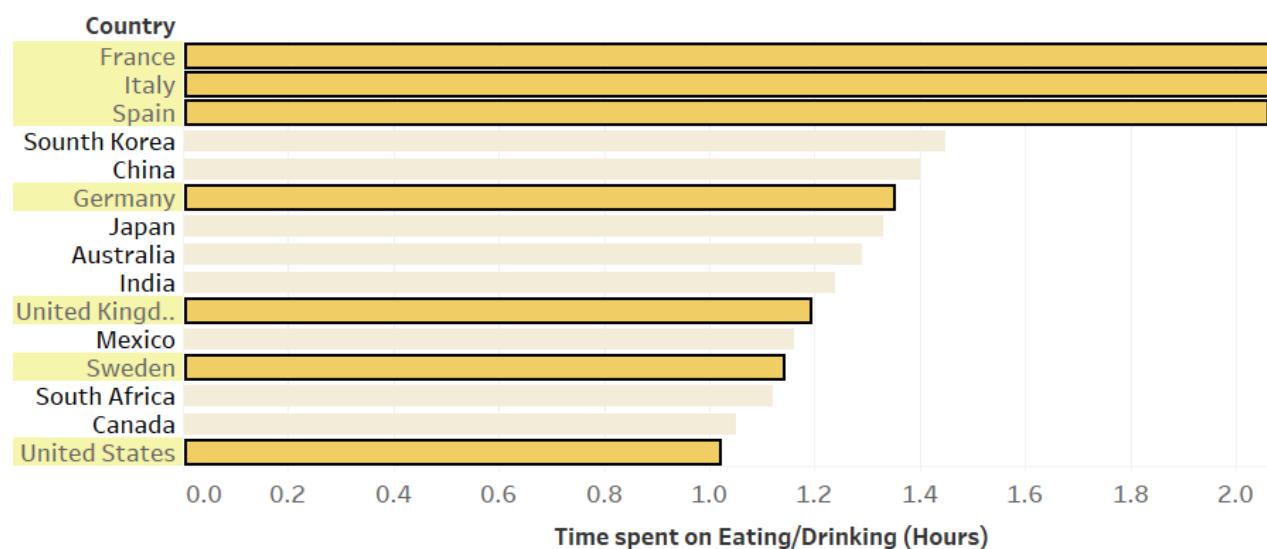


Red blind Protanopia:



Green blind Deutanopia:

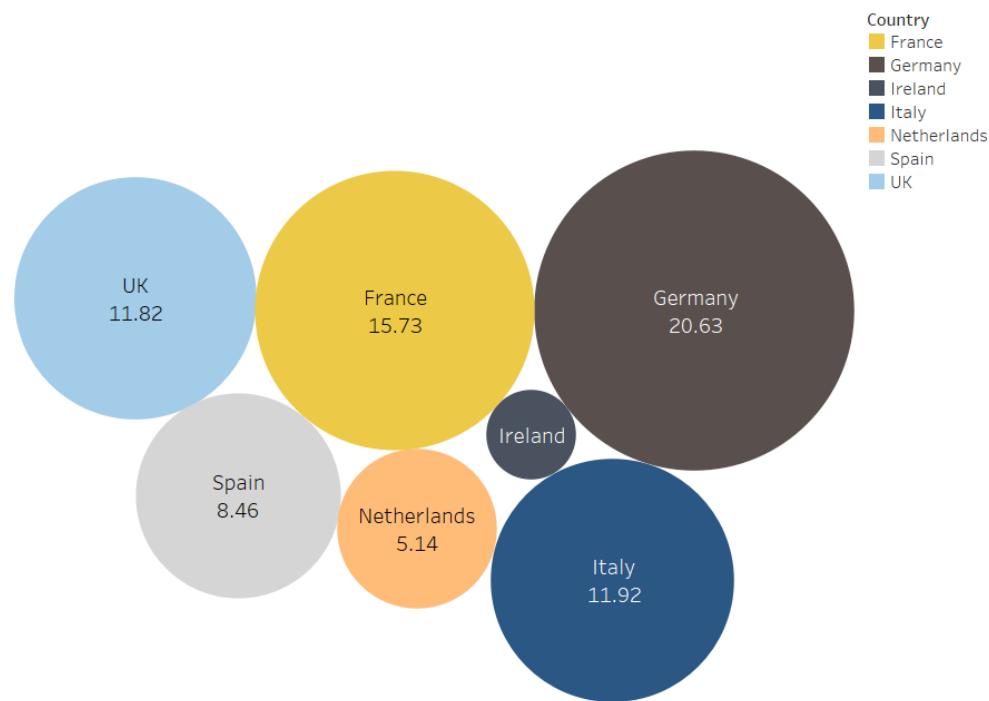
How much time do people spend in Eating/Drinking in different countries?



