



Foodservice Rewards Attribute Study

**Prepared for
Amy Bisek
Director of Marketing, Coalition Marketing
The Business Improvement Company**

**By
Caroline Perkins
Principal
The Foodservice Content Company**



40 Park Avenue • 7-F • New York, NY 10016
(212) 684-2916 • fx (212) 683-4116 • www.fscontentco.com

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Background and Methodology

The purpose of this research is to provide customer intelligence to The Foodservice Content Company pertaining to editorial program development for the Foodservice Rewards website and newsletter. Research was conducted by The Qume Group, Ltd.

The research was designed to identify the specific communications needs and desires of Foodservice Rewards members, otherwise known as “attributes,” specifically with regard to:

1. The importance of various communication elements, described in the research as “benefits,” and the existing satisfaction of these needs; and,
2. Personal needs and the opportunities to satisfy these needs at work.

The goal was to identify communications requirements and opportunities in terms of benefit and need fulfillment. The research takes three approaches to this goal:

1. It assesses benefit and need fulfillment for Foodservice Reward members.
2. It analyzes the relationship between benefits and personal needs and members’ activity level, that is the level of code entry per month, defined in the research as “usage.”
3. It seeks to identify segment differences in benefits and personal needs for focused segment communications.

To these ends, a questionnaire was broadcast in August 2005 to a random sample of Foodservice Rewards members. Seven hundred and nine useable returns were received.

The questionnaire appears in an appendix at the end of this report.

Summary Findings & Research Conclusions

Benefit Delivery Analysis

- ◆ Because they are judged highly important and well satisfied by existing information sources, two benefits were identified as being **essential communications requirements** of any foodservice communications to the Foodservice Rewards total membership. These are:
 1. Recipes
 2. Safe food handling practices

An additional essential communications requirement for high code users was:

3. The internet as a source of foodservice/business information.
- ◆ Because they are judged highly important but less well satisfied by existing information sources, two sets of benefits were identified as being **immediate opportunities** for foodservice communications to provide both Foodservice Rewards total membership and high code users, defined as members who enter 21 or more codes per month. These are:
 1. Employment issues including salaries/benefits/training/hiring & retention
 2. Menu and food development including menu pricing, menu development, food presentation ideas and food ideas and trends

Personal Needs Analysis

- ◆ Because they were found to be highly descriptive and with high degrees of work satisfaction, three personal needs items were identified as being **essential to affirm** as fitting the self-image of Foodservice Rewards members. They are:
 1. I take pride in the work I do.
 2. I'm interested in making service to patrons a rewarding experience.
 3. I work hard to improve business for our customers/patrons benefit.

- ◆ Because they were found to be highly descriptive but with less job satisfaction, three personal needs items were identified as being **immediate opportunities** for foodservice communications to provide routes for improving work place satisfaction for both total and high code user Foodservice Rewards members.
 1. I seek a high degree of work satisfaction.
 2. I'm always working to improve my work situation.
 3. I work hard to improve the working condition for our employees.

Predictors of Code Usage

- ◆ Three highly important benefits relate to high monthly code usage. These are:

1. Employee training/hiring/retention
2. Menu pricing
3. Foodservice salaries/benefits

These seem to imply that a high level of concern with factors that directly affect profitability relate to high code usage implying that raised consciousness of profitability factors and the need to address them lead, and will lead, to higher code usage.

- ◆ Average monthly code use was found to be a function of the size of the member's establishment: the larger the establishment, the more code usage.

Frequency of Accessing E-mail

- ◆ Seventy-eight percent of Foodservice Rewards members say they access e-mail daily.

Operator Segments

- ◆ Differences between operator segments were consistent with common understandings of the segments.

Length of Communications

- ◆ Whether shorter or longer articles would be most effective with Food Rewards members turns out to be problematic. More members want brief concise articles and are largely unsatisfied with the length of articles implying that the article they read are often too long.

On the other hand, the desire for longer in-depth information is desired more strongly by higher code users than by lower code users.

These findings imply that communications to members should begin with a brief synopsis and major implications but have links to longer, more analytic articles.

Major Communications Implications

There are short-term and long-term implications of these research results for the Foodservice Rewards communications strategy. Long-term, Foodservice Rewards is considering tailoring editorial content to different core user segments. This attribute research was designed to identify the needs, current fulfillment of those needs, desired information benefits and the present satisfaction level with receipt of those benefits. The goal was to relate these needs and benefits to significant core user groups. The two most significantly different user groups that emerged are high code users, defined as those who enter more than 21 reward codes per month, and moderate code users, those who enter less than 21 codes per month. There were many attributes identified that are common to the total sample.

Short-term Implications

In the short-term, until the Foodservice Rewards website and newsletter are full redesigned and functional, a single, undifferentiated communications strategy will be delivered to Rewards members. Based on the current research, the essential elements of this “one size fits all” strategy fall into four categories:

1. Information essential to an operator’s business, such as safe food handling, employment issues, etc.
2. Menu tactics, such as menu development, food presentation ideas, and recipes
3. Industry news and trends
4. Work satisfaction and being rewarded for that work

A preliminary plan for the website magazine incorporating these findings has been presented. A full strategy, with editorial calendar, will be forthcoming for the website and for the newsletter.

Long-term Implications

This research has been analyzed for a number of variables to determine significant user group differences: commercial vs. non-commercial, large vs. small operations, number of employees, operator segments and self-operated vs. non-self operated businesses. Some differences exist among the various groups, but they are not significant enough for a differentiated strategy, except as references when writing specifically to a segment.

The most meaningful differences are related to the frequency of code entry. High code users report the need and desire for benefits of a more sophisticated level of communication related to making their businesses more financially successful. In addition, high code usage is shown to be a function of the size of the operator's business, defined by annual sales. The larger the annual sales, the greater code usage. The logical deduction is that the financial stakes and risks are higher, thus these operators seek a higher degree of information to help them run their businesses.

Differentiated Communications Strategy

The Foodservice Content Company will create a tailored editorial strategy to serve these two segments defined by frequency of code entry. We have given them preliminary names: High code users are "Gold Members" and moderate code users are "Silver Members." There will be core content offered all members, as revealed in the research results. Gold Members will receive value-added content tailored to their more sophisticated needs. This can be marketed as a value-added benefit as an incentive for higher code usage to the Silver Members. This strategy will be created after the short-term strategy has been in place and Foodservice Rewards is ready to move to the next stage.

Affirming the Foodservice Rewards Member

Three personal needs items came to the fore as descriptive of all Foodservice Rewards members. It will be important to weave these attributes into the communications strategy. They also would be highly affective marketing attributes. This self-image of the members who responded to the survey is very distinct. The personal needs are:

1. I take pride in the work I do.
2. I'm interested in making service to patrons a rewarding experience.
3. I work hard to improve business for our customers/patrons benefit.

These attributes paint a picture of hard-working operators who strive to satisfy their customers in a way that gives them personal satisfaction.

