

All-new study
with custom research
available for a limited time!

Growth Drivers in the K-12 Foodservice Segment

Most U.S. K-12 schools offer on-site meals to their students. Many receive federal reimbursements for these meals through their participation in the USDA's Child Nutrition Program such as the National School Lunch Program (NSLP) and the School Breakfast Program (SBP). Child Nutrition Programs are available to all students regardless of income, however students from lower-income households may qualify for free or reduced-price meals and/or snacks.

For suppliers, this K-12 segment offers many attractive features. First of all, the K-12 foodservice market is large (expected to reach almost \$15B in food, beverage and non-food purchases in 2019). Secondly, this segment is expected to experience real growth over the next 5 years. Thirdly, nutritional guidelines for school meal programs are constantly in flux and suppliers can differentiate in supporting school operators in meeting these state and district mandates to receive federal funding.

The scope of this assignment includes all K-12 schools and districts within the United States, including:

- Public and Private
- Elementary (K-5), middle (6-8) and secondary (9-12) grade levels
- Self-operated and contract-managed

APPROACH

- **ENGAGEMENT INITIATION** review scope, proprietary questions, and determine key timing and delivery dates
- **MARKET REVIEW** comprehensive assessment of K-12 segment trends and dynamics via secondary research
- **IN-DEPTH RESEARCH** to better understand operator issues, preferences, and usage for individual sponsor categories, Q1 will conduct 25 qualitative interviews of foodservice directors in large U.S. school districts, further supported by a survey of 300 foodservice directors that will quantify attitudes, practices and behaviors
- **COMPREHENSIVE REPORTING** that covers common-interest and proprietary issues to answer sponsors' "so what" and "what now" questions — ultimately providing guidance for planning improved market penetration

OBJECTIVES

- Bring to light foodservice growth trends and drivers in U.S. K-12 schools
- Market segmentation and differentiation between public and private institutions
- Deliver dynamics and trends related to different service areas/systems
- Identify critical issues faced by K-12 institutions and how these impact foodservice manufacturers
- Forecast how the K-12 foodservice market will evolve through 2022
- Identify key growth opportunities, anticipated challenges/hurdles and critical success factors for manufacturers who participate in the K-12 foodservice market

DELIVERABLES

- **In-depth PowerPoint report** with metrics, analysis, and expert insights around critical success factors for improved K-12 market penetration
- Easy-to-digest commentary with **key takeaways and actionable recommendations**
- Robust appendix with **full study data from questions and responses**

NEXT STEPS

To sign on today and have your proprietary questions included in our survey, please complete the acceptance form on the following page or contact:

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ADVANCED Q1 ANALYSIS

- Understanding of the decision-making process related to what foods are offered in the school foodservice program
- Identification of critical selection criteria when deciding which foods to offer, and an understanding of where sponsor categories fit on meeting these criteria
- Identification of key decision makers and influencers, their degree of influence and their key "hot buttons"
- Exploration of how the school foodservice program is viewed among educators, students, and the community
- Evaluation of how specific products are perceived in the school foodservice environment - benefits and drawbacks
- Understanding and evaluating how F&B are positioned in the "good food" vs. "bad food" context
- Assessment of health and nutrition perceptions and misperceptions of food and beverage categories
- Understanding the nutritional and health programs within the school foodservice area, including menu development and promotions, and how sponsor categories fit in
- Evaluation of nutritional education held by foodservice directors, and how this is practiced
- Discussion of the opportunities and obstacles to menuing within the school foodservice area
- Recommendations of how sponsors can enhance the position of specific products and expand within the K-12 school foodservice environment



Purchase Agreement

Growth Drivers in the K-12 Foodservice Segment

YES, I'd like to sponsor the study for \$9,500 and have my proprietary questions included.

ACCEPTANCE

Name _____

Title _____

Company _____

Address _____

Phone _____

Fax _____

Email _____

Signed _____

Date _____

Once approved, please sign, scan, and email to the attention of:

**Tim Powell (tpowell@q1consultingllc.com) or
Julie Heseman (jheseman@q1consultingllc.com).**

Thank you for your business!