

2024

MULTICLIENT RESEARCH

Strategic & affordable foodservice intelligence

Customizable options ensure relevance

Actionable, trusted recommendations for growth

Multiclient Research

The following is an overview of Foodservice IP's (FSIP'S) planned research studies for 2024, outlining 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 extensive metrics, analysis and expert insights.
- 2 Easy-to-digest commentary with key takeaways and actionable recommendations.
- 3 Robust appendix with full study data from questions and responses.

2024 Topics



Study topic & background



Key questions addressed



Details

The Role of Sandwiches and Handhelds in Foodservice

Consumer demand for quick, convenient meals is ever on the rise, with grab-and-go and fresh-prepared handheld entrees gaining share. An inflation-driven "chicken sandwich war" is bringing new twists to a longstanding favorite. Plant-based options are gaining prevalence. Efforts to speed service are driving change, including Subway's emphasis on signature sandwiches vs. build-your-own. Others - including c-stores - are pursuing revitalized opportunities for workplace catering, including build-your-own sandwich bars. Ingredient updates are diversifying carriers (e.g., flatbreads, cheese-enhanced breads), and new premium-focused growth chains are bringing unexpected flavor combinations to a broader audience. With opportunity throughout industry segments, what's needed to capitalize?

- What are the long-term strategic issues affecting development of the category?
- How are operators responding to growing delivery demand?
- What role does disposable packaging play?
- What are the attitudes toward certain product categories?
- What are the differences by daypart, occasion, meal?
- What is the influence of operator merchandising?
- What role does equipment play in preparation?
- How are hot food items typically served?
- How important are combo meals to operators?
- What is the role of commissaries in the category?
- What are current consumer attitudes regarding create-your-own sandwiches vs. signature sandwiches or grab-and-go retail?
- Which ingredient trends are emerging? (protein, bread, condiments, etc.)
- How have rising food costs impacted the category?
- How has the continuation of working from home impacted the category?

Planned approach:
operator and consumer research

Scope:
hot and cold sandwiches, breakfast sandwiches, burgers, tacos/burritos, hot dogs and other handhelds prevalent across relevant industry segments.

Price: \$15,000

Delivery:
End of Q1 2024

Capturing Opportunities in Micromarkets

Elevating the vending channel with an approach better-aligned with consumer demand for fast options that are diverse, fresh and better-for-you, Micromarkets offer an expanded selection of grab-and-go meals, snacks and beverages that can be purchased contactlessly via touchscreens. And unlike vending machines, users are able to pick up/examine items from Micromarkets' shelves, coolers and freezers. They can operate unattended 24 hours a day, providing a minimal labor format suited for B&I, Healthcare, Colleges/Universities, Hotels, Airports and more. Also delivering higher profits, FSIP has identified Micromarkets as a high-interest target for suppliers seeking new growth avenues across a variety of categories.

- What different Micromarket models exist?
- What is the market size? How big is the opportunity?
- Which consumers shop there? What are their expectations?
- What are attitudes toward certain product categories?
- How is product mix determined?
- Which products are they buying? Does occasion or daypart have an influence?
- Which segments use Micromarkets? Why were they selected?
- What role does national/manufacturer brand vs. private label play?
- What is the margin structure for each product category?
- Who are the leading Micromarkets?
- How do Micromarkets select suppliers? Who makes the decision? How does this differ by product category, if at all?
- To what extent is better-for-you a focus? What aspects are most prevalent?
- How do Micromarkets receive their products?
- What role does equipment play?

Planned approach:
operator, ocs/vending and distributor research

Price: \$15,000

Delivery:
End of Q1 2024



Study topic & background



Key questions addressed



Details

Selling to Central Kitchens/ Commissaries

A central kitchen – also known as a commissary kitchen – is an internal facility that supplies restaurant branches under a single business with ingredients or items that will be used or sold at each location. In our update, we will focus on central kitchens that also rent space to emerging businesses, food trucks, mobile food carts, and smaller restaurants without capacity to store and prep large quantities of food. This full update to our 2022, 2020 and 2017 studies reflects the rapid changes that have occurred in this channel with the explosion of centralized production and delivery.

- What goes into the decision to pursue an in-house or third party central kitchen solution?
- What drives the decision for which products to produce?
- What are the benefits and drawbacks of using central kitchens?
- What percentage of foodservice purchases comes through central kitchens? How will this change going forward?
- Who are the leading central kitchens (national and regional)?
- How are products received? How are they distributed?
- How do central kitchens select suppliers?
- Who are best-in-class suppliers to central kitchens and why?
- Which other segments (e.g., vending, healthcare) do central kitchens service?
- How important are central kitchens to distributors?
- What is the margin structure by key product groups?
- What are the key selection criteria for products in this venue?
- What are the contract structures with manufacturers?
- What is the role of central kitchens vs. prepared on-site?