The Foodservice Content Company will design a communications strategy based on these valuable findings.

Detailed Findings
Total Foodservice Rewards Members

Benefit Delivery Analysis: Total Sample

- ◆ Because they are judged highly important and well satisfied by existing information sources, two benefits were identified as being **essential communications requirements** of any foodservice communications to provide. These are:
 1. Recipes
 2. Safe food handling practices

- ◆ Because they are judged highly important but less well satisfied by existing information sources, two sets of benefits were identified as being **immediate opportunities** for foodservice communications to provide. These are:
 1. Employment issues including salaries/benefits/training/hiring & retention
 2. Menu and food development including menu pricing, menu development, food presentation ideas and food ideas and trends

- ◆ Because they are judged somewhat less important but less well satisfied by existing information sources, three benefit items were identified as being **secondary opportunities** for foodservice communications to provide. These are:
 1. Brief concise foodservice articles that just address the facts
 2. In-depth information about products
 3. Career development

| Summary Table 1 | | | |
|---|-------------------------|---------------------------|------------|
| Benefit Delivery Analysis | | | |
| Total Foodservice Rewards Members | | | |
| | Importance ¹ | Satisfaction ² | Difference |
| Communications Requirements: Relatively High Importance & Well Satisfied | | | |
| Recipes | 77.4% | 48.7% | 28.7% |
| Safe food handling practices | 96.9% | 72.1% | 24.8% |
| Immediate Communications Opportunities: Relatively High Importance but Less Well Satisfied | | | |
| Foodservice salaries/benefits | 75.3% | 27.4% | 47.9% |
| Employee training/hiring/retention | 84.5% | 37.7% | 46.8% |
| Menu pricing | 78.8% | 36.1% | 42.7% |
| Menu development | 83.6% | 41.9% | 41.7% |
| Food presentation ideas | 83.1% | 44.0% | 39.1% |
| Food ideas and trends | 79.8% | 42.9% | 36.9% |
| Secondary Communications Opportunities: Somewhat Less Important and Less Well Satisfied | | | |
| Getting brief concise foodservice/ business articles that just address the facts | 69.1% | 25.7% | 43.4% |
| Getting in-depth information about products | 67.4% | 27.4% | 40.0% |
| Career development | 58.5% | 25.1% | 33.4% |
| Secondary Communications Requirements: Less Important but Well Satisfied | | | |
| Consumer away-from-home eating expenditures/trends | 54.7% | 25.5% | 29.2% |
| Catering | 49.6% | 23.0% | 26.6% |
| Consumer demographic trends | 49.1% | 24.4% | 24.7% |
| Beverage ideas and trends | 49.4% | 26.1% | 23.3% |
| Print publications as a source of foodservice information | 61.2% | 38.5% | 22.7% |
| The internet as a source of foodservice information | 73.3% | 50.6% | 22.7% |
| Take out/Grab 'n Go/Home meal replacement | 43.6% | 21.0% | 22.6% |
| Daypart planning | 44.1% | 22.3% | 21.8% |
| Getting longer foodservice/ business articles with facts and analysis | 35.5% | 16.2% | 19.3% |

1. Extremely/Very Important

2. Extremely/Very Satisfied among those Extremely/Very Important

Benefit Delivery Analysis: High Code Users
(High Code Users = 21 or more entries a month)

- ◆ Because they are judged highly important and well satisfied by existing information sources, three benefits were identified as being **essential communications requirements** of any foodservice communications to the Foodservice Rewards high code users. These are:
 1. The internet as a source of foodservice/business information
 2. Recipes
 3. Safe food handling practices

- ◆ Precisely as in the total sample, two sets of benefits were identified as being **immediate opportunities** for foodservice communications to provide. These are:
 1. Employment issues including salaries/benefits/training/hiring & retention
 2. Menu and food development including menu pricing, menu development, food presentation ideas and food ideas and trends

- ◆ Two benefit items were identified as being **secondary opportunities** for foodservice communications to provide. These are:
 1. Career development
 2. Menu and food development including menu pricing, menu development, food presentation ideas and food ideas and trends

The secondary opportunity identified for the total sample, “getting in-depth product information,” was not identified for as a secondary opportunity for high code users.

In summary, the only benefit delivery differences between the high code users and the total sample indicate that high code users use the internet reasonably satisfactorily and are not as unsatisfied with the depth of product information they get. This last is no doubt a result of their satisfactory internet usage.

This of course implies that the Foodservice Rewards site as a source of foodservice/business information will compete for readership/loyalty with other internet sites among high code users.

| Summary Table 2 | | | |
|---|-------------------------|---------------------------|------------|
| Benefit Delivery Analysis | | | |
| High Code Usage (21 or more entries per month) | | | |
| Foodservice Rewards Members | | | |
| | Importance ¹ | Satisfaction ² | Difference |
| Communications Requirements: Relatively High Importance & Well Satisfied | | | |
| The internet as a source of foodservice information | 77.4% | 54.5% | 22.9% |
| Safe food handling practices | 97.9% | 72.9% | 25.0% |
| Recipes | 77.1% | 49.6% | 27.5% |
| Immediate Communications Opportunities: Relatively High Importance but Less Well Satisfied | | | |
| Food ideas and trends | 82.8% | 44.7% | 38.0% |
| Food presentation ideas | 87.3% | 49.2% | 38.1% |
| Menu development | 85.3% | 45.5% | 39.7% |
| Menu pricing | 84.8% | 40.6% | 44.2% |
| Employee training/hiring/retention | 89.3% | 42.3% | 47.1% |
| Foodservice salaries/benefits | 81.6% | 31.6% | 50.0% |
| Secondary Communications Opportunities: Somewhat Less Important and Less Well Satisfied | | | |
| Career development | 67.2% | 28.7% | 38.5% |
| Getting brief concise foodservice/ business articles that just address the facts | 70.5% | 27.9% | 42.6% |
| Secondary Communications Requirements: Less Important but Well Satisfied | | | |
| Daypart planning | 47.2% | 25.8% | 21.3% |
| Print publications as a source of foodservice information | 62.3% | 40.6% | 21.7% |
| Getting longer foodservice/ business articles with facts and analysis | 42.3% | 20.1% | 22.2% |
| Take out/Grab 'n Go/Home meal replacement | 45.1% | 22.6% | 22.6% |
| Getting in-depth information about products | 55.2% | 30.4% | 24.8% |
| Beverage ideas and trends | 58.6% | 32.4% | 26.2% |
| Catering | 50.4% | 24.2% | 26.2% |
| Consumer demographic trends | 58.6% | 30.4% | 28.2% |
| Consumer away-from-home eating expenditures/trends | 59.4% | 29.1% | 30.3% |

1. Extremely/Very Important

2. Extremely/Very Satisfied among those Extremely/Very Important

Personal Needs Analysis: Total Sample

- ◆ Because they were found to be highly descriptive and with high degrees of work satisfaction, three personal needs items were identified as being **essential to affirm** as fitting the self-image of Foodservice Rewards members. These attributes can be used in marketing. They are:
 1. I take pride in the work I do.
 2. I'm interested in making service to patrons a rewarding experience.
 3. I work hard to improve business for our customers/patrons benefit.

- ◆ Because they were found to be highly descriptive but with less job satisfaction, three personal needs items were identified as being **immediate opportunities** for foodservice communications to provide routes for improving work place satisfaction for the Foodservice Rewards members. These are:
 1. I seek a high degree of work satisfaction.
 2. I'm always working to improve my work situation.
 3. I work hard to improve the working condition for our employees.

- ◆ Because they are somewhat less descriptive of the respondent but with less job satisfaction, three personal needs items, all related to personal work-rewards, were identified as being **secondary opportunities** for foodservice communications to provide routes for improving work place satisfaction. These are:
 1. I often look for more time for myself or my family.
 2. I'm interested in receiving recognition for the work I do.
 3. I'm interested in rewards for the work I do.

| Summary Table 3 | | | |
|---|-----------------------------------|--------------------------------|------------|
| Personal Needs Analysis Total Foodservice Rewards Members | | | |
| | Describes Respondent ¹ | Work Satisfaction ² | Difference |
| Communications Requirements: Relatively High Personal Need & Well Satisfied at Work | | | |
| I take pride in the work I do | 98.9% | 71.5% | 27.4% |
| I'm interested in making service to patrons a rewarding experience | 91.4% | 63.3% | 28.1% |
| I work hard to improve business for our customers/patrons benefit | 93.2% | 64.9% | 28.3% |
| Communications Opportunities: Relatively High Personal Need but Less Well Satisfied at Work | | | |
| I seek a high degree of work satisfaction | 91.6% | 56.9% | 34.7% |
| I'm always working to improve my work situation | 91.8% | 54.5% | 37.3% |
| I work hard to improve the working condition for our employees | 90.9% | 58.5% | 32.4% |
| Secondary Communications Opportunities: Somewhat Lower Personal Need and Less Well Satisfied | | | |
| I often look for more time for myself and/or my family | 73.7% | 31.6% | 42.1% |
| I'm interested in receiving recognition for the work I do | 62.3% | 27.1% | 35.2% |
| I'm interested in rewards for the work I do | 58.9% | 22.0% | 36.9% |
| Secondary Communications Requirements: Somewhat Lower Personal Need but Well Satisfied | | | |
| I work hard to make the business financially successful | 62.3% | 61.9% | 0.4% |

1. Extremely/Very Descriptive of the respondent

2. Extremely/Very Satisfied with work opportunities among those Extremely/Very Descriptive

Personal Needs Analysis: High Code Users
 (High Code Users = 21 or more entries a month)

- ◆ No meaningful differences were found between high code users and the total sample on personal needs.

| Summary Table 4 | | | |
|---|-----------------------------------|--------------------------------|------------|
| Personal Needs Analysis | | | |
| High Code Users | | | |
| | Describes Respondent ¹ | Work Satisfaction ² | Difference |
| Communications Requirements: | | | |
| Relatively High Personal Need & Well Satisfied at Work | | | |
| I work hard to improve business for our customers/patrons benefit | 92.0% | 65.7% | 26.3% |
| I'm interested in making service to patrons a rewarding experience | 90.9% | 63.7% | 27.2% |
| I take pride in the work I do | 98.8% | 70.2% | 28.5% |
| Communications Opportunities: | | | |
| Relatively High Personal Need but Less Well Satisfied at Work | | | |
| I work hard to improve the working condition for our employees | 88.8% | 58.7% | 30.2% |
| I seek a high degree of work satisfaction | 91.7% | 59.9% | 31.8% |
| I'm always working to improve my work situation | 93.4% | 55.8% | 37.7% |
| I often look for more time for myself and/or my family | 77.7% | 37.2% | 40.5% |
| Secondary Communications Opportunities: | | | |
| Somewhat Lower Personal Need and Less Well Satisfied | | | |
| I'm interested in receiving recognition for the work I do | 62.8% | 26.9% | 35.9% |
| I'm interested in rewards for the work I do | 63.2% | 26.0% | 37.2% |
| Secondary Communications Requirements: | | | |
| Somewhat Lower Personal Need but Well Satisfied | | | |
| I work hard to make the business financially successful financial success | 72.5% | 72.0% | 0.5% |

1. Extremely/Very Descriptive of the respondent

2. Extremely/Very Satisfied with work opportunities among those Extremely/Very Descriptive

Benefit Importance as Predictors of Code Usage

◆ Three highly important benefits relate to high monthly code usage. These are:

1. Employee training/hiring/retention
2. Menu pricing
3. Foodservice salaries/benefits

These seem to imply that a high level of concern with factors that directly affect profitability relate to high code usage.

◆ Less important variables predicting monthly code usage were:

1. Career development.
2. Consumer away-from-home eating expenditures/trends.
3. Consumer demographic trends.
4. Daypart planning.
5. Beverage ideas and trends
6. Receiving information on-line in electronic format
7. Getting longer foodservice/business articles with facts and analysis.

These items imply:

- a. A planning interest based on factors outside the immediate foodservice operation based on up-to-date analysis.
- b. Using this information to manage both the business and the respondent's career.

| Summary Table 5 | | | | | | |
|--|-------|-------------------------------|--------|---------|----------|-----------|
| Benefit is Extremely/Very Important Versus Monthly Code Use | | | | | | |
| | Total | Average Monthly Codes Entered | | | | |
| | | 0 to 3 | 4 to 8 | 9 to 20 | 21 to 49 | 50 & Over |
| Important Benefits Related to Monthly Code Usage | | | | | | |
| Employee training/hiring/retention | 84.5% | 74.5% | 81.4% | 89.3% | 87.4% | 92.1% |
| Menu pricing | 78.8% | 76.5% | 77.9% | 73.2% | 81.1% | 90.1% |
| Foodservice salaries/benefits | 75.3% | 66.7% | 73.1% | 76.2% | 80.4% | 83.2% |
| Less Important Benefits Related to Monthly Code Usage | | | | | | |
| Career development | 58.5% | 48.4% | 60.0% | 54.2% | 62.9% | 73.3% |
| Consumer away-from-home eating expenditures/trends | 54.7% | 49.0% | 52.4% | 54.8% | 55.9% | 64.4% |
| Receiving information on-line in an electronic format | 53.6% | 38.6% | 52.4% | 47.0% | 60.8% | 55.4% |
| Beverage ideas and trends | 49.4% | 46.4% | 46.9% | 41.1% | 55.9% | 62.4% |
| Consumer demographic trends | 49.1% | 42.5% | 44.8% | 45.2% | 54.5% | 64.4% |
| Daypart planning | 44.1% | 41.8% | 40.0% | 45.2% | 43.4% | 52.5% |
| Getting longer foodservice/ business articles with facts and analysis | 35.5% | 30.7% | 32.4% | 32.7% | 40.6% | 44.6% |
| Benefits That Do Not Relate to Monthly Code Usage | | | | | | |
| Safe food handling practices | 96.9% | 96.1% | 96.6% | 96.4% | 97.2% | 99.0% |
| Menu development | 83.6% | 79.1% | 84.8% | 84.5% | 86.7% | 83.2% |
| Food presentation ideas | 83.1% | 77.8% | 82.8% | 82.1% | 86.0% | 89.1% |
| Food ideas and trends | 79.8% | 80.4% | 80.7% | 74.4% | 81.1% | 85.1% |
| Recipes | 77.4% | 79.1% | 75.2% | 78.6% | 79.0% | 74.3% |
| The internet as a source of foodservice information | 73.3% | 73.9% | 71.7% | 67.9% | 79.0% | 75.2% |
| Getting brief concise foodservice/ business articles that just address the facts | 69.1% | 62.7% | 77.2% | 66.1% | 70.6% | 70.3% |
| Getting in-depth information about products | 67.4% | 36.4% | 71.0% | 67.3% | 65.0% | 41.3% |
| Print publications as a source of foodservice information | 61.2% | 58.2% | 57.9% | 64.9% | 60.1% | 65.3% |
| Catering | 49.6% | 45.8% | 49.0% | 52.4% | 44.8% | 58.4% |
| Take out/Grab 'n Go/Home meal replacement | 43.6% | 35.9% | 49.7% | 43.5% | 39.9% | 52.5% |
| Receiving information in hardcopy printed format | 38.2% | 33.3% | 43.4% | 39.3% | 36.4% | 38.6% |

1. Extremely/Very Important
2. Extremely/Very Satisfied among those Extremely/Very Important

Personal Needs as Predictors of Average Monthly Codes Used

◆ Three personal needs were found to be positively related to average monthly codes used. These are:

1. I often look for more time for myself and/or my family.
2. I work hard to make the business financially successful.
3. I'm interested in rewards for the work I do.

These attributes imply that the high monthly code user does so for both personal reward and business financial success.

| Summary Table 6 | | | | | | |
|--|-------|----------------------------|--------|---------|----------|-----------|
| Percent Personal Need is Extremely/Very Descriptive Versus Monthly Codes Redeemed | | | | | | |
| | Total | Average Monthly Codes Used | | | | |
| | | 0 to 3 | 4 to 8 | 9 to 20 | 21 to 49 | 50 & Over |
| Personal Needs Related to Monthly Membership Codes Used | | | | | | |
| I often look for more time for myself and/or my family | 73.7% | 71.7% | 72.4% | 71.3% | 77.5% | 78.0% |
| I work hard to make the business financially successful | 62.3% | 59.7% | 58.7% | 53.3% | 72.7% | 72.2% |
| I'm interested in rewards for the work I do | 58.9% | 52.9% | 55.9% | 61.1% | 61.3% | 66.0% |
| Personal Needs Not Related to Monthly Membership Codes Used | | | | | | |
| I take pride in the work I do | 98.9% | 97.4% | 100.0% | 99.4% | 98.6% | 99.0% |
| I work hard to improve business for our customers/patrons benefit | 93.2% | 94.0% | 93.0% | 94.6% | 92.1% | 91.8% |
| I'm always working to improve my work situation | 91.8% | 92.1% | 92.4% | 88.6% | 94.4% | 92.0% |
| I seek a high degree of work satisfaction | 91.6% | 92.8% | 91.7% | 90.4% | 91.5% | 92.0% |
| I'm interested in making service to patrons a rewarding experience | 91.4% | 90.8% | 91.0% | 92.8% | 91.5% | 90.0% |
| I work hard to improve the working condition for our employees | 90.9% | 94.1% | 89.7% | 92.2% | 90.8% | 86.0% |
| I'm interested in receiving recognition for the work I do | 62.3% | 58.6% | 62.1% | 65.3% | 63.4% | 62.0% |

Size of Operation, and Communications Analysis

- ◆ Average monthly code use is clearly a function of the size of the member’s establishment.

| Summary Table 7 | | | | | | |
|--|-------|----------------------------|--------|---------|----------|-----------|
| Annual Food & Beverage Expenditures By Average Monthly Codes Used | | | | | | |
| Annual Food & Beverage Expenditures: | Total | Average Monthly Codes Used | | | | |
| | | 0 to 3 | 4 to 8 | 9 to 20 | 21 to 49 | 50 & Over |
| \$100,000 - 199,999 | 32.8% | 59.7% | 46.2% | 27.5% | 16.5% | 4.1% |
| \$200,000 - 299,999 | 16.3% | 13.4% | 16.8% | 20.4% | 15.1% | 14.4% |
| \$300,000 - 499,999 | 16.1% | 12.8% | 19.6% | 18.0% | 18.7% | 9.3% |
| \$500,000 - \$999,999 | 16.3% | 6.7% | 8.4% | 21.6% | 24.5% | 21.6% |
| \$1,000,000 to \$4,999,999 | 14.5% | 6.7% | 5.6% | 11.4% | 20.9% | 36.1% |
| \$5 Million or more | 4.0% | 0.7% | 3.5% | 1.2% | 4.3% | 14.4% |

| Summary Table 8 | | | | | | |
|--|-------|----------------------------|--------|---------|----------|-----------|
| Number of Employees By Average Monthly Codes Used | | | | | | |
| Number of Employees: | Total | Average Monthly Codes Used | | | | |
| | | 0 to 3 | 4 to 8 | 9 to 20 | 21 to 49 | 50 & Over |
| 1 to 14 Employees | 51.8 | 79.2% | 68.5% | 44.3% | 36.7% | 19.6% |
| 15 to 49 Employees | 28.8 | 15.4% | 22.4% | 39.5% | 32.4% | 35.1% |
| 50 to 99 Employees | 12.2 | 4.0% | 5.6% | 9.6% | 25.9% | 19.6% |
| 100 or more Employees | 7.2 | 1.4% | 3.5% | 6.6% | 5.0% | 25.7% |

- ◆ While the size of the member’s operation predicts usage rates, there is no difference between the benefit needs or the personal needs of members at smaller establishments than for the foodservice rewards membership overall. (See tables next two pages: Each is essentially identical to the total sample tables).

Thus, based on work benefits and personal needs, as studied here, there is no need to craft separate communications policies and tactics for members at smaller establishments than for those at larger establishments.

| Summary Table 9 | | | |
|---|-------------------------|---------------------------|------------|
| Benefit Delivery Analysis 14 or Fewer Employees | | | |
| | Importance ¹ | Satisfaction ² | Difference |
| Communications Requirements: Relatively High Importance & Well Satisfied | | | |
| Safe food handling practices | 96.4 | 73.6 | 22.8 |
| Recipes | 76.1 | 48.3 | 27.8 |
| The internet as a source of foodservice information | 72.2 | 49.2 | 23.0 |
| Immediate Communications Opportunities: Relatively High Importance but Less Well Satisfied | | | |
| Food ideas and trends | 79.2 | 42.8 | 36.4 |
| Food presentation ideas | 81.9 | 42.2 | 39.7 |
| Menu development | 82.5 | 41.9 | 40.6 |
| Menu pricing | 75.6 | 34.7 | 40.9 |
| Employee training/hiring/retention | 80.8 | 35.6 | 45.2 |
| Foodservice salaries/benefits | 73.9 | 27.2 | 46.7 |
| Secondary Communications Opportunities Somewhat Less Important and Less Well Satisfied | | | |
| Getting brief concise foodservice/ business articles that just address the facts | 66.1 | 25.0 | 41.1 |
| Getting in-depth information about products | 65.3 | 27.2 | 38.1 |
| Secondary Communications Requirements: Less Important but Well Satisfied | | | |
| Career development | 51.7 | 23.3 | 28.4 |
| Consumer away-from-home eating expenditures/trends | 53.1 | 25.0 | 28.1 |
| Print publications as a source of foodservice information | 61.1 | 37.5 | 23.6 |
| Catering | 44.4 | 20.8 | 23.6 |
| Daypart planning | 43.9 | 21.4 | 22.5 |
| Take out/Grab 'n Go/Home meal replacement | 41.9 | 20.3 | 21.6 |
| Beverage ideas and trends | 45.6 | 24.7 | 20.9 |
| Consumer demographic trends | 44.2 | 23.3 | 20.9 |
| Getting longer foodservice/ business articles with facts and analysis | 33.1 | 15.3 | 17.8 |

1. Extremely/Very Important

2. Extremely/Very Satisfied among those Extremely/Very Important

| Summary Table 10 | | | |
|---|-------------------------|---------------------------|------------|
| Personal Needs Analysis | | | |
| 14 or Fewer Employees | | | |
| | Importance ¹ | Satisfaction ² | Difference |
| Communications Requirements: | | | |
| Relatively High Personal Need & Well Satisfied at Work | | | |
| I take pride in the work I do | 99.2 | 75.8 | 23.4 |
| I work hard to improve business for our customers/patrons benefit | 93.9 | 67.5 | 26.4 |
| I'm interested in making service to patrons a rewarding experience | 88.1 | 61.7 | 26.4 |
| Communications Opportunities: | | | |
| Relatively High Personal Needs but Less Well Satisfied at Work | | | |
| I seek a high degree of work satisfaction | 91.4 | 60.0 | 31.4 |
| I work hard to improve the working condition for our employees | 92.8 | 60.8 | 32.0 |
| I'm always working to improve my work situation | 91.7 | 56.9 | 34.8 |
| I often look for more time for myself and/or my family | 71.9 | 31.4 | 40.5 |
| Secondary Communications Opportunities: | | | |
| Relatively Lower Personal Needs and Less Well Satisfied at Work | | | |
| I'm interested in receiving recognition for the work I do | 59.7 | 25.3 | 34.4 |
| I'm interested in rewards for the work I do | 52.8 | 21.9 | 30.9 |
| Secondary Communications Requirements: | | | |
| Somewhat lower Personal Need but Well Satisfied at Work | | | |
| I work hard to make the business financially successful financial success | 60.8 | 60.6 | 0.2 |

1. Extremely/Very Descriptive of the respondent

2. Extremely/Very Satisfied with work opportunities among those Extremely/Very Descriptive

Frequency of Accessing e-Mail

- ◆ Seventy-eight percent of Foodservice Rewards members say they access e-mail daily.

| Summary Table 11 | | | | | | |
|--|-------|----------------------------|--------|---------|----------|-----------|
| Frequency of Accessing E-Mail By Average Monthly Codes Used | | | | | | |
| Access e-mail: | Total | Average Monthly Codes Used | | | | |
| | | 0 to 3 | 4 to 8 | 9 to 20 | 21 to 49 | 50 & Over |
| Daily | 77.8% | 78.5% | 74.1% | 73.1% | 81.3% | 85.6% |
| Multiple times a week | 15.1% | 14.8% | 16.8% | 19.2% | 12.9% | 9.3% |
| Less Often | 7.1% | 6.7% | 9.1% | 7.7% | 5.8% | 5.1% |

**Detailed Findings
Operator Segments**

Commercial Compared to Non-Commercial Operators

Topic Importance Ratings:

- ◆ Commercial operators gave higher importance rating than did non-commercial operators to menu pricing and items related to consumer behavior including demographic trends, away-from-home eating patterns and trends.
- ◆ Non-commercial operators gave higher importance rating than did commercial operators to recipes, getting information from print and e-mail, and getting in-depth product information.
- ◆ Non-self operators give more importance to career development than do self-operators.

Topic Satisfaction Ratings:

- ◆ Commercial operators are less satisfied than are non-commercial operators with their information sources for menu development, food ideas and trends, recipes, and the internet and print publications as sources of information as well as getting in-depth product information.

Personal Needs:

- ◆ Non-self operators describe themselves as more interested in rewards and recognition for the work they do than do self-operators.
- ◆ Non-commercial non-self operators are more likely than others to describe themselves as looking for more time for themselves and their families.
- ◆ Commercial operators are less satisfied than non-commercial operators with the opportunities work provides for finding time for themselves and their families.

E-Mail:

- ◆ Non-commercial operators are more likely than commercial operators to access e-mail daily (83% versus 73%).

| Summary Table 12 | | | | | | | |
|--|-------|----------------------|---------|--------|----------------|---------|--------|
| Topic Importance (Percent Extremely/Very Important) Commercial and Non-Commercial Operators | | | | | | | |
| | Total | Commercial Operators | | | Non-Commercial | | |
| | | Total | Self-Op | Others | Total | Self-Op | Others |
| More Important to Commercial Operators | | | | | | | |
| Menu pricing | 78.8% | 86.5% | 89.6% | 81.7% | 72.1% | 66.9% | 79.0% |
| Consumer away-from-home eating expenditures/trends | 54.7% | 67.3% | 67.3% | 67.2% | 42.0% | 33.7% | 52.9% |
| Consumer demographic trends | 49.1% | 54.1% | 52.6% | 56.5% | 44.5% | 40.3% | 50.0% |
| Take out/Grab 'n Go/Home meal replacement | 43.6% | 50.6% | 51.7% | 48.9% | 38.6% | 31.5% | 47.8% |
| More Important to Non-Commercial Operators | | | | | | | |
| Recipes | 77.4% | 71.6% | 74.9% | 66.4% | 83.1% | 84.0% | 81.9% |
| The internet as a source of foodservice information | 73.3% | 68.1% | 68.2% | 67.9% | 76.8% | 75.7% | 78.3% |
| Getting in-depth information about products | 67.4% | 64.6% | 65.4% | 63.4% | 71.5% | 72.4% | 70.3% |
| Print publications as a source of foodservice information | 61.2% | 55.3% | 54.5% | 56.5% | 65.5% | 65.2% | 65.9% |
| More Important to Non-Self Operators | | | | | | | |
| Career development | 58.5% | 59.1% | 48.3% | 76.3% | 58.3% | 49.7% | 69.6% |
| Other Items | | | | | | | |
| Safe food handling practices | 96.9% | 96.8% | 96.2% | 97.7% | 97.2% | 96.1% | 98.6% |
| Employee training/hiring/retention | 84.5% | 86.5% | 82.6% | 92.4% | 83.7% | 82.3% | 85.5% |
| Menu development | 83.6% | 83.0% | 85.3% | 79.4% | 85.6% | 86.2% | 84.8% |
| Food presentation ideas | 83.1% | 82.5% | 82.0% | 83.2% | 84.6% | 80.1% | 90.6% |
| Food ideas and trends | 79.8% | 78.4% | 76.3% | 81.7% | 82.1% | 79.6% | 85.5% |
| Foodservice salaries/benefits | 75.3% | 72.5% | 67.3% | 80.9% | 79.0% | 75.7% | 83.3% |
| Getting brief concise foodservice/ business articles that just address the facts | 69.1% | 69.0% | 68.2% | 70.2% | 68.0% | 65.7% | 71.0% |
| Receiving information online in an electronic format | 53.6% | 51.8% | 51.7% | 51.9% | 55.5% | 54.1% | 57.2% |
| Catering | 49.6% | 50.6% | 49.8% | 51.9% | 48.0% | 40.9% | 57.2% |
| Beverage ideas and trends | 49.4% | 51.8% | 52.1% | 51.1% | 48.6% | 42.5% | 56.5% |
| Daypart planning | 44.1% | 43.6% | 41.2% | 47.3% | 43.6% | 38.7% | 50.0% |
| Receiving information in hardcopy printed format | 38.2% | 37.1% | 38.9% | 34.4% | 39.2% | 35.9% | 43.5% |
| Getting longer foodservice/ business articles with facts and analysis | 35.5% | 36.8% | 35.5% | 38.9% | 32.9% | 26.0% | 42.0% |

| Summary Table 13 | | | | | | | |
|--|-------|----------------------|---------|--------|----------------|---------|--------|
| Topic Satisfaction | | | | | | | |
| (Percent Extremely/Very Satisfied ¹) | | | | | | | |
| Commercial and Non-Commercial Operators | | | | | | | |
| | Total | Commercial Operators | | | Non-Commercial | | |
| | | Total | Self-Op | Others | Total | Self-Op | Others |
| Less Satisfied Among Commercial Operators | | | | | | | |
| Getting in-depth information about products | 27.4% | 24.0% | 22.3% | 26.7% | 31.3% | 32.0% | 30.4% |
| Print publications as a source of foodservice information | 38.5% | 33.0% | 32.7% | 33.6% | 43.6% | 44.8% | 42.0% |
| Menu development | 41.9% | 37.7% | 35.5% | 41.2% | 46.1% | 44.8% | 47.8% |
| Food ideas and trends | 42.9% | 38.0% | 36.0% | 41.2% | 47.6% | 43.6% | 52.9% |
| Recipes | 48.7% | 43.3% | 45.5% | 39.7% | 53.3% | 49.2% | 58.7% |
| The internet as a source of foodservice information | 50.6% | 44.7% | 44.1% | 45.8% | 55.5% | 53.6% | 58.0% |
| Other Items | | | | | | | |
| Getting longer foodservice/ business articles with facts and analysis | 16.2% | 14.3% | 12.3% | 17.6% | 18.2% | 13.3% | 24.6% |
| Take out/Grab 'n Go/Home meal replacement | 21.0% | 21.9% | 21.3% | 22.9% | 20.7% | 17.7% | 24.6% |
| Daypart planning | 22.3% | 22.5% | 18.0% | 29.8% | 20.7% | 19.3% | 22.5% |
| Catering | 23.0% | 21.1% | 19.9% | 22.9% | 24.1% | 18.8% | 31.2% |
| Consumer demographic trends | 24.4% | 24.3% | 21.8% | 28.2% | 25.7% | 23.2% | 29.0% |
| Career development | 25.1% | 23.1% | 16.6% | 33.6% | 27.3% | 25.4% | 29.7% |
| Consumer away-from-home eating expenditures/trends | 25.5% | 26.3% | 24.5% | 27.5% | 24.1% | 19.3% | 30.4% |
| Getting brief concise foodservice/ business articles that just address the facts | 25.7% | 21.9% | 20.9% | 23.7% | 28.5% | 27.1% | 30.4% |
| Beverage ideas and trends | 26.1% | 24.0% | 22.3% | 26.7% | 29.8% | 26.0% | 34.8% |
| Foodservice salaries/benefits | 27.4% | 24.9% | 20.9% | 31.3% | 29.5% | 27.1% | 32.6% |
| Menu pricing | 36.1% | 36.3% | 33.2% | 41.2% | 35.7% | 30.4% | 42.8% |
| Employee training/hiring/retention | 37.7% | 35.7% | 30.8% | 43.5% | 40.4% | 40.9% | 39.9% |
| Food presentation ideas | 44.0% | 39.8% | 36.5% | 45.0% | 48.3% | 46.4% | 50.7% |
| Safe food handling practices | 72.1% | 74.3% | 72.5% | 77.1% | 69.6% | 64.1% | 76.8% |

| Summary Table 14 | | | | | | | |
|---|-------|----------------------|---------|--------|--------------------------|---------|--------|
| Personal Needs Description (Percent Extremely/Very Well) Commercial and Non-Commercial Operators | | | | | | | |
| | Total | Commercial Operators | | | Non-Commercial Operators | | |
| | | Total | Self-Op | Others | Total | Self-Op | Others |
| More Important to Commercial Operators | | | | | | | |
| I'm interested in receiving recognition for the work I do | 62.3% | 59.6% | 54.0% | 68.7% | 66.2% | 63.3% | 70.1% |
| I'm interested in rewards for the work I do | 58.9% | 60.5% | 53.1% | 72.5% | 59.3% | 51.1% | 70.1% |
| I often look for more time for myself and/or my family | 73.7% | 71.1% | 70.6% | 71.8% | 75.4% | 68.9% | 83.9% |
| Other Items | | | | | | | |
| I seek a high degree of work satisfaction | 91.6% | 89.8% | 88.8% | 92.4% | 93.4% | 91.7% | 95.6% |
| I'm interested in making service to patrons a rewarding experience | 91.4% | 93.0% | 91.9% | 94.7% | 89.6% | 87.8% | 92.0% |
| I take pride in the work I do | 98.9% | 98.2% | 97.6% | 99.2% | 99.7% | 99.4% | 100.0% |
| I'm always working to improve my work situation | 91.8% | 91.2% | 90.0% | 93.1% | 92.1% | 91.7% | 92.7% |
| I work hard to improve the working condition for our employees | 90.9% | 90.1% | 88.6% | 92.4% | 91.5% | 90.0% | 93.4% |
| I work hard to improve business for our customers/patrons benefit | 93.2% | 95.3% | 95.2% | 95.4% | 92.0% | 88.6% | 96.3% |
| I work hard to make the business financially successful | 62.3% | 61.5% | 58.2% | 66.9% | 62.7% | 60.0% | 66.2% |

| Summary Table 15 | | | | | | | |
|---|--|------------|---------|--------|----------------|---------|--------|
| Personal Needs Work Satisfaction Opportunities (Percent Extremely/Very Satisfied ¹) Commercial and Non-Commercial Operators | | | | | | | |
| | Total | Commercial | | | Non-Commercial | | |
| | | Total | Self-Op | Others | Total | Self-Op | Others |
| | Less Satisfied Among Commercial Operators | | | | | | |
| I often look for more time for myself and/or my family | 31.6% | 24.0% | 22.7% | 26.0% | 39.4% | 36.7% | 43.1% |
| | Other Items | | | | | | |
| I seek a high degree of work satisfaction | 56.9% | 53.2% | 51.2% | 56.5% | 58.7% | 61.1% | 55.5% |
| I'm interested in making service to patrons a rewarding experience | 63.3% | 64.9% | 64.5% | 65.6% | 61.2% | 61.1% | 61.3% |
| I'm interested in receiving recognition for the work I do | 27.1% | 28.9% | 25.6% | 34.4% | 25.6% | 22.2% | 29.9% |
| I'm interested in rewards for the work I do | 22.0% | 24.3% | 21.8% | 28.2% | 20.5% | 16.1% | 26.3% |
| I take pride in the work I do | 71.5% | 73.4% | 74.4% | 71.8% | 69.4% | 73.3% | 64.2% |
| I'm always working to improve my work situation | 54.5% | 55.3% | 55.5% | 55.0% | 52.7% | 57.8% | 46.0% |
| I work hard to improve the working condition for our employees | 58.5% | 59.1% | 57.8% | 61.1% | 58.0% | 59.4% | 56.2% |
| I work hard to improve business for our customers/patrons benefit | 64.9% | 66.9% | 68.8% | 63.8% | 63.7% | 64.6% | 62.5% |
| I work hard to make the business financially successful | 61.9% | 60.9% | 57.7% | 66.2% | 62.4% | 59.4% | 66.2% |

| Summary Table 16 | | | | | | | |
|--|-------|------------|---------|--------|----------------|---------|--------|
| Frequency of Accessing E-Mail Commercial Compared to Non-Commercial Operators | | | | | | | |
| | Total | Commercial | | | Non-Commercial | | |
| | | Total | Self-Op | Others | Total | Self-Op | Others |
| Daily | 77.8% | 72.5% | 69.2% | 77.7% | 82.6% | 80.6% | 85.3% |
| Multiple times a week | 15.1% | 18.0% | 22.1% | 11.5% | 12.9% | 15.4% | 9.6% |
| Less Often | 7.1% | 9.5% | 8.7% | 11.8% | 4.5% | 4.0% | 5.1% |

Operator Segments

Topic Importance Ratings

- ◆ Operator segments are differentiated in terms of topic importance.
 - a. Restaurant and Bar operators consider menu pricing and consumer away-from-home expenditures and trends to be more important than other operators do. They find print publications as sources of information to be less important.
 - b. Education operators consider recipes and print publications as sources of information to be more important than others do.
 - c. Healthcare operators consider recipes, getting in-depth information about products, and employee training and retention to be more important. They consider information on take-out, grab 'n go and home meal replacement to be less important.
 - d. Retail Host operators consider menu development, food presentation ideas and getting in-depth product information to be less important than others do. They consider information on grab 'n go, take-out and home meal replacement to be more important.
 - e. Travel and Leisure operators consider consumer away-from-home eating expenditures and trends and consumer demographic trends to be more important than other operators do. They also consider food and beverage ideas and catering information to be more important than others do. Also more important to these operators are menu pricing and career development.
 - f. Business and Industry operators consider information on daypart planning, catering, take-out, grab 'n go and home meal replacement, and food ideas and trends to be more important than do other operators. They give less importance to getting information in hardcopy printed format.

Personal Needs

Segment operators are not well differentiated on personal needs importance.

| Summary Table 17 | | | | | | | |
|--|-------|----------------------------|----------------|----------------|-----------------|------------------------|---------------------------|
| Topic Importance by Segments (Percent Extremely/Very Important) | | | | | | | |
| | Total | Segments | | | | | |
| | | Restau- rants & Bars | Educa- tion | Health Care | Retail Hosts | Travel & Leisure | Business & Industry |
| Sample Size | 709 | 216 | 123 | 105 | 63 | 63 | 48 |
| Receiving information in hardcopy printed format | 38.2% | 34.7% | 44.7% | 40.0% | 39.7% | 42.9% | 29.2% |
| Print publications as a source of foodservice information | 61.2% | 51.4% | 74.0% | 61.0% | 61.9% | 61.9% | 60.4% |
| Menu pricing | 78.8% | 88.4% | 75.6% | 66.7% | 76.2% | 90.5% | 77.1% |
| Consumer away-from-home eating expenditures/trends | 54.7% | 71.3% | 43.1% | 26.7% | 55.6% | 65.1% | 56.3% |
| Consumer demographic trends | 49.1% | 51.4% | 45.5% | 39.0% | 57.1% | 60.3% | 45.8% |
| Getting brief concise foodservice/ business articles that just address the facts | 69.1% | 66.2% | 72.4% | 69.5% | 68.3% | 79.4% | 64.6% |
| Getting longer foodservice/ business articles with facts and analysis | 35.5% | 34.7% | 32.5% | 33.3% | 34.9% | 46.0% | 33.3% |
| Beverage ideas and trends | 49.4% | 49.1% | 48.0% | 40.0% | 46.0% | 66.7% | 58.3% |
| Career development | 58.5% | 56.5% | 55.3% | 65.7% | 54.0% | 73.0% | 62.5% |
| Food ideas and trends | 79.8% | 75.5% | 89.4% | 74.3% | 76.2% | 90.5% | 89.6% |
| Receiving information online in an electronic format | 53.6% | 49.5% | 58.5% | 49.5% | 49.2% | 61.9% | 66.7% |
| Catering | 49.6% | 47.7% | 43.9% | 44.8% | 38.1% | 73.0% | 70.8% |
| Daypart planning | 44.1% | 43.5% | 47.2% | 37.1% | 41.3% | 46.0% | 54.2% |
| Take out/Grab 'n Go/Home meal replacement | 43.6% | 50.0% | 38.2% | 27.6% | 68.3% | 34.9% | 56.3% |
| Recipes | 77.4% | 70.8% | 86.2% | 90.5% | 69.8% | 76.2% | 81.3% |
| Employee training/hiring/retention | 84.5% | 86.6% | 80.5% | 93.3% | 88.9% | 84.1% | 77.1% |
| Getting in-depth information about products | 67.4% | 64.8% | 73.2% | 76.2% | 63.5% | 65.1% | 68.8% |
| Menu development | 83.6% | 84.7% | 91.1% | 87.6% | 69.8% | 90.5% | 83.3% |
| Food presentation ideas | 83.1% | 82.4% | 83.7% | 88.6% | 74.6% | 90.5% | 83.3% |
| Safe food handling practices | 96.9% | 95.8% | 99.2% | 98.1% | 98.4% | 98.4% | 97.9% |
| Foodservice salaries/benefits | 75.3% | 69.4% | 78.0% | 82.9% | 79.4% | 76.2% | 75.0% |
| The internet as a source of foodservice information | 73.3% | 65.3% | 78.0% | 75.2% | 71.4% | 74.6% | 77.1% |

| Summary Table 18 | | | | | | | |
|---|-------|----------------------------|----------------|----------------|-----------------|------------------------|---------------------------|
| Personal Needs Descriptives by Segment (Percent Extremely/Very Well) | | | | | | | |
| | Total | Segment | | | | | |
| | | Restau- rants & Bars | Educa- tion | Health Care | Retail Hosts | Travel & Leisure | Business & Industry |
| I seek a high degree of work satisfaction | 91.6% | 88.0% | 96.7% | 91.4% | 93.7% | 92.1% | 91.5% |
| I often look for more time for myself and/or my family | 73.7% | 69.0% | 79.5% | 69.5% | 71.4% | 77.8% | 74.5% |
| I'm interested in making service to patrons a rewarding experience | 91.4% | 92.1% | 91.0% | 93.3% | 92.1% | 96.8% | 85.1% |
| I'm interested in receiving recognition for the work I do | 62.3% | 57.9% | 64.8% | 73.3% | 61.9% | 63.5% | 68.1% |
| I'm interested in rewards for the work I do | 58.9% | 59.3% | 57.4% | 64.8% | 55.6% | 69.8% | 63.8% |
| I take pride in the work I do | 98.9% | 97.7% | 100.0% | 99.0% | 700.0% | 98.4% | 100.0% |
| I'm always working to improve my work situation | 91.8% | 90.3% | 92.6% | 94.3% | 92.1% | 93.7% | 87.2% |
| I work hard to improve the working condition for our employees | 90.9% | 88.4% | 93.4% | 90.5% | 92.1% | 93.7% | 91.5% |
| I work hard to improve business for our customers/patrons benefit | 93.2% | 94.5% | 92.4% | 90.4% | 96.8% | 95.2% | 95.7% |
| I work hard to make the business financially successful | 62.3% | 58.5% | 64.4% | 53.8% | 68.3% | 65.1% | 70.2% |

| Summary Table 19 | | | | | | | |
|---|-------|----------------------------|----------------|----------------|-----------------|------------------------|---------------------------|
| Frequency of Accessing E-Mail By Operator Segments | | | | | | | |
| | Total | Segment | | | | | |
| | | Restau- rants & Bars | Educa- tion | Health Care | Retail Hosts | Travel & Leisure | Business & Industry |
| Daily | 77.8% | 70.8% | 86.4% | 78.8% | 68.3% | 82.5% | 91.5% |
| Multiple times a week | 15.1% | 17.9% | 10.2% | 16.3% | 25.4% | 11.1% | 4.3% |
| Less Often | 7.1% | 11.3% | 3.6% | 4.9% | 6.3% | 6.4% | 4.2% |

**APPENDIX:
THE QUESTIONNAIRE**

SURVEY A

The following questions seek your level of interest in various foodservice topics and how satisfied you are with the information sources currently available about that topic in the industry today.

Extremely Very Somewhat Not Too Not At All

Consumer demographic trends.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Consumer away from home eating frequency and expenditure trends.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Menu pricing.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Menu development.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Food presentation ideas.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Recipes.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Food ideas and trends.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Beverage ideas and trends.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Safe food handling practices.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

Day part planning.

- How important is this to you?
- How satisfied are you with existing information sources on this topic?

[] [] [] [] []
[] [] [] [] []

| | |
|--|---|
| Take out / grab 'n go / home meal replacement. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Catering. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Career development. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Employee training, hiring and retention. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Foodservice salaries and benefits. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| The internet as a source of foodservice information <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Print publications as a source of foodservice information. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Getting brief, concise foodservice and business articles that just address the facts. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Getting longer foodservice and business articles with facts and analysis <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Getting in-depth information about products. <ul style="list-style-type: none"> • How important is this to you? • How satisfied are you with existing information sources on this topic? | [] [] [] [] [] [] [] [] [] [] |
| Receiving information in a hardcopy printed format. <ul style="list-style-type: none"> • How important is this to you? | [] [] [] [] [] |
| Receiving information online in an electronic format. <ul style="list-style-type: none"> • How important is this to you? | [] [] [] [] [] |
| Please indicate how well each of these statements describes you or your interests. Then indicate how well your current work situation provides opportunities for you to experience the activity described. | Extremely Very Somewhat Not Too Not At All |

| | |
|---|---|
| <p>I seek a high degree of work satisfaction.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I often look for more time for myself and/or my family.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I'm interested in making service to patrons a rewarding experience.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I'm interested in receiving recognition for the work I do.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I'm interested in receiving rewards for the work I do.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I take pride in the work I do.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I'm always working to improve my work situation.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I work hard to improve the working conditions for our employees.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I work hard to improve business for our customers/patrons benefit.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>I work hard to make the business financially successful.</p> <ul style="list-style-type: none"> • How well does this statement describe you? • How well does your current work situation provide opportunities to experience this? | <p>[] [] [] [] []</p> <p>[] [] [] [] []</p> |
| <p>Which best describes, on average, how frequently you access your email?</p> <ul style="list-style-type: none"> • Daily • Multiple times a week • Once a week • Every other week • Once a month • Once every other month • Very seldom | |

Are you the primary foodservice purchase decision maker?

- Yes
- No

How many full time/full time equivalent employees are in your foodservice operation?

- 1 - 14
- 15 - 49
- 50 - 99
- 100 – 225
- 226 or more

How much does your foodservice operation purchase in food and beverages annually?

- \$100,000 - \$199,999
- \$200,000 - \$299,999
- \$300,000 - \$499,999
- \$500,000 - \$999,999
- \$1,000,000 - \$4,999,999
- \$5,000,000 and over

Thank you for completing this survey. You will now be entered into a sweepstakes drawing for five prizes of 2,500 Bonus Points each! We appreciate your contribution toward improving Foodservice Rewards.