



New Zealand *foodservice*



{ A continuous information service }

New Zealand *Foodservice*

New Zealand Foodservice addresses key trends, developments and drivers within a dynamic industry as well as providing detailed market size estimates down to product and channel level.

Our annual reports comprise three main modules:



BIS Foodservice provides a two year subscription during which time subscribers have on-line access to our foodservice database including market size estimates, yearly reports, latest market forecasts and Foodservice Symposium presentations as well as hard copy reports.

New Zealand Foodservice comprises **two** reporting occasions:

Every **July** ■ Every **December**

Over a **two** year subscription period **New Zealand Foodservice** addresses:

July

General foodservice trends and developments
BIS Foodservice Confidence Index
R&G Coffee Barometer
Market Prospects and Outlook
Individual Channel Characteristics & Market Drivers
Product & Customer Service Requirements
The Importance of Sales & Distributor Representatives
Tracking of Major Distributor Reputation
Tracking of Internet Usage in the Foodservice Market
Healthy Eating in Foodservice

*Brand Analysis & Awareness
Communication & Promotion in Foodservice*

*Packaging in Foodservice
Distribution & Supplier Choice in Foodservice*

December

The Foodservice Consumer – Tracking Study

- Eating Out Preferences & Trends
- Eating Out Occasions ■ Cuisine Trends ■ Average Spend per Meal
- The Economic Environment's Impact on Eating Out ■ Other Topical Issues

Market Forecasts

© **Think foodservice, not retail**

Market size database

BIS Foodservice consistently refines both our methodology for data gathering as well as analysis models for reaching well founded market estimates.

We also work with major foodservice distributors to validate our estimates.

Clients have on-line access to our **market size database** which contains:

- Market size estimates down to product and channel/segment level in the commercial and institutional sectors
- The database allows for market share indications
- The database also allows for currency manipulation
- Number of outlets by sector and channel
- Number of meals served by meal segment and channel



BIS Foodservice Symposium

The outlook for the New Zealand foodservice market

Every July • Auckland

As part of the subscription, clients are invited to our annual half day symposium when we report on the latest developments, trends and drivers in the New Zealand foodservice market. Clients will also have the opportunity to meet various industry specialists as speakers, and hear BIS Shrapnel's latest economic forecasts from our economists.

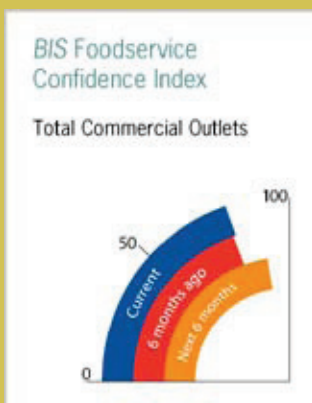
The New Zealand Foodservice Market

The New Zealand foodservice market has changed markedly over the past 10 to 12 years in line with New Zealanders changing attitudes towards food. People are now willing to try new cuisines, flavours and ingredients.

Two factors have first and foremost contributed to the development of the foodservice market. The positive influence of immigration on this market has come much later in New Zealand compared with Australia but is now growing in step with a more multi ethnic society. New Zealanders now enjoy new cuisines and restaurants when eating out of home.

Secondly, growing overseas travel among all socio-economic groups always influences a foodservice market as people are inspired by their foreign food experiences and gradually want to see similar food in their home market.

BIS Foodservice Confidence Index



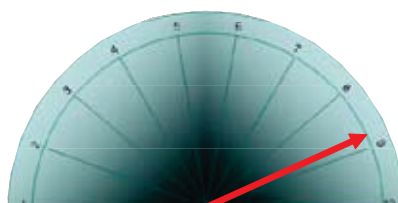
BIS Foodservice Confidence Index gauges the general business sentiment and confidence level among a cross section of commercial foodservice operators.

Roundtable discussions with clients

In March every year we hold Roundtable discussions in Auckland and Wellington with our clients in order to understand areas of particular interest to the industry in terms of current foodservice research needs and objectives.

R&G Coffee Barometer

R&G Coffee Barometer captures and explains, in one figure, the development phase of the café and R&G coffee culture in the foodservice market.



Institutional Sector

HEALTH

EDUCATION

MILITARY

CORRECTIONAL

WORKPLACE CANTEENS

CHARITABLE ORGANISATIONS

Commercial Sector

FULL SERVICE RESTAURANTS (FSR)

HOTELS/MOTELS/PUBS

CAFÉS

FAST FOOD (QSR)

SNACK FOOD

CATERERS

CLUBS

FUNCTION CENTRES

SPORTING VENUES

Brand Analysis

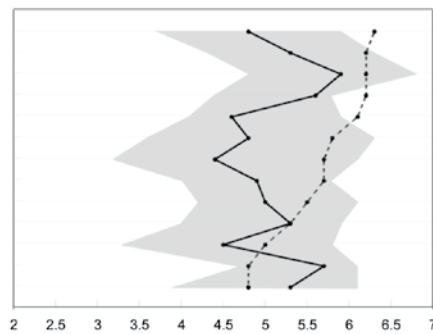
The **brand analysis** gives detailed information on each brand's position and performance in the market as perceived and rated by both commercial and non-commercial foodservice operators within each channel. It also indicates the importance of each brand selection criteria.



Brand positioning maps

The **brand analysis** will be presented using **Brand Positioning Maps** or **Gap Charts** as pictured below.

Reputation of brand
Quality of product
Stock availability
Price/value for money
Product range
Quality of packaging



Gap charts

These **brand selection criteria** include:

- Reputation of brand
- Quality of brand
- Price/value for money
- Innovative products
- Product range
- Service by sales representatives
- Stock availability
- Delivery terms
- Specific sales promotions & support
- Quality of packaging

Research Methodology

New Zealand Foodservice methodology includes:

- › Qualitative face-to-face interviews by *BIS Foodservice* consultants
 - › 400 quantitative interviews
 - › 500 consumer interviews
- › Secondary research including proprietary databases
 - › Extensive analysis

BIS FOODSERVICE

BIS Foodservice is a business unit within BIS Shrapnel. For the last 25 years we have provided research and analysis into the foodservice industry drawing on our two core competencies:

- ▶ *Market research & market intelligence*
- ▶ *Forecasting*

BIS Foodservice runs continuous information services in Australia and New Zealand as well as in-depth country reports in another 14 markets in Asia and The Middle East.

For further details about our business and studies please visit our website: www.bis.com.au (click on Foodservice).

Inquiry & consultancy facility

Our consultants are continually available to clients who want to discuss trends, developments and market estimates. We are contactable via telephone and email and will seek to facilitate face-to-face meetings whenever possible.

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- 20% in October 2010
- 20% when 2011 report is published

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