

FOODSERVICE
RESEARCH
INSTITUTE

THE BEST REPORT®



BRAND EQUITY SHARE TRENDS®



BEST REPORTS INCLUDE

- **Executive Summary** --- generally 3 to 5 slides
- **Detailed Findings** --- 15 to 25 charts utilizing tables and graphs
- Trend reports in second and succeeding years increase the size of the Executive Summary and Detailed Findings
- Computer tabulations provide detailed information on the brand share of each brand and company of all reported brands
- For example, if a company has 3 brands, results are provided for total company (example 25%) and for each brand (example: A=15%, B=7% and C=3%)

BEST PROVIDES DATA INSIGHT INTO YOUR PRODUCT CATEGORIES

VALUABLE CATEGORY INFORMATION ON MARKET SIZE AND BRAND SHARE

- Market Size by operator segment and region
- Volumetric Measure: Pounds, gallons or other non dollar measures
- Manufacturer Brand and Distributor Label Shares
- Foodservice segments that are primary users of the category
- Top selling formats/and or flavors
- Trend data for market size and brand shares

BEST PROSPECTUS

Since 1992, the BEST Survey of operators has investigated more than 125 Foodservice product categories with 100+ Food Supplier Companies and Associations participating. BEST Reports® are syndicated (shared cost) research surveys that are far more economical and more accurate than custom surveys of lesser sample size. BEST provides valuable, hard to find category insight on Category Size and Brand Shares among **9 commercial and 5 non-commercial** market segments. Foodservice operators in these fourteen segments account for an estimated 93% of the foodservice purchase dollar universe. Each BEST Report consists of a thorough analysis of a single foodservice category by providing pound volume by market segment and brand share statistics for all brands (and sub-categories) including Sysco and US Foodservice. All levels of your organization stand to gain valuable and objective knowledge of the foodservice market place and your position in it.

BEST RESEARCH METHODOLOGY

List Source and Name Selection

List of commercial restaurant operators and non commercial/institutions is leased from major foodservice business publications. Completion quotas are established for 37 market segments within each of four geographic regions. Universe count for each of 148 sample cells (37 segments within 4 regions) is used to determine the sample size and also the projection factor which explodes sample data into estimates for market size for the entire foodservice universe .

Questionnaire

A total of 1,800 interviews are to be completed with foodservice operators by the research phone staff of Foodservice Research Institute (FSRIN). Quotas are to be observed for each market segment within each state and region using state by state operator counts based on leading industry and government sources. Questionnaire is to be designed by the Foodservice Research Institute. Questions are to be asked on quantities of product categories purchased for each brand/label per average week. Client approves wording of their category question (s).

Data Collection and Processing

All calls are completed at the call center of Foodservice Research institute in Oak Park. Computer Aided Telephoning Interviewing is used with brand coding built into the CATI system. Questionnaire,

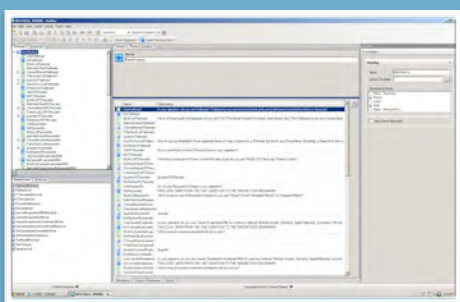
survey, data control and tabulation are implemented using an IBM/SPSS® software package. Records are reviewed for consistency and completeness by the staff of Foodservice Research Institute, Inc.

Quality Control

BEST phone interviewing is conducted using college students from Concordia and Dominican Universities. Interviewing is conducted on the premises of Foodservice Research Institute. All interviews are constantly audited by a dedicated QC monitor on the FSRIN staff. Real Time viewing of results is possible as interviews are completed.

Research Margin of Error

All survey research is based on the premise that a randomly selected sample of the universe can be used to infer characteristics and behavior about the universe. Provided strict sampling methods are employed, the sample is a reflection of the universe within a plus or minus margin of error that is related to sample size and confidence level. The plus or minus margin of error for the BEST sample is 2.4 percentage points (at the 95 degree level of confidence), however, this applies only to market share data. The margin of error for market size estimates is in the range of 10% to 15% depending on the product category.



Foodservice Research Institute uses industry standard SPSS® Computer Aided Telephone Interviewing (CATI) to field market research surveys.

BEST SAMPLE FOR CHAINS

More than 350 phone operator level interviews are to be completed with the top 125 QSR Chains. Completion quotas are set for each chain depending on chain size. A sample of QSR chains included in QSR sample includes: Arby's, Burger King, Domino's, Jack in the Box, McDonalds, Popeye's, Taco Bell, Carl's Jr., Zaxby's, Del Taco, Panda Express, White Castle, Whataburger, Captain D's, KFC, Qdoba, Krystal, Hardee's and more.

Phone interviews are to be completed with 125 Casual Chain Operators at the unit level and these include: Applebee's, Chili's, Olive Garden, Long Horn Steakhouse, Red Lobster, Ruby Tuesday, California Pizza Kitchen, Romano's Macaroni Grill, O'Charley's, Daily Grill, Rainforest Café and more.

Phone interviews will be completed with 115 Midscale Chain Operators at the unit level and these include: Denny's, Ponderosa, Perkin's, Steak 'n Shake, Friendly's, IHOP, Cracker Barrel, Waffle House, Big Boy, Bob Evan's, Sizzler, Eat 'n Park, Marie Callender's, Western Sizzlin' and more.