Planned approach: operator, commissary and supply chain research

Price: \$15,000

Planned kickoff: Mid-first quarter 2024

Understanding and Selling to the Next Generation of Chefs

Generation Z's impact as foodservice consumers has been closely studied, but understanding their influence as members of the workforce is just as vital. In 2016, FSIP completed a landmark study on Millennial chefs and how their unique traits and preferences were poised to redefine industry conventions. Generation Z amplifies dynamics that were ushered in by Millennials. (e.g., ethnically diverse, technology-savvy and socially conscious). Yet Generation Z also differs from Millennials in substantial ways, from how they receive information and communicate to changed views on career and work life to different approaches to meals and cooking. To help manufacturers understand how the strong presence of these two generations in foodservice kitchens impacts menu innovation, product and equipment selection, and relationships with partners, FSIP is launching an update study that examines both Millennials and Gen Z in the future of foodservice operations.

- 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 satisfaction level for 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.?

Planned approach: Surveys with Gen Z, Millennial, Gen X and Boomer chefs for comparison.

Price: \$16,000

Planned Kickoff: Q2 2024



Study topic & background



Key questions addressed



Details

Exploring the On-Premise Self-Serve Segment

Restaurants, hotels, college dining halls, supermarkets and convenience stores offer various “serve yourself” items (e.g., buffets, salad bars, dispensed beverages). Popular for the ability to sample multiple items and customize selections, the concept was brought to a standstill during the pandemic. Yet research indicates self-serve is undergoing a resurgence. This study will explore post-pandemic attitudes and approaches, satisfaction, opportunities, challenges and future growth. *Note: prepackaged grab-and-go offerings are not included in the research scope, but it will examine shifts operators have made to ensure patron confidence in self-serve offerings, including prepackaging of items that were previously self-serve.*

- What criteria is used for identification/classification?
- What is the market size of on-premise self-serve models? How big is the opportunity? What is the expected growth of on-premise self-serve models over the next 3-5 years? What has been the historic growth? What is the awareness level of self-serve options within segments? Which consumers use them? What are expectations?
- What are attitudes toward certain product categories?
- Who are “typical” self-serve customers? Who are the heavy users? Who are the moderate users?
- Which products are they buying? Does occasion or daypart have an influence?
- What role does national/manufacture vs. private label play? How does this impact self-serve selection?
- What is the approximate margin structure for each product category?
- Who are the leading self-serve concepts? How do they define themselves?

Planned approach: operator and consumer research

Scope: segments with on-premise, self-serve cafeteria/buffet models. Includes but not limited to C&U, supermarkets, QSRs, FSRs and hotels/lodging.

Product scope: prepared foods and dispensed beverages.

Price: \$16,000

Maintaining Quality with Third-Party Delivery

Third-party delivery providers like DoorDash and Uber Eats provided a business-building lifeline during Covid-19 restrictions, and they have endured as an attractive convenience for consumers post-pandemic. Yet these partnerships pose risks as operators lose aspects of control. A broad range of concepts have been drawn into the complexities of ensuring that their offerings can maintain quality in the journey from restaurant kitchens to points of consumption that extend beyond on-premise or the more immediate nature of dashboard dining. With perceptions of quality so crucial to brand reputations, this study explores the spectrum of issues operators face in ensuring a good experience when working with outside delivery partners.

- How do operators choose their takeout and delivery offerings? What types of products do they feel are best-suited?
- How does focus on takeout and delivery differ by industry segment? Daypart?
- How has menu development shifted in response to growing demand for takeout?
- How are equipment needs evolving?
- What are the latest developments in packaging functionality and food safety?
- What challenges do operators report in dealing with a shift toward more off-premise occasions? What new solutions and support would they value from manufacturers?
- What role are ghost kitchens playing in meeting demand?
- What strategies do operators use to offset commissions charged by third-party delivery apps?
- How are operators gauging customer satisfaction?
- How do consumers choose a concept when ordering through third-party delivery apps?
- What are their perceptions of the quality of offerings received via third-party delivery apps?

Planned approach: operator, consumer and third-party delivery research

Price: \$15,000

Planned Kickoff: Q3 2024

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