



Custom “Q”

Targeted Survey Research

- ▶ Let us bid on your next custom research project whether it involves consumer practices / behavior / attitudes, concept screening or an AAU survey of foodservice operators using your product category.



CUSTOM “Q”

One of the biggest mistakes made in foodservice product research is to over generalize the sample base by not controlling representation of various market segments / concepts.



Purchasing and Usage Dynamics of Operators Buying your Product

Custom “Q” is a research platform targeted to restaurant operators currently purchasing or favorably inclined to purchase your product (category) or your brand. Custom “Q” is extremely efficient because it guarantees a respondent base of category users. Rather than interview 500 restaurants of which only 200 use your category, Custom “Q” research is based on 500 category users. Thanks to the BEST Report®, information on category incidence and market size by segment is already available and ready to be incorporated into project planning and sampling.

Insights Provided by Custom “Q”

During the course of in-depth phone interviews (CATI) with restaurant operators screened for category use, a wealth of valuable information is obtained on product usage and preferences.

Sampling Plan

Marketing research conducted by phone interview with foodservice operators is only as good as the integrity of the sample permits. For behavioral and attitudinal research, it is meaningless to interview chain operators at the unit level because they do not control the menu and the purchasing decision is made at chain headquarters. Many product categories, however, such as bread, coffee, cheese and bacon cut across all market segments and a total universe sample is warranted.

Custom “Q” methodology calls for a strictly controlled sampling plan that targets only those market segments and store concepts that either use a given product category or are likely to use it. Quite obviously, it is inefficient to collect information on the use of Asian Noodles at a Mexican restaurant, although a few may actually use the category.

In developing a sampling plan, Custom “Q” thoroughly investigates the category incidence level and the share of total volume by market segment/concept. Brand Equity Share Trends, the BEST Report®, has compiled category usage and brand share data on hundreds of foodservice product categories. Secondary insight is gained from the MenuMine® database of chain, independent and non commercial menus.

Who uses my product?

- Key Market Segments
- Restaurant Concepts

How?

- Applications of use
- Reasons for use (unaided and aided)
- Extended Use
- Problems and Opportunities

Category Perceptions

- Importance of attributes
- Delivery of attribute package
- Brand images
- Preferences and reasons

Competitors

- Market Share
- Growth Rate

Buying Factors

- Availability
- Convenience
- Price/Value

How is my brand viewed?

- Brand awareness
- Differentiation
- Brand and feature association/delivery

Concept Screening

- New flavors or packaging
- New systems
- Express delivery of product samples if needed

Specialty

We specialize in contacting “down the street” independents and “on-site” operators.



Client Services Package for Strategic Menu Information

All Professionals in the foodservice industry need to be acutely aware of what's on the menu. The menu is the focus of the restaurant hospitality business. If an item is not on the menu, then it is not served and no money is made. Foodservice Research Institute realizes that sometimes just a little menu information is needed and sometimes a lot. Our research staff stands ready to tap its vast MenuMine database to quickly and thoroughly meet your menu information needs. Either with a simple spreadsheet of leading appetizers or with an in depth analysis of a food item or category. Let us know how we can serve you.

