

Technomic Glossary

Segment and Subsegment Definitions

Limited-Service Restaurants (LSR): Establishments where patrons generally order or select items and pay before eating, with check averages generally between \$3 and \$12. Food and drink may be consumed on-premise, taken out or delivered to customers' locations. This segment consists of quick-service operations, fast-casual restaurants and cafeterias/buffets

- **Quick-Service Restaurants (QSR):** Traditional fast-food restaurants, generally with check averages between \$3 and \$8
- **Fast-Casual Restaurants (FC):** Establishments with a limited-service or self-service format, with check averages generally above \$9. Food is prepared to order and made with fresh (or perceived as fresh) ingredients. Restaurants offer innovative food suited to sophisticated tastes, and upscale or highly developed interior design. Alcohol may be served

Full-Service Restaurants (FSR): Establishments with a relatively broad menu along with table and/or booth service and a waitstaff. These establishments offer meals and snacks for immediate consumption primarily on-premise; some may also offer takeout service. This segment is composed of midscale, casual-dining and fine-dining restaurants

- **Midscale Restaurants (MSR):** Full service; moderate check averages (generally under \$15). Many do not sell alcohol, but if they do, it is limited to beer and/or wine. Breakfast orientation often defines this segment
- **Casual-Dining Restaurants (CDR):** Full service; check average generally \$15-\$50, excluding the purchase of alcohol, which is served. A full bar is characteristic of this segment. This subsegment includes upscale/polished casual-dining chains
- **Fine Dining (FD):** Full service; check average generally above \$50, excluding alcohol purchases, with an emphasis on dinner. Establishments usually offer an extensive alcohol program. Also known as white-tablecloth restaurants

Classification/Cuisine Type Definitions

All Other (Limited Service): The limited-service All Other menu category includes barbecue, chili, doughnut, smoothie, salad, seafood, hot dogs, snack and specialty concepts

All Other (Full Service): The full-service All Other menu category includes barbecue chains as well as other ethnic concepts

Asian: Concepts including Chinese, Thai, Vietnamese, Japanese, Korean, etc., including those that specialize in specific items or in specific preparation methods such as stir-fry or sushi. Restaurants may offer full service or limited service, and generally serve lunch and dinner

Asian/Noodle: Limited-service, generally fast-casual concepts emphasizing made-for-you assembly of Asian noodle dishes, global noodle and pasta dishes or Asian dishes generally served on rice

Bakery Cafe: Limited-service, fast-casual restaurants emphasizing artisan breads, baked goods and made-for-you service formats. Menus are centered on sandwiches along with salads and soups. The lunch segment is emphasized; most also offer breakfast and, outside of business districts, they may be open for dinner as well

Burger: Primarily limited-service restaurants that focus on serving hamburgers, french fries and soft drinks, although many also menu other bun-style sandwiches as well as breakfast items. Restaurants are open for lunch and dinner and many are open for breakfast and late-night segments. Highest-volume operations are quick service, but higher-end limited-service “better burger” concepts are proliferating, and some full-service restaurants also specialize in burgers

Chicken: Primarily limited-service restaurants that menu chicken by the piece, in sandwiches and in large-quantity orders, such as buckets. Sides are also stressed. The traditional preparation technique is frying, but grilling and roasting are increasingly used. Typically, units are open for lunch and dinner, and some also offer breakfast

Coffee Cafe: Limited-service restaurants with a menu focused on coffee—both hot and iced—including specialty items such as barista-prepared espresso-based beverages. Concepts generally also menu teas, other beverages such as juices, pastries, snacks and breakfast items. Prepackaged meals and snacks prepared in a commissary may be offered for immediate consumption or on-site reheating and immediate consumption. Many stores also have a significant retail component, offering coffees and brewing equipment

Family Casual: Limited-service buffet-style restaurants that prepare and serve meals for immediate consumption, with patrons selecting from already-prepared food and drink items on display. Examples include steak buffet restaurants, other buffet-format restaurants and traditional cafeterias

