

NRA distribution practice survey 2016 final

Q32 NRA/TCU Supply Chain Survey 2016: Distribution Practices in Restaurant Chains This research survey is part of a study of distribution design and product delivery practices, with the goal of further improving practices in the restaurant industry. Your participation in the survey is completely voluntary and your responses will be anonymous. No individual data attributable to a specific company will be shared or reported. You can leave the survey and return at any time. As long as you use the same device (computer, smart phone), the survey will pick up again at the point at which you left it. The survey will take about 30 minutes to complete for each concept (brand) on which you choose to report. In return for your participation, you will receive the following: The overall findings will be presented at the NRA Supply Chain Management Executive Study Group semi-annual conference in Orlando Florida, Oct 25 to 26, 2016, where researchers will be available to discuss the results with you. If you attend the conference, there you can choose to receive a personalized report that compares your practices against the range of practices reported in the overall survey sample. Researchers will then discuss your report with you by phone if desired. In addition, the raw data will be made available to participants through a new executive supply chain study group research web site. Thank you for participating! If you have concerns or questions about this study, please contact Dr. Morgan Swink, Center for Supply Chain Innovation, Neeley School of Business, Texas Christian University, Box 298530, Fort Worth, TX, 76129 Phone: 817-257-7463, m.swink@tcu.edu

Q33 Please provide your job title

Q34 What is the job title of the person to whom you report?

Q35 How many years have you worked at your current firm?

Q29 About how many employees work in your company's supply chain function?

Q30 About how many employees work in distribution and logistics in your supply chain function?

Q22 How many different restaurant concepts (brands) does your organization support? Please read the instructions below.

Q186 PLEASE READ THESE INSTRUCTIONS: You can choose to complete this survey repeatedly for up to 4 separate concepts. The next page will start questions for the first concept (any concept you choose), which we will call "concept 1". At the end of this section, you will be asked if you want to end the survey (if your organization supports only 1 concept, for example) or to answer questions about another concept, which we will call "concept 2". After completing the section for concept 2, you can end the survey, or move to a section for concept 3, and so on.

Q21 Concept 1: Background Information

Q53 Please answer the following questions with regard to the first concept that your organization supports.

Q24 Which of the following categories best describes this concept?

- Quick service (2)
- Fast casual (3)
- Casual or family dining (4)
- Fine dining (5)
- Specialty (please describe) (1) _____
- Other (please describe) (6) _____

Q25 What are the most recent U.S. total annual sales for this concept?

- 0 - \$50 Million (1)
- \$51 - \$200 Million (2)
- \$201 - \$500 Million (3)
- \$501 Million - \$1 Billion (4)
- \$1.1 - \$5 Billion (5)
- More than \$5 Billion (6)
- I don't know (7)

Q26 How many U.S. restaurant locations are supported for this concept?

Q27 Which of the following terms best describes the geographic scope of the restaurants in this concept?

- Nationwide locations (1)
- Locations mostly within 1 region (e.g., west coast, southeast region, etc.) (2)
- Locations mostly within 1 state (3)
- Locations in multiple regions (4)
- Other (please describe) (5) _____

Q28 Roughly what percentage of your restaurants in this concept are franchised operations (not owned by your company)? Skip the question if you do not know the answer.

_____ Percentage of restaurant locations that are franchised (1)

Q31 Which of the following terms best describes the overall sales growth for this concept over the past 2 years?

- Fast growth (more than 5% same store per year) (1)
- Slow growth (2)
- Steady business (less than 1% growth or decline) (3)
- Slow decline (4)
- Fast decline (more than 5% same store per year) (5)

Q36 Concept 1: The Mainline Distribution Network

Q187 About how many SKUs are purchased through all mainline distributors for all concepts that you support?

Q37 About how many SKUs are purchased through your mainline distributor for concept 1?

Q38 What is your approximate annual \$ spend on these items for concept 1?

Q39 Approximately what percentage of these SKU's for concept 1 are proprietary (versus non-proprietary and distributor label items)? Skip this question if you don't know the answer.

_____ Percentage of total SKU count that is proprietary (1)

_____ Percentage of total dollar spend that is proprietary (2)

Q40 Approximately what percentage of your total spend for this concept is for each of the following categories of items?

_____ Dry items (1)

_____ Refrigerated items (2)

_____ Frozen items (3)

_____ Other (4)

_____ If you don't know the answer, indicate 100% here (5)

Q188 How many distribution centers (DCs) serve the restaurants included in all concepts that your organization supports?

Q41 How many distribution centers (DCs) serve the restaurants in concept 1?

Q42 Approximately what percentage of the DCs serving this concept are owned by your company?