Service	Description	Example
MenuMine Trend	A weekly newsletter focusing on a different menu related or new item topic each week	Recent topics include Burgers, Sandwiches, Grilling Appetizers and Prepared Entrees. Upcoming topics are to include BBQ, Prepared Salads, Vinaigrettes and Comfort Foods.
Product In Use DYNAMICS	Mini research report on all relevant foods, flavors and ingredients associated with a targeted menu item type	Menu Item share characteristics, whether cooking method, sauce application, flavor profile, cuisine preference or other classification. MenuMine is formatted to find and report on all relevant data fields for each item type. Using graphs, leading item shares and category incidence by market segment, Product in Use DYNAMICS facilitates a thorough understanding of menu item positioning and opportunities.
Ad Hoc NOW!	Quick turnaround assistance for any project utilizing menu data.	When the research director is "swamped" or the national accounts manager needs a quick list, the service staff at MenuMine stands ready to help. Call us anytime. Call us frequently.
Chain BenchMark Reports	Competitive set analysis pitting one chain against all other major and minor competitors in a given chain market segment.	Transcends merely seeing what is on a competitor's menu. BenchMark thoroughly analyzes segments foods and ingredients by chain within competitive market segment Market Segment. Thus, Sonic knows what burger competitors are adding to the menu and how they are positioning items and ingredients up against 29 other burger chains and more importantly up against the Big Three (McDonald's, Burger King, Wendy's). BenchMark Reports may be prepared for manufacturers or for chains.
Menu Opportunity Reports	In depth analysis of a particular menu part, food, flavor or ingredient.	Examined are trends for leading items and category growth. Usually 30 to 40 PowerPoint slides. Examples include reports on Lemon (as a flavoring), Beans (as a side dish / accompaniment), Breaded Appetizers (as a menu part) and Dipping Sauces (as an application).
Chain Menu Practices	Menu content similarities, differences and positioning for all chains in a given market segment.	Available for 25 market segments such as 124 Family Dining Chains, 36 Casual Steakhouses, 11 Fast Casual Asian Chains, 16 Family Dining BBQ Chains and more.
MenuMine Database of Chain and Independent Menus	Online Database of menu items containing trending and analysis tools for information on ingredients, menu items and flavors.	Reports, spreadsheets and graphs provide answers easily and quickly. Pre-formatted Templates anticipate clients needs. Spreadsheets of up to 20 fields may be developed and filtered to produce any conceivable sort or data set. All data is organized by market segment, region, operation name, menu part, item type, cuisine of item and cooking method. Food product types are dedicated data fields for proteins, veggies, carbs, bread, cheese, breading, sauces, condiments, dressings, marinades, seasonings and more.

Considering Panel Research?

Foodservice Research Institute does not use panels. In our BEST survey and in Custom Q, we lease a list of operators randomly selected from a foodservice universe of 750,000 plus restaurants and institutions.

When considering panel research, keep in mind that panels are not representative of the foodservice universe.

- ▶ No matter how stratified the panel is, the results reflect only the views of the people in the panel.
- ▶ Statisticians say every single member (restaurant) of a population (all foodservice operators) must be given a randomly selected chance to be a participant. Panels exclude recently opened restaurants and they generally do not include hard-to-reach operators.
- ▶ The application of levels of confidence to research results is invalid with panels, and thus, it is a fallacy to claim plus or minus margin of error variances.
- ▶ Panelists have a tendency to wish to please the interviewer, because they earn points towards a gift. This frequently results in overstated, inaccurate responses.
- ▶ If panelists use a category and pass the screener, they are more likely to earn points and so there are always some panelists who try to dupe the interviewer.
- ▶ A good portion of incentives paid for by clients frequently end up in the pockets of the research house, and are simply an excuse to up-charge the client.
- ▶ Panels are frequently overused meaning that a single panelist may be contacted several times a month. Panelists, as a consequence, may regard themselves as “experts”. Frequently used panelists have a tendency to become “jaded” or “repetitious” in their responses. They soon figure it out that if they give “no brainer” responses requiring no followup questions, they get through the interview faster.
- ▶ Custom Q’s respondent efficiency and price value ratio is suited more than any other competitor for today’s rough economic times.

Experience

We have conducted survey research every year since 1992.





Random Sampling Methodology

Custom Q research is based on random sampling methodology using operator lists leased from leading business publications and from NPD Recount.

Research Based on Users

Custom Q research is based strictly on category users. Going into the research project you know that results will be founded on, as an example, 500 restaurants that menu ice cream rather than on 250 (out of the original 500) that menu ice cream. Knowing exactly what you are going to get is an essential factor in evaluating project cost. In the event, research is to be conducted over the chain marketplace, specific market segments may comprise the sampling plan drawn from Casual, Midscale Fast Casual and QSR sectors.

Caveats

One of the biggest mistakes made in foodservice product research is to over generalize the sample base by not controlling the representation of various market segments/concepts. Broad based research conducted over “limited service restaurants” or simply “institutions” runs the risk of skewing results to a particular heavily sampled component market segment. A second and very serious mistake made comes from using “Panels” of operators. Panels do not reflect the marketplace and, as such, usage of level of confidence statistical measures is invalid.