Technomic Glossary

Family Style: Also known as midscale restaurants. A subsegment of full service. Restaurants feature broad menus with many options for all dayparts, including a strong breakfast focus and late-night or even 24-hour service. There is limited or no alcohol service, and check averages are under \$15

Frozen Dessert: Limited-service restaurants specializing in ice cream, frozen yogurt and/or other frozen desserts and treats

Italian/Pizza: Full-service restaurants with menus built around Italian-inspired dishes such as pasta and pizza

Mexican: Full-service or limited-service restaurants that serve Mexican-style dishes such as tacos and burritos for lunch and dinner. Full-service Mexican concepts typically emphasize adult beverages

Pizza: Limited-service restaurants that specialize in pizzas along with pastas and sandwiches that have Italian and American roots. Units are typically open for lunch and dinner. Note: Technomic classifies full-service restaurants specializing in pizza within the full-service Italian cluster

Sandwich: Limited-service restaurants specializing in sandwiches other than burgers, such as hot dogs, pitas and wraps. Sandwiches may be hot or cold and may be made from a variety of cheeses, meats and other toppings. Many of these restaurants are open for breakfast, lunch and dinner

Seafood: Full-service and limited-service restaurants that specialize in fish and shellfish but also offer nonseafood items. FSRs may feature fresh, seasonal fish and seafood

Sports Bar: A subset of casual-dining restaurants that features a strong alcohol focus and a casual environment with numerous TVs tuned in to sporting events. Sports Bars typically offer burger- or wing-centric menus and often run promotions and menu specials based on seasonal sporting events

Steak: Full-service restaurants that specialize in signature steaks but also typically menu poultry and seafood entrees. Many focus on premium meats and high service levels. Most steak restaurants are open for lunch and dinner, with an emphasis on the dinner daypart

Varied Menu: Full-service restaurants featuring a broad-based menu of items inspired by a variety of cuisines, often in Americanized formats, along with established American fare such as hamburgers and sandwiches. Most are open for lunch and dinner

Technomic Glossary

Technomic Eater Archetypes

Affluent Socializer:

- Unique Differentiators: Dining out is entertainment; values quality service and products; price not a driving factor in dining decisions
- Demographic Skews: Male, baby boomer, upper income, suburban

Bargain Hunter:

- Unique Differentiators: Driven by low prices; seeks out specials/deals to save while treating themselves; not concerned with health
- Demographic Skews: Female, lower income, has younger children

Busy Balancer:

- Unique Differentiators: On the go; multitasker; uses online reviews; foodservice makes life easier; likely to increase foodservice usage
- Demographic Skews: Female, millennial, middle to upper income, urban, has younger children

Foodservice Hobbyist:

- Unique Differentiators: Dining out is a hobby; very value-conscious; avid technology user
- Demographic Skews: Female, married and living with spouse

Functional Eater:

- Unique Differentiators: Food is fuel; opts for familiar restaurants to fit an on-the-go lifestyle; doesn't plan for meals or spend time cooking
- Demographic Skews: Male, young millennial, fully employed, single

Habitual Mature:

- Unique Differentiators: Convenience and price drive dining decisions; sticks to familiar foods; loyal to a small number of restaurants to avoid a hassle when dining out
- Demographic Skews: Male, baby boomer+, low or fixed income, Caucasian, lives alone

Technomic Glossary

Health Enthusiast:

- **Unique Differentiators:** Health at forefront of dining; believes cooking at home is healthier; lives simply and pays attention to ingredients and labels
- **Demographic Skews:** Male and female, baby boomer+, middle income, married and living with spouse

Technomic Operator Archetypes

Mainstream Magnet: Mainstream Magnets are somewhat less passionate about current trends and menu evolution. They do not feel as concerned as others when it comes to issues facing commercial foodservice, although they share the industry's concern over labor attraction and retention. Supplier decisions largely center around consistency, with an additional focus on food quality and cost control

