



TRENDS IN THE TRAVEL CATERING INDUSTRY: A Survey Report

The Travel Catering Research Centre (TCRC)
Novie Johan and Prof. Peter Jones



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Preface

It is not necessarily the case that the people that are best able to forecast what the future holds for an industry are the people working in that industry. Nonetheless ‘insiders’ usually do have a very good idea as to the key issues and trends that are affecting their organisations. The purpose of this research study was to investigate what people in the travel catering industry thought were their key issues and trends.

As well as identifying the overall trends, this report also investigates the extent to which different stakeholder groups within the industry – operators, caterers, and suppliers – share the same perceptions as to the challenges facing them. Not surprisingly, it turns out there are some significant differences between them.

The report also tries to identify how perceptions of these trends vary by region, principally between Europe, North America and Asia-Pacific. Given the significant structural differences between these three parts of world, the results suggest there are relatively few differences of opinion.

It is planned that this will be the first of an annual trends survey for the travel catering industry. This means that over time, as well as providing a snap shot of industry opinion each year, it will be possible to map the way in which the industry is changing and the key trends affecting it.

If you would like to take part in future surveys, please email Novie Johan, ITCA Research Officer (n.johan@surrey.ac.uk). It is easy to complete since it is an online survey on the internet, conducted in March each year.

Prof. Peter Jones
ITCA Chair Production and Operations Management
and
Novie Johan
ITCA Research Officer
Travel Catering Research Centre
University of Surrey

Executive Summary

This report provides an overview of practitioners' opinions on seven external issues and 15 industry trends affecting the travel catering industry, drawing on data from a survey conducted at the ITCA Trade Show and Conference in Cologne, Germany March 7-9th, 2007. The respondents represent the four major sectors of the industry from around the world, allowing evaluation of their responses on both a sectoral and regional basis.

Major External Issues

- Hike in oil price is the issue of the overall highest concern within the industry (3.66), while human flu outbreak is the issue of the overall least concern (2.97).
- Corresponding to their level of concern, hike in oil price (3.65) is perceived to have the most impact on the industry's business performance. The issue with the perceived least impact on the industry is climate change (2.83).
- Some similarities are identified for both climate change and increased passenger security measures across level of concern and impact. Airlines are not only more concerned about the two issues than suppliers, but also perceive more impact from these issues than food suppliers.
- Some significant differences are also identified. Although there is a significant difference between food supplier and other sectors in the level of concern on terrorists' attacks in major cities, there are no differences in terms of level of impact. Whereas a significant difference is identified between non-food suppliers and airlines on higher taxation on air travel, no difference is identified on their level of concern.

Major Industry Trends

- Increased competition in the airline industry (3.46) is the issue of the overall highest concern, whereas adoption of RFID for equipment tracking (2.24) is the trend of the overall least concern.
- Corresponding to their level of involvement, increased competition in the airline industry (3.62) is perceived to have the most impact on the industry's daily operations, while the adoption of RFID for equipment tracking (2.4) is perceived as having the overall lowest impact.
- Some similarities across level of concern and impact are identified for five trends: increased competition in the airline industry, increased security management, outsourcing of food production, increased branded food products on tray sets and increased concern on food safety and health.
- Significant differences are identified. Four trends show significant differences in the level of concern, but not on the level of impacts: outsourcing of catering logistics function, increase use of internet based IT, increase in single seat class airlines, and reduction in packaging.
- On the other hand, significant differences were noted on the perceived level of impact of the increased role of distributors, but not on the level of concern.

TRENDS IN THE TRAVEL CATERING INDUSTRY SURVEY REPORT

I. INTRODUCTION

This report provides an overview of the opinions of practitioners within the travel catering industry on the external issues and industry trends affecting the industry.

The Survey

The data gathering in this study was done through a survey distributed at the ITCA Trade Show and Conference in Cologne, Germany March 7-9th, 2007. The survey consists of three sections: 1) level of concern/involvements of external issues and industry trends, 2) level of impacts of these external issues and industry trends, and 3) timing of these impacts. In each of the following chapters, the findings from these three major parts will be discussed and analyzed.

In the first section of the survey, the respondents were asked how concerned or involved they are with seven major external issues and 15 industry trends affecting the travel catering industry, on a scale of 1 (no concern/involvement) to 5 (very great concern or involvement). The second section provides results on the responses in regards to the level of impacts they believe the following will have on the business performance of their company. In this section, the respondents were asked to measure the level of impacts on five point scale ranging from 1 (no extent) to 5 (very great extent). In the third section, the respondents were asked the timing they foresee of these external issues and industry trends in relation to their companies. The findings indicate whether the respondents believe that these issues are to take place short term (less than 2 years) or long term (more than 2 years).

The Respondents

Respondents were asked to indicate the sector of the travel catering industry their company represented: airlines, caterers, food suppliers or non-food suppliers. The purpose of this question was to ensure that all sectors were well-represented in the survey and to enable valid comparisons between sectors. As shown in Figure 1, all sectors are well represented with non-food suppliers as the largest sub-group. This may be explained by the fact that majority of the trade show exhibitors are non-food suppliers.

Figure 1 Sectors Representation of the Respondents

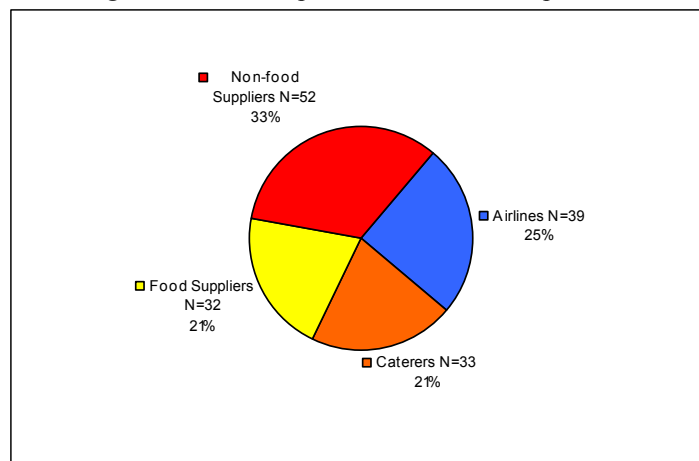
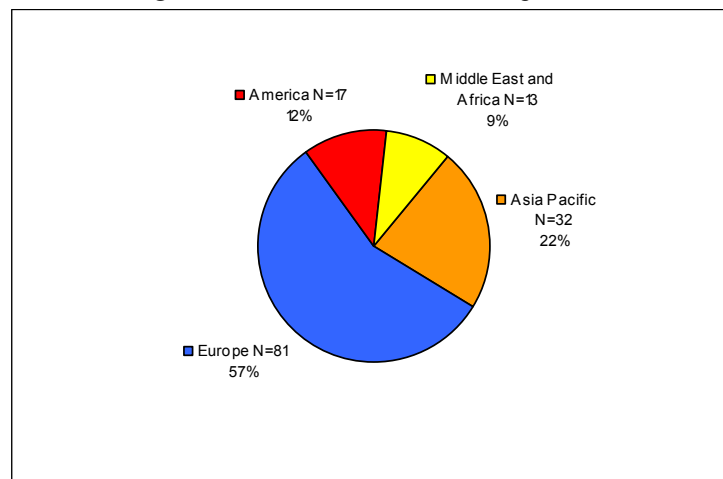


Figure 2 illustrates the geographic profile of the respondents based on their current office location. This finding suggests that the respondents are diversely located in all continents around the world, although the majority of respondents are based on the office of Europe, followed by Asia Pacific and North America. This representation can be explained by the fact that the survey was conducted at the ITCA Trade Show and Conference in Germany.

Figure 2. Office Location of the Respondents



These two demographics data will be used in evaluating the results of the survey, in order to understand different perspectives from both sectors and regions.

The Report

The report consists of five parts: introduction, findings and discussion, conclusion, and demographic sections. In the finding and discussion section, the overall results are presented. The results of four sectors and four regions will be compared and contrasted; the difference and similarities among the sectors will be highlighted. Then, the top three and lowest two rankings on major external issues and industry trends will be discussed, followed by statistical analysis. Any issues or trends with significant statistical differences will be highlighted and figures will be depicted. A conclusion is provided. The final section describes the participants' profile. In addition, supplementary figures are provided in the appendices.

II. FINDINGS AND DISCUSSION

This section is divided into two main sub-sections as follows:

- Major External Issues.
- Major Industry Trends.

There is a subsection of respondents' level of concern, and then on the level of impacts of the trends, followed by the timing. Each of these is considered first from the overall perspective, then from a sectoral viewpoint and then from different regional responses.

A. MAJOR EXTERNAL ISSUES

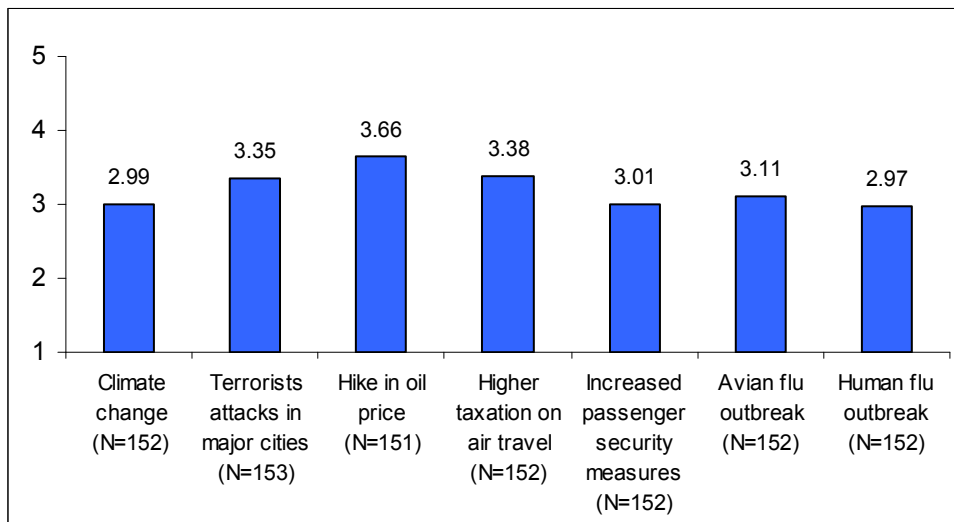
Seven major issues were researched:

- Climate change
- Terrorists attacks in major cities
- Hike in oil price
- Higher taxation on air travel
- Increased passenger security measures
- Avian flu outbreak
- Human flu outbreak

1. Level of Concern

Overall

Figure 3. Overall Level of Concern with External Issues



The overall result (Figure 3) suggests that hike in oil price is the highest concern within the industry, with a mean of 3.66, followed by higher taxation on air travel (3.38) and terrorists attacks in major cities (3.35). On the other hand, the survey respondents believe that a human flu outbreak is of least concern (2.97), followed by climate change (2.99).

Analysis by Sectors

Table 1. The Top Three and Lowest Two Rankings on External Issues of Level of Concern by Sectors

Sectors	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Hike in oil price (3.66) 2. Higher taxation on air travel (3.38) 3. Terrorists attacks in major cities (3.35) 	<ol style="list-style-type: none"> 1. Human flu outbreak (2.97) 2. Climate change (2.99)
Airlines	<ol style="list-style-type: none"> 1. Hike in oil price (3.95) 2. Increased passenger security measures (3.76) 3. Higher taxation on air travel (3.63) 	<ol style="list-style-type: none"> 1. Human flu outbreak (3.18) 2. a. Climate change (3.47) b. Avian flu outbreak (3.47)
Caterers	<ol style="list-style-type: none"> 1. Hike in oil price (3.61) 2. Terrorists attacks in major cities (3.48) 3. Increased passenger security measures (3.30) 	<ol style="list-style-type: none"> 1. Avian flu outbreak (3.03) 2. Human flu outbreak (3.06)
Food Suppliers	<ol style="list-style-type: none"> 1. Hike in oil price (3.57) 2. Higher taxation on air travel (3.29) 3. Avian flu outbreak (2.77) 	<ol style="list-style-type: none"> 1. Increased passenger security measures (2.3) 2. Climate change (2.57)
Non Food Suppliers	<ol style="list-style-type: none"> 1. a. Hike in oil price (3.52) b. Terrorists attacks in major cities (3.52) 2. Higher taxation on air travel (3.36) 3. Avian flu outbreak (3.08) 	<ol style="list-style-type: none"> 1. Increased passenger security measures (2.69) 2. Climate change (2.71)

Top three rankings. As indicated in Table 1, all of the four industry sectors share the same opinions on the overall highest concern: hike in oil price (3.66). For non food suppliers, this position is shared with terrorists' attacks in major cities with the same mean score (3.52). Higher taxation on air travel (3.38), which is ranked second by all respondents, is ranked second by both food (3.29) and non food (3.36) suppliers and third by airlines (3.63). Interestingly, the issue does not appear to be of enough concern for caterers to be placed on the top three rankings. The issue of terrorists' attacks in major cities (3.35) is indicated by overall respondents on the third place, and is ranked even higher by non-food suppliers (3.52) and caterers (3.48). But, this issue is not listed in top three rankings by airlines and food suppliers.

Lowest two rankings. Human flu, Avian flu, climate change and increased passenger security measures are the four issues identified as lowest two rankings by various sectors within the industry. In general, respondents are least concerned with human flu outbreak (2.79), followed by climate change (2.99). Human flu outbreak is also of least concern to airlines (3.18), followed by Avian flu outbreak (3.47) and climate change sharing the same position. Meanwhile, the reverse is true for caterers, with Avian flu outbreak (3.03) as the least concern followed by human flu outbreak (3.06). The two suppliers groups share the same views. Both sectors believe that increased passenger security measures (respectively 2.3 and 2.69 for food and non food suppliers) are the least issue of concern, followed by climate change (respectively 2.57 and 2.71).

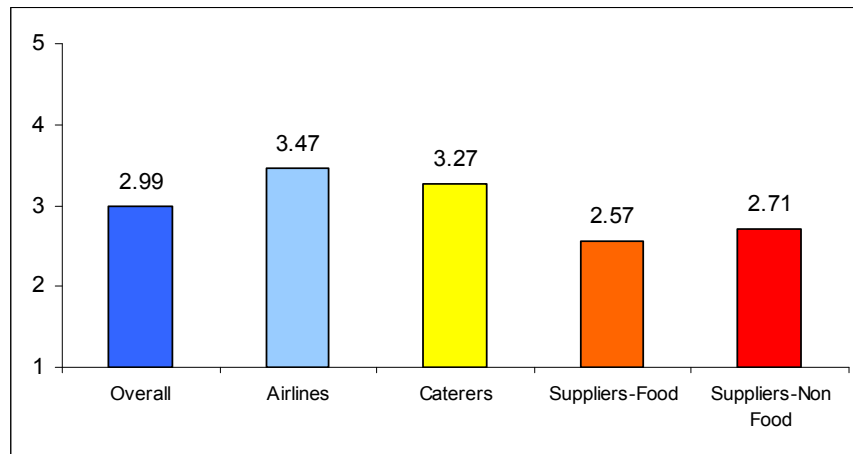
Review of general pattern. In general, airlines and caterers share roughly similar concern, and the two supplier groups do the same. Hike in oil price remains the most important issue across sectors. Increased passenger security measures appear to be a high concern to airlines and caterers, while higher taxation on air travel and avian flu outbreak appear so for the two suppliers. In terms of the lowest two rankings, airlines and caterers have higher concern on the issues of both human and Avian flu outbreaks, while both

suppliers are more concern about increased passenger security measures and climate change. (See Appendices 2.1.2 – 2.1.5)

Significant Differences between Sectors

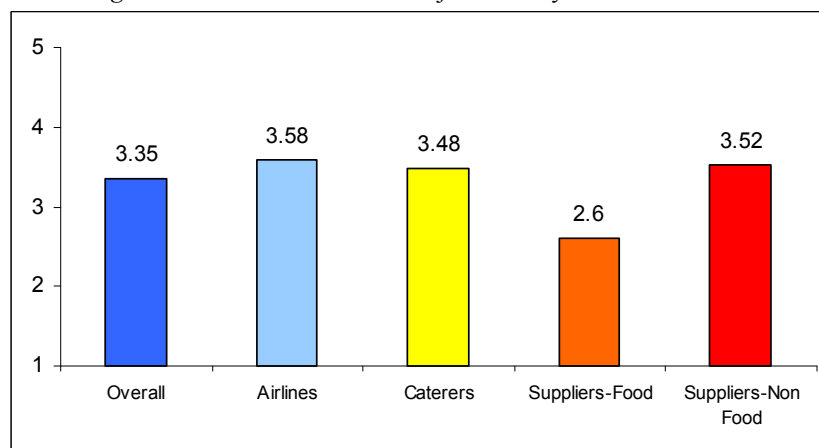
Three external issues, as indicated in Figure 4-6, have significant statistical differences: climate change, terrorists’ attacks in major cities, and increased passenger security measures. The figures for the remainder factors are depicted in Appendices 2.1.6-2.1.12.

Figure 4 Climate Change by Level of Concern



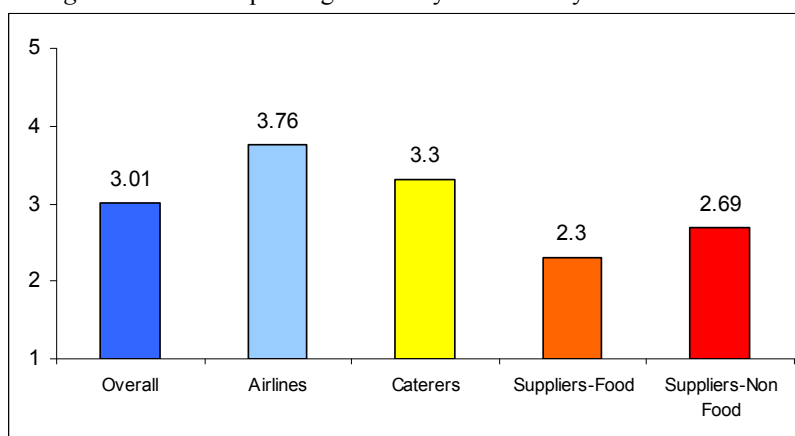
Climate change. The statistical analysis (Sig.: 0.004) has shown that both suppliers (2.57, 2.71) are significantly less concerned than airlines (3.47) in regards to climate change.

Figure 5 Terrorists attacks in major cities by Level of Concern



Terrorists attacks in major cities. A significant difference (Sig.: 0.007) is noted between the level of concern of food suppliers and the rest of the industry, suggesting that airlines (3.58), caterers (3.48) and non food suppliers (3.52) are far more concerned about terrorist attacks in major cities than food suppliers (2.60).

Figure 6 Increased passenger security measures by Level of Concern



Increased passenger security measures. The results suggest a significant difference (Sig.: 0.000) between food suppliers and caterers, in which the food (2.30) and non food (2.69) suppliers are significantly less concerned than airlines (3.76) about increased passenger security measures. In addition, caterers (3.30) are significantly more concerned about the issue than food suppliers (2.30).

Analysis by Regions

All regions agree that hike in oil price is issue of the highest concern, with exceptions of Middle East and Africa (4.08) which put higher taxation on air travel as the highest issue of concern (Table 2). In terms of issues of least concern, the opinions are varied. Asia Pacific suggested it to be increased passenger security measures (3.07); Europe opted for human flu outbreak (2.59); America indicated climate change (2.50), and finally Middle East and Africa regarded it to be Avian flu outbreak (3.31).

Table 2. The Top Three and Lowest Two Rankings on External Issues of Level of Concern by Regions

Regions	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Hike in oil price (3.66) 2. Higher taxation on air travel (3.38) 3. Terrorists attacks in major cities (3.35) 	<ol style="list-style-type: none"> 1. Human flu outbreak (2.97) 2. Climate change (2.99)
Asia Pacific	<ol style="list-style-type: none"> 1. Hike in oil price (3.87) 2. Avian flu outbreak (3.70) 3. Terrorists attacks in major cities (3.61) 	<ol style="list-style-type: none"> 1. Increased passenger security measures (3.07) 2. Climate change (3.23)
Europe	<ol style="list-style-type: none"> 1. Hike in oil price (3.61) 2. Higher taxation on air travel (3.30) 3. Terrorists attacks in major cities (3.18) 	<ol style="list-style-type: none"> 1. Human flu outbreak (2.59) 2. Avian flu outbreak (2.78)
America	<ol style="list-style-type: none"> 1. Hike in oil price (3.44) 2. Terrorists attacks in major cities (3.25) 3. Higher taxation on air travel (3.13) 	<ol style="list-style-type: none"> 1. Climate change (2.50) 2. Avian flu outbreak (2.69)
Middle East & Africa	<ol style="list-style-type: none"> 1. Higher taxation on air travel (4.08) 2. Terrorists attacks in major cities (3.92) 3. Hike in oil price (3.67) 	<ol style="list-style-type: none"> 1. Avian flu outbreak (3.31) 2. Increased passenger security measures (3.46)

Top three rankings. The overall top three rankings remain to be the main issues for each individual sector. Hike in oil price remains to be on top rank for Asia Pacific (3.87), Europe (3.61) and America (3.44), while it is positioned on the third rank for Middle East and Africa (3.67). Terrorists' attack in major cities is on the second or third rank for all regions. Similarly, higher taxation on air travel is on either second or third rank

for all regions, with exceptions of Asia Pacific, where Avian flu outbreak (3.70) has replaced the issue and Middle East and Africa, where the issue is on the first position (4.08).

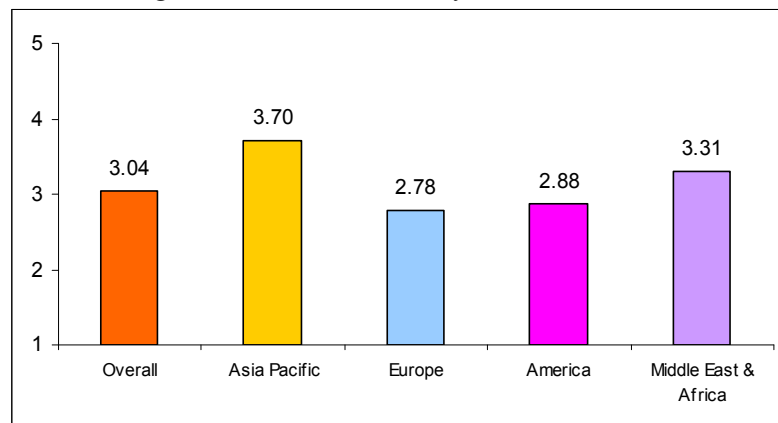
Lowest two rankings. The overall lowest two rankings have trivial representation among individual regions. Human flu outbreak (2.59) is the lowest ranking for Europe, and climate change is noted for both Asia Pacific (3.23) and America (2.50). On the other hand, Avian flu outbreak is a new issue that is well represented in three out of four regions: Europe (2.78), America (2.69), Middle East and Africa (3.31), as an issue of less concern. Another issue considered to be less important is increased passenger security measures by Asia Pacific (3.07) and Middle East and Africa (3.46).

Review of general pattern. The top three rankings for different regions follow the pattern of the overall rankings, even though they are in no particular order. The only exception is Avian flu outbreak as indicated by Asia Pacific (3.70), which is a new issue introduced on the top three rankings. There is no overall pattern for the two lowest rankings. The least concerns issues identified are climate change, human flu outbreak, Avian flu outbreak, and increased passenger security measures (See Appendices 2.1.13-2.1.16).

Significant Differences between Regions

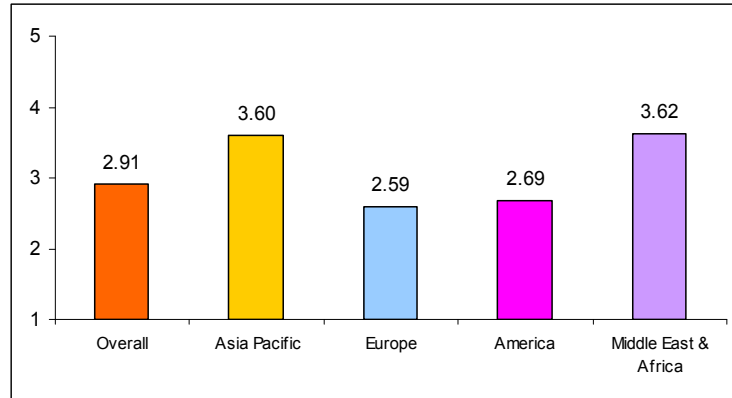
Two external issues, as identified in Figures 2a.1.5-2a.1.6, are notified to have statistical significant differences: Avian flu outbreak and human flu outbreak. The remainder figures of issues are illustrated in Appendices 2.1.17-2.1.23.

Figure 7 Avian flu outbreak by Level of Concerns



Avian flu outbreak. A significant difference (Sig.:0.004) is noted, suggesting that Asia Pacific (3.70) is significantly more concerned about Avian flu outbreak than Europe (2.78) is.