BEST SAMPLE BY STATE/REGION

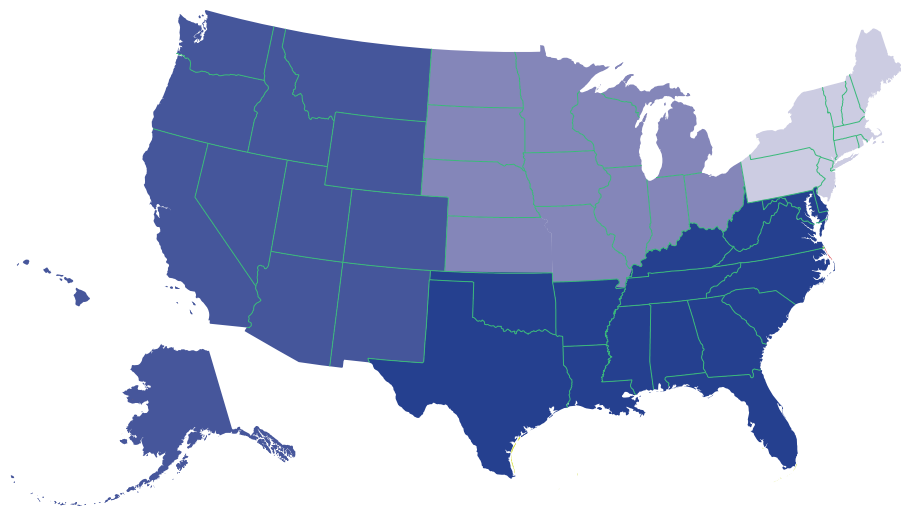
BEST Sample is selected with quotas set by Market Segment within Region.

Central: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

Northeast: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont.

South: Alabama, Arkansas, Delaware, DC, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Virginia, West Virginia, Texas.

West: Arizona, California, Colorado, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming, Alaska, Hawaii.



BEST REPORT ENROLLMENT PRICING

- Report price is \$35,000 for one category, \$30,000 each for two categories and \$25,000 each for three or more categories.
- Add \$2,000 per sub category format
- Example: report on Bacon, with two sub categories (raw and pre-cooked) has a base price of \$35,000 plus (2 x \$2,000), yielding a total price of \$39,000.

# Categories	Price Per Report	Per Sub Category
One Category	\$35,000 each	\$2,000
Two Categories	\$30,000 each	\$2,000
Three or more	\$25,000 each	\$2,000

BEST ANSWERS KEY QUESTIONS

WHAT IS THE CATEGORY SIZE FOR MY PRODUCT LINES?

- Expressed in pound volume
- Detailed for Product Sub-Categories / formats

IS MY PRODUCTS CATEGORY VOLUME GROWING?

- Growth of my brand vs. competition

WHICH FOODSERVICE CHANNELS HAVE THE BEST OPPORTUNITIES?

- Provides volume on 14 market segments.
- Category incidence and growth rate

HOW IS MY BRAND PERFORMING VS. COMPETITORS

- Provides market share based on pound volume
- Share Trends vs. performance on previous BEST surveys

INTERVIEW PROCESS GUIDELINES

- 100% of BEST telephone interviews are made from our Chicago corporate office by our fluent English and Spanish speaking staff of student interviewers from local Universities. Quality Controls and monitoring allow real time viewing of resultant distributions as they occur during the interview process.
- Staff is trained to administer questionnaire using CATI methodologies and IBM/SPSS® software.
- All respondents are qualified by interviewers for purchasing knowledge and authority.
- Respondents are then asked to indicate which product categories (out of our subscribed list of 15-20) they purchase. i.e. Do you purchase Bacon?, Breakfast Sausage?, Cheese?
- For each category purchased, the respondent is then asked to indicate (aided basis) which product formats they purchase. i.e. "Do you purchase Raw Bacon or Pre Cooked?" Or "Which types of Cheese, I am now going to mention, do you purchase? American? Cheddar? Colby?
- When category use/purchase has been established, operators are asked (unaided basis for each format): "What brand do you purchase? What other brands do you purchase? Do you purchase any other brands?"
- Operators are then asked "How much of this brand (product) do you use in an average week?" Most volumetric measures are expressed in pounds. Volumetric measures also may include number of PC containers, gallons, bag in box volume packs, pouch packs (#10 equivalent), 5 gallon pails and other configurations.

CONTACT US

FOODSERVICE RESEARCH INSTITUTE

6957 North Ave.
Suite 201
Oak Park, IL
60302

Joseph E Brady

Managing Director
joseph.brady@fsrin.com

John W. Sepsis

VP Sales and Marketing
john.sepsis@fsrin.com

Sue Gulacsy

Client Services Director
sue.gulacsy@fsrin.com

Matthew Brady

Director Research Systems
matthew.brady@fsrin.com

Jasmine Moss

Field Services Manager
jasmine.moss@fsrin.com

Want more Information on BEST?

Contact us at 800-685-BEST(2378)

Or visit our website:

foodserviceresearchinstitute.com



**FOODSERVICE
RESEARCH
INSTITUTE**



About Foodservice Research Institute

Foodservice Research Institute has been providing valuable information to the food, beverage and hospitality industries since 1991. We understand the needs of the Foodservice/Restaurant Industry and provide clear analysis that will make an impact to your business.

Foodservice Manufacturers/Restaurants have relied on our shared cost and custom research services to provide category insight, develop new items, identify food, flavor and ingredient growth trends, obtain market size and brand share as well as product usage characteristics.

We are a specialized company with our own call center that provides focused, detailed and personal attention to collecting primary data on the foodservice operator. Our company pioneered foodservice market sizing and brand share studies as well as tracking growth with the first menu item database in the industry.