Sum of Time spent on eating/drinking for each Country.

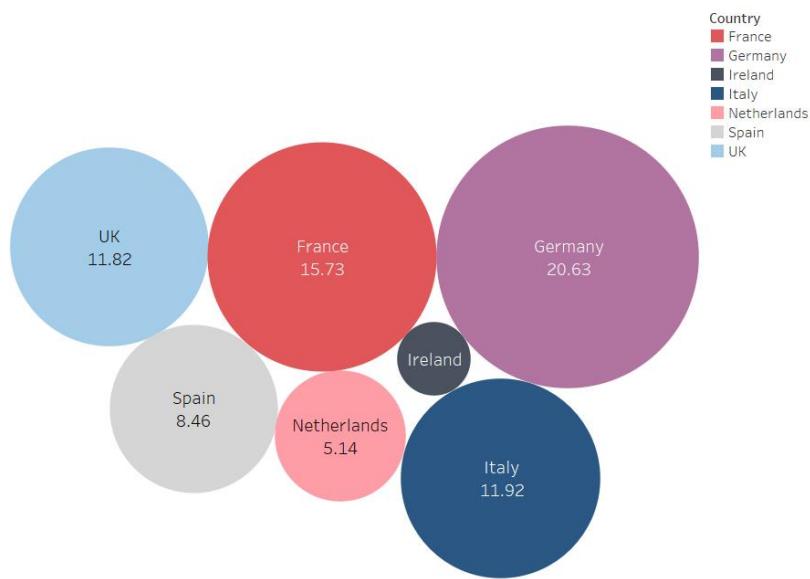
Red blind Protanopia:

Percentage Contribution to EU budget



Blue blind Tritanopia:

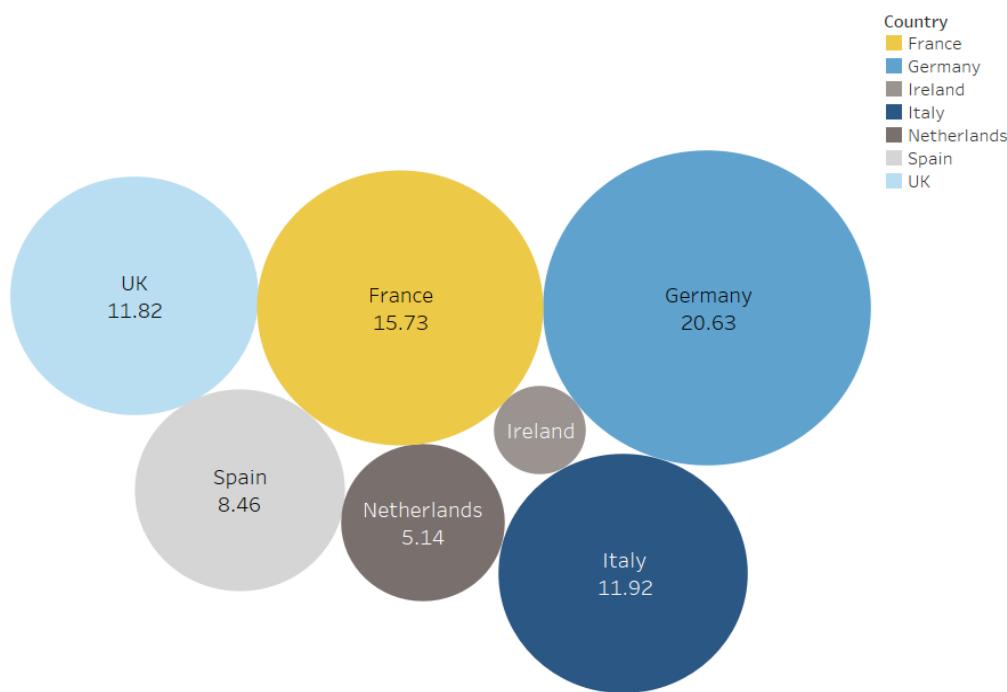
Percentage Contribution to EU budget



Country and sum of Contributions. Color shows details about Country. Size shows sum of Contributions.
The marks are labeled by Country and sum of Contributions. The view is filtered on Country, which keeps 7
of 28 members.

