

FOODFrontiers Analysis – An overview

Overview

The FOODFrontiers analysis extends out to identify commercial implications, and through that **is designed for use as:**

- **A strategic tool** that puts food market influences into a context that can guide strategy decision-making.
 - The increased pace of food market change raises the need to be informed, and in particular, to add up the impact as market influences combine.
- **An insightful injection** into your **business development agenda** that can stretch internal thinking that is often constrained by the pressure of daily operations and the source of current sales. Ask yourself:
 - As the new and emerging distribution channels increase their food market share, will you enjoy their sales increase?
 - Are your products suitable for the smaller retail top up shop as that is how most food shopping happens?
 - Are you exposed to the growth channels in foodservice that are enjoying the value trade off?
- **The content to validate your new product agenda** with customers which can be a critical aid justifying your investments in your brand and maintaining the distribution you require.
 - With retail competitive intensity set to increase, sound commercial reasoning will be required to gain advantages with the large retailers.
 - Maintaining the capacity to differentiate your product is of higher value, but if your planned investments in brand and consumer franchises are not understood or welcomed by customers, they will be made at higher risk.



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FOODFrontiers is an in-depth set of insights on the Australian food market that explores the links between key food market influences and consumer food buying behaviour. It incorporates the following:

- **A forwarding looking view** of the key and emerging market forces affecting consumer **food purchasing** behaviour
- **An evidence base to validate findings** that will be tracked as ongoing market indicators
- **Profiling how market settings** are changing to **lock in** what were once viewed as short term trends
- **Use of the most recent available market data** that includes drawing on the latest Mealpulse™ food consumer panel responses
- **The expertise of professional** food industry experts with the ability to **look across the food market frontier and draw meaningful insights.**

This is a comprehensive, insightful market assessment that offers an invaluable external perspective. The \$4,500 for the initial analysis provides strong value-for-money compared with self-commissioned alternatives.

How do I participate?

You can participate in FOODFrontiers by purchasing the initial analysis report immediately. However, we have found there are benefits from our support in conveying findings and driving the change required. Therefore, there are also options available as an annual package that includes two reports, a board/management workshop, together with tailored implications for your enterprise.

Pricing for the FOODFrontiers purchase options are as follows:

- Single report** at **\$4,500 + GST**
- Two reports** at **\$7,500 + GST** (*Special offer available until 20 December 2011)
- Annual package** by arrangement + **GST, including**
 - Two reports – November and May
 - Development of tailored implications for your enterprise based on the capture and use of client input
 - Board/management half day workshop (including pre-meeting consultation)

Each report is approximately 70-80 A4 pages and is provided under copyright in protected electronic form.

To order FOODFrontiers today, complete the attached order and send to foodfrontiers@freshlogic.com.au or fax to +61 3 9818 1558. If you have queries please just call +61 3 9818 1588.

What issues are addressed?

FOODFrontiers provides a focused analysis on key issues facing the food industry and the resulting implications. Some of the key issues and considerations addressed include:

- The major drivers of change in consumer spending, and how those forces have converged into new food market settings
- The implications of those settings for:
 - Market growth
 - Research focus
 - Marketing mix
 - Consumer engagement
- What shoppers are prepared to trade off against price
- The pressures on meal and food shopping choices, and the increasing role that technology plays
- How consumer aspirations affect choice, and where these are playing out
- Where online retailing is headed
- New channels to the consumer - what are they, where are they flourishing, and why
- How intense is the caution in food spending, and which segments are most sensitive
- The incidence of food sales away from major grocery chains to specialist stores
- Which trends in global retail and foodservice are coming our way.



Which are the key indicators monitored and updated?

FOODFrontiers draws on a full range of data sources that are continually monitored and updated throughout the year. This includes unique data from Freshlogic's internal research tools, such as our [Mealpulse™](#) consumer panel, [Adwatch](#) retailer advertisement tracking service, [THRUchain](#) market model, and detailed evidence of consumer purchasing behaviour through [Docketdata analysis](#).

Key indicators that are monitored and updated include:

- Changes in, and relative strength of key market settings, affecting the food market
- Household spending on food by sales channel and the impact on overall food market channel shares
- The various influences on, and indicators of, shopper sentiment towards future spending
- Shifts in grocery market trends and their impact
- Changing shopper attitudes and the link between attitudes and actual spending
- Pressures on the intensity of retailer competition
- Tactics used over time in retailer promotion, including what and why
- Developments and opportunities from new sales channels to the consumer
- Developments in the use of technology and the effect on shopping and dining choices
- Emerging global retail trends that have relevance for the Australian food market
- Insights from extending the conversation with consumers in our Mealpulse panel.

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- Outlet types
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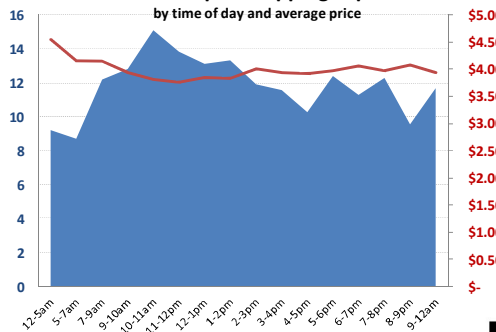
Eating Out

- Overall trends in eating-out
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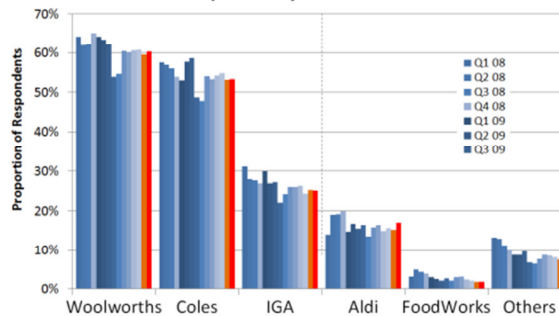
Total Food Spend per week - average for households in 4 Qtrs to Sept 2011



Items per shopping trip by time of day and average price



Participation by Take Home Retailer



More information

For more information on this and any of our other products and services, please visit www.freshlogic.com.au, contact us on (+61 3) 9818 1588 or email us at foodfrontiers@freshlogic.com.au.



FOODFrontiers Order Form

Order number:
Internal use only

	Price*	Tick
Single Report	\$4,500 + GST	<input type="checkbox"/>
Two Reports <i>(Special offer available until 20 December 2011)</i>	\$7,500 + GST	<input type="checkbox"/>
Annual Package , including <ul style="list-style-type: none"> • Two reports – November and May • Board/management half day workshop (including consultation) • Tailored implications for your enterprise (including client input) 	By arrangement	<input type="checkbox"/>

* Includes 10% GST. The report (s) will be provided in protected electronic copy

Name _____

Position _____

Company _____

Address _____

_____ **Post code** _____

Phone _____

Email _____

Following the receipt of the order form, customers will be sent an invoice with payment details prior to delivery of FOODFrontiers products and services.

I confirm that this report is for the internal use of our organisation only and will not be made available or copied for the benefit of other organisations or individuals without the written approval of Freshlogic.

Signature _____

Date _____

Please email the completed form to foodfrontiers@freshlogic.com.au or fax +61 3 9818 1558

If you would like to discuss this service further, please contact Freshlogic at +61 3 9818 1588, or email foodfrontiers@freshlogic.com.au