Fence Sitter: Fence Sitters are highly focused on “heritage” quality (traditional quality cues not necessarily derived from newer, health-halo attributes) and consistency, as their core offering tends to be more basic and somewhat less trendy. They are less inclined to seek sustainable, local or seasonal ingredients, yet they make supplier decisions based on ingredients and products that are consistently of the highest quality, with both steady pricing and ideation support to help them differentiate

Controlled Explorer: Controlled Explorers are highly engaged in rapid menu change, and look to leverage product seasonality to help steer menu directions. They are very likely to seek sustainable, local or seasonal ingredients, yet they do not shy away from processed or value-added products

Culinary Adapter: Culinary Adaptors are acutely focused on consumer trends and opinions, and are quick to jump on emerging trends. They are more likely than most to seek sustainable, local or seasonal ingredients, yet they also may readily integrate processed or value-added products

Cutting Edger: The Cutting Edger segment is comprised of many fine-dining operators, and dedication to the highest-quality local, seasonal and sustainable products and ingredients is frequently at the core of their operational philosophy. Many within this group set the trends, and are responsible for pushing the dining experience envelope

Technomic Glossary

Technomic Drinker Archetypes

The Maximizer: Maximizers want to feel like they are getting the best value out of their experience away from home. They go out for drinks less often than other archetypes, but when they do, they want to feel like they are either getting a deal or having an experience they wouldn't get at home. While this means that this group pays closer attention to menu prices, they also evaluate the broader value proposition in aspects such as service or beverage quality

The Chameleon: Chameleons blend in with their surroundings and, like a chameleon, this group's drinking behavior changes according to the atmosphere and occasion. They watch what others are drinking prior to ordering and behave based on their observations—a behavior that stems from prioritizing social aspects of the beverage occasion over the beverage itself

The Extrovert: For Extroverts, the social aspects of the beverage occasion are of principal importance. This group is less likely to be sticklers about price and more likely to be generous, both with the others in their party and with their servers. They have reliable, go-to establishments and, when it comes to selecting a drink, they know what they like and have a set of reliable go-to brands that they tend to stick to whenever possible

The Purist: Purists know what they like and aren't interested in being challenged or pushed out of their comfort zone. They evaluate a bar or restaurant by its ability to make a certain drink the way they like it, period. While they may meet up with friends for a drink, the social aspects of the experience are less important than the quality of the beverage and the service

The Tourist: The Tourist has a thirst for learning and is endlessly curious about the adult beverage experience. This group doesn't have a set rotation of brands to which they're loyal. Instead, they like to use away-from-home beverage occasions to try new flavors and products to get a better understanding of the category overall. Expect this group to value innovation, quality of process and uniqueness, above all else

Overall Industry Terms

AFH: Away from home

Average Unit Volume (AUV): Total food and beverage sales of a typical individual unit location

Broadline Distributor: A distributor to foodservice establishments, carrying a full line of products including dry groceries, frozen foods, tabletop, equipment and supplies. Many broadliners also carry perishable items such as meat, dairy and produce. The typical broadline distributor carries upwards of 20,000 SKUs and provides delivery, credit, sales representation

Technomic Glossary

and other value-added services to its foodservice operator customers. Other types of foodservice distributors include specialty distributors and systems distributors

Broker: A provider of outsourced field sales services. Dedicated to an aligned manufacturer's product range, brokers visit end-using operators to generate demand

Caterers: Foodservice businesses primarily engaged in providing foodservice for social or business events. Caterers may have equipment and vehicles to transport meals and snacks to events and/or prepare food at an off-premise site. Banquet halls with catering staff are included

Center of the Plate (COP): The item around which a meal is built, such as a protein or pasta

Compound Annual Growth Rate (CAGR): Annualized increase over a given period of years

CGR: Compound growth rate or category growth rate

Chain Operator: A company that operates 11 or more restaurants or foodservice establishments under the same name and maintains some degree of central control. Company operations may also include beyond restaurant foodservice. A multichain operator supervises operations of several chains as owner, franchisee or both

COGS: Cost of goods sold; Inventory costs of those goods the business has sold during a particular period. Costs are associated with particular goods using one of several formulas, including specific identification, first-in first-out (FIFO) or average cost