_____ % of DCs owned by your company (1)

If % of DCs owned by your company Is Equal to 100, Then Skip To Across all concepts, do you or any of...

Q43 For contract DCs (not owned) serving this concept, how many different distribution or 3PL companies are involved?

Q44 What percentage of your distribution contracts for this concept are of the following lengths (must sum to 100)?

_____ 0-1 years (1)

_____ 1-3 years (2)

_____ 3-5 years (3)

_____ More than 5 years (4)

_____ If you don't know the answer, indicate 100% here (5)

Q189 Across all concepts, do you or any of your distributors utilize redistribution for your mainline distribution?

- Yes (1)
- No (2)
- I don't know (3)

If No Is Selected, Then Skip To What percentage of in-bound freight t...If I don't know Is Selected, Then Skip To What percentage of in-bound freight t...

Q46 Across all concepts, how many redistribution companies are used?

Q47 Across all concepts, how many redistribution facilities are used?

Q45 Do you/your distributors utilize redistribution for your mainline distribution for concept 1?

- Yes (1)
- No (2)
- I don't know (3)

If No Is Selected, Then Skip To What percentage of in-bound freight t...If I don't know Is Selected, Then Skip To What percentage of in-bound freight t...

Q190 How many redistribution companies are used for concept 1?

Q191 How many redistribution facilities are used for concept 1?

Q48 What percentage of the products that are put through redistribution for concept 1 are in the following categories (must sum to 100)?

- _____ Dry items (1)
- _____ Refrigerated items (2)
- _____ Frozen items (3)
- _____ Other (please describe) (4)
- _____ If you don't know the answer, please indicate 100% here. (5)

Q49 What percentage of in-bound freight to DCs serving this concept is managed by each party shown below (must sum to 100)?

- _____ My company manages the freight (1)
- _____ Contract DCs manage the freight (2)
- _____ Vendors manage the freight (3)
- _____ Other (please describe) (4)
- _____ If you don't know the answer, indicate 100% here (5)

Q50 Approximately what percentage of inbound deliveries to DCs for this concept are full truck load quantities? Skip the question if you don't know the answer.

- _____ % inbound deliveries to DCs that are full truck loads (1)

Q51 Which categories for this concept are distributed using distributors other than mainline? Please complete the information below for each category. If the category is delivered by mainline distributors, please enter 0 in each box

	Number of distributors (1)	Number of facilities (2)	Annual \$ spend on purchases (3)	Number of SKUs (4)
Produce (1)				
Dairy (2)				
Fresh bakery (6)				
Small wares (3)				
Equipment (4)				
Other (please specify): (5)				

Q1 Concept 1: Deliveries to Restaurants from Mainline Distributors

Q2 Overall, about what percentage of delivery routes to restaurants in this concept are dedicated routes (not shared with another company or concept)? Skip the question if you don't know the answer.

_____ % of dedicated delivery routes (1)

Q3 About how many cases are shipped in each delivery to your average restaurant for this concept (average drop size)?

Q207 What is the average case cube for deliveries to restaurants for this concept?

Q4 About how many deliveries are made to each restaurant for this concept on average each week?

Q5 Which of the following delivery restrictions do you apply?

- No breakfast time deliveries (1)
- No lunch time deliveries (2)
- No dinner time deliveries (3)
- No night time deliveries (4)
- Other times when deliveries are not allowed (please specify) (5) _____
- Only accept tailgate deliveries (6)
- Only accept "in restaurant" deliveries (7)
- Only accept back door deliveries (8)
- Only accept single driver deliveries (9)
- Other restrictions (please specify) (10) _____

Q6 What percentage of deliveries to restaurants in this concept:

_____ are day drops (not night drops)? (1)

_____ do store personnel participate in the delivery/receiving process (2)

Q7 Which of the following delivery terms apply to this concept (select all that apply)?

We apply fuel surcharges (if yes, please specify how it is calculated) (1)

We hedge fuel prices through distributors (2)

We index distribution fees to account for backhaul credits (3)

We have visibility to backhauls (4)

DC unloading fees (lumpers) are embedded in per case fees (5)

DC unloading fees (lumpers) are assessed on a load by load basis (6)

We have a base fee arrangement using fee per case (7)

We have a base fee arrangement using a % mark up (8)

Fees are adjusted for non-contracted products (12)

We have certain inventory turnover requirements (13)

The number of proprietary items are limited (14)

Other factors that impact case fees (if yes, please specify) (15) _____

Q8 Concept 1: Distribution Information and Performance Measurement

Q9 What activities raise or lower distribution case fees in this concept (select all that apply)?