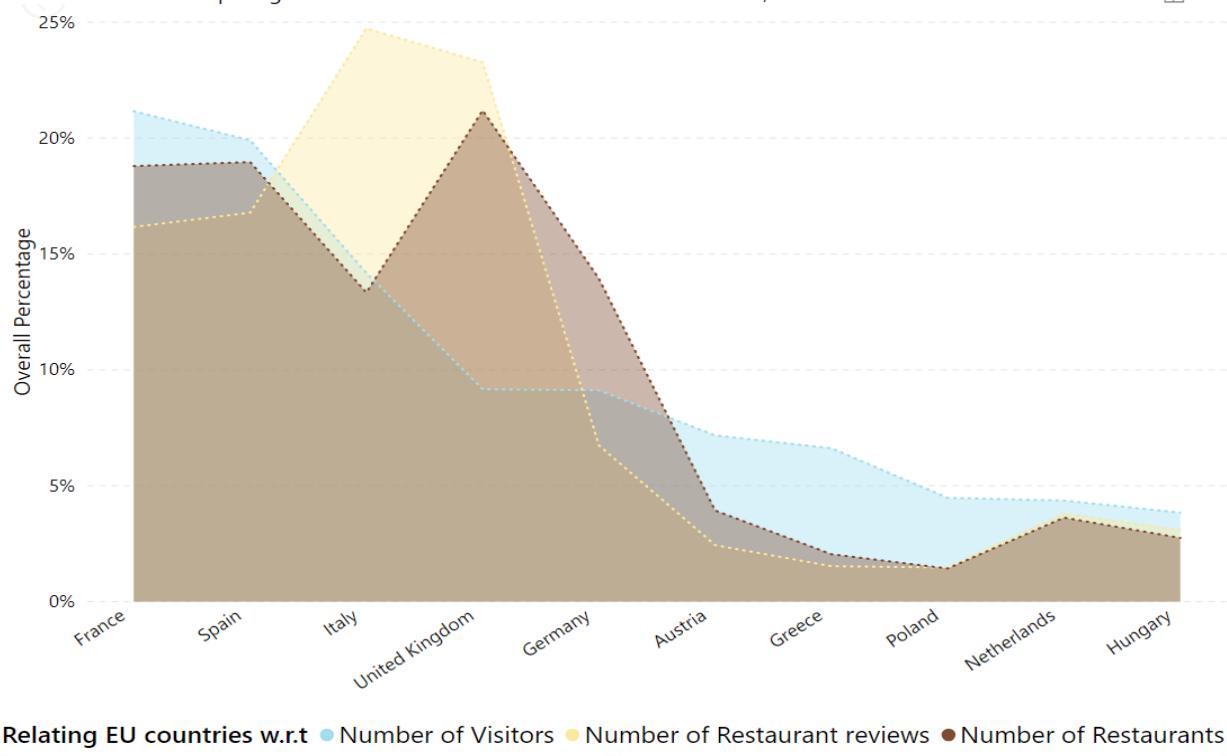
Green blind Deutanopia:

Percentage Contribution to EU budget



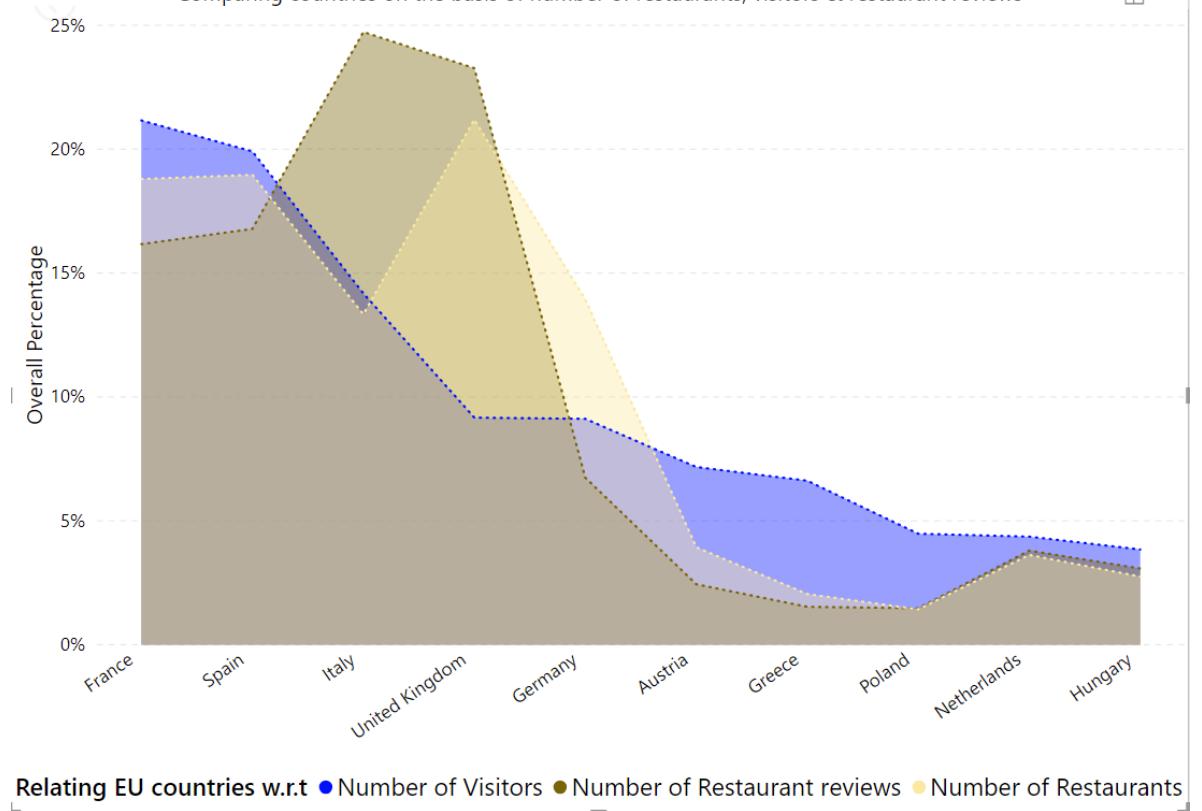
Green blind Deuteranopia:

Comparing countries on the basis of number of restaurants, visitors & restaurant reviews

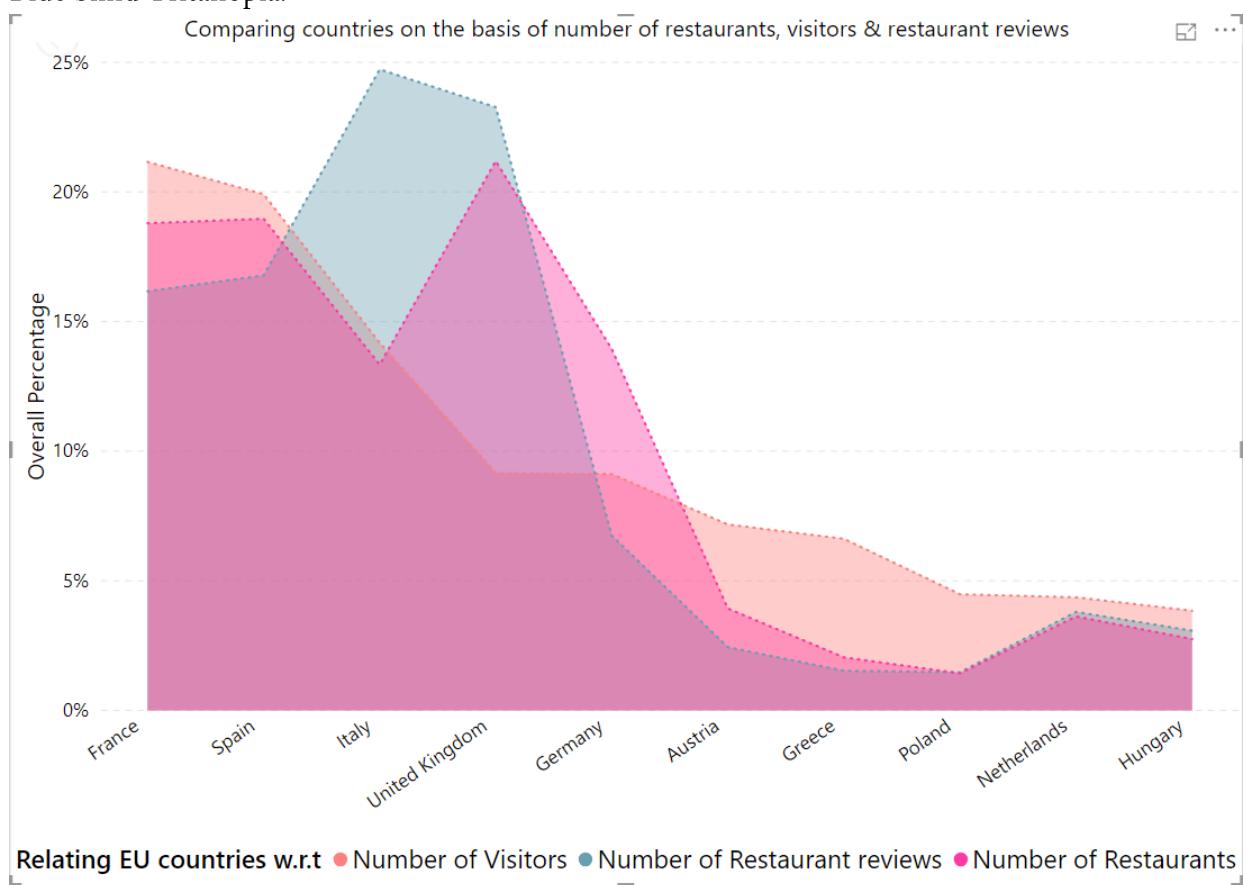


Red blind Tritanopia:

Comparing countries on the basis of number of restaurants, visitors & restaurant reviews



Blue blind Tritanopia:



Relating EU countries w.r.t ● Number of Visitors ● Number of Restaurant reviews ● Number of Restaurants

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