Consumer Packaged Goods (CPG): Products that are sold quickly and at relatively low cost. Examples include nondurable goods such as soft drinks, toiletries, over-the-counter drugs, toys, processed foods and many other consumables. CPG is often used in reference to companies that manufacture and distribute consumable packaged goods

CPI: Consumer price index; In foodservice, this refers to menu price inflation

DC: Distribution center

Dealer: Dealers purchase and maintain an inventory of the merchandise to be sold and therefore share the costs of marketing and distribution with the manufacturer. Dealers differ from manufacturers' representatives and brokers, who never take title to the merchandise. Dealers are prevalent within the foodservice equipment categories

Distributor Brand: A food or other product branded under the name of its distributor, not its manufacturer. Examples include the Sysco Supreme brand and the Monarch brand from US Foods

Technomic Glossary

Distributor Buying Group: An organization that consolidates purchases and provides support for its foodservice distributor members. Most small- and medium-size distributors and even some large broadline distributors are members of a buying group

Distributor Sales Representative (DSR): The “face” of the distributor to the foodservice operator, and the independent operator’s most important source of product information

DPI: Disposable personal income

Emerging Chain: Small restaurant chains that exhibit substantial growth potential. Generally, concepts must have five units already in operation; three- or four-unit concepts may be included if they have firm deals for expansion

F&B: Food and beverage

FOH: Front of house; the dining room and servers—the parts of a restaurant that the consumer sees

Foodservice Industry: Includes all suppliers, processors, manufacturers, distributors, restaurants and noncommercial foodservice operators, and ancillary businesses (such as consultants and investors) involved in the sourcing, distribution, preparation and serving of ready-to-eat prepared food and beverages away from home

Foodservice Management Companies (FSMs): Profit-making companies that operate and manage foodservice within and on behalf of a parent establishment such as a company, school, college, hospital, etc. Major FSMs include Compass Group, Sodexo and Aramark. Many FSMs also manage other contracted services such as maintenance, laundry, etc.

Franchise Restaurant: A franchised restaurant is owned by an outside investor, company or individual following certain guidelines set out by the parent company including product, price and operational guidelines. The operator becomes the franchisee. The franchising agreement is structured stipulating the terms, fees and use of names/images within the operations and marketing

Franchise(e): License granted by a company (the franchisor) to an individual or firm (the franchisee) to operate a retail, food, or drug outlet where the franchisee agrees to use the franchisor’s name; products; services; promotions; selling, distribution, and display methods; and other company support. McDonald’s, Midas, and Holiday Inn are all examples of franchise operations

GDP: Gross domestic product

Global Chain Restaurant: A chain restaurant brand that operates in three or more countries

Technomic Glossary

Group Purchasing Organizations (GPOs): Buying organizations that consolidate purchases and provide support for its operator members. GPOs began in the healthcare segment and most healthcare organizations today are GPO members. Other segments are being penetrated by GPOs, including foodservice management firms, education, recreation and lodging. Foodservice is now seeing a third stage of GPO progression as the GPOs pursue local and independent operators. More complexities have also arisen, particularly issues with pricing extendibility as prices negotiated for one segment are carried over to others. This practice is resulting in diminished supplier profitability in multiple segments

Independent Operator: Commercial restaurant enterprises with 10 or fewer restaurant units. They may be traditional neighborhood eateries; large high-volume independent restaurants doing several million dollars a year in sales; multiconcept operators overseeing several restaurants with different names and identities; or small local chains operating several restaurants under the same brand. Independent operators make purchases at the unit level, with the executive chef and/or general manager or owner exerting a great deal of control

Kiosk: Less than 800 square feet. The store sells only the fast-moving items found in traditional convenience stores (e.g., tobacco, beverages, snacks, and confectioneries). Grocery items and foodservice are absent. Parking is usually only at the pumps

Left Side of the Menu (LSM): Nonentree menu items such as appetizers, soups and salads