Figure 8 Human flu outbreak by Level of Concerns

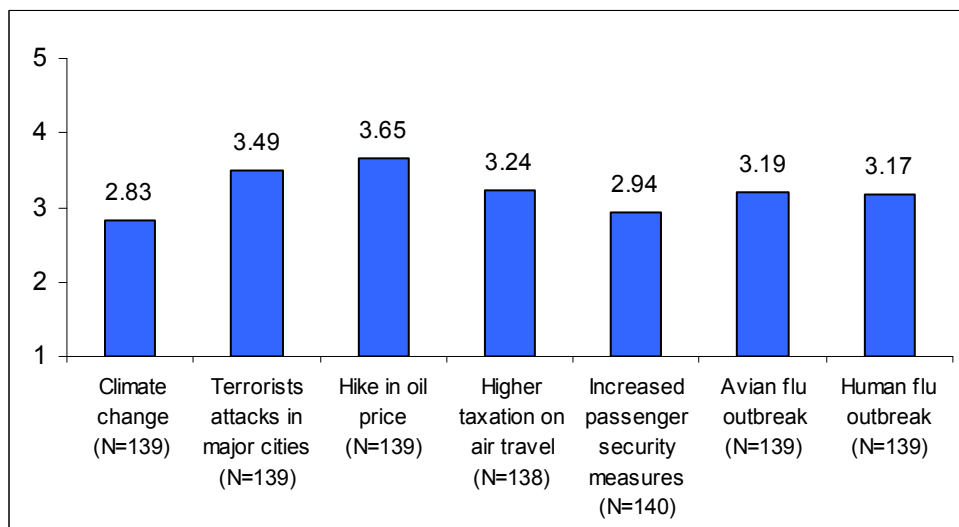


Human flu outbreak. The results indicate a statistical difference (Sig.: 0.000) suggesting that Europe (2.59) is significantly less concerned than Asia Pacific (3.60) and Middle East and Africa (3.62).

2. Level of Impact

Overall

Figure 9 Overall Level of Impact of External Issues



The respondents (Figure 9) suggest that hike in oil price (3.65) has the most impact on their business performance, followed by terrorists' attacks in major cities (3.49) and higher taxation on air travel (3.24). In the contrary, they believe that climate change (2.83) has the least impact on their daily operations, followed by increased passenger security measures (2.94).

Analysis by Sectors

Table 3. The Top Three and Lowest Two Rankings on External Issues of Level of Impact by Sectors

Sectors	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Hike in oil price (3.65) 2. Terrorists attacks in major cities (3.49) 3. Higher taxation on air travel (3.24) 	<ol style="list-style-type: none"> 1. Climate change (2.83) 2. Increased passenger security measures (2.94)
Airlines	<ol style="list-style-type: none"> 1. Hike in oil price (4) 2. Higher taxation on air travel (3.75) 3. a. Increased passenger security measures (3.72) <li style="padding-left: 20px;">b. Terrorists attacks in major cities (3.72). 	<ol style="list-style-type: none"> 1. Human flu outbreak (3.34) 2. Climate change (3.41)
Caterers	<ol style="list-style-type: none"> 1. Terrorists attacks in major cities (3.75) 2. a. Hike in oil price (3.43) <li style="padding-left: 20px;">b. Human flu outbreak (3.43) 3. a. Higher taxation on air travel (3.03) <li style="padding-left: 20px;">b. Avian flu outbreak (3.03) 	<ol style="list-style-type: none"> 1. Climate change (2.93) 2. Increased passenger security measures (3.11)
Food Suppliers	<ol style="list-style-type: none"> 1. Hike in oil price (3.57) 2. Terrorists attacks in major cities (3.13) 3. a. Higher taxation on air travel (3.1) <li style="padding-left: 20px;">b. Human flu outbreak (3.1) 	<ol style="list-style-type: none"> 1. Increased passenger security measures (2.61) 2. Climate change (2.8)
Non Food Suppliers	<ol style="list-style-type: none"> 1. Hike in oil price (3.59) 2. Terrorists attacks in major cities (3.41) 3. Avian flu outbreak (3.04) 	<ol style="list-style-type: none"> 1. Climate change (2.41) 2. Increased passenger security measures (2.53)

Top three rankings. The overall result of level of impact (Table 3) suggests that hike in oil price (3.65) has the most impact on the industry's business performance. Caterers are the only sector that does not share this opinion, positioning the issue on the second rank (3.43), sharing the position with human flu outbreak. Although the positions are reversed, the terrorists' attacks in major cities and higher taxation on air travel remain to be the second and third top issues listed. Caterers ranked the issue first as the most impacting issues (3.75). Other issues that are considered as top three rankings are increased passenger security measures (3.72) by airlines, human flu outbreak by caterers (3.43) and food suppliers (3.1), and avian flu by caterers (3.03) and non-food suppliers (3.04).

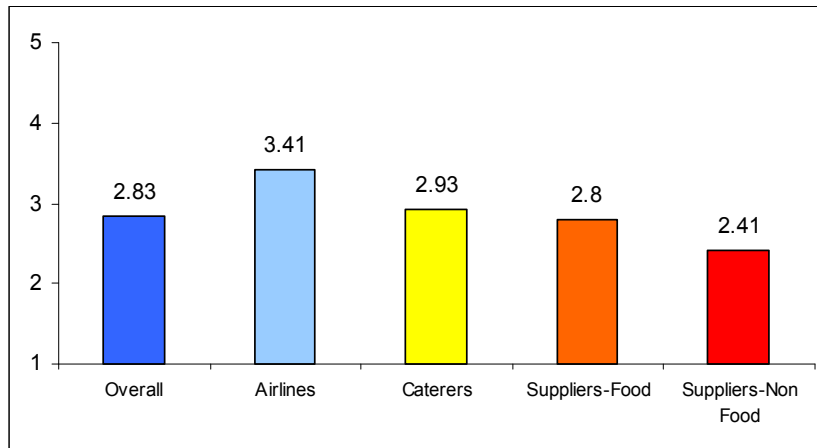
Lowest two rankings. Climate change (2.83) and increased passenger security measures (2.94) as the overall lowest two rankings are also rated as the lowest two by almost all sectors. Caterers and non food suppliers position the two issues in the same order, while food suppliers believe that increased passenger security measures is the least impacting issue (2.61), followed by climate change (2.8). Atypical to other sectors, airlines regard human flu outbreak (3.34) as the least impacting factor.

Review of general pattern. In general, the top three issues and the lowest two issues are echoed by almost all sectors. A few exceptions applies as both the more impacting and less impacting issues, such as: Avian flu outbreak, human flu outbreak, and increased passenger security measures. The positioning by caterers is slightly different compare to other sectors, as they replace hike in oil price (3.43) with terrorists' attacks in major cities (3.75) as their top ranking. On the other hand, airlines are slightly different to others in which the sector places human flu outbreak (3.34) as the lowest issue (See Appendices 2.2.2–2.2.5).

Significant Differences by Sectors

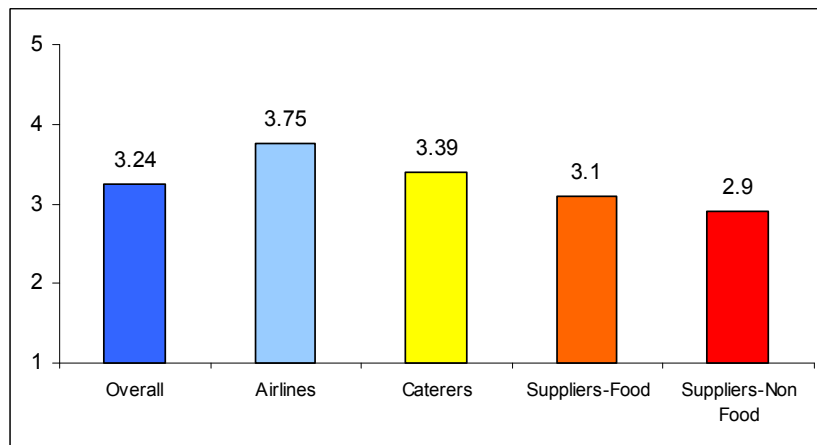
Three external issues (Figures 10-12) have statistical significant differences among sectors: climate change, higher taxation on air travel, and increased passenger security measures. The remainder figures of issues are illustrated in Appendices 2.2.6-2.2.12.

Figure 10 Climate Change by Level of Impacts



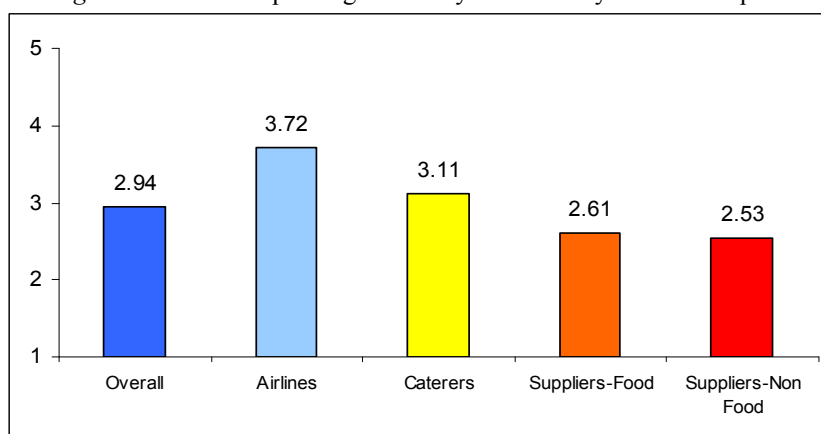
Climate Change. A significant difference (Sig.: 0.001) is found between non-food suppliers (2.41) and airlines (3.41), with airlines identifying more impact from climate change than non-food suppliers.

Figure 11 Higher taxation on air travel by Level of Impacts



Higher taxation on air travel. A significant difference (Sig.: 0.007) exists between non-food suppliers (2.90) and airlines (3.75). This is not surprising.

Figure 12 Increased passenger security measures by Level of Impacts



Increased passenger security measures. Airlines (3.72) perceive more impact than both food (2.61) and non food suppliers (2.53), with statistical differences of 0.000, in this area.

Analysis by Regions

Table 4. The Top Three and Lowest Two Rankings on External Issues of Level of Impacts by Regions

Regions	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Hike in oil price (3.65) 2. Terrorists attacks in major cities (3.49) 3. Higher taxation on air travel (3.24) 	<ol style="list-style-type: none"> 1. Climate change (2.83) 2. Increased passenger security measures (2.94)
Asia Pacific	<ol style="list-style-type: none"> 1. Avian flu outbreak (3.87) 2. Human flu outbreak (3.81) 3. Hike in oil price (3.71) 	<ol style="list-style-type: none"> 1. Climate change (2.90) 2. Higher taxation on air travel (3.29)
Europe	<ol style="list-style-type: none"> 1. Hike in oil price (3.58) 2. Terrorists attacks in major cities (3.34) 3. Higher taxation on air travel (3.23) 	<ol style="list-style-type: none"> 1. Increased passenger security measures (2.70) 2. Climate change (2.76)
America	<ol style="list-style-type: none"> 1. Hike in oil price (3.88) 2. Terrorists attacks in major cities (3.38) 3. a. Higher taxation on air travel (3) b. Avian flu outbreak (3) 	<ol style="list-style-type: none"> 1. a. Increased passenger security measures (2.69) b. Climate change (2.69) 2. Human flu outbreak (2.94)
Middle East & Africa	<ol style="list-style-type: none"> 1. Terrorists attacks in major cities (3.83) 2. a. Hike in oil price (3.58) b. Increased passenger security measures (3.58) 3. Higher taxation on air travel (3.33) 	<ol style="list-style-type: none"> 1. Avian flu outbreak (2.58) 2. Human flu outbreak (2.83)

Top three rankings. Different regions have different opinions in regards to the issues with the highest impacts (Table 4). For their top ranking, Asia Pacific suggested Avian flu (3.87) and human flu outbreak (3.81), placing hike in oil price only on the third place. Other sectors remain with hike in oil price, e.g. Europe (3.58) and America (3.88), or terrorists attacks in major cities, e.g. Middle East and Africa (3.83). It worth noting that America ranks Avian flu outbreak (3) top third, sharing the position with higher taxation on air travel.

Lowest two rankings. A few exceptions exist for the lowest two rankings. Europe and America have similar patterns to the overall lowest two issues: climate change and increased passenger security measures, with addition of human flu outbreak (2.94) as the second least impacting issue for America. For Asia Pacific, climate change (2.90) remains the least impacting issue, however is now followed by higher taxation on air travel (3.29).

Unlike others, Middle East and Africa suggested Avian flu (2.58) and human flu (2.83) outbreak as their lowest two issues.

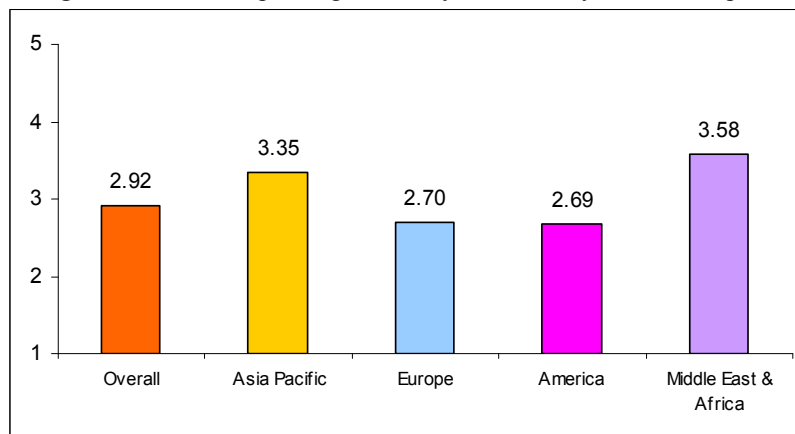
Review of general pattern. The top three rankings remain with the same pattern of the overall rankings, with a few exceptions considered as the most impacting issues by Asia Pacific (human flu outbreak and Avian flu outbreak), America (Avian flu outbreak), and Middle East and Africa (increased passenger security measures). Similar is relevant to the lowest two rankings, with a few exceptions to the overall rankings: higher taxation on air travel (for Asia Pacific), human flu outbreak (for America), and Avian flu and human flu outbreak (for Middle East and Africa) (See Appendices 2.2.13-2.2.16).

Significant Differences by Regions

Three external issues (Figures 13–15) are reported to have statistical significant differences in terms of level of impacts: increased passenger security measures, Avian flu outbreak, and human flu outbreak. The figures for the remainder issues are illustrated in Appendices 2.2.17-2.2.23.

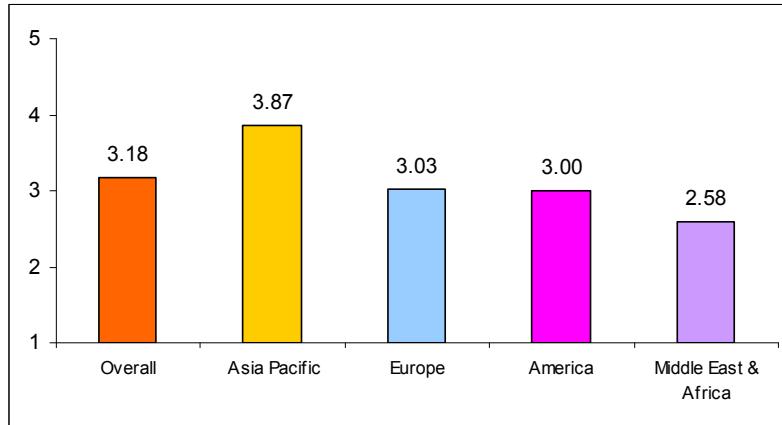
Analysis by Regions

Figure 13 Increased passenger security measures by Level of Impacts



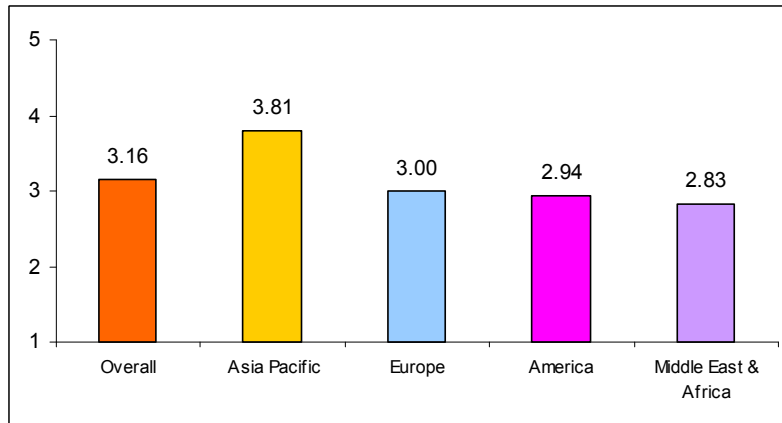
Increased passenger security measures. Europe (2.70) perceives less impact (Sig.: 0.010) from increased passenger security measures than Asia Pacific (3.35) does.

Figure 14 Avian flu outbreak by Level of Impacts



Avian flu outbreak. In regards to the issue of Avian flu outbreak, Asia Pacific (3.87) perceives more impact (Sig.: 0.003) than Europe (3.03) and Middle East and Africa (2.58) do.

Figure 15 Human flu outbreak by Level of Impacts

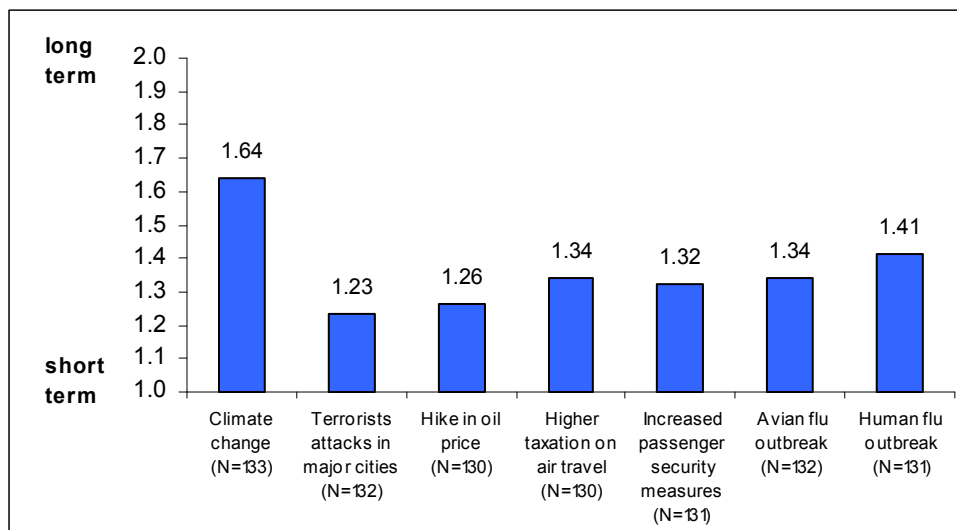


Human flu outbreak. A significant difference (Sig.: 0.016) is noted between Europe (3) and Asia Pacific (3.81), in which Europe perceives less impact from human flu outbreak than Asia Pacific does.

3. Timing of Impacts

Overall

Figure 16 Overall Timing



The overall findings (Figure 16) suggest that only one of the seven external issues is to have long term impact on the industry: climate change (1.64). The remainder of the issues are believed by the respondents to have immediate impacts within the next two years. The most immediate issue predicted to have impacts are terrorists attacks in major cities (1.23), followed by hike in oil price (1.26).

Analysis by Sectors

Climate change is identified as the issue which will have impact in the long term, more than 2 years or never, for all sectors. Caterers (1.68) and food suppliers (1.68) foresee this in the very distant in the future, followed by non food suppliers (1.65) and airlines (1.56). In addition to climate change, human flu outbreak appears to be the second issue to have an impact in the distant future for non food suppliers (1.54) and airlines (1.50).

Terrorists' attacks in major cities are predicted to have the most immediate impact within the next two years for the industry in general (1.23) Even though this issue is regarded by all of the four sectors to have immediate impacts, the timings predicted are different among sectors. Airlines believe that hike in oil price, higher taxation on air travel and increased passenger security measures are the issue with most immediate impacts to the industry, at means of 1.19. Interestingly, caterers (1.18) and food (1.32) suppliers share the same opinions that terrorists' attacks in major cities and avian flu outbreak are the most immediate impacts, sharing exact same means between the two issues. Whereas non-food suppliers believe that terrorists attacks in major cities will happen in a much nearer future (1.19) (See Appendices 2.3.2-2.3.12).

Analysis by Regions

Similar to findings by sector, only one of the external issues across regions is regarded to happen in the frame of 2 years and more: climate change. The mean average for climate change varies between 1.45 to 1.71, with Middle East and Africa believes it to happen more immediate and America more distant in the future. The remainders of the

external issues are deemed to happen in the short term, within less than 2 years time. Asia Pacific believes that increased passenger security measures (1.14) and terrorists attacks (1.17) to have most immediate impacts. For Europe, this will be the case for terrorists' attacks in major cities (1.24) and hike in oil price (1.27). Similar to Europe, Middle East and Africa regards terrorist attacks (1.27) to have the most immediate impact followed by two issues sharing a same mean (1.30): hike in oil price and higher taxation on air travel. For America, the higher taxation on air travel (1.24) appears to have the most immediate impacts, followed by three issues of the same mean (1.29): terrorists' attacks in major cities, hike in oil price and increased passenger security measures (See Appendices 2.3.13 to 2.3.22).

B. MAJOR INDUSTRY TRENDS

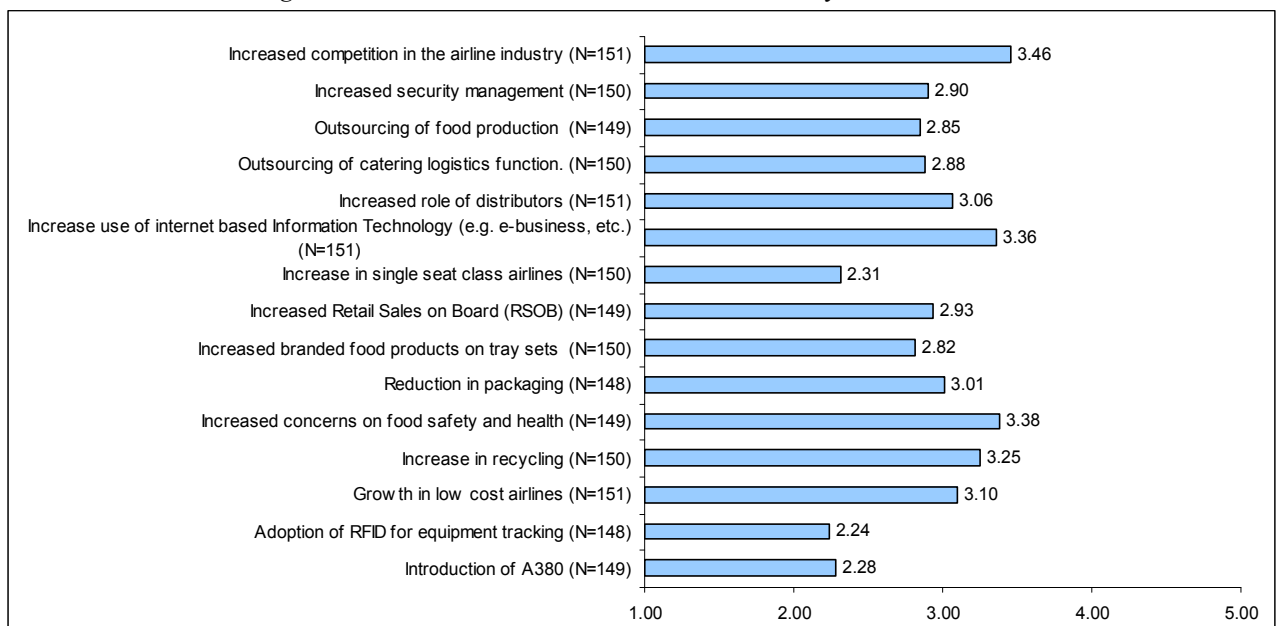
1. Level of Involvement

Fifteen major trends were researched:

- Increased competition in the airline industry
- Increased security management
- Outsourcing of food production
- Outsourcing of catering logistics function
- Increased role of distributors
- Increase use of internet based IT
- Increase in single seat class airlines
- Increased Retail Sales on Board (RSOB)
- Increased branded food products on tray sets
- Reduction in packaging
- Increased concerns on food safety and health
- Increase in recycling
- Growth in low cost airlines
- Adoption of RFID for equipment tracking
- Introduction of A380

Overall

Figure 17 Overall Level of Involvement with Industry Trends



The overall result (Figure 17) suggests increased competition in the airline industry (3.46) is the trend in which industry's most involved in, followed by increased concern on food safety and health (3.38) and increase use of internet (3.36). Respondents suggest adoption of RFID for equipment tracking (2.24) to be the trend with the least level of involvement, followed by introduction of A380 (2.28).

