Q1 CONSULTING SERVICES™

Research | Insight | Business Solutions

2019 MULTICLIENT RESEARCH

Strategic and affordable foodservice intelligence

Customizable research ensures relevance

Actionable, trusted recommendations for growth

Q1 Consulting Multiclient Research

The following overview of our planned studies for 2019 outlines key themes and questions to be explored. Your input is welcome and encouraged as we continue to develop project scope for these topics. Each multiclient study includes the following deliverables:

1. **Comprehensive PowerPoint report** with exclusive Q1 data analysis around complex foodservice elements, such as brand perception, packaging, promotions, frequent users, and more. Includes a robust appendix with full study data, questions, and responses.
2. **Easy-to-digest commentary** with key takeaways and actionable recommendations.
3. **Cusomizable data outputs** for study sponsors who sign on before the research kickoff date to shape the research scope by adding confidential and proprietary survey questions.

2019 Topics

Study topic & background	Key questions addressed	Timing
Understanding and Selling to the Next Generations of Chefs Gen-z are entering the workforce and these young professionals vary significantly from millennials and they want you to know it. According to The Center for Generational Kinetics, growing up in the post-recession times has led to a much more practical outlook towards work and spending. In 2016, Q1 conducted a study on millennial chefs. As millennials continue to grow in the food industry and gen-z begins entering the space, Q1 Consulting is updating the earlier study. This study will explore the role of millennials and gen-z in the future of foodservice and innovation away-from-home and assist sponsors with their longer term strategic planning process.	- How do millennial and gen-z chef attitudes, opinions, behavior and lifestyle characteristics impact product selection, supplier relationships and foodservice philosophies? How does it differ across chefs in these and older generations? - What is their level of satisfaction with products, processes and procedures? - What sources do these group use for inspiration? Travel? Media? Social Media? Peers? - What's important to them? Not so important? - What challenges/opportunities do they envision coming down the road in the next 3-5 years? - What actions are they taking to solve these issues, capture opportunities? - What role does innovation play in the response to short-term and long-term issues and challenges? - How are consumer trends, changing tastes and demographic makeup impacting menu development? - What consumer trends will most impact them going forward? For example, health/wellness, bold/unique flavors, sustainability, corporate social responsibility, etc.?	**Kickoff :** First Quarter **Delivery:** Late Second Quarter
Capturing New Opportunities in Senior Living Senior Living has been a bright spot in the broader healthcare segment of foodservice thanks to aging Baby Boomers. But this growth trend that brought these facilities an influx in residents is now poised to also benefit hospitals as this generation begins to reach age 70 and beyond. It also raises questions about current foodservice dynamics in these segments, warranting new exploration as viable growth vehicles outside of traditional foodservice channels.	- Some Baby Boomers are already considered "elderly." To what degree has this transition materialized? - What are the trends in residency for Senior Living centers? Are numbers up, down or holding steady? - How has the influx of Baby Boomers impacted foodservice budgets? - How have Baby Boomers' dietary preferences impacted Senior Living foodservice compared to the prior generation who favored more traditional foods? Is there a difference between younger and older Baby Boomers? - To what extent are facilities adopting restaurant-style identities? - To what degree are special diet considerations, flexible dining hours, availability of alcohol, sustainable/green practices important? What challenges have these new factors imposed on planning/purchases/equipment?	**Kickoff:** First Quarter **Delivery:** Late Second Quarter