Lessee/Lease Dealer: The dealer owns the business. A major or regional oil company or a distributor owns the land and building (i.e., gas station) and leases it to a dealer. The dealer operates the location and pays rent to the owner (as opposed to an open dealer that owns the property). This arrangement gives the oil company or distributor a guaranteed supply outlet for their petroleum products, pursuant to a supply contract. A typical lessee dealer operates one to two stores and does not wholesale gasoline. Also known as company-controlled, contractor-operated and direct-serve dealer

Licensed Restaurant: A restaurant operator that has a contractual agreement to use a brand name that is owned by another company. The operator becomes the licensee. The licensing agreement is structured stipulating the terms, fees and use of names/images within the operations and marketing

LLOs: Local leverage operators; Large independent and small chain operators that have leverage on their distributors to carry specific brands required and typically have annual purchases over \$500,000

LTO: Limited-time offer

M&A: Mergers and acquisitions

Technomic Glossary

Manufacturer Brand: A brand identified with the product's manufacturer, in contrast to a distributor brand or restaurant brand

Manufacturer Shipments: The value of food and beverage products shipped by the manufacturer or processor into the foodservice channel (without any distributor margin)

Multiconcept Operator (MCO): A company that owns and operates at least three distinct restaurant concepts. An MCO may also be an owner or franchisee of one or more chains in addition to its unique concepts

OpCo: Operating company, such as a division within a larger broadline foodservice distribution business

Operator Purchases: The value of distributors' sales to operators, including distributors' margins. Purchases are derived by using food cost ratios, which vary by foodservice segment

POP: Point of purchase

Point-of-Sale (POS) System: Point-of-sale computer systems, which typically include bar code scanners, automated price look-up and inventory tracking components

Potential Contact Points: Technomic's estimate of the number of units or locations for a given segment

PPI: Producer price index; wholesale price inflation

RE-DI: Redistribution center

Shrink: Inventory/merchandise loss resulting from theft, spoilage, short deliveries, etc.

Specialty Distributor: A distributor that carries a broad, deep line within a specific product category (e.g., meat, dairy, produce, equipment, beverages, ethnic foods, etc.) or focuses on a specific customer segment (e.g., airlines, vending, etc.). Like broadline distributors, specialty distributors provide delivery, credit, sales representation and other value-added services, but unlike broadliners, specialty distributors do not carry a full line of products

Spiff: Manufacturer's incentive given to distributor sales representatives

SSS: Same-store sales/comparable-store sales; a year-to-year comparison of sales from the same units or equivalent units

Stock Keeping Unit (SKU): A number or code given to each unique product or item (by category and brand) stocked in a retail outlet for inventory and tracking purposes

Store Margin: Profit margin in convenience stores, typically ranging from 30% to 35%

Technomic Glossary

Systems Distributor: A foodservice distributor that exclusively serves chain restaurants and other multiunit operators. Systems distributors carry only items used by their chain customers, typically only 500-1,000 stock-keeping units, and do not provide sales representation

Top 500: Largest 500 restaurant chains in terms of U.S. sales, calculated annually by Technomic

Adult Beverage Terms

ABV: Alcohol by volume; the percent measurement of alcohol (ethanol) contained in a beverage. Alcohol content of beer and wine is typically expressed in ABV. Alcohol content of spirits is typically expressed as proof

Bars and Taverns (Drinking Places): Bars, taverns, nightclubs, or other away-from-home establishments licensed to serve alcohol and primarily engaged in preparing and serving alcohol beverages for immediate consumption; may also provide limited food services

Control State: States where the state government is involved in the wholesale tier and possibly the retail tier

Off-Premise: Locations licensed to sell beverage alcohol for consumption off-premise; includes liquor stores, wine stores, beer stores, grocery stores, convenience stores and other retail outlets

On-Premise: Locations licensed to serve beverage alcohol to be consumed on-premise; includes restaurants, bars, nightclubs, lounges, taverns, pubs, music/cabaret clubs, comedy clubs and other venues

Open State: State in which the state government is not involved in the wholesaling or retailing of beverage alcohol