Analysis by Sectors

Table 5. The Top Three and Lowest Two Rankings on Industry Trends of Level of Involvement by Sectors

Sectors	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.46) 2. Increased concern on food safety and health (3.38) 3. Increase use of internet based Information Technology (e.g. e-business, etc.) (3.36) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.24) 2. Introduction of A380 (2.28)
Airlines	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (4.05). 2. Increase use of internet based Information Technology (3.82) 3. Increased concern on food safety and health (3.68) 	<ol style="list-style-type: none"> 1. Introduction of A380 (2.32). 2. Increase in single seat class airlines (2.34)
Caterers	<ol style="list-style-type: none"> 1. Increased concern on food safety and health (3.91) 2. Increase use of internet based Information Technology (3.56). 3. Increased competition in the airline industry (3.53). 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.39) 2. Introduction of A380 (2.47)
Food Suppliers	<ol style="list-style-type: none"> 1. Increased concern on food safety and health (3.7) 2. Reduction in packaging (3.40) 3. Increase in recycling (3.30) 	<ol style="list-style-type: none"> 1. Introduction of A380 (1.87) 2. Adoption of RFID for equipment tracking (2.07)
Non Food Suppliers	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.25) 2. Increase use of IT within the industry (3.2) 3. Growth in low cost airlines (3.02) 	<ol style="list-style-type: none"> 1. Outsourcing of food production (1.85) 2. Increase in single seat class airlines (2.02)

Top three rankings. Increased competition in the airline industry (3.46), increased concern on food safety and health (3.38), and increase use of internet based IT (3.36) are the top three rankings across sectors (Table 5). The same concerns were expressed by majority of sectors. Airlines and caterers fully agree to these issues, even though they are not in the exact order. Food suppliers introduced new issues of involvement at their second and third rank: reduction in packaging (3.40) and increase in recycling (3.30), following increased concern on food safety and health (3.7). In the case of non food suppliers, they suggested growth in low cost airlines (3.02) on the third rank, following increased competition (3.25) and increase use of internet (3.2).

Lowest two rankings. Adoption of RFID for equipment tracking (2.24) and introduction of A380 (2.28) are the overall lowest two rankings. Caterers follow this pattern, while food suppliers follow them in reverse. However, non food suppliers introduce other trends: outsourcing of food production (1.85) and increase in single seat class airlines (2.02). While airlines places introduction of A380 (2.32) as its first concern, it also introduces another trend: increase in single seat class airlines (2.34).

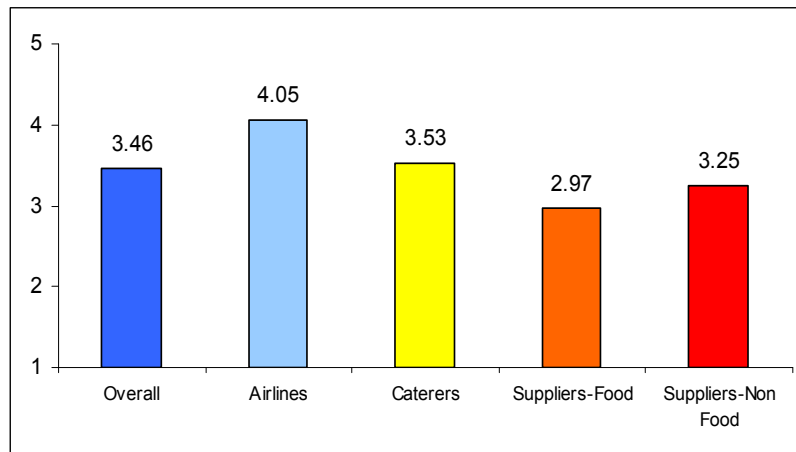
Review of general patterns. Airlines and caterers are more involved in the same issues as identified by overall participants, whereas the suppliers group only share a few of them and introduce other trends which they are involved in: reduction in packaging (3.40), increase in recycling (3.30), and growth in low cost airlines (3.02). Similarly, in terms of

the lowest two rankings, caterers and food suppliers are least involved in the same issues as identified by the respondents. However, airlines and non-food suppliers introduce other trends of involvement: increase in single seat class airlines (respectively 2.34 and 2.02) and outsourcing of food production (1.85 for non-food supplier) (See Appendices 3.1.2-3.1.5).

Significant Differences between Sectors

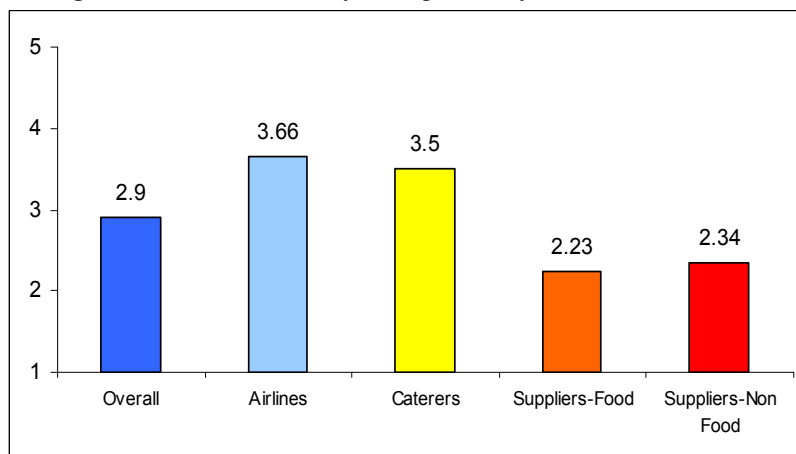
Nine out of 15 industry trends are identified (Figures 18-26) to have statistical significant differences in terms of level of involvement. These trends will be discussed, and illustrated with figures. The figures for the remaining trends are illustrated in Appendices 3.1.6-3.1.20.

Figure 18 Increased competition in the airline industry by Level of Involvement



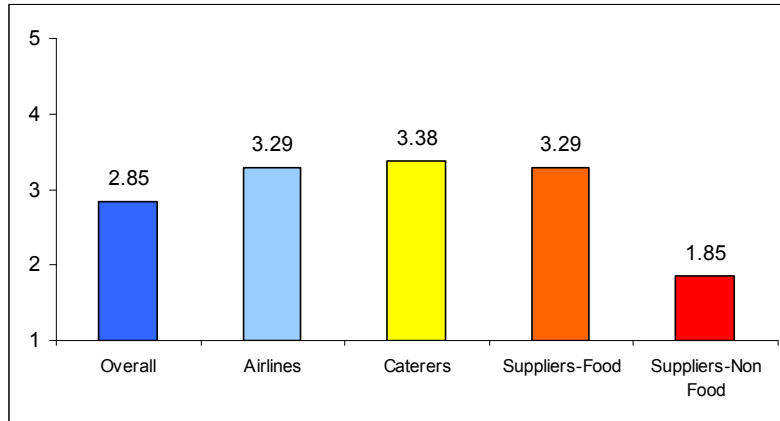
Increased competition in the airline industry. The result suggests a significant difference between airlines and suppliers (Sig.: 0.001), in which airlines (4.05) are significantly more involved in the increased competition in the airline industry than food (2.97) and non food (3.25) suppliers are.

Figure 19 Increased security management by Level of Involvement



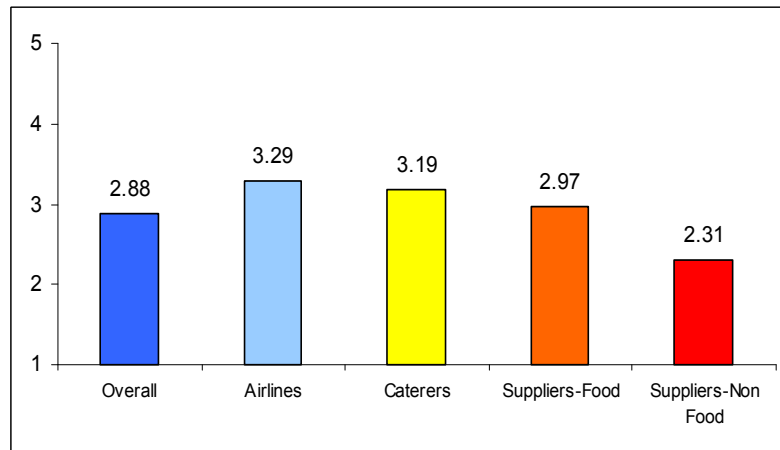
Increased security management. Both airlines (3.66) and caterers (3.50) are significantly more involved than food (2.23) and non food (2.34) suppliers in the issue of increased security management (Sig.: 0.000).

Figure 20 Outsourcing of food production by Level of Involvement



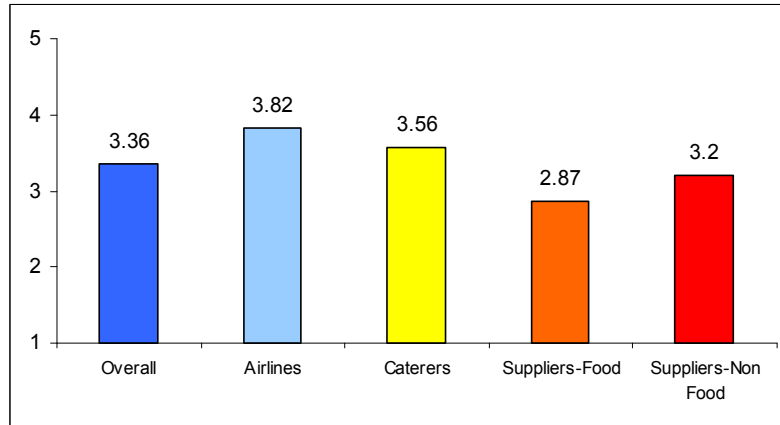
Outsourcing of food production. Non food suppliers (1.85) are significantly less involved in the outsourcing of food production than other sectors: airlines (3.29), caterers (3.38) and food suppliers (3.29), with significance of 0.000.

Figure 21 Outsourcing of catering logistics function by Level of Involvement



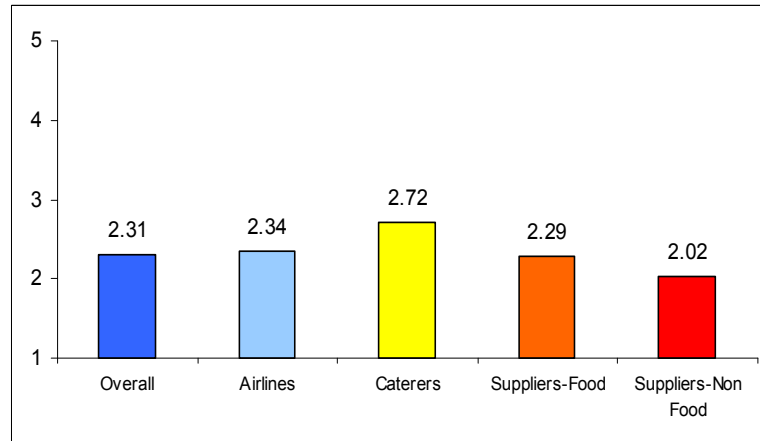
Outsourcing of catering logistics function. A significant difference is noted (Sig.: 0.001), suggesting that non food suppliers (2.31) are significantly less involved in the issue of outsourcing of catering logistics function compared to airlines (3.29) and caterers (3.19).

Figure 22 Increase use of internet based Information Technology by Level of Involvement



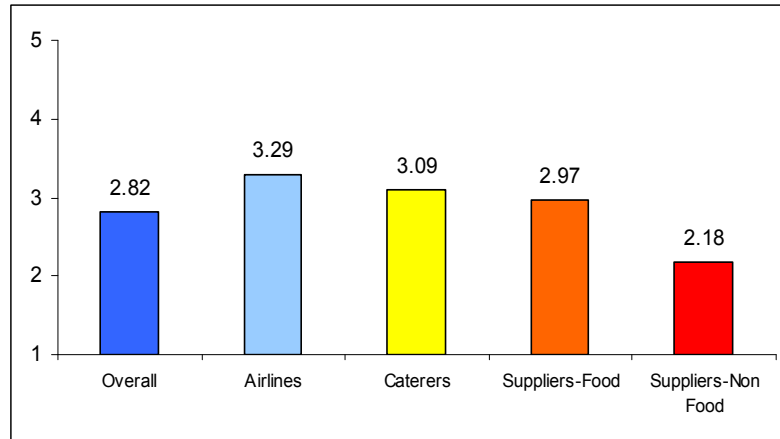
Increase use of internet based Information Technology. A significant difference (Sig.: 0.005) is identified between food suppliers (2.87) and airlines (3.82), in which airlines are more involved in the use of the internet.

Figure 23 Increase in single seat class airlines by Level of Involvement



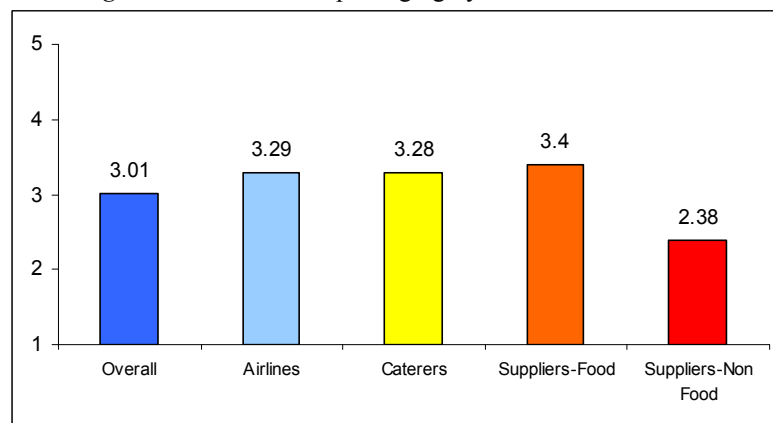
Increase in single seat class airlines. Non food suppliers (2.02) are recorded to have a significantly lower involvement than caterers (2.72) in the increase in single seat class airlines (Sig.: 0.055).

Figure 24 Increased branded food products on tray sets by Level of Involvement



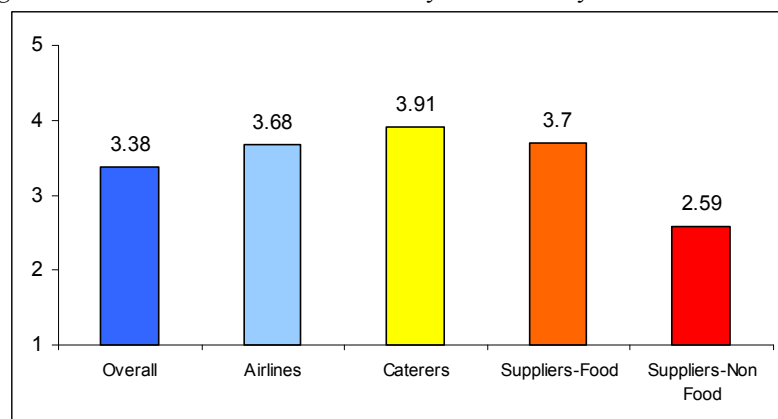
Increased branded food products on tray sets. Non food suppliers (2.18) are significantly less involved in the increased branded food products on tray sets than other sectors: airlines (3.29), caterers (3.09), and food suppliers (2.97) (Sig.: 0.000).

Figure 25 Reduction in packaging by Level of Involvement



Reduction in packaging. A statistical difference (Sig.: 0.000) exists for the issue of reduction in packaging, suggesting that non-food suppliers (2.38) are significantly less involved than airlines (3.29), caterers (3.28), and food suppliers (3.4).

Figure 26 Increased concern on food safety and health by Level of Involvement



Increased concern on food safety and health. Non-food suppliers (2.59) are significantly less involved (Sig.: 0.000) in the increased concern of food safety and health than other sectors: airlines (3.68), caterers (3.91) and food suppliers (3.70).

Analysis by Regions

Table 6. The Top Three and Lowest Two Rankings on Industry Trends of Level of Involvement by Regions

Regions	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.46) 2. Increased concerns on food safety and health (3.38) 3. Increase use of internet based Information Technology (e.g. e-business, etc.) (3.36) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.24) 2. Introduction of A380 (2.28)
Asia Pacific	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.63). 2. Increase use of internet based Information Technology (3.61) 3. Increased concerns on food safety and health (3.48) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.26) 2. Outsourcing of food production (2.61)
Europe	<ol style="list-style-type: none"> 1. Increased concerns on food safety and health (3.32) 2. Increase in recycling (3.24) 3. Increased competition in the airline industry.(3.19) 	<ol style="list-style-type: none"> 1. Introduction of A380 (1.99). 2. Increase in single seat class airlines (2.06)
America	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.88) 2. a. Increased role of distributors (3.5) b. Increase use of internet based Information Technology (3.5) 3. Outsourcing of catering logistics function (3.31) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.31) 2. Introduction of A380 (2.38)
Middle East & Africa	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (4.09) 2. Increased role of distributors (3.5) 3. a. Increased security management (3.45) b. Increase use of internet based Information Technology (3.45) 	<ol style="list-style-type: none"> 1. Outsourcing of food production (2.3) 2. Adoption of RFID for equipment tracking (2.45)

Top three rankings. As depicted on table 6, Asia Pacific (3.63), America (3.88), and Middle East and Africa (4.09) agree with the overall top ranking that increased competition in the airline industry is an issue of major concern placing the issue on the first rank, while Europe place the issue on the third rank (3.19). Increased concern on food safety and health is considered to be the most important issue for Europe (3.32), and is on the third place for Asia Pacific (3.48). The increase use of internet is placed on the second rank by Asia Pacific (3.61), America (3.5), and on third rank by Middle East and Africa (3.45). Both America (3.5) and Middle East and Africa (3.5) place increased role of distributors on the second rank. In addition, America is also concerned on the outsourcing of catering logistics function (3.31), while Middle East and Africa place increased security management (3.45) on the third rank sharing with the use increase of internet.

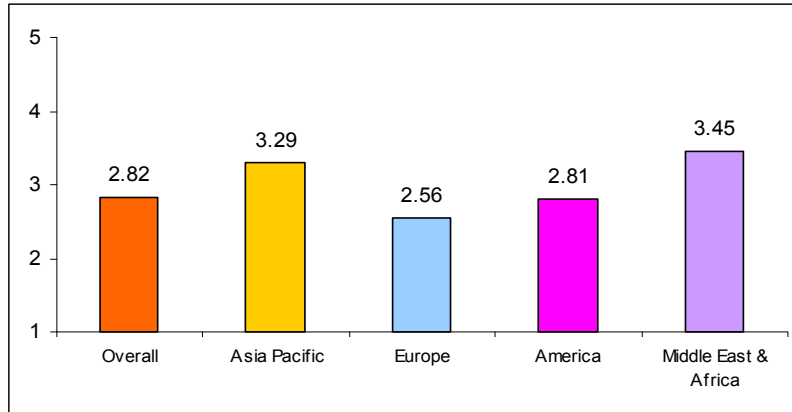
Lowest two rankings. Adoption of RFID for equipment tracking (2.24) and introduction of A380 (2.28) are the industry trends in which overall participants are less involved in. America shares exactly the same issues of least involvement in that particular order. Meanwhile, Asia Pacific highlights their involvement on adoption of RFID for equipment tracking (2.26) coupled with outsourcing of food production (2.61). The same is true for Middle East and Africa on the opposite order. For Europe, introduction of A380 (1.99) is placed as the trend of least involvement, followed by increase in single seat class airlines (2.06).

Review of general patterns. Increased competition in the airline industry remains to be the top ranking for most regions, with exceptions of Europe. All regions share similar level of involvement with the overall trends, and adding a few new trends: increase in recycling (3.24), increase role of distributors (3.5), and increased security management (3.45). In terms of the issue with the least involvement, adoption of RFID for equipment tracking and introduction of A380 remains to be the trends with least involvement for America. However, only adoption of RFID remains for both Asia Pacific and Middle East and Africa, and only introduction of A380 remains for Europe. In addition, a new trend of involvement was introduced: outsourcing of food production (See Appendices 3.1.21-3.1.24).

Significant Differences between Regions

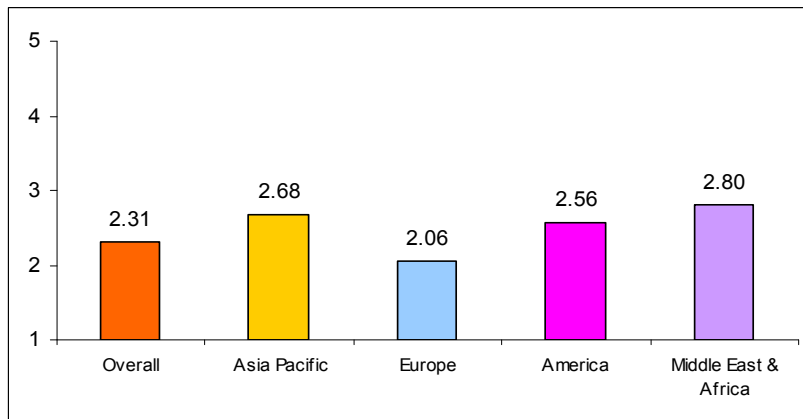
The findings suggest that three out of 15 industry trends (Figures 27-29) within different regions have statistical differences: increased security management, increase in single seat class airlines, and introduction of A380. Figures of these three industry trends are illustrated and explained below, whereas the remainder figures are depicted on Appendices 3.1.25-3.1.39.

Figure 27 Increased security management by Level of Involvements



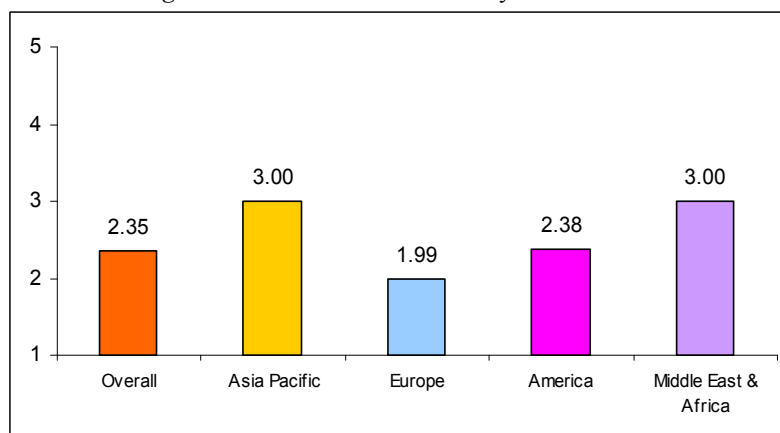
Increased security management. The finding suggests that there is a significant difference (Sig.: 0.011), in which Europe is significantly less involved in the increased security management than Asia Pacific (3.29).

Figure 28 Increase in single seat class airlines by Level of Involvements



Increase in single seat class airlines. Europe (2.06) is noted to have a significant level of less involvement in the increase in single seat class airlines than Asia Pacific (2.68) (Sig.: 0.017).

Figure 29 Introduction of A380 by Level of Involvements



Introduction of A380. Asia Pacific (3.00) and Middle East and Africa (3.00) are significantly more involved than Europe (1.99) in the introduction of A380 (Sig.: 0.000).

2. Level of Impacts

Overall

Figure 30 Overall Level of Impact of Industry Trends

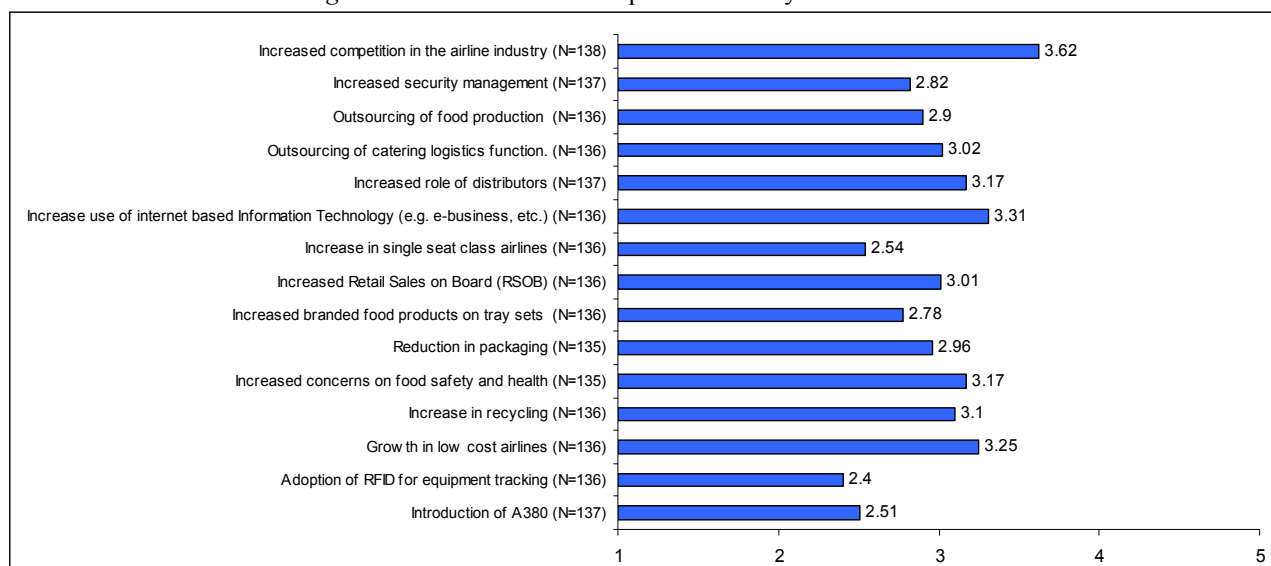


Figure 30 suggests that the industry is likely to receive the biggest impact from increased competition in the airline industry (3.62), followed by increase use of internet (3.31) and growth in low cost airlines (3.25). The trend in which is believed to have the lowest impact on the industry is the adoption of RFID for equipment tracking (2.4), followed by introduction of A380 (2.51).

Analysis by Sectors

Table 7. The Top Three and Lowest Two Rankings on Industry Trends of Level of Impacts by Sectors

Sectors	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.62) 2. Increase use of internet based Information Technology (3.31) 3. Growth in low cost airlines (3.25) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.4) 2. Introduction of A380 (2.51)
Airlines	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (4.09) 2. Increased concern on food safety and health (3.63) 3. Increase use of internet based Information Technology (e.g. e-business, etc.) (3.59) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.53) 2. Introduction of A380 (2.59)
Caterers	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.75) 2. Increased concern on food safety and health (3.46) 3. Outsourcing of catering logistics function (3.43) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.75) 2. Increase in single seat class airlines (2.79)
Food Suppliers	<ol style="list-style-type: none"> 1. Increased role of distributors (3.73). 2. Outsourcing of food production (3.48) 3. Increased concern on food safety and health (3.34) 	<ol style="list-style-type: none"> 1. Introduction of A380 (2.1) 2. Increased security management (2.13).
Non Food Suppliers	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.49) 2. Growth in low cost airlines (3.34) 3. Increase use of internet based Information Technology (3.32) 	<ol style="list-style-type: none"> 1. Outsourcing of food production (2.09) 2. Adoption of RFID for equipment tracking (2.26)

Top three rankings. Table 7 suggests that increased competition in the airline industry as an overall top ranking (3.62) persists to be the top ranking across sectors, with exceptions of food suppliers which completely replacing the trend. Despite the fact that increase use of internet are placed second overall (3.31), the trend is only recognized by airlines (3.59) and non food suppliers (3.32), both at the third rank. Growth in low cost airlines on analysis by sector is only recognized by non food suppliers (3.34) on the second rank. Whereas quite the opposite, the impact of increased concern on food safety and health is recognized by three out of four sectors: airlines (3.63), caterers (3.46) and food suppliers (3.34). Caterers highlighted the impact of outsourcing of catering logistics (3.43) on its daily performance by placing the issue on the third rank, while food suppliers highlight the impact of increased role of distributors (3.73) and outsourcing of food production (3.48) on the first and second ranks.

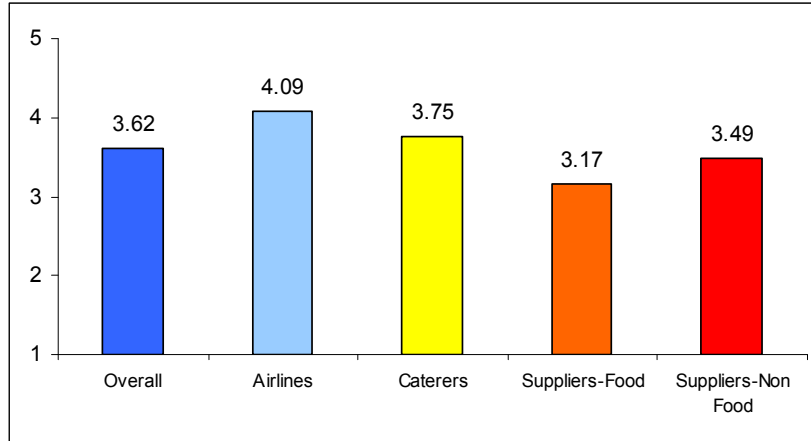
Lowest two rankings. The impacts of adoption of RFID for equipment tracking (2.4) and introduction of A380 (2.51) are recognized by all participants in the industry. The least impacts of the two trends are also fully recognized by airlines industry. However, caterers and non food suppliers only enlist adoption of RFID for equipment tracking (respectively 2.75 and 2.26) and food suppliers only enlist introduction of A380 (2.1) as one of their least impacting trend. Increase in single seat class airlines (2.79), increased security management (2.13), and outsourcing of food production (2.09) are highlighted to be one of the least impacting trends, consecutively by caterers, food and non-food suppliers.

Review of general patterns. In general, only a few of the top three rankings (e.g. increased competition in the airline industry and increase use of internet based IT), and lowest two rankings (e.g. adoption of RFID for equipment tracking and introduction of A380) are recognized by all sectors. Increased competition in the airline industry remains to be the overall and sectoral top rankings, with exception of food suppliers, in which increased role of distributors prevails. In terms of the lowest two rankings, airlines is the only sector agreeing on the same set of trends, while the rest of the industry only identify one of the two overall least impacting trends. Consequently, new trends are identified within the rankings for different sectors (See Figures 3.2.2-3.2.5).

Significant Differences between Sectors

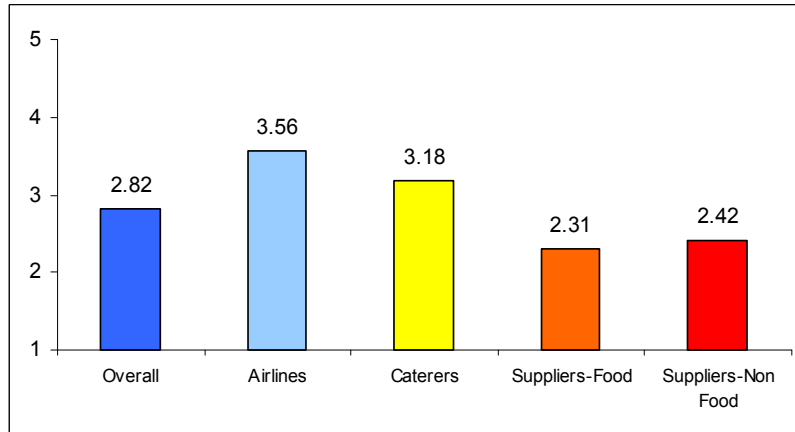
The following are six industry trends (Figures 31-36), in which statistical differences were recognized in terms of level of impacts by sectors. The remaining nine figures of industry trends are illustrated in Appendices 3.2.6-3.2.20.

Figure 31 Increased competition in the airline industry by Level of Impacts



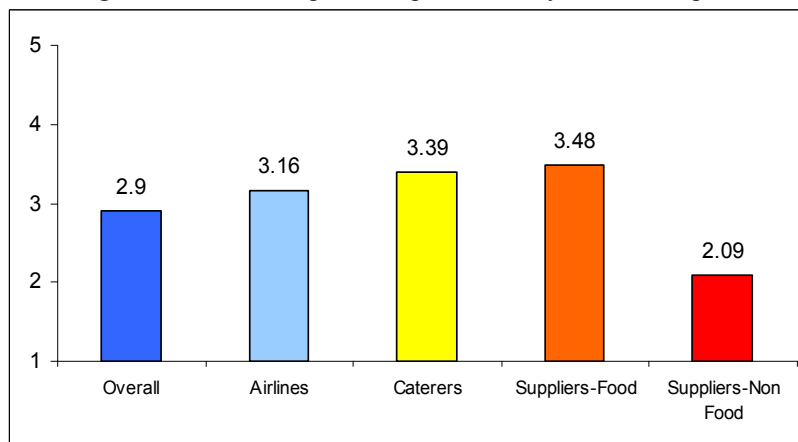
Increased competition in the airline industry. Airlines (4.09) are perceived to receive significantly more impacts than food (3.17) and non-food suppliers (3.49). The statistical difference noted is 0.002.

Figure 32 Increased security management by Level of Impacts



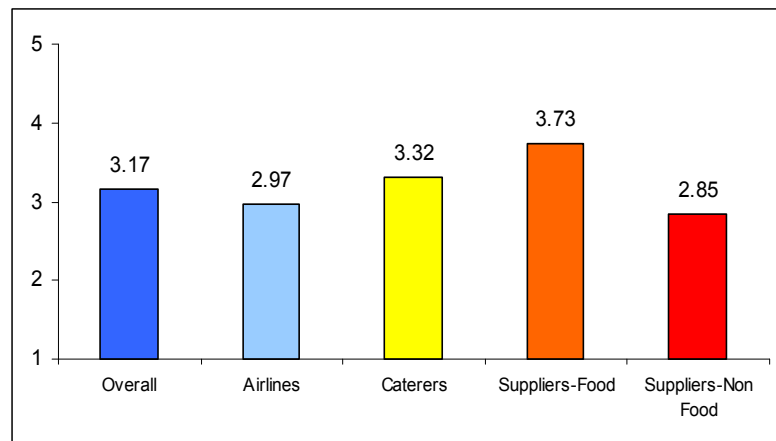
Increased security management. Airlines (3.56) are perceived to receive significantly higher impact than food (2.31) and non food (2.42) suppliers, with significant difference of 0.000.

Figure 33 Outsourcing of food production by Level of Impacts



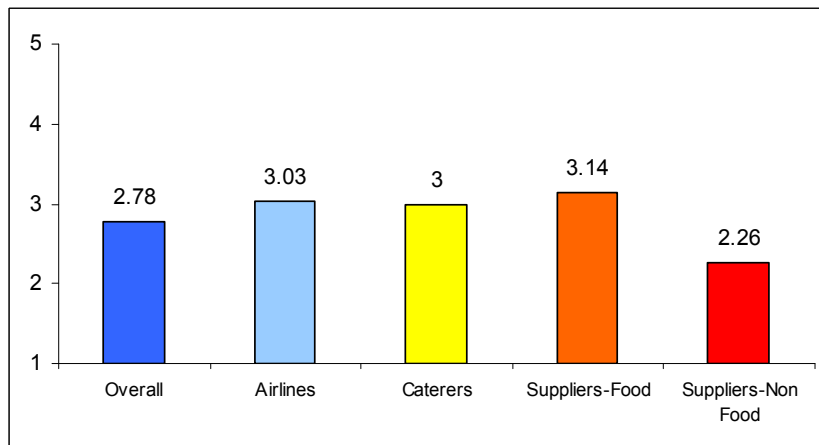
Outsourcing of food production. There is a significant difference between non food suppliers (2.09) and airlines (3.16), caterers (3.39) and food suppliers (3.48). Non food suppliers are not involved with outsourcing food production.

Figure 34 Increased role of distributors by Level of Impacts



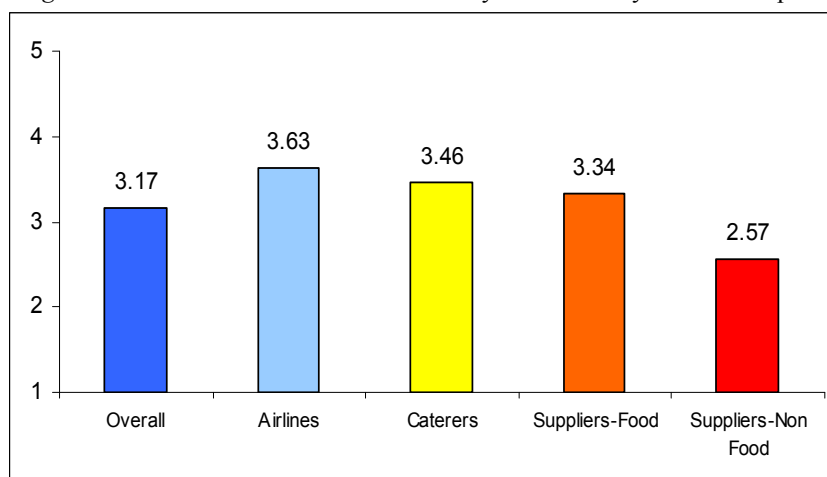
Increased role of distributors. Food suppliers (3.73) perceive a significantly higher level of impact than airlines (2.97) and non food suppliers (2.85) on the issue of increased role of distributors (Sig.: 0.008).

Figure 35 Increased branded food products on tray sets by Level of Impacts



Increased branded food products on tray sets. Non food suppliers (2.26) perceive a lower level of impact than airlines (3.03) and food suppliers (3.14), with significance of 0.005.

Figure 36 Increased concerns on food safety and health by Level of Impacts



Increased concern on food safety and health. A significant difference (Sig.: 0.000) exists signifying that non food suppliers (2.57) perceive significantly lower level of impacts than airlines (3.63), caterers (3.46) and food suppliers (3.34).

Analysis by Regions

Table 8. The Top Three and Lowest Two Rankings on Industry Trends of Level of Impacts by Regions

Regions	Top Three Rankings	Lowest Two Rankings
Overall	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.62) 2. Increase use of internet based Information Technology (3.30) 3. Growth in low cost airlines (3.25) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.4) 2. Introduction of A380 (2.51)
Asia Pacific	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.84) 2. Increase use of internet based Information Technology (3.47) 3. a. Increased concerns on food safety and health (3.41) b. Growth in low cost airlines (3.41) 	<ol style="list-style-type: none"> 1. Adoption of RFID for equipment tracking (2.48) 2. a. Increase in single seat class airlines (2.6) b. Increased Retail Sales on Board (RSOB) (2.6)
Europe	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.45) 2. Growth in low cost airlines (3.19) 3. a. Increase use of internet based Information Technology (3.15) b. Increased Retail Sales on Board (RSOB) (3.15) 	<ol style="list-style-type: none"> 1. Introduction of A380 (2.18) 2. Adoption of RFID for equipment tracking (2.29)
America	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.81) 2. Increase use of internet based Information Technology (3.69). 3. Outsourcing of catering logistics function (3.56) 	<ol style="list-style-type: none"> 1. Introduction of A380 (2.44) 2. a. Increase in recycling (2.5) b. Adoption of RFID for equipment tracking (2.5)
Middle East & Africa	<ol style="list-style-type: none"> 1. Increased competition in the airline industry (3.91) 2. Increase role of distributors (3.7) 3. a. Increase in recycling(3.64) b. Growth in low cost airlines (3.64) 	<ol style="list-style-type: none"> 1. Increased branded food products on tray sets (2.3) 2. a. Outsourcing of food production (2.5) b. Outsourcing of catering logistics function (2.5)

Top three rankings. Table 8 shows that increased competition in the airline industry as an overall top ranking (3.62) is also the top ranking across regions, varying from 3.45 to 3.91. Similarly, an increased use of internet also the second rank for Asia Pacific (3.47), whereas it is the third rank for Europe (3.15) and America (3.69), and is not included on the top three rankings for Middle East and Africa. The overall third ranking, growth in low cost airlines (3.25), is also acknowledged by Asia Pacific as the third rank (3.41), sharing with increased concerns on food safety and health; by Europe as the second rank (3.19) and by Middle East and Africa as the third rank (3.64), sharing the position with increase in recycling. Other issues are also introduced on the top three rankings: increased Retail Sales on Board (3.15) on the third rank by Europe, outsourcing of catering logistics (3.56) on the third rank by America, and increase role of distributors (3.7) on the second rank and increase in recycling (3.64) on the third rank by Middle East and Africa.

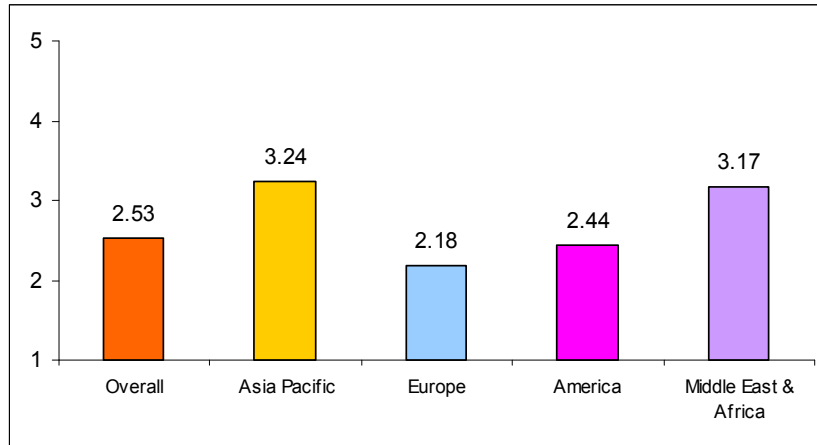
Lowest two rankings. The level of agreements on the lowest rankings among regions is very little. Europe and America agrees on the two least impacting trends as suggested by the general respondents, placing introduction of A380 on the first place (respectively 2.18 and 2.44), and adoption of RFID for equipment tracking (respectively 2.29 and 2.5) on the second place. In the case of America, increase of recycling (2.5) shares the same mean average on the second place. Asia Pacific agrees with the overall picture in regards to adoption of RFID for equipment tracking (2.48) as its least impacting ranking, while the sector also suggests that it also does not receive much impacts from increase in single seat class airlines and increased Retail Sales on Board (both at 2.6). In the case of Middle East and Africa, none of the trends identified are similar to the overall pictures. The sector suggests that increased branded food products on tray sets (2.3) is the least impacting factor, followed by outsourcing of food production and catering logistics function on the second rank (both at 2.5).

Review of general patterns. For all regions, increased competition in the airline industry is positioned as the top ranking. The second and third overall rankings, increase use of internet and growth in low cost airlines, are also pertinent in most regions, even though some new trends were introduced. Nevertheless, there is no agreement on the lowest ranking among regions. Adoption of RFID and introduction of A380 were identified in most regions, with exceptions of Middle East and Africa in which completely new trends were suggested (See Appendices 3.2.21-3.2.24).

Significant Differences between Regions

In term of level of impact among regions, only one of the industry trends is reported to have a statistical difference below (Figure 37), whereas the remainders are illustrated on Appendices 3.2.25-3.2.39 with no significant differences.

Figure 37 Introduction of A380 by Level of Impacts

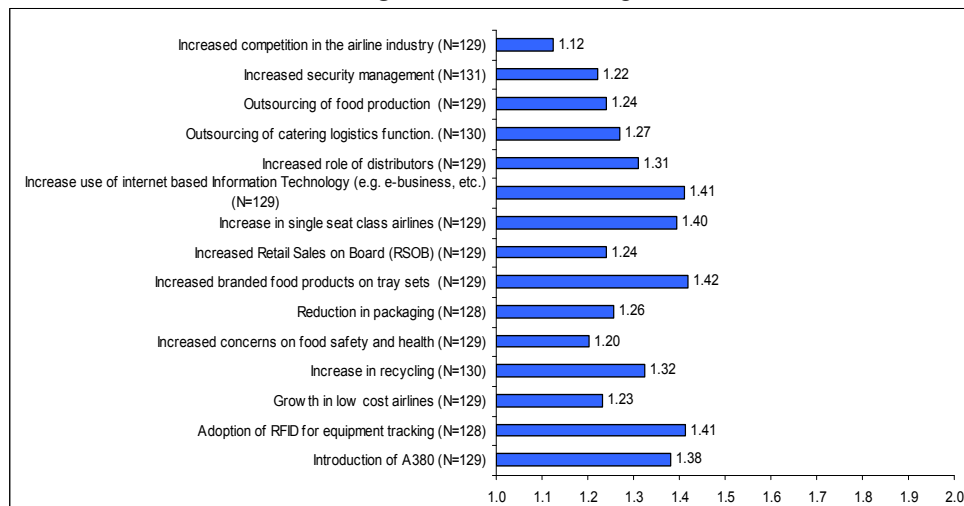


Introduction of A380. A significant difference (Sig.: 0.000) is noted so that Asia Pacific (3.24) perceives a higher level of impact compared to Europe (2.18).

3. Timing of Impacts

Overall

Figure 38 Overall Timing



The overall findings (Figure 38) suggest that all industry trends is to have immediate impact. The most immediate impact is predicted to arrive from increased competition in the airline industry (1.12), followed by increased concern of food safety and health (1.20).

Analysis by Sectors

The sectoral analysis suggests that some trends are to happen in much distance future, with exception of caterers. These trends are: that increase use of internet (1.56) and adoption of RFID for equipment tracking (1.50) for airlines, introduction of A380 (1.58) for food suppliers, and increased branded food products on tray sets (1.53) for non food suppliers. On the contrary, various sectors suggest the trends that are likely to have immediate impact: increased security management for airlines (1.09) and caterers (1.07), increased competition in the airline industry for caterers (1.07), food (1.12) and non food

(1.09) suppliers, and outsourcing of food production for food suppliers (1.12). (See Appendices 3.3.2 to 3.3.20).

Analysis by Regions

America (1.00) and Middle East and Africa (1.10) agree that growth in low cost airlines is likely to have the most immediate impact on the regional performance. Increased security management (1.10) is the case for Asia Pacific, and increased competition in the airline industry is the case for Europe (1.12). On the other hand, only two regions foresee trends to have long term impact on their performances. Asia Pacific believes that the region will receive impact from the increase use of internet (1.54) in more than two years time. Middle East and Africa also indicated that increase in single seat class airlines (1.60), adoption of RFID for equipment tracking (1.50) and introduction of A380 (1.50) are likely to happen in more than two years time. (See Appendices 3.3.21 to 3.3.39).

IV. DEMOGRAPHIC DATA

At the end of the survey, respondents were asked to indicate their demographic data, including gender, age, previous trade show attendance and job role (See Appendices 1.1-1.6).

The majority of the respondents are male (72%), and the respondents are diverse in terms of their age: below 25 years (1.4%), 25-34 years (37%), 35-44 years (46%), 45-54 years (40%) and 55+ years (18%).

The majority of the respondents (35.66%) have previously attended 4 to 10 trade shows, while 22.38% has attended more than 10 trade shows before. Meanwhile, only 18.18% of the respondents have never attended trade show before, and the remainder (23.78%) have previously attended 1-3 trade shows.

The respondents profile suggest that majority of the participants' job roles are general management (36.88%) and sales and marketing (38.30%), followed by operations (11.35%), consultants (3.5%) and others (9.93%).

V. CONCLUSION

In conclusion, there are some similarities and differences of external issues and industry trends across sectors and regions. Differences across sectors are more apparent, whereas similarities prevail in most cases across regions.

External Issues

The same top three rankings are echoed as the overall level of concern and level of impact: hike in oil price, increased passenger security measures and higher taxation on air travel. Climate change remains to be one of the lowest two rankings in term of both level of concern (accompanied by human flu outbreak) and level of impact (accompanied by increased passenger security measures).

Sectors. In general, airlines are the most concerned of all sectors on all of the external issues. Airlines are also to receive the most impact from these external issues compared to other sectors, significantly on climate change, higher taxation on air travel and increased passenger security measures. On the other hand, the suppliers generally are not only less concerned (significantly on climate change, terrorists attacks in major cities and increased passenger security measures), but are also likely to receive the least impact.

Regions. Overall, there are no major differences among regions, with a few exceptions. Asia Pacific is significantly more concerned and receives more impacts on the issues of increased passenger security measures, Avian flu and human flu outbreak. On the other hand, Europe is fairly less concerned and receives less impact on those issues. Middle East and Africa is significantly more concerned about human flu outbreak, however receives significantly less impact from Avian flu outbreak.

Industry Trends

The overall picture suggests that the industry is more involved in increased competition in the airline industry, increased concern on food safety and health and increase use of internet based IT. In the analysis of impacts of these trends, growth in low cost airlines replaces increased concern on food safety and health on the top three rankings. However, an overall agreement on the lowest two rankings by level of involvement and level of impact is pronounced: adoption of RFID for equipment tracking and introduction of A380.

Sectors. The overall pattern suggests that airlines, followed by caterers, are significantly more concerned and also receive more impact than other sectors. On the other hand, suppliers are significantly less concerned and receive less impact than other sectors. Five out of 15 industry trends were identified to have significant differences across sectors in both level of concern and impact. Four trends are of major concern, but do not have major impact on the industry; one trend was not identified to be of a major concern, but is identified to have major impact on the industry.

Regions. Similar patterns are identified across regions, with the exception of Asia Pacific, Europe and Middle East. Asia Pacific has higher level of concern on increased security management, increase in single seat class airlines and introduction of A380 than Europe. In the case of Middle East, the region is also more concerned in the introduction of A380 than Europe. Finally, Asia Pacific also receives more impact from the introduction of A380 than Europe.