Study topic & background	Key questions addressed	Timing
The Role of Packaging & Disposables in an On-The Go, Green World Packaging and disposables are not necessarily top-of-mind for consumers relative to other aspects of a foodservice experience. For that reason, the category is one that can receive less operator attention, particularly during the extended post-recession industry slump. But now that states are passing laws regarding plastics, and the industry is more comfortably established in its rebound, how have consumer interest in "green" and growing focus on takeout altered operators' thoughts?	- What packaging/disposables categories are most and least price-driven in terms of operators' purchasing decisions? - Which segments of the industry are most and least likely to be predominantly driven by price when making packaging/disposables purchasing decisions? - To what degree do operators recognize environmentally friendly (EF) packaging and disposables as an opportunity to demonstrate a position of good corporate citizenship? To what degree are they willing to invest in EF packaging/disposables to enhance their "green" reputation? Which features are most valued (e.g., made from recycled materials, biodegradable, compostable)? - To what extent are "zero-waste" initiatives impacting operators' purchasing decisions for packaging and disposables? In what areas of the country is this most prevalent? (e.g., California, Colorado, Texas) - To what extent do operators consider packaging/disposables an extension of brand identity? Which segments are most interested in appearance, customized designs?	**Kickoff:** Second Quarter **Delivery:** Third Quarter
Opportunities in Emerging Chains It's no secret that innovation—in menus, service formats, and technologies—can most often be found at emerging chains, the trend-setters and mavericks who are outpacing industry growth and are poised to gain major market share in coming years. In our all-new study that leverages insights from original qualitative and quantitative research, Q1 will examine emerging chain success factors and marketplace dynamics to help: • **Foodservice suppliers** understand, target, and successfully sell to/build lasting value-added relationships with these promising players. • **Foodservice operators** monitor trends, glean competitive insights, and benchmark performance.	- What criteria is used for emerging chain classification? Who are the 100 fastest-growing emerging chains? Where are they located and who are the key contacts? What are the menu, service, and technology or equipment trends that are making these concepts successful? - What are current systemwide sales for individual chains, menu categories and the market at large? How might these numbers look in 5-7 years? - Which menu categories have the largest share? Which segments? - Which dayparts and occasions see the most traffic? Which menu categories? - What regional menu trends are driving traffic? - Which promotions are the most effective? How are these chains promoting themselves? - Where does my product best fit? What is the recommended strategy to target these select chains? - What percentage of sales are driven by carryout? What types of packaging are popular with operators? - How are the most innovative concepts using technology to boost ordering and delivery?	**Kickoff:** Second Quarter **Delivery:** Third Quarter

Additional studies on the following page

2019 Multiclient Studies

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Study topic & background	Key questions addressed	Timing
Exploring the Self-Serve Segment The vending and convenience store channels have seen significant innovation in recent years, from on-trend food offerings to micromarts, where customers select food items from a variety of merchandisers at a self-checkout touchscreen kiosk. The newest hybrid innovation is the self-serve or frictionless concept. One example of this concept are the AmazonGo stores that have opened in Seattle and Chicago, allowing consumers to use an app upon entry, shop for any daypart or snack, and leave without having to stop for checkout. As consumers desire increased convenience for the on-the-go lifestyle, how will this self-serve segment impact foodservice suppliers?	- What criteria is used for identification/classification? - What is the market size of self-serve concepts? How big is the opportunity? - What are historic vs. projected self-serve growth rates in 3-5 years? - What is the awareness level of self-serve concepts? Which consumers shop there? What are their expectations? - What are attitudes toward certain product categories? - Who are "typical" self-serve concepts store customers? Who are the heavy users? Who are the moderate users? - Which products are popular? Do occasions or dayparts influence decisions? - What role does national/manufacturer vs. private label play? How does this impact self-serve concept selection? - What is the approximate margin structure for each product category? - Who are the leading self-serve concepts? How are they marketing? - How do self-serve concepts select suppliers? Who makes the decision? How does this differ by product category, if at all? - How do self-serve concepts receive their products?	**Kickoff:** Third Quarter **Delivery:** Fourth Quarter
Maintaining Quality with Third-Party Delivery The rise of delivery services in recent years has been a major growth driver for foodservice. Fast food and casual dining chains are now offering delivery through third-party services such as GrubHub, Door Dash, UberEats, and Caviar. The biggest challenge foodservice operators face with the rise in delivery is that product quality can suffer once the food leaves the restaurant. Study benefits include: • **Foodservice suppliers** will understand consumer expectations with regard to delivery and product quality to develop value-add products for operator customers. • **Foodservice operators** will monitor trends, glean competitive insights, and benchmark performance.	- Who are the major third-party delivery services? What is their market share? - How is food stored and handled once it leaves the restaurant? Does it differ by third-party delivery services? - Do consumers favor one third-party delivery service over others? What are the drivers of those preferences? - What are consumer expectations regarding food quality? How can they be better met? - Are there product categories consumers do not order for delivery? How could those categories get into delivery orders? - What is the role of packaging in third-party delivery? - Are there chains that have innovative packaging or practices that protect food quality? - What are consumer expectations around disposable cutlery for delivery orders?	**Kickoff:** Third Quarter **Delivery:** Fourth Quarter

Please contact Tim Powell at 312-602-9899 (tpowell@q1consultingllc.com) to discuss sponsorship opportunities today.