Supplier: A company that produces, imports or otherwise markets a beverage alcohol product; producers are distillers, winemakers and brewers

Wholesaler: The middle tier of the three-tier system of beverage alcohol distribution in the U.S.; suppliers may only sell product directly to wholesalers, who then sell to on- and off-premise operators or retailers

Technomic Glossary

Retail/C-Store/Gas Station Terms

All Other Retailers: Includes general merchandise stores that offer a number of lines of merchandise (such as department stores and variety stores), drugstores (such as Walgreens) and other retail hosts (from liquor stores to bookstores). Sales of food and beverages at convenience stores and supermarket in-store delis are excluded

Category Manager: Person responsible for a particular or several specific categories within the convenience-store or supermarket/grocery store operations for their chain

Club/Warehouse Stores: Large membership-based general merchandise stores that emphasize low prices and carry a fairly extensive line of groceries, such as Costco or Sam's Club

Convenience Store (C-Store): A small, higher-margin grocery store that offers an edited selection of staple groceries and other convenience items beyond food. Usually sells foodservice items for immediate consumption, often requiring special equipment such as a coffee brewer or roller grill. Convenience stores include both stand-alone operations and those attached to gas stations

Convenient Meal Solutions (CMS): Commercially prepared meals and components that reduce or eliminate the need for preparation on the part of the consumer. Formerly known as Home Meal Replacement. Includes retailer meal solutions (RMS)—products found in specific section(s) of a retail store where consumers are able to pick up ready-to-eat or ready-to-heat foods

Dealer/Jobber: A gas station dealer—especially an independent operator not affiliated with a large chain—buys fuel through a jobber (also known as a fuel marketer.) The dealer-jobber relationship generally refers to independent operators that receive fuel for their station or stations and c-stores from a jobber or wholesale marketer

Dollar Stores: A small store format that traditionally sold staples and knickknacks, but now sales of food and consumable items at aggressive price points account for at least 20% and up to 66% of their volume (e.g., Dollar General, Dollar Tree and Family Dollar)

Drugstores: Centrally feature a pharmacy, but carry an assortment of general merchandise and a limited assortment of food and beverage items

DSB: Direct store delivery; Goods are sold directly to the point of sale rather than through a wholesaler or warehouse. Used extensively for fresh products such as milk and bread

Franchise: A franchise agreement in the convenience-store industry generally means an operator is in a relationship with a company to operate a business that uses the parent trademarks, has operational support from the parent company, and pays fees that may include an initial fee, royalties, advertising fees, training fees and fees for equipment. A franchise

Technomic Glossary

operator generally has legal ties and rules of governance dictated by the parent company and trademark owner

Licensee: Traditionally, fuel companies license their fuel brand to jobbers (fuel marketers), that in turn license the brand to dealers for use at their gas stations. A convenience-store operator may license its store brand to an independent operator, although a franchise agreement with more operational oversight is more common. License agreements generally permit the use of a trademark or product, often with performance criteria specific to the product, but licensees otherwise operate their businesses independently

Mass Merchandiser: Large, broad-assortment, low-price general merchandise store that features clothing, electronics and sporting goods as well as an assortment of groceries, such as Walmart or Target

Retail Hosts: Retail stores that host foodservice, including supermarkets, convenience stores and other retailers such as general merchandise stores and department stores. Does not include foodservice within the store managed by an outside restaurant company

Retail Meal Solutions (RMS): Ready-to-eat or ready-to-heat foods offered in supermarkets and retail stores, including sandwiches/wraps, value-added meats, appetizers, prepared entrees, prepared salads, pizza, pasta, soups, sweets, and dispensed hot and cold beverages. Frozen prepared foods are not included. A subset of convenient meal solutions (CMS)

Specialty Food Retailers: Typically offer a specialized assortment of items, such as natural and organic products, and often have prepared foods available for purchase

Supercenter: Large food/ drug combination store and mass merchandiser under one roof, offering a wide variety of food. These stores average more than 150,000 square feet and typically devote as much as 40% of the space to grocery items