**TRENDS IN THE TRAVEL CATERING INDUSTRY SURVEY
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I. DEMOGRAPHIC PROFILE

Figure 1.1 Sector Representations

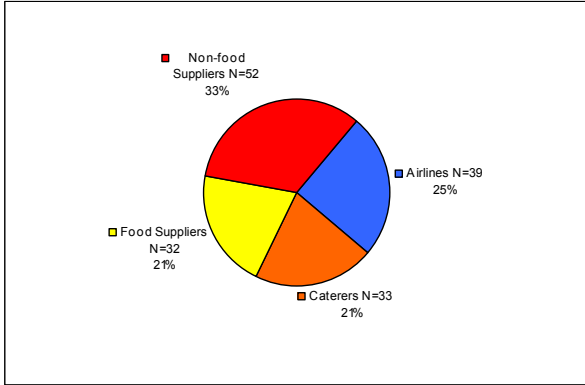


Figure 1.4 Age Profile

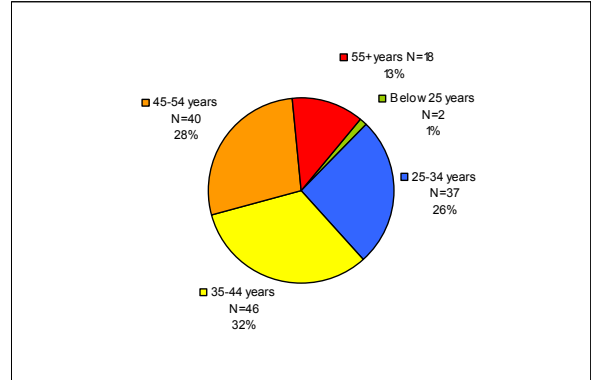


Figure 1.2. Office Locations

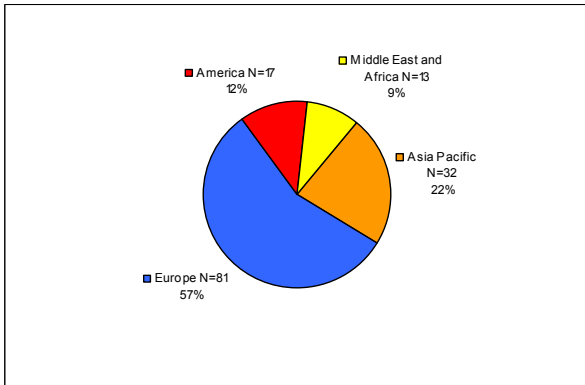


Figure 1.5 Previous Trade Show Attendances

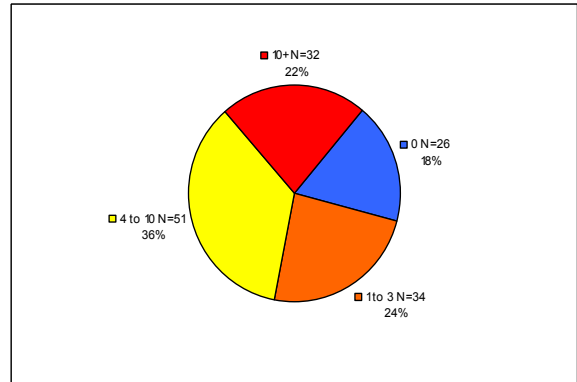


Figure 1.3 Gender Profile

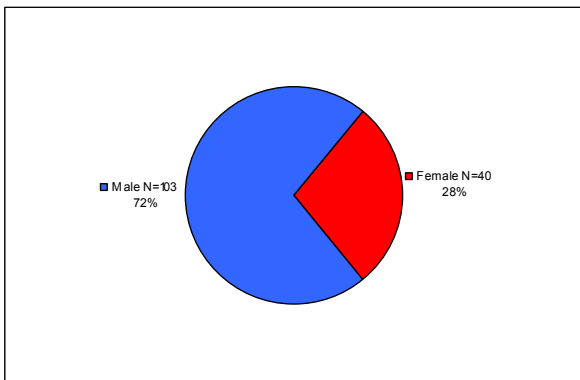
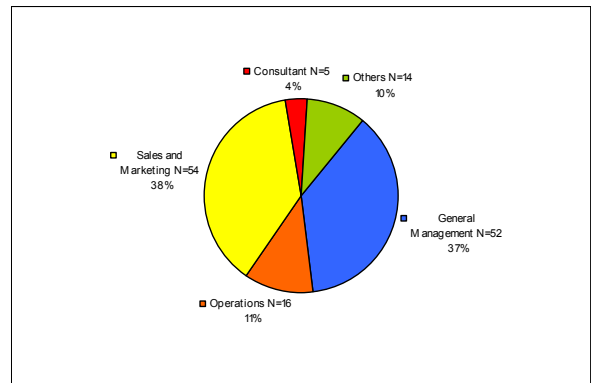


Figure 1.6 Job Role Profile



II. MAJOR EXTERNAL ISSUES

1. Level of Concern

Overall

Figure 2.1.1 Overall Level of Concern

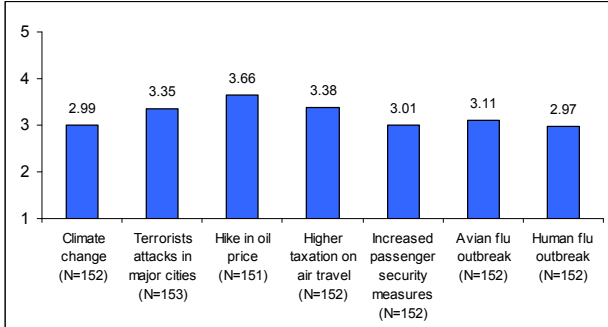
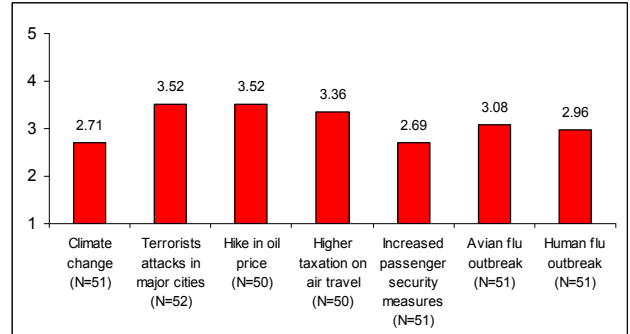
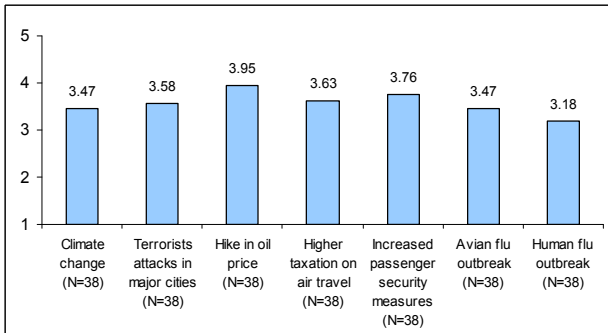


Figure 2.1.5 Non Food Suppliers Level of Concern



By Sectors

Figure 2.1.2 Airlines Level of Concern



By Factors (and Sectors)

Figure 2.1.6 Climate Change by Level of Concern

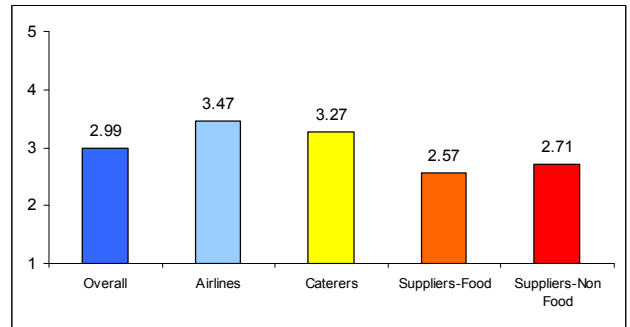


Figure 2.1.3 Caterers Level of Concern

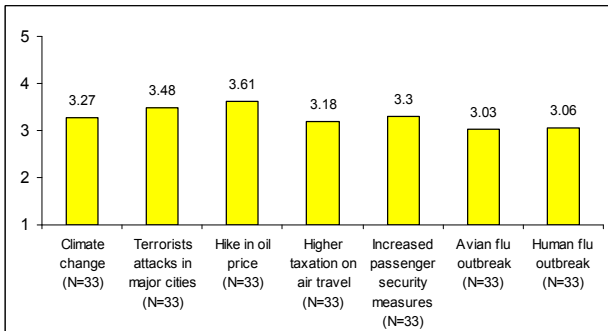


Figure 2.1.7 Terrorists attacks in major cities by Level of Concern

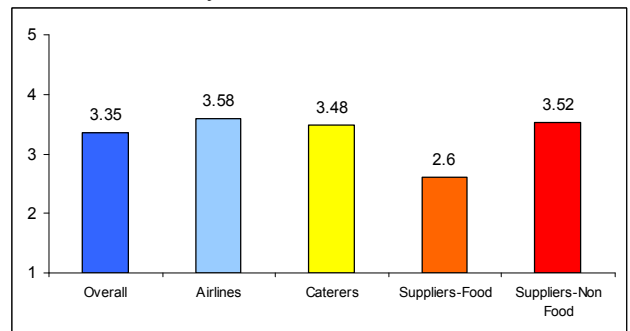


Figure 2.1.4 Food Suppliers Level of Concern

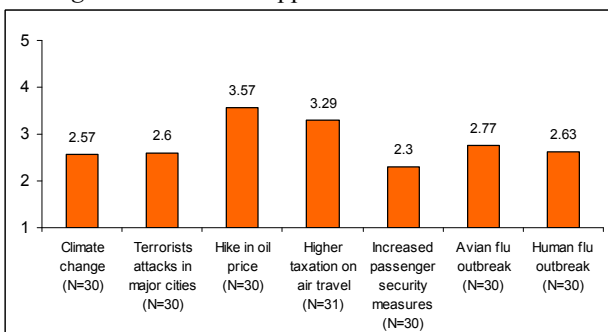


Figure 2.1.8 Hike in oil price by Level of Concern

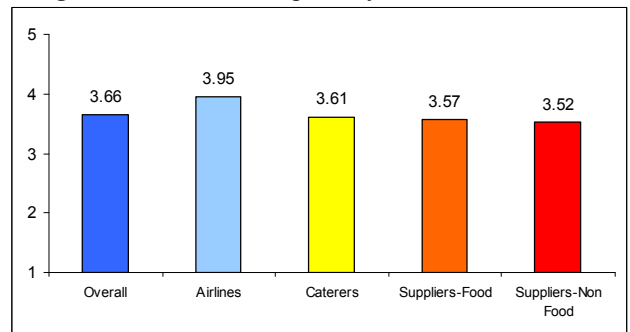


Figure 2.1.9 Higher taxation on air travel by Level of Concern

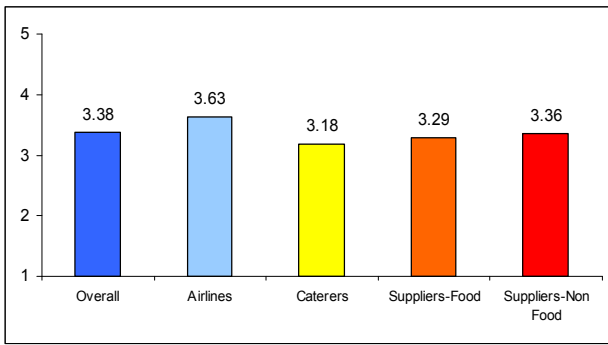


Figure 2.1.10 Increased passenger security measures by Level of Concern

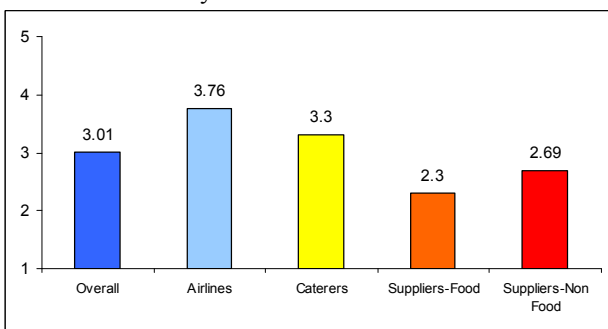


Figure 2.1.11 Avian flu outbreak by Level of Concern

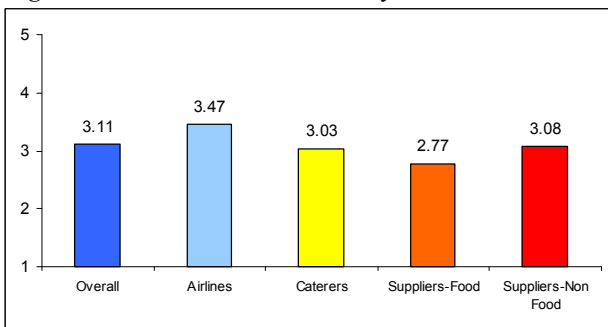
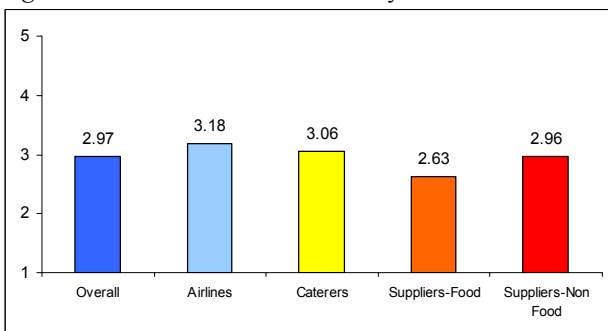


Figure 2.1.12 Human flu outbreak by Level of Concern



By Regions

Figure 2.1.13 Asia Pacific Level of Concern

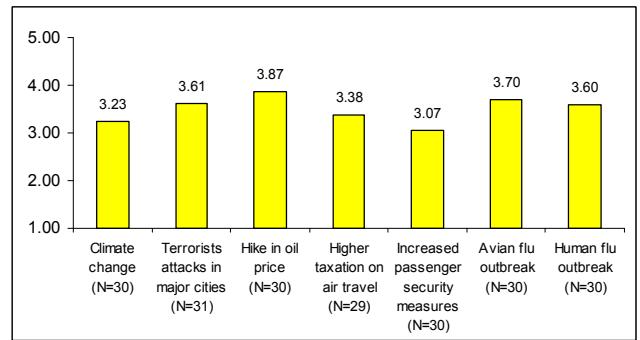


Figure 2.1.14 Europe Level of Concern

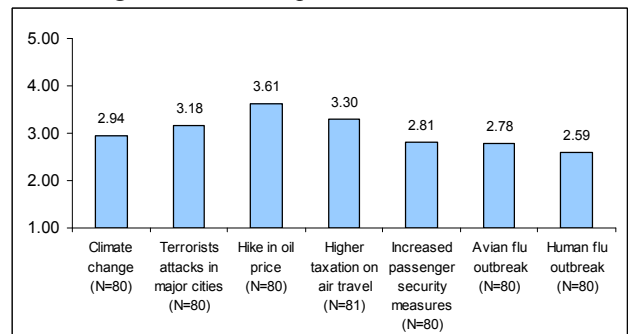


Figure 2.1.15 America Level of Concern

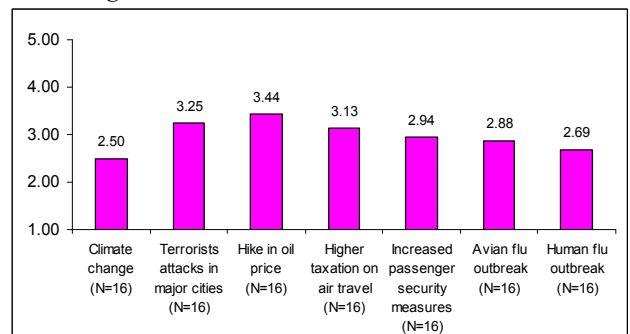
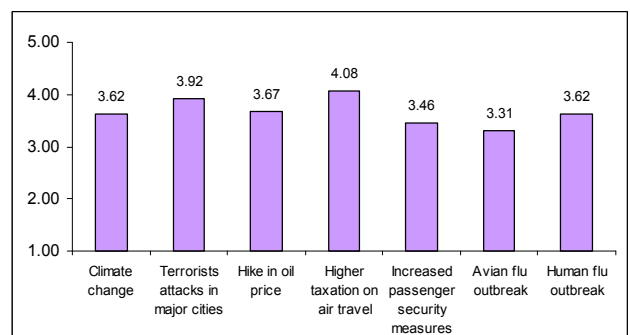


Figure 2.1.16 Middle East and Africa Level of Concern



By Factors (and Regions)

Figure 2.1.17 Climate Change by Level of Concern

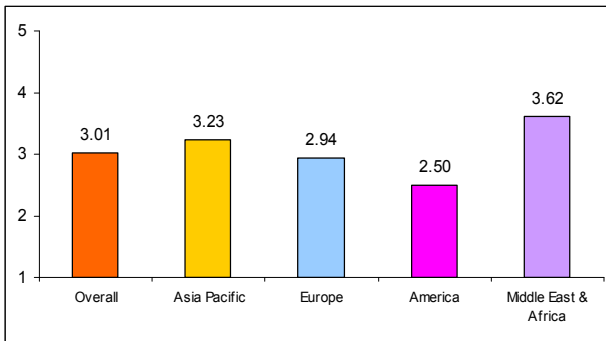


Figure 2.1.18 Terrorists attacks in major cities by Level of Concern

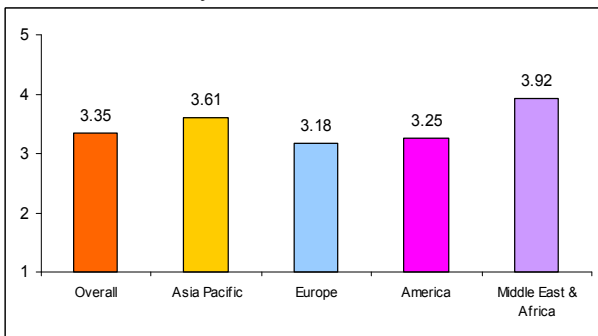


Figure 2.1.19. Hike in oil price by Level of Concern

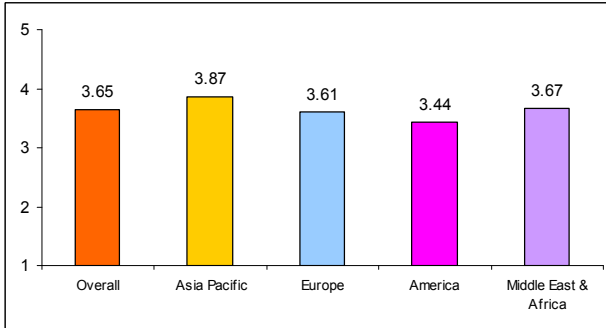


Figure 2.1.20 Higher taxation on air travel by Level of Concern

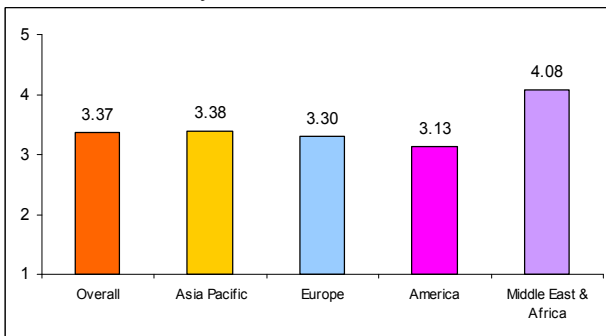


Figure 2.1.21 Increased passenger security measures by Level of Concern

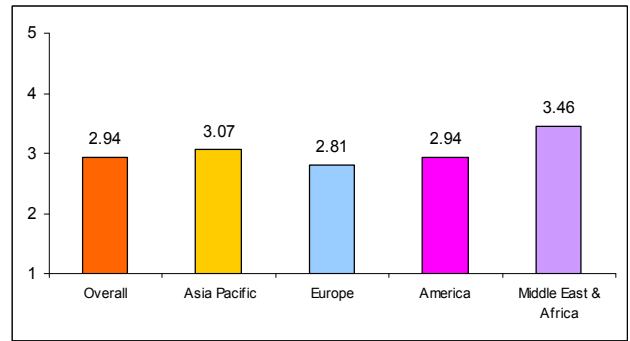


Figure 2.1.22 Avian flu outbreak by Level of Concern

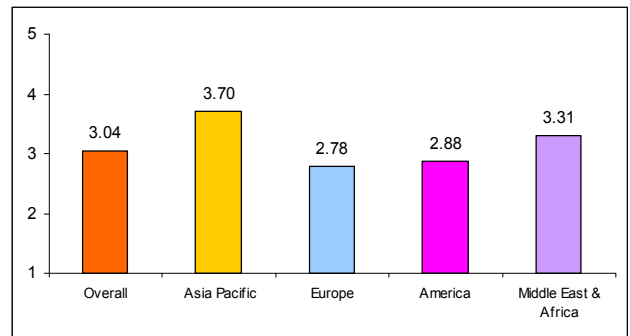
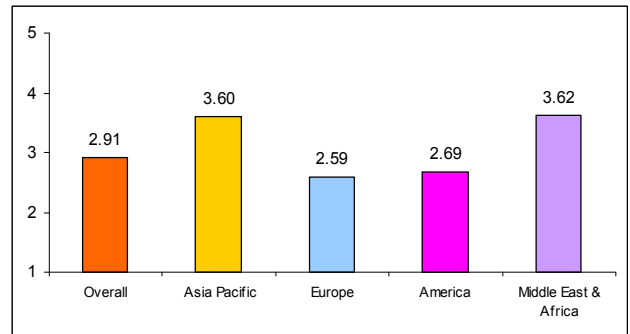


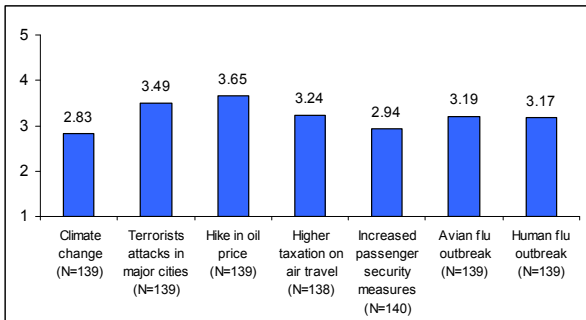
Figure 2.1.23 Human flu outbreak by Level of Concern



2. Level of Impact

Overall

Figure 2.2.1 Overall Level of Impact



By Sectors

Figure 2.2.2 Airline Level of Impact

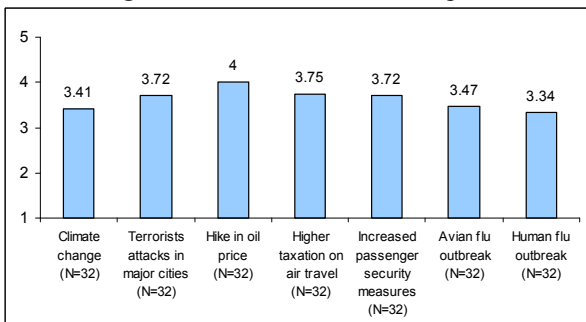


Figure 2.2.3 Caterers Level of Impact

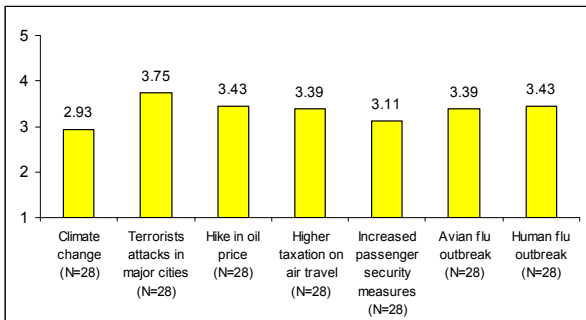


Figure 2.2.4 Food Suppliers Level of Impact

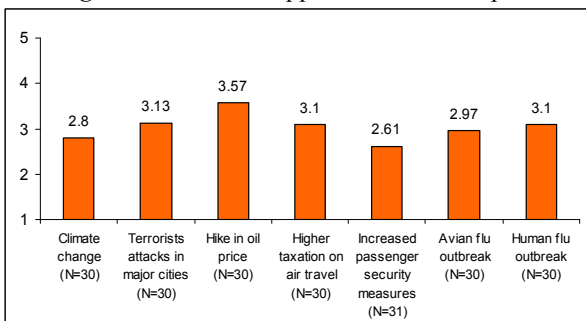
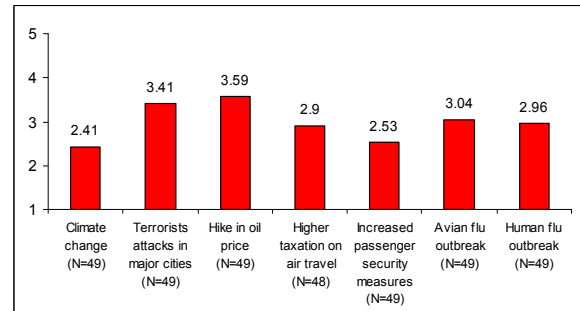


Figure 2.2.5 Non Food Suppliers Level of Impact



By Factors (and Sectors)