Research Target Restaurant Segment/ Concept	Foodservice Universe # Operator Locations	Respondent Base of Users		
		Plan “A”	Plan “B”	Plan “C”
Theme Bar-Grill	31,110	150	50	
Asian Dinnerhouse	27,270		50	
Mexican Dinnerhouse	12,197		25	
Italian Dinnerhouse	6,091		15	
Steak / Seafood Dinnerhouse	3,870	50	10	
Total Casual Independents:	80,538	200	150	
Family Dining	67,334	200		
Barbecue	6,517			
Buffet Bakery Grill	3,267			
Total Midscale Independent:	77,118	200		
Sub Sandwich Deli	37,620	50		150
Pizza Italian	45,975			150
Burgers Dogs	10,925	25		75
Mexican	12,479			
Chicken	4,386			
Asian	3,239			
Total QSR Independents:	114,624	75		375
Business & Industry	18,500	75		
College University	4,115	75		75
Hospitals	5,950	75		
Nursing Homes/Retirement	17,500	75		
School Districts	16,500	75		75
Total Non-Commercial:	62,565	475		150
Total Foodservice Sample:	334,865	950	150	525

Call
888.386.MENU for
more information on
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Research Fielding

Data is collected using Computer Aided Telephone Interviewing (CATI) at our contracted call center in Scottsdale, AZ. Results are provided on a computer tabulation custom designed to report information cross tabbed by market segment and region and filtered by identified user groups or other characteristics. Generally, CATI interviewing with 500 restaurant operators takes two to three weeks to implement.

Research Report

Reports are ready six to ten weeks after the beginning of fielding. Reports consist of a presentation of key findings displayed in statistical tables and graphs accompanied by bulleted comments. An Executive Summary addresses major issues. Reports include a computer tabulation.

Project Cost

Quotes are provided after confidential discussion of objectives and timing.

Other Services Available

MenuMine ® - Menu Analysis

MenuMine is a menu information database for use by Marketing and Culinary R&D in the food industry to gain perspectives on new possibilities and gaps in their product line. The MenuMine Database consists of 125k+ menu items cataloged by up to 120 unique characteristics, with price trends going back to 1996. Unique features of MenuMine include Category Incidence Trending, Market Size Projections, Menu Price Trends, Chain Benchmarking Methods and multiple column Spreadsheets.

BEST Report ®

Brand Equity Share Trends®, is a comprehensive source of information to be used in market planning and tracking. Best Reports® provide information on market size and brand share for all competing brands within specific product categories. Each BEST Report® contains market size and brand share information analyzed for twelve chain, independent and institutional segments and four geographic regions.

ABOUT FOODSERVICE RESEARCH INSTITUTE

Since 1992, Foodservice Research Institute has provided Industry decision makers with fact based, value oriented data

Joseph E Brady

Managing Director

joseph.brady@fsrin.com

Larry Atseff

Marketing Director

larry.atseff@fsrin.com

Sue Brose

Client Services Director

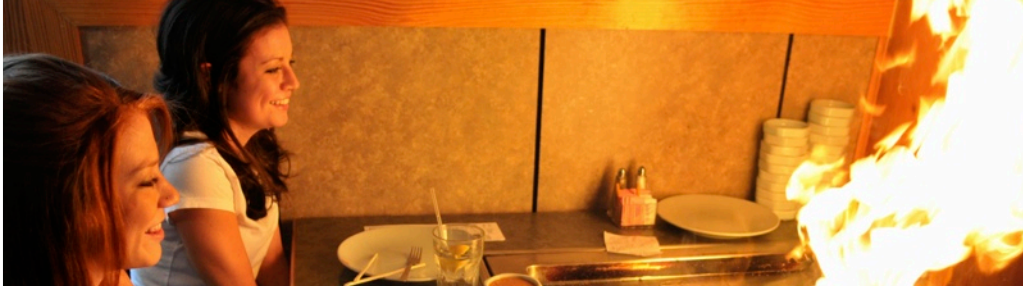
sue.brose@fsrin.com

Want more Information on Custom "Q"?

Contact us at 888-386-MENU

Foodservice Research Institute

6957 North Ave.
Suite 201
Oak Park, IL
60302

A photograph of a financial data table with columns for the years 2006, 2008, and 2004. The numbers are arranged in a grid, with some values in bold. The table is slightly out of focus, emphasizing the overall concept of financial data.

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Suite 201

Oak Park, IL 60302

Phone 888.386.MENU

foodserviceresearchinstitute.com