Supermarket Foodservice: The supermarket foodservice category includes sales of fully prepared food/ beverage products usually for immediate consumption sold through in-store supermarket delis and food bars, and from restaurants located within supermarkets that are operated by the supermarket

Superstore: A grocery store larger than a conventional supermarket, with at least 30,000 square feet in total selling area and 14,000+ items

Warehouse/Club Stores: Large membership-based stores that emphasize low prices and carry a fairly extensive line of groceries, such as Costco or Sam's Club

Wholesale Club: Membership retail-wholesale hybrid with a varied selection and limited variety of products presented in a warehouse-type atmosphere. These 90,000+-square-foot

Technomic Glossary

stores have 60% to 70% general merchandise/health and beauty care and a grocery line dedicated to large sizes and bulk sales (e.g.; Sam's Club, Costco and BJ's)

Wholesale Sales: Sales of refined fuel products to purchasers that are other than ultimate consumers (i.e., sales for resale). The Energy Information Administration blends rack, bulk and DTW price to create wholesale price

Noncommercial Terms

All Other—Other Segments: Other establishments that offer foodservice, either for profit or not for profit, including food trucks, child care centers, orphanages and religious establishments like convents or seminaries

Beyond Restaurants: Foodservice in businesses and establishments where foodservice is an adjunct, support service rather than the primary purpose of the business. Beyond restaurant foodservice is also known as on-site or noncommercial foodservice. Major sectors include schools, colleges, hospitals and other healthcare establishments, business and industry, lodging, recreation, military bases and corrections. Foodservice may be self-operated (directly supervised by the parent organization) or contracted to a foodservice management firm (FSM)

Business and Industry (B&I) Foodservice: Includes foodservice operations within companies and corporations, office complexes, plants, factories, etc.

College and University Foodservice (C&U): Includes dining-hall foodservice, restaurants, snack shops, convenience stores and foodservice catering in two-year and four-year colleges and universities

Food Truck: A mobile venue that operates as a restaurant on wheels to provide a limited menu of specific foods. Food trucks must meet the same health and safety requirements as a brick-and-mortar restaurant

Hospital Foodservice: Includes patient feeding, employee feeding, meals served to visitors and catering operations at all U.S. hospitals offering short-term or long-term care, public and private; also includes psychiatric and other specialty institutions

Hotel Foodservice: Foodservice in hotel/lodging locations, including restaurants, bars/lounges, cafes, markets and poolside eateries/bars, as well as banquet and catering operations

K-12 Foodservice: Foodservice in public or private primary and secondary schools (K-12) schools. Dollar sales equivalent for food served is based on school purchases and government contributions

Technomic Glossary

Lodging: Hotels, motels, casino hotels, resorts, etc., primarily engaged in providing short-term lodging. Establishments may offer food and beverage services including restaurants, bars, conference services, catering services, banquet services and room service. Moderately priced hotels and motels may offer complimentary breakfast and snacks

Long-Term Care (LTC) Foodservice: Foodservice for patients and employees in institutions primarily engaged in providing inpatient care on a long-term basis, including nursing homes, convalescent homes, homes for the mentally ill and other facilities

Military Foodservice: Foodservice on military bases and installations within the U.S. only. Includes both troop feeding and clubs

Recreation Foodservice: Foodservice sales in recreation venues such as amusement parks, bowling alleys, nonhotel casinos, convention centers, country clubs, cruise lines, movie theaters, parks, racetracks, stadiums and arenas

Retail Sales Equivalent (RSE): Consumer expenditures

Senior Living Segment: Continuous care retirement centers, retirement centers, retirement homes and other homes for the elderly where healthcare is not the primary function

Transportation Foodservice: All meals, including nonalcohol beverage on domestic and international airline flights originating in the United States, and all ferries, trains, buses and other forms of public transport within the U.S.

Vending: Ready-to-eat foods and beverages sold through automatic vending machines, regardless of their location. Not included are other cigarettes and other nonfood vended items