Figure 2.2.6 Climate Change by Level of Impact

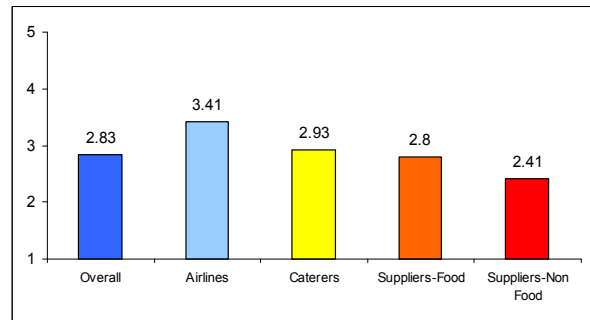


Figure 2.2.7 Terrorists attacks in major cities by Level of Impact

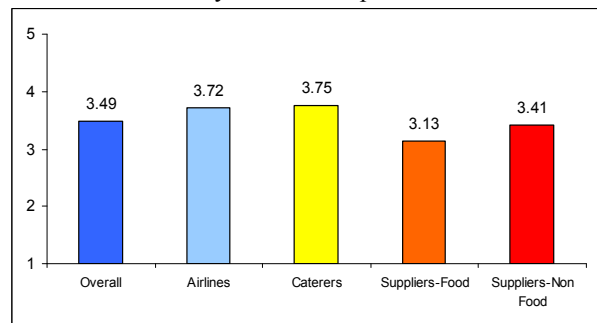


Figure 2.2.8. Hike in oil price by Level of Impact

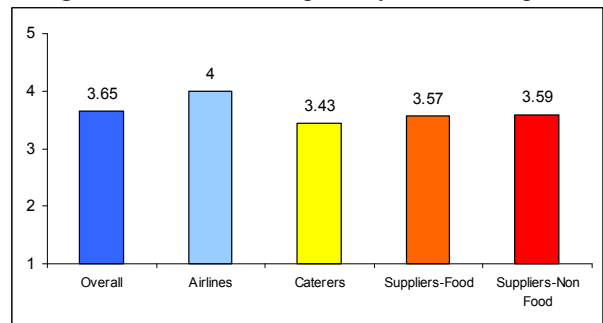


Figure 2.2.9 Higher taxation on air travel by Level of Impact

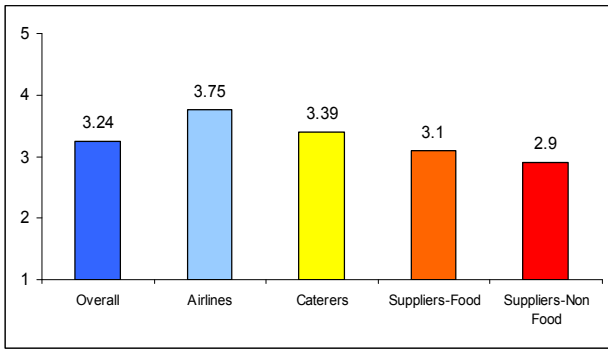


Figure 2.2.10 Increased passenger security measures by Level of Impact

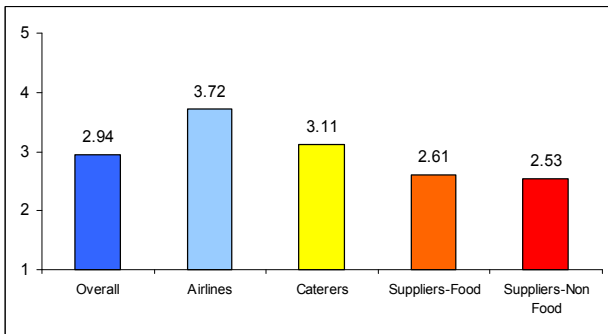


Figure 2.2.11 Avian flu outbreak by Level of Impact

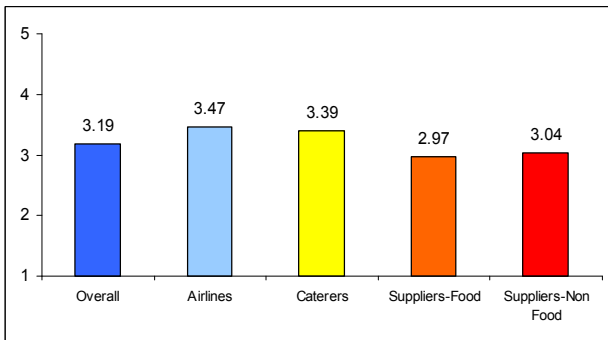
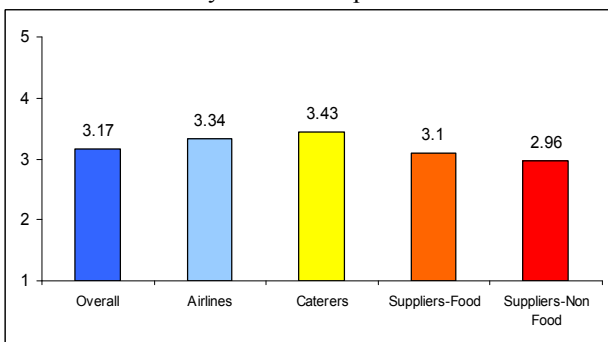


Figure 2.2.12 Human flu outbreak by Level of Impact



By Regions

Figure 2.2.13 Asia Pacific Level of Impact

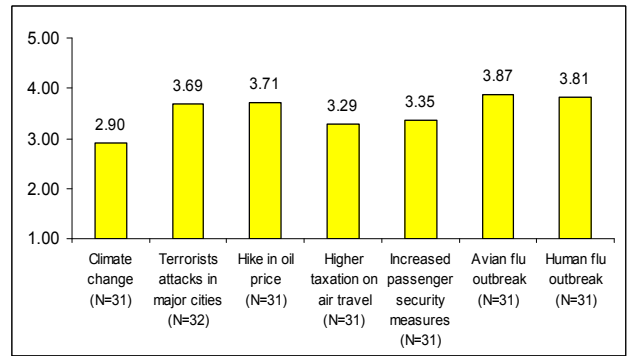


Figure 2.2.14 Europe Level of Impact

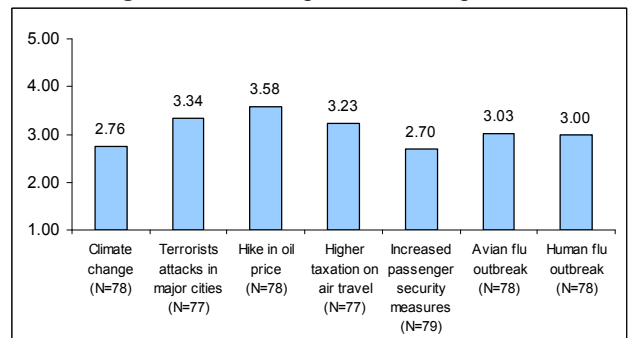


Figure 2.2.15 America Level of Impact

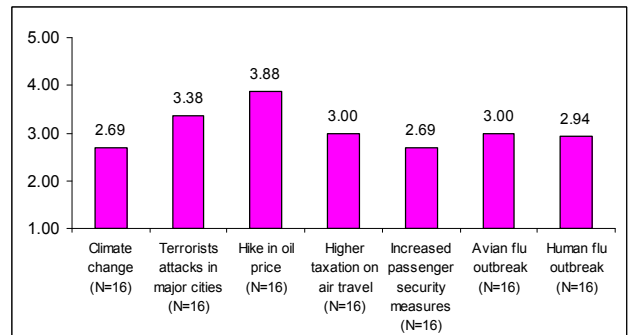
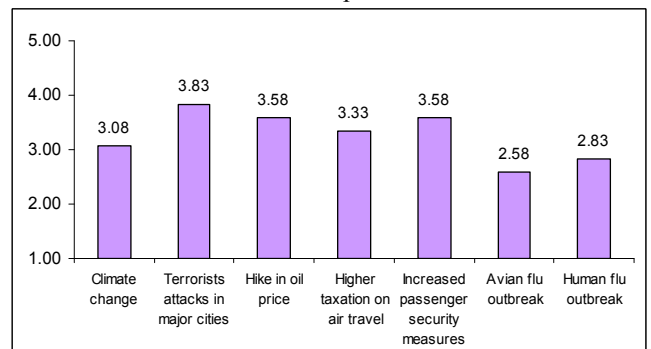


Figure 2.2.16 Middle East and Africa Level of Impact



By Factors (and Regions)

Figure 2.2.17 Climate Change by Level of Impact

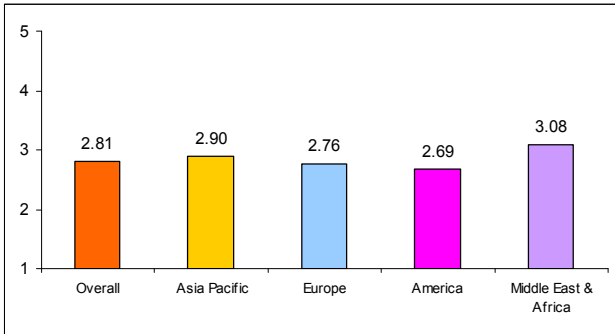


Figure 2.2.18 Terrorists attacks in major cities by Level of Impact

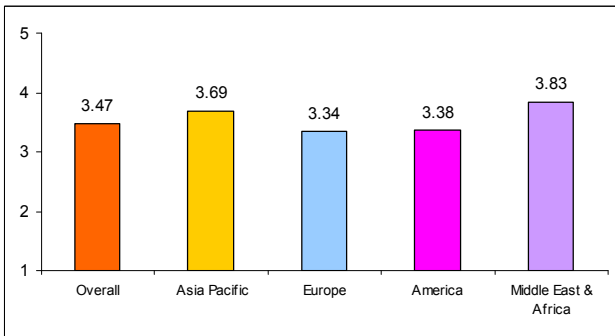


Figure 2.2.19 Hike in oil price by Level of Impact

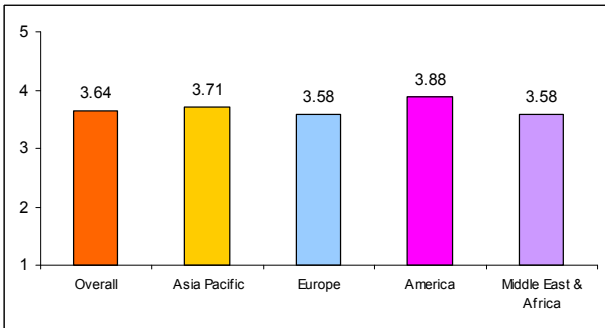


Figure 2.2.20 Higher taxation on air travel by Level of Impact

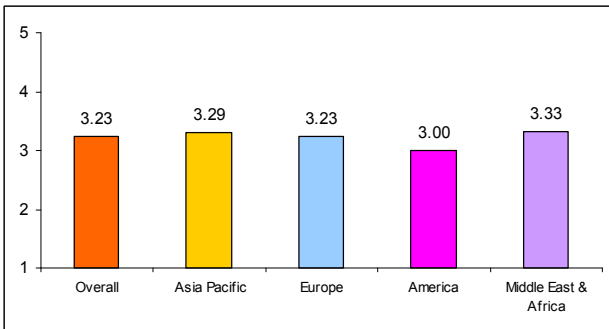


Figure 2.2.21 Increased passenger security measures by Level of Impact

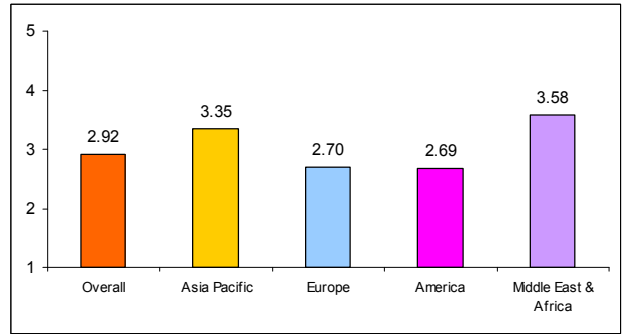


Figure 2.2.22 Avian flu outbreak by Level of Impact

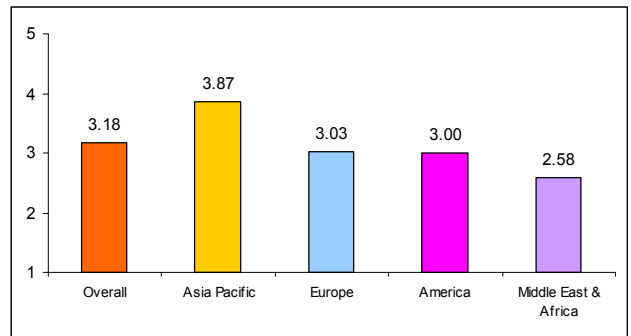
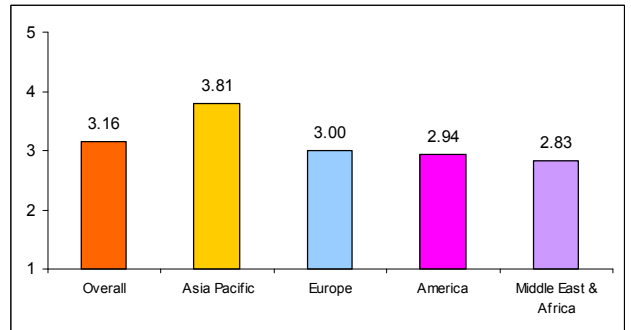


Figure 2.2.23 Human flu outbreak by Level of Impact



3. Timing of Impact

Overall

Figure 2.3.1 Overall Timing

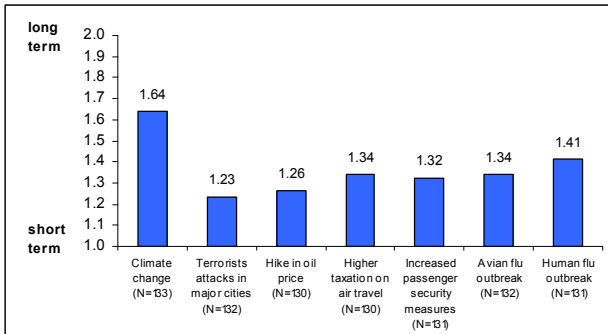
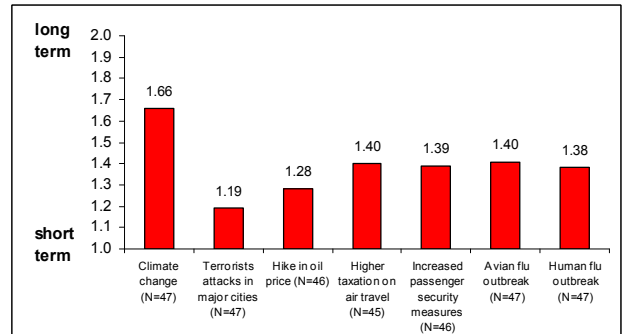
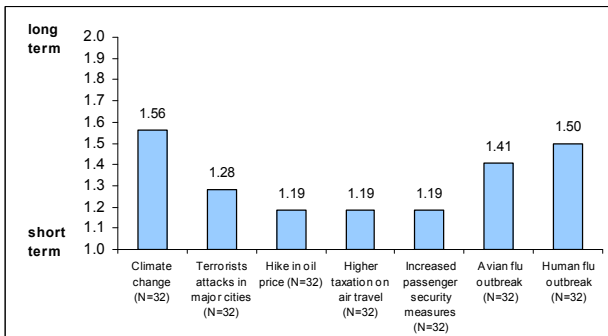


Figure 2.3.5 Non food Suppliers Timing



By Sectors

Figure 2.3.2 Airlines Timing



By Factors (and Sectors)

Figure 2.3.6 Climate Change by Timing

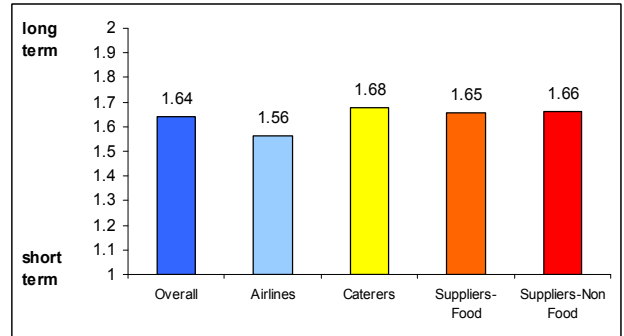


Figure 2.3.3 Caterers Timing

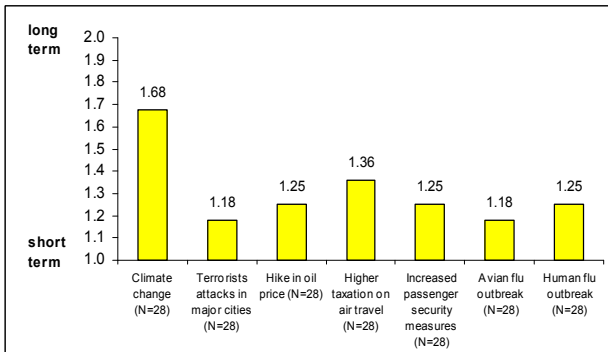


Figure 2.3.7 Terrorists attacks in major cities by Timing

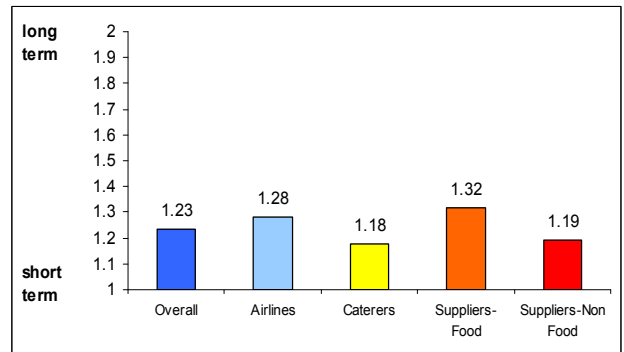


Figure 2.3.4 Food Suppliers Timing

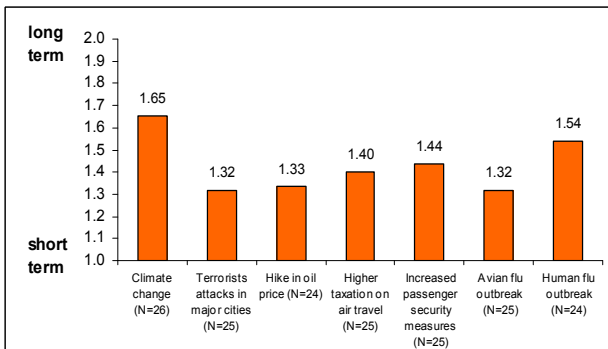
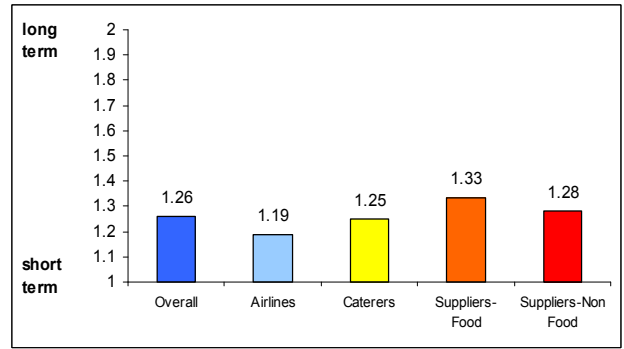


Figure 2.3.8 Hike in oil price by Timing



By Regions

Figure 2.3.9 Higher taxation on air travel by Timing

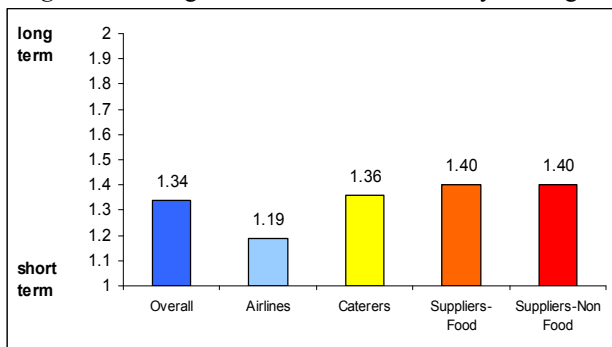


Figure 2.3.10 Increased passenger security measures by Timing

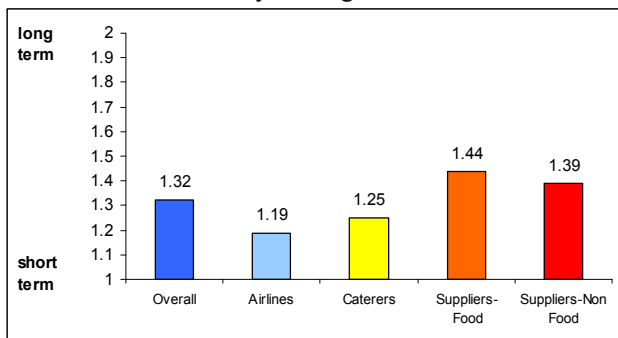


Figure 2.3.11 Avian flu outbreak by Timing

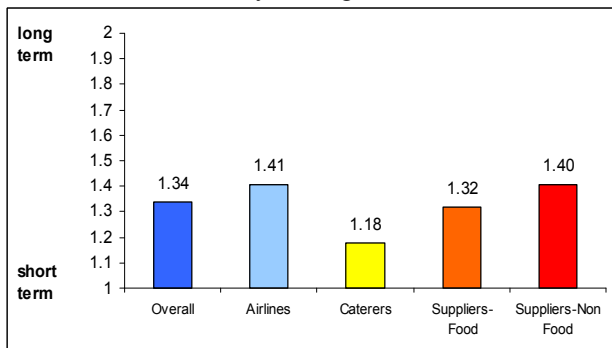


Figure 2.3.12 Human flu outbreak by Timing

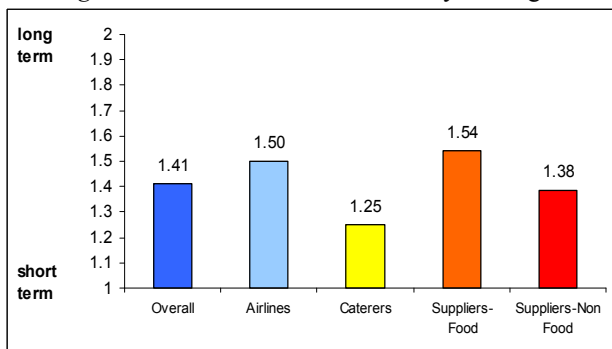


Figure 2.3.13 Asia Pacific Timing

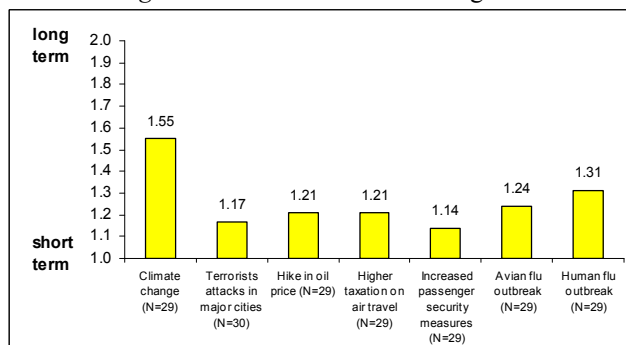


Figure 2.3.14 Europe Timing

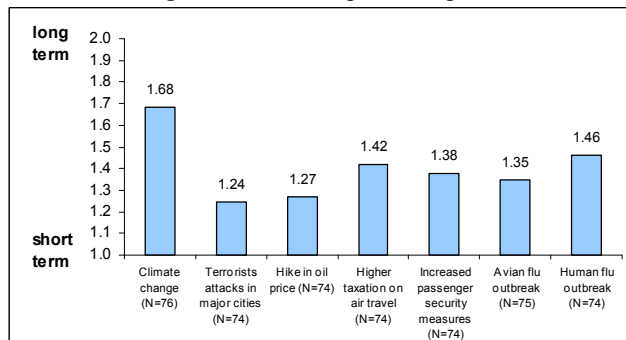


Figure 2.3.15 America Timing

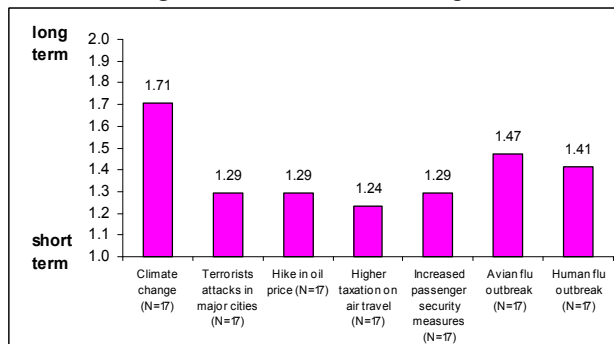
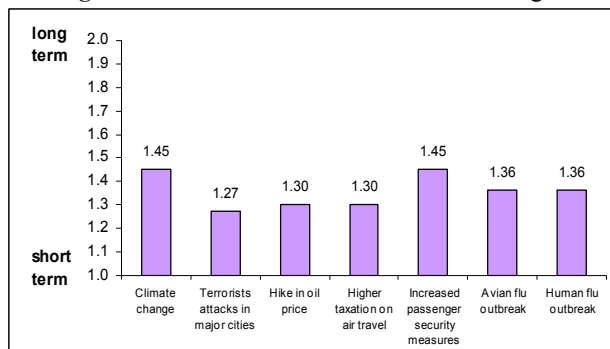


Figure 2.3.16 Middle East and Africa Timing



By Factors (and Regions)

Figure 2.3.17 Climate Change by Timing

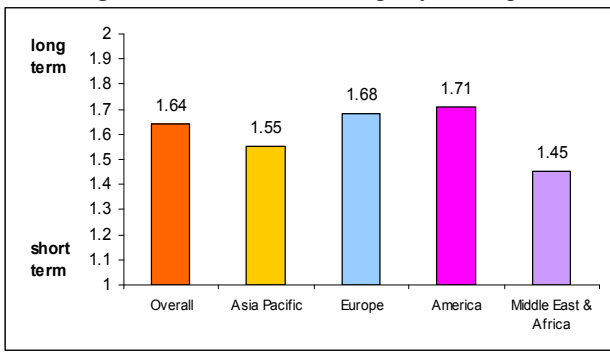


Figure 2.3.18 Terrorists attacks in major cities by Timing

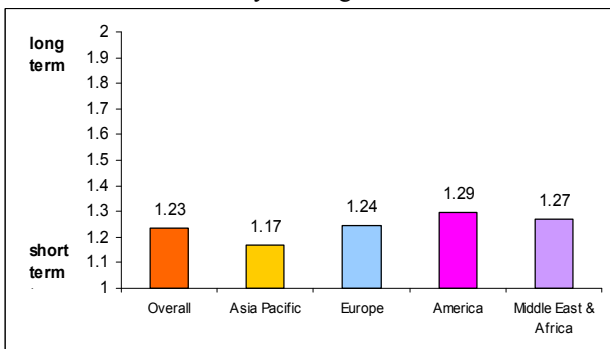


Figure 2.3.19 Hike in oil price by Timing

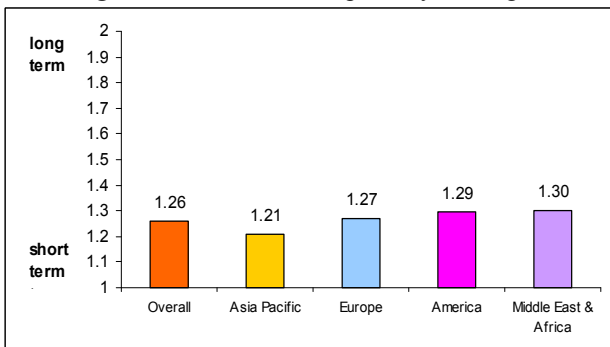


Figure 2.3.20 Higher taxation on air travel by Timing

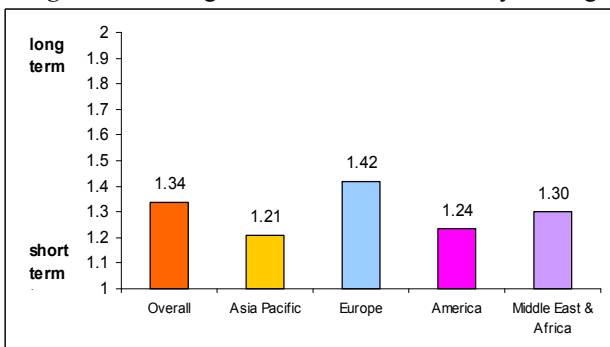


Figure 2.3.21 Increased passenger security measures by Timing

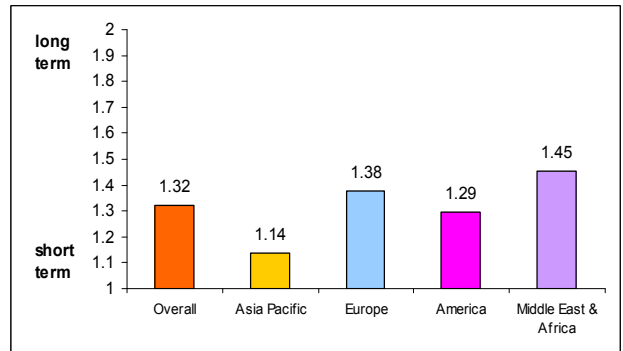


Figure 2.3.22 Avian flu outbreak by Timing

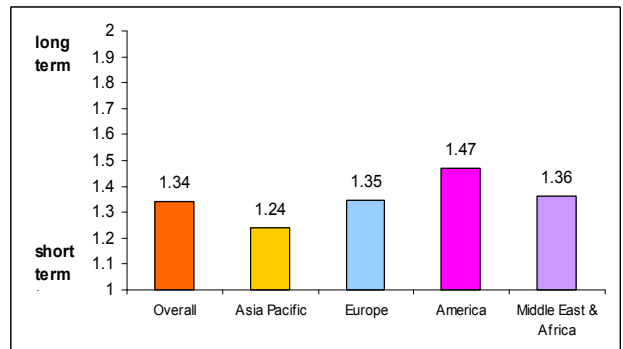
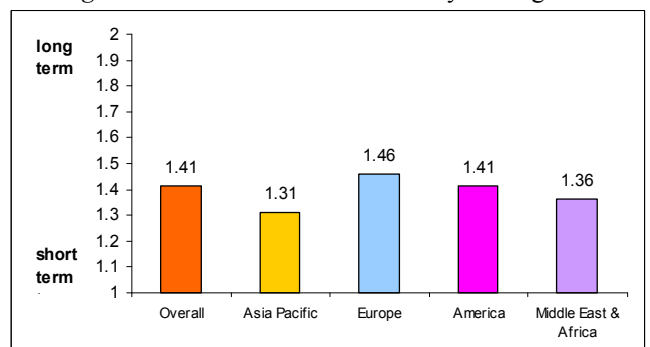


Figure 2.3.23 Human flu outbreak by Timing

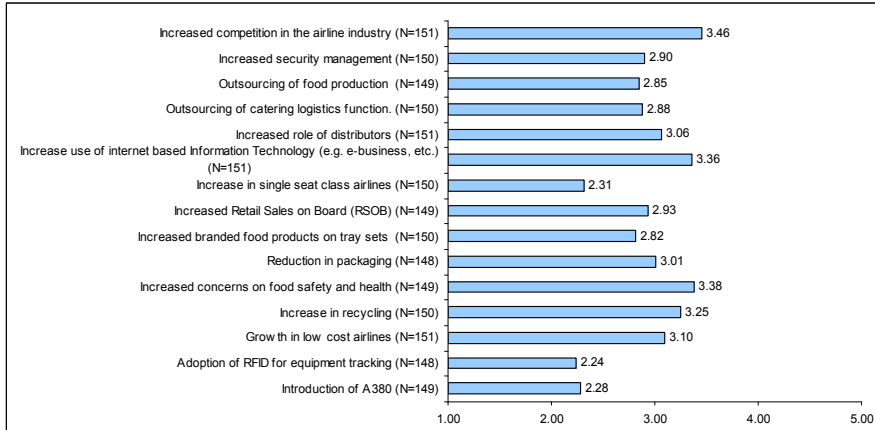


III. MAJOR INDUSTRY TRENDS

1. Level of Involvement

Overall

Figure 3.1.1 Overall Level of Involvement



By Sectors

Figure 3.1.2 Airline Level of Involvement

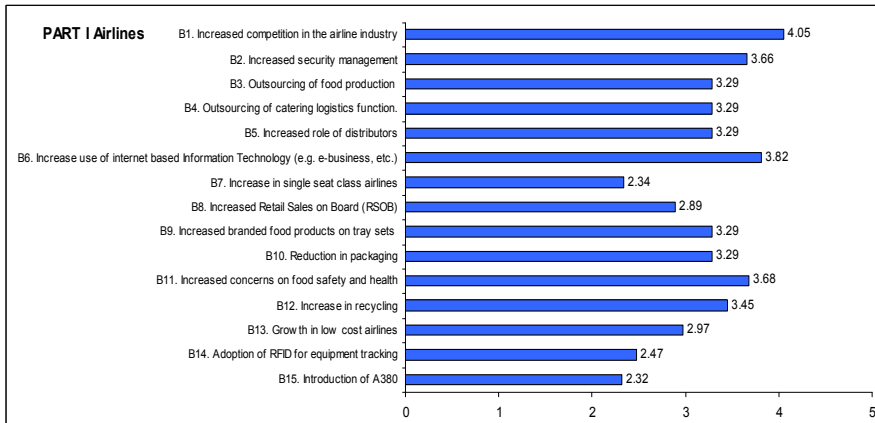


Figure 3.1.3 Caterer Level of Involvement

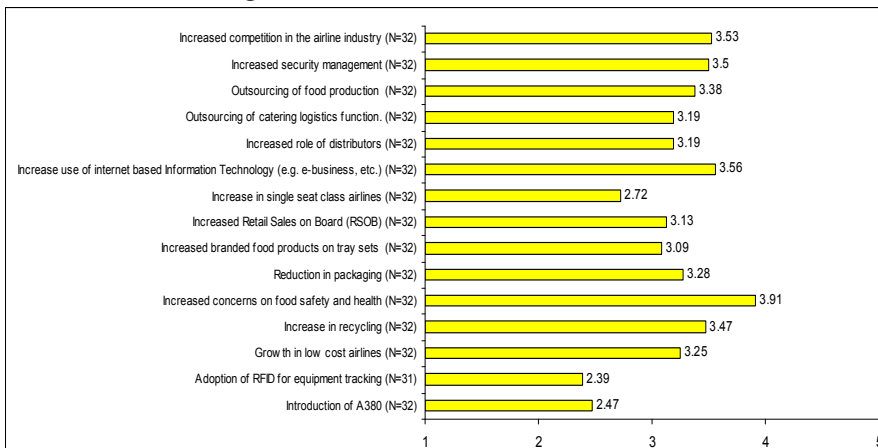


Figure 3.1.4 Food Suppliers Level of Involvement

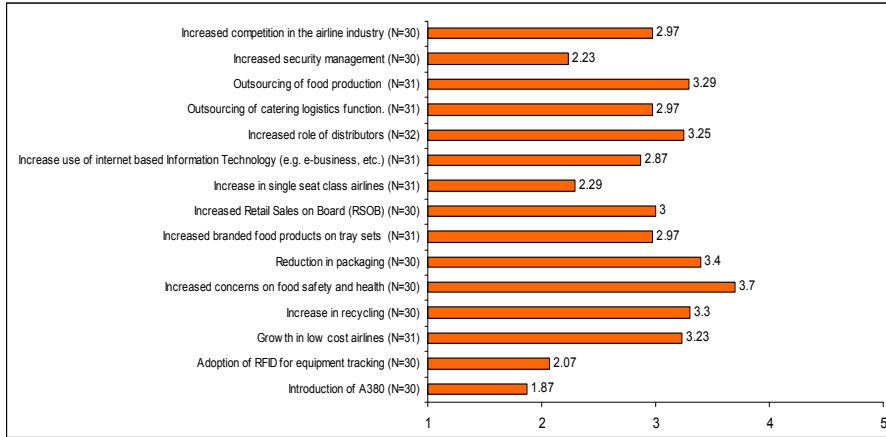
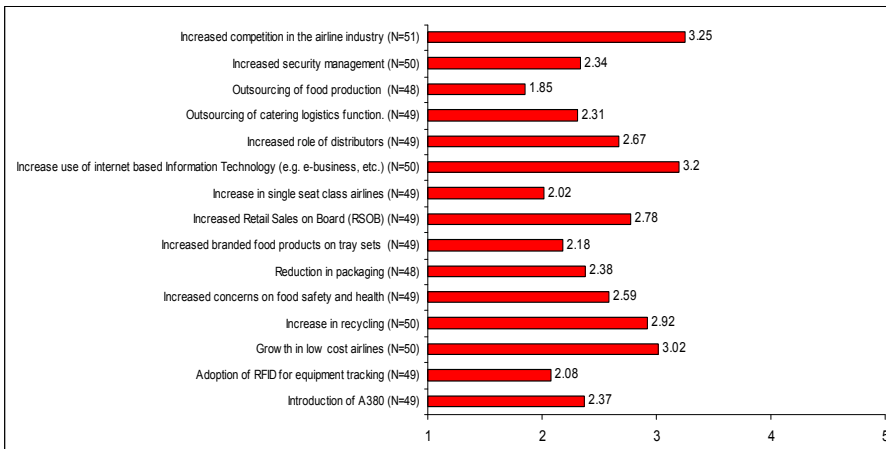


Figure 3.1.5 Non Food Suppliers Level of Involvement



By Factors (and Sectors)

Figure 3.1.6. Increased competition in the airline industry by Level of Involvement

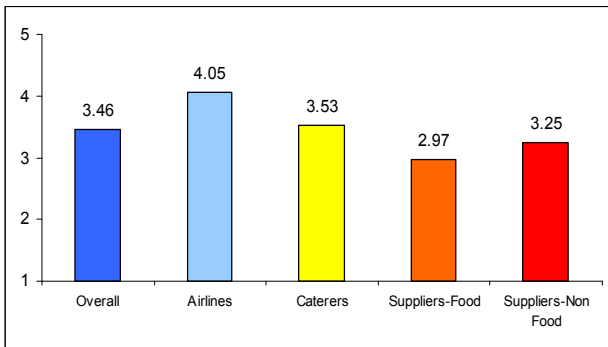


Figure 3.1.7 Increased security management by Level of Involvement

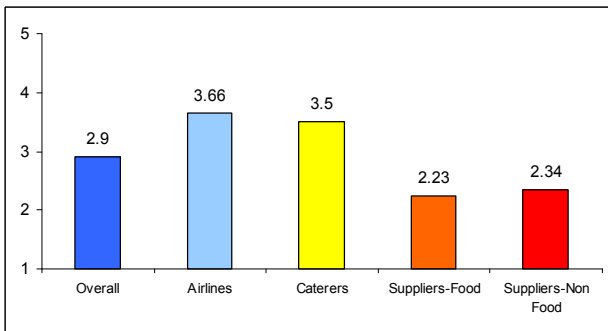


Figure 3.1.8 Outsourcing of food production by Level of Involvement

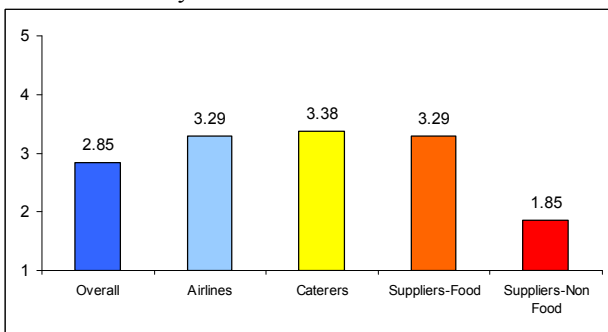


Figure 3.1.9 Outsourcing of catering logistics function by Level of Involvement

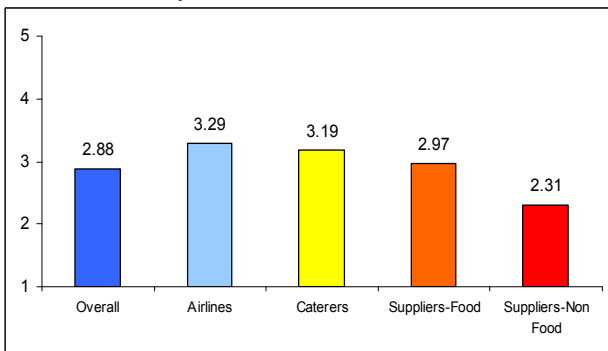


Figure 3.1.10 Increased role of distributors by Level of Involvement

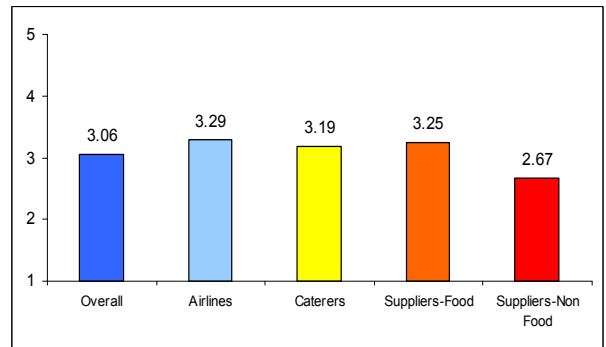


Figure 3.1.11 Increase use of internet based Information Technology by Level of Involvement

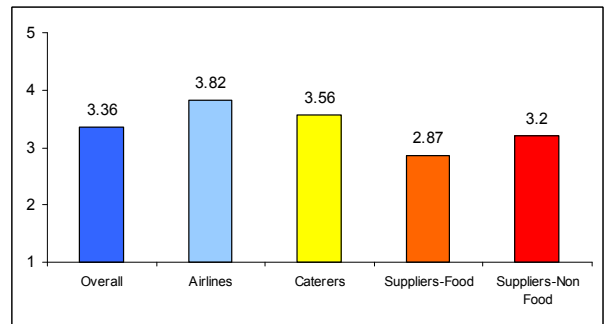


Figure 3.1.12 Increase in single seat class airlines by Level of Involvement

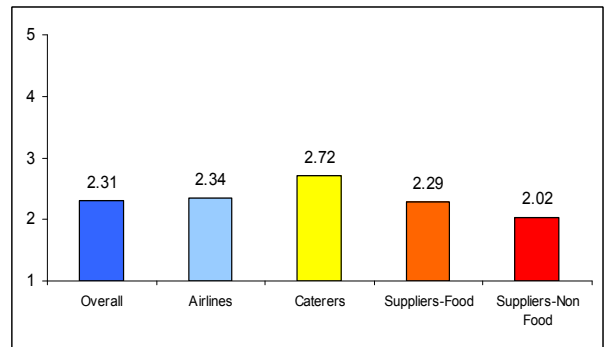


Figure 3.1.13 Increased Retail Sales on Board (RSOB) by Level of Involvement

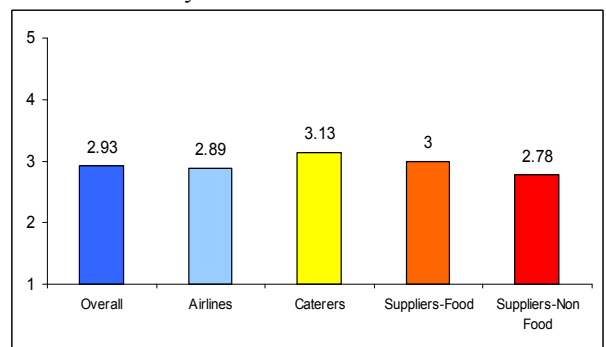


Figure 3.1.14 Increased branded food products on tray sets by Level of Involvement

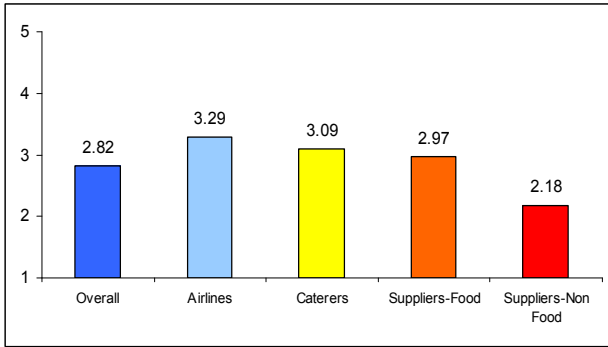


Figure 3.1.15 Reduction in packaging by Level of Involvement

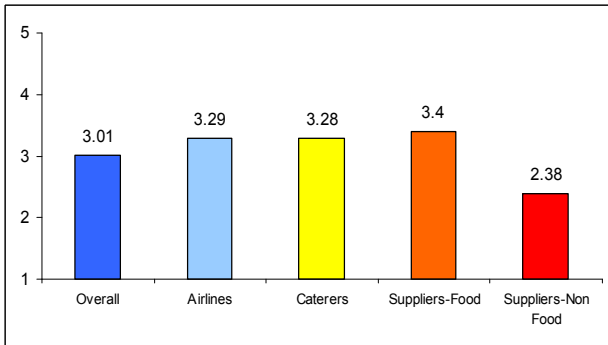


Figure 3.1.16. Increased concern on food safety and health by Level of Involvement

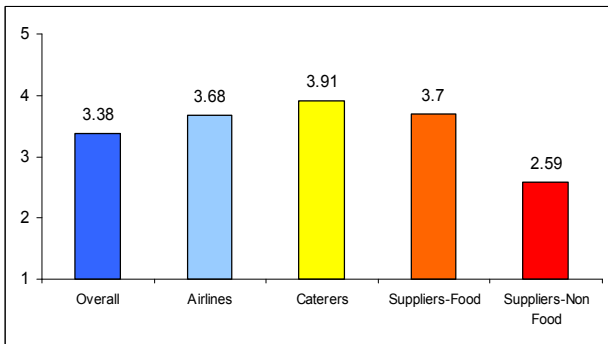


Figure 3.1.17 Increase in recycling by Level of Involvement

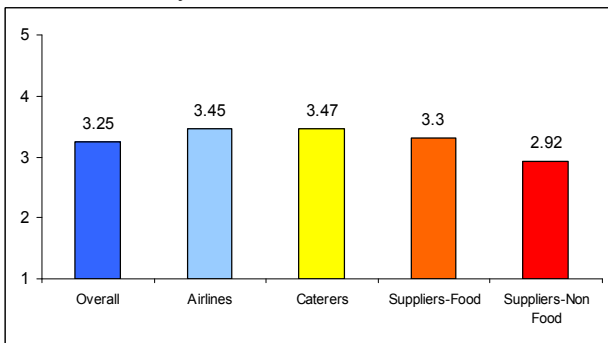


Figure 3.1.18 Growth in low cost airlines by Level of Involvement

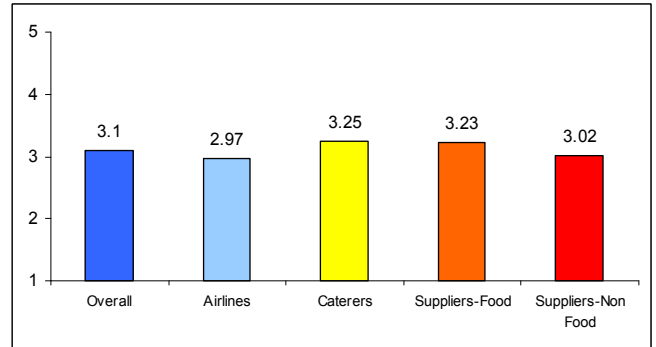


Figure 3.1.19 Adoption of RFID for equipment tracking by Level of Involvement

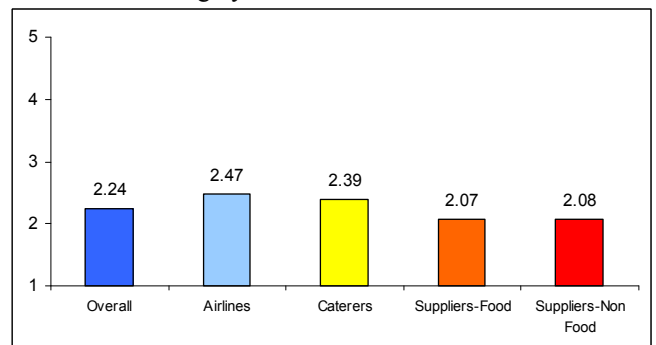
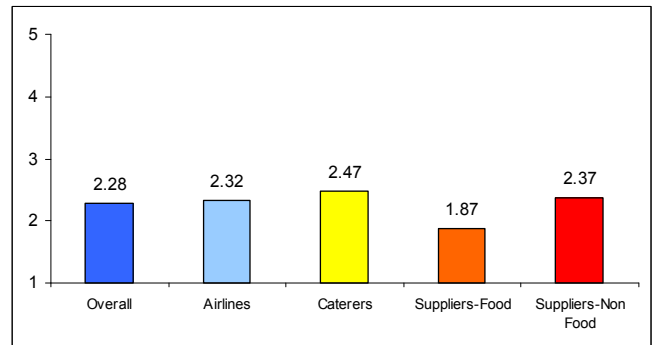


Figure 3.1.20 Introduction of A380 by Level of Involvement



By Regions

Figure 3.1.21. Asia Pacific Level of Involvement

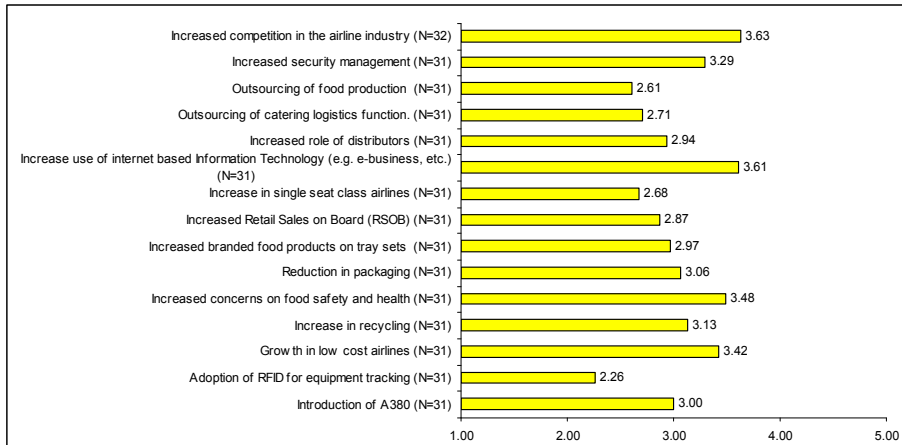


Figure 3.1.22. Europe Level of Involvement

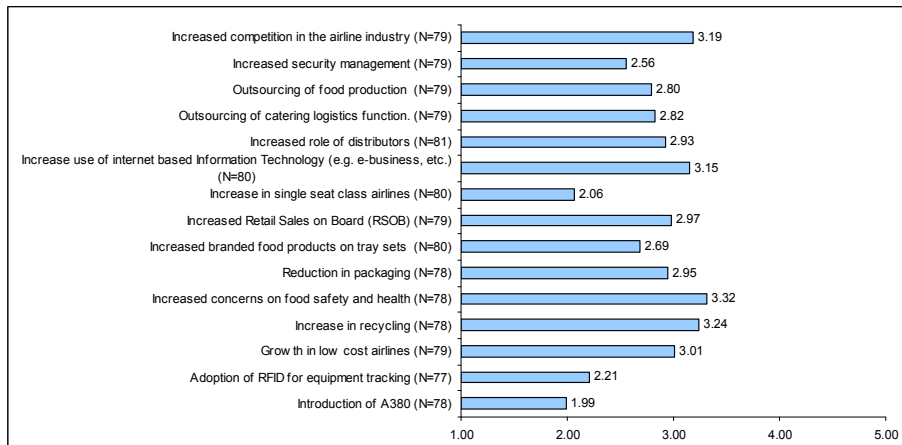


Figure 3.1.23. America Level of Involvement

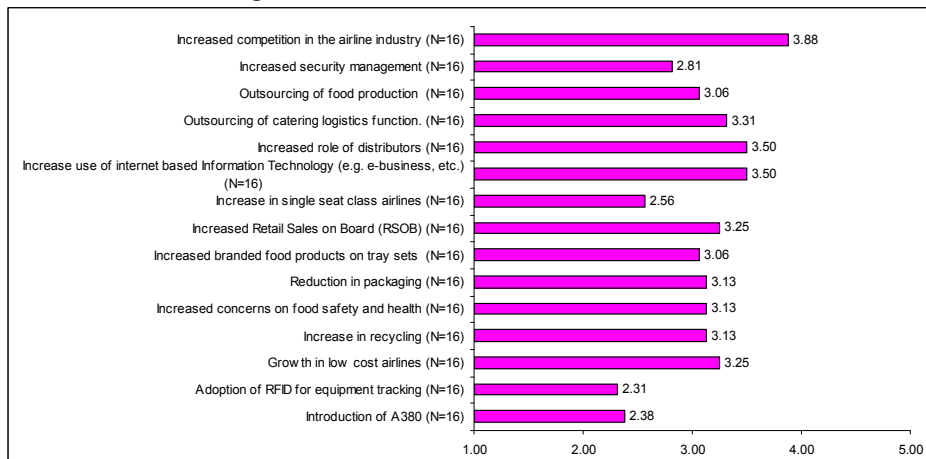
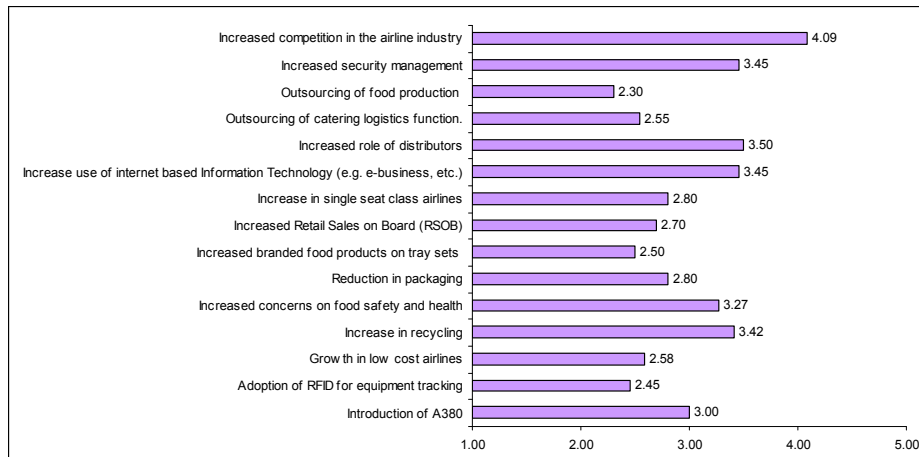


Figure 3.1.24. Middle East and Africa Level of Involvement



By Factors (and Regions)

Figure 3.1.25. Increased competition in the airline industry by Level of Involvement

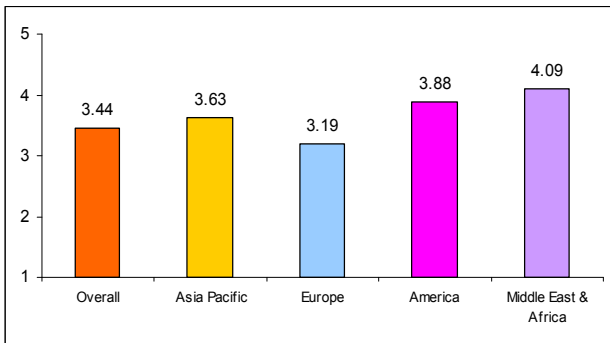


Figure 3.1.26. Increased security management by Level of Involvement

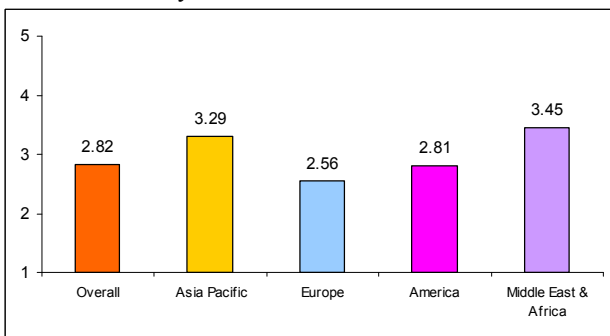


Figure 3.1.27. Outsourcing of food production by Level of Involvement

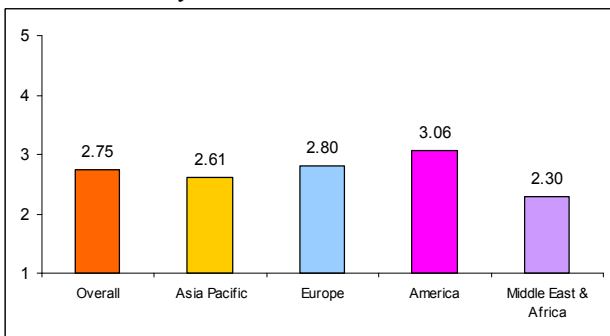


Figure 3.1.28. Outsourcing of catering logistics function by Level of Involvement

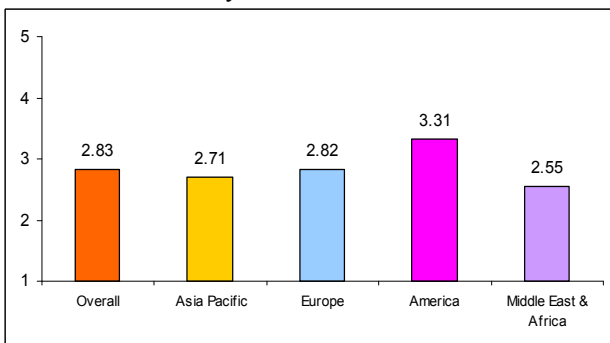


Figure 3.1.29 Increased role of distributors by Level of Involvement

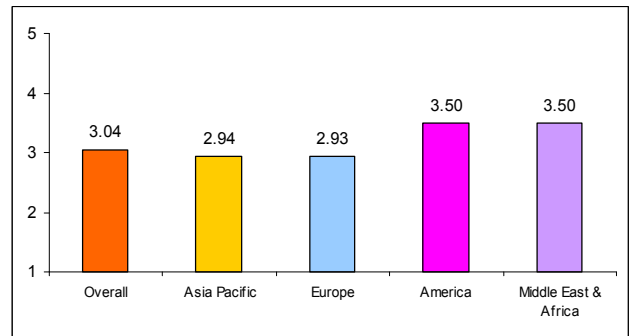


Figure 3.1.30 Increase use of internet based Information Technology by Level of Involvement

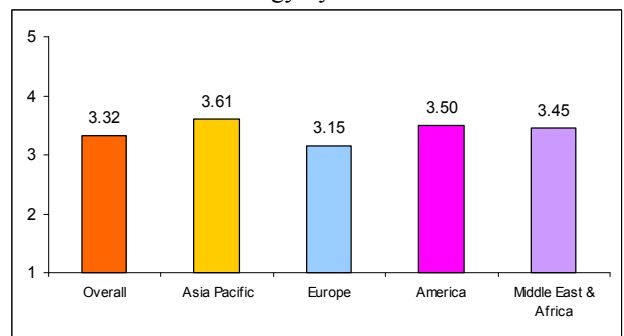


Figure 3.1.31 Increase in single seat class airlines by Level of Involvement

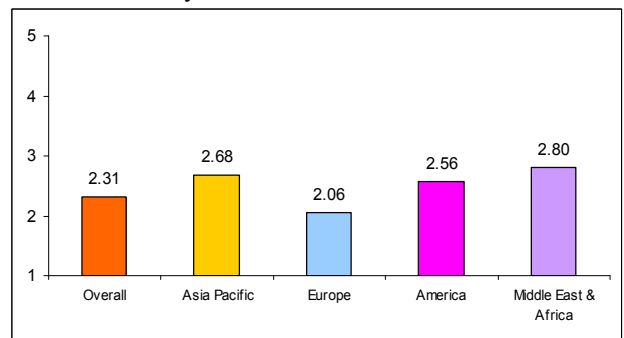


Figure 3.1.32 Increased Retail Sales on Board (RSOB) by Level of Involvement

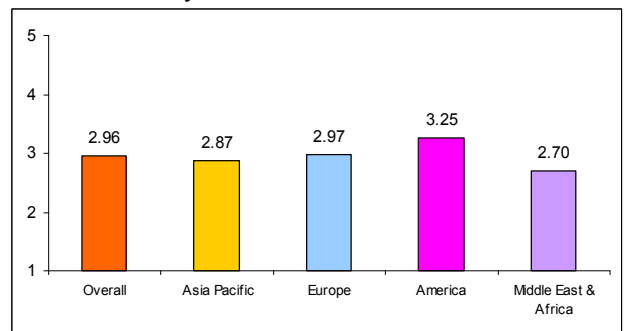


Figure 3.1.33 Increased branded food products on tray sets by Level of Involvement

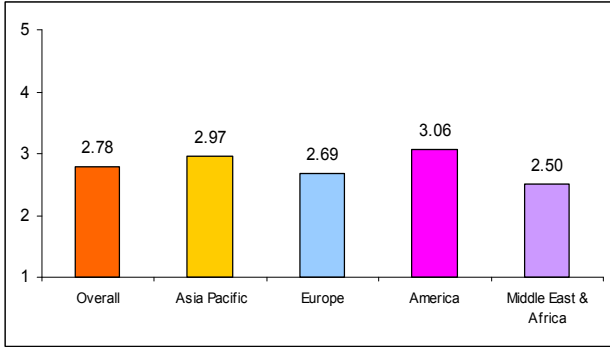


Figure 3.1.34 Reduction in packaging by Level of Involvement

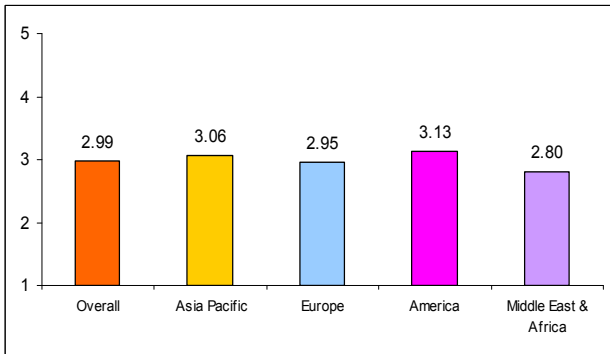


Figure 3.1.35 Increased Concern on food safety and health by Level of Involvement

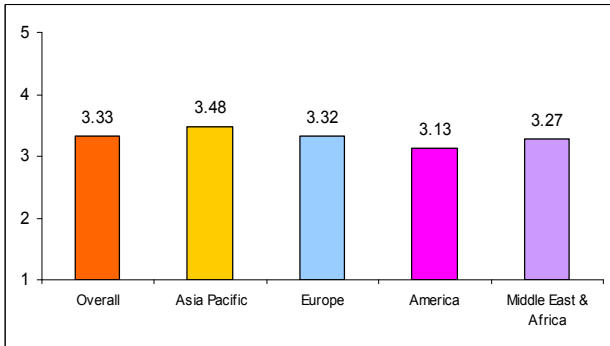


Figure 3.1.36 Increase in recycling by Level of Involvement

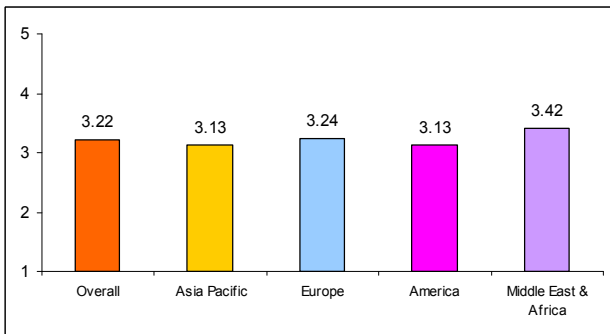


Figure 3.1.37 Growth in low cost airlines by Level of Involvement

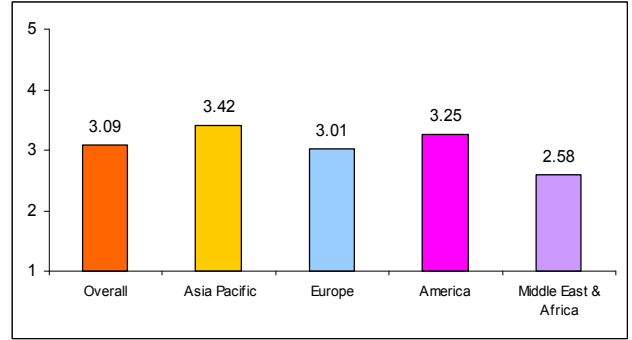


Figure 3.1.38 Adoption of RFID for equipment tracking by Level of Involvement

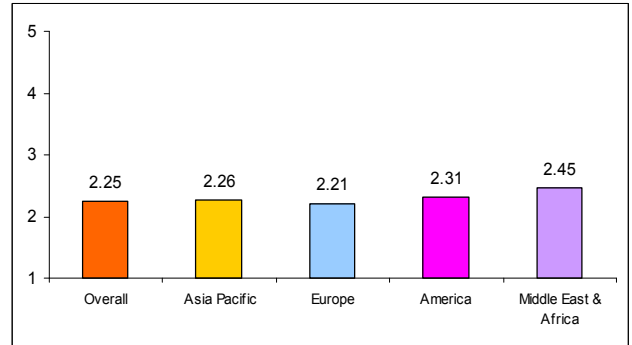
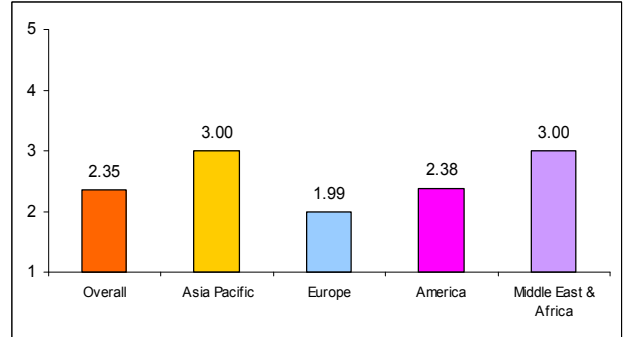


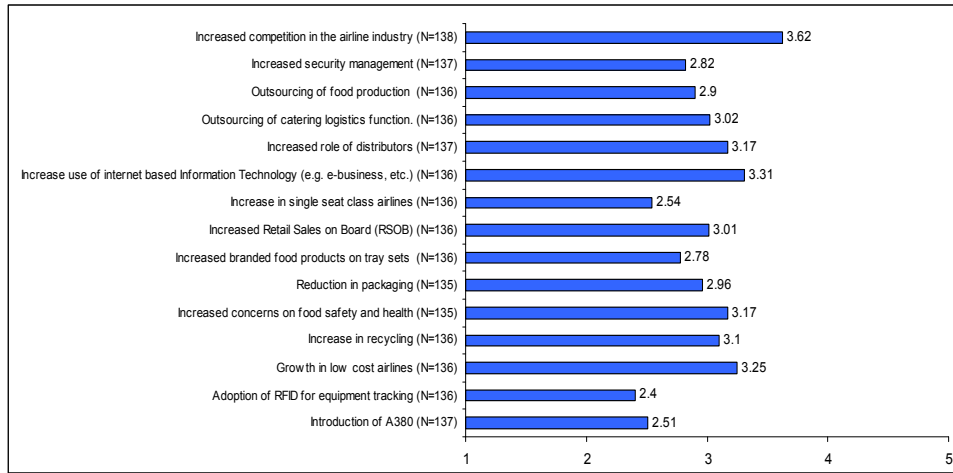
Figure 3.1.39 Introduction of A380 by Level of Involvement



2. Level of Impact

Overall

Figure 3.2.1 Overall Level of Impact



By Sectors

Figure 3.2.2 Airline Level of Impact

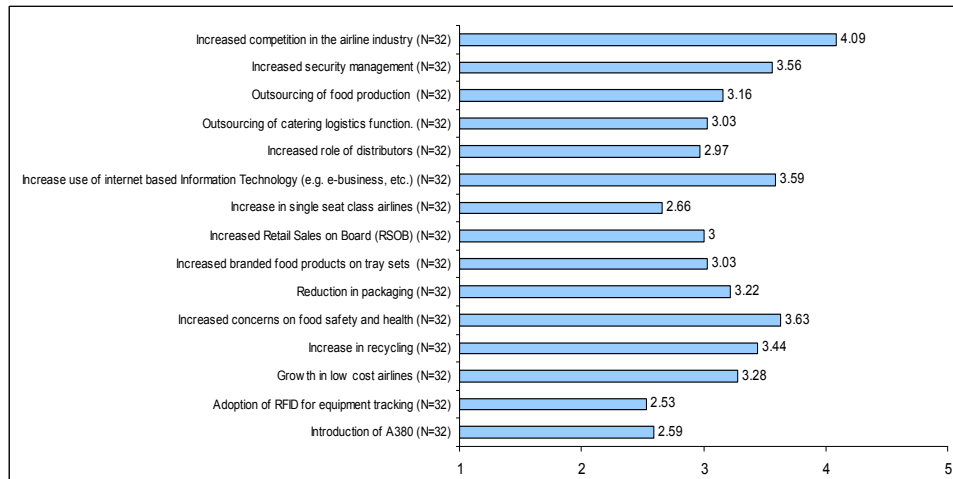


Figure 3.2.3 Caterers Level of Impact

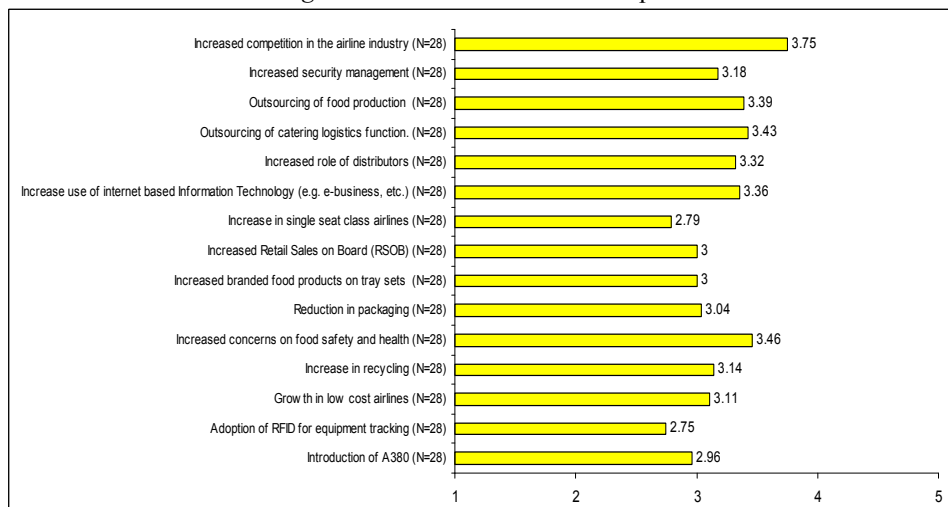


Figure 3.2.4 Food Suppliers Level of Impact

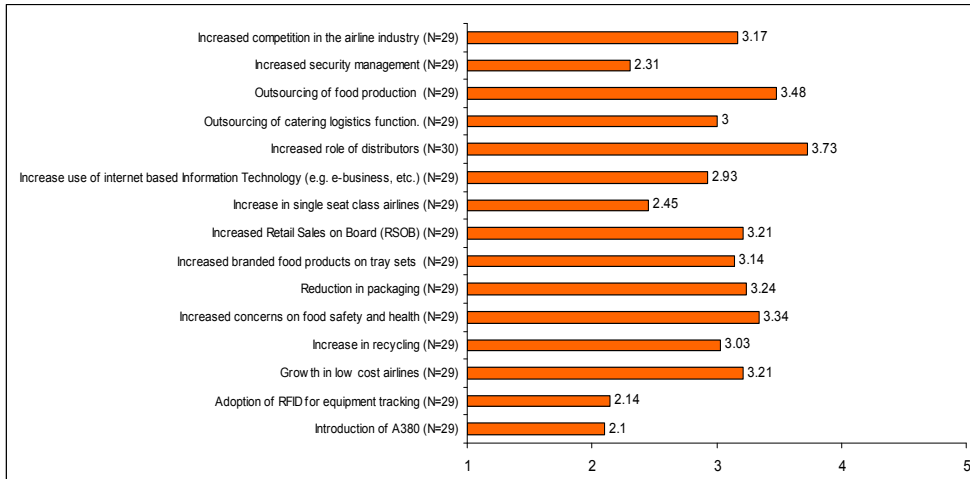
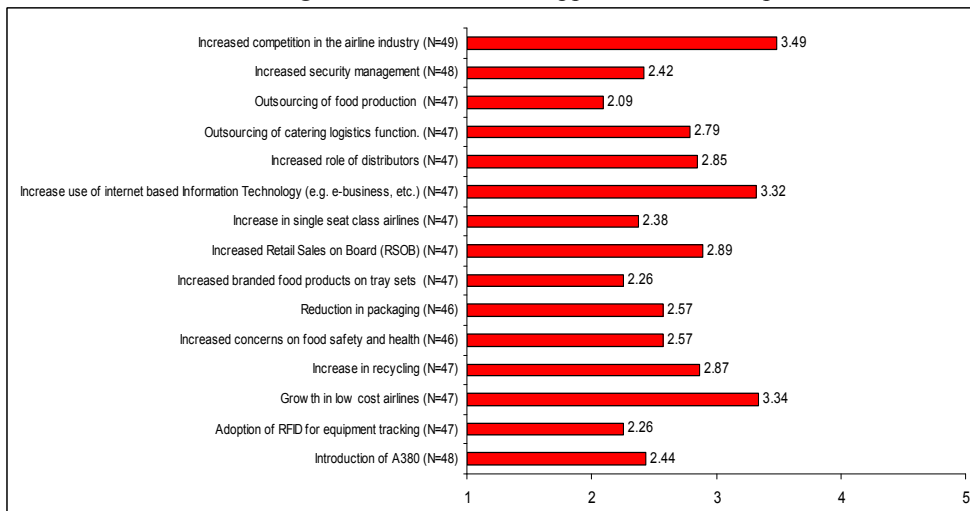


Figure 3.2.5 Non Food Suppliers Level of Impact



By Factors (and Sectors)

Figure 3.2.6 Increased competition in the airline industry by Level of Impact

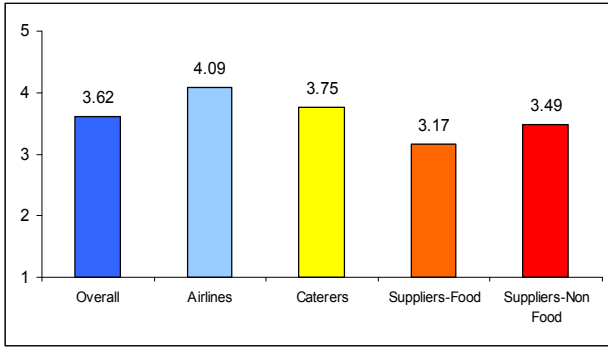


Figure 3.2.7 Increased security management by Level of Impact

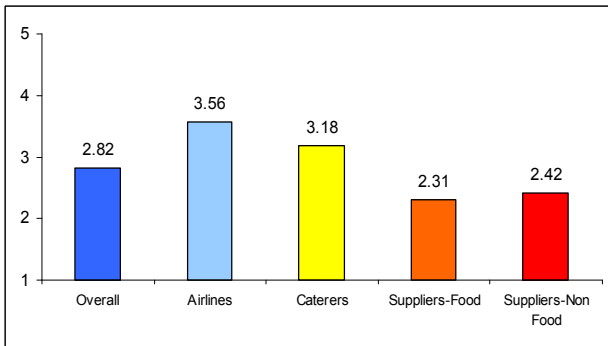


Figure 3.2.8 Outsourcing of food production by Level of Impact

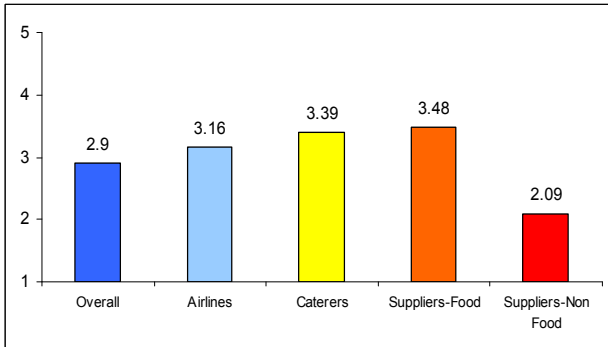


Figure 3.2.9 Outsourcing of catering logistics function by Level of Impact

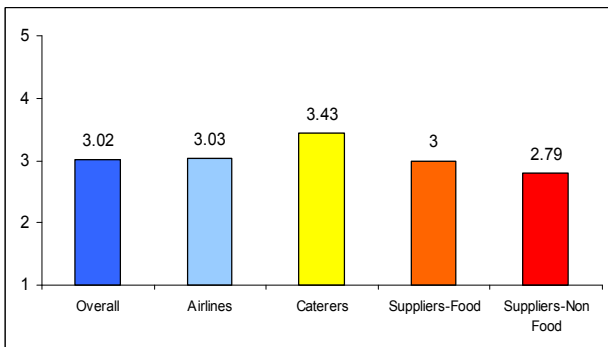


Figure 3.2.10 Increased role of distributors by Level of Impact

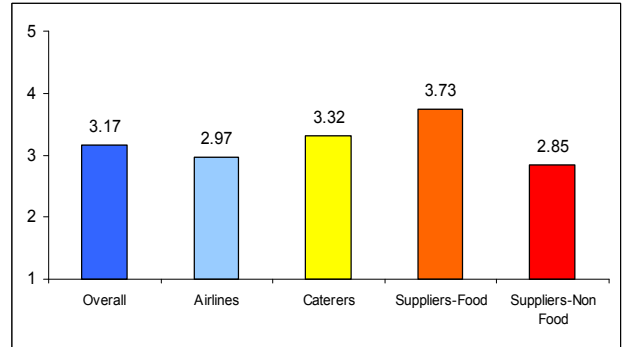


Figure 3.2.11 Increase use of internet based Information Technology by Level of Impact