Back hauls (1)

Line hauls (2)

Unloading fees (3)

Prompt pay discounts (4)

Hitting delivery windows (5)

Proportion of proprietary vs distributor items (6)

Number of key stops vs days stops (7)

Proportion of attended vs unattended deliveries (8)

Marketing allowances (10)

Other factors that impact fees (please list) (11) _____

Q10 What types of data feeds do your distributors supply for this concept (select all that apply)?

	Do you receive these data feeds?			If yes, how often is the data supplied?			
	Yes (1)	No (2)	I don't know (3)	Daily (1)	Weekly (2)	Monthly (3)	Less frequently (4)
Restaurant invoices (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inventory positions (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inbound purchase orders (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery/route data (i.e. truck tracker or uber) (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advanced shipment notices (ASNs) (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify) (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11 What types of restaurant order systems do you use in this concept (check all that apply)?

- Phone (1)
- Fax (2)
- On line (3)
- Mobile (4)
- I don't know (5)

Q12 Do restaurants in this concept place orders or receive suggested orders?

- Place own orders (1)
- Receive suggested orders from in-house (2)
- Receive suggested orders from 3rd party (3)
- I don't know (4)

Q13 To what extent do distributors servicing this concept use bar code scanning (select all answers that apply)?

- Not at all (1)
- In DC (2)
- At time of delivery to restaurants (3)
- Other (please specify) (4) _____
- I don't know (5)

Q193 To what extent do your distributors for this concept use the GS1 standard?

- Not at all (1)
- In some instances (2)
- in most areas (3)
- Everywhere possible (4)
- I don't know (5)

Q14 Does your chain for this concept have its own proprietary scanning nomenclature?

- Yes (1)
- No (2)
- I don't know (3)

Q15 Which of the following are key performance indicators (KPIs) that you use to measure the performance of your distribution system for this concept?

- On time deliveries (1)
- Order accuracy (2)
- Order lead time (3)
- Perfect orders (4)
- Shorts (5)
- Clean invoice (14)
- Inventory turns (6)
- Average case cost (7)
- Total distribution cost (8)
- Operator/Franchisee satisfaction (10)
- Temperature control checks on delivered items (12)
- Other (please list all other KPIs) (9) _____

Q199 Which statement below best describes your perception of your overall distribution performance for this concept compared to other similar concepts in your industry?

- Good, probably above the average for similar concepts in the industry (1)
- OK, probably about average for similar concepts in the industry (2)
- Not so good, probably below the average for similar concepts in the industry (3)
- I don't know (6)

Q17 Over the past three years, what has been the average yearly change in your mainline distribution case fees for this concept?

- increased more than 10% on average each year (1)
- increased 7% - 10% on average each year (2)
- increased 4% - 6% on average each year (3)
- increased 1% - 3% on average each year (4)
- stayed about the same on average each year (5)
- decreased 1% - 3% on average each year (6)
- decreased 4% - 6% on average each year (7)
- decreased 7% - 10% on average each year (8)
- decreased more than 10% on average each year (9)
- I don't know (10)

Q203 Over the past three years, what has been the trend for distributor service levels for this concept?

- Service levels have improved (1)
- Service levels have stayed about the same (2)
- Service levels have gotten worse (3)
- I don't know (4)

Q18 For the question above, approximately what percentage of the change in distribution case fees is attributable to the following factors (must sum to 100)?

- _____ External factors you don't have control over (1)
- _____ Actions you have taken to change the distribution system (2)
- _____ Growth or decline in your overall business (3)
- _____ Automatic or pre-determined contractual changes such as CPI adjustments, etc. (6)
- _____ Other (please specify) (4)
- _____ If you don't know the answer, indicate 100% here (5)

Q184 This is the end of questions regarding the first concept supported by your distribution network. Would you like to answer questions about another concept?

- Yes (1)
- No (2)

If No Is Selected, Then Skip To End of Block

Q19 Thank you for participating in this survey! Results of the study will be presented at the NRA Supply Chain Management Executive Study Group semi-annual conference in Orlando Florida, Oct 25 to 26, 2016, where researchers will be available to discuss the results with you if desired. If you attend the conference you can also choose to receive a personalized report of the findings, with a comparison of your responses against the overall sample data. [Click here to learn more about the conference.](#) If you plan to attend the conference and might want to receive a personalized report of the findings, please provide below a word or short phrase that you can remember and use to identify your data record in the overall sample. This way we can preserve your anonymity while giving you access to your own data if you wish.

Q103 Please contact Dr. Morgan Swink at m.swink@tcu.edu or 817-257-7463 if you have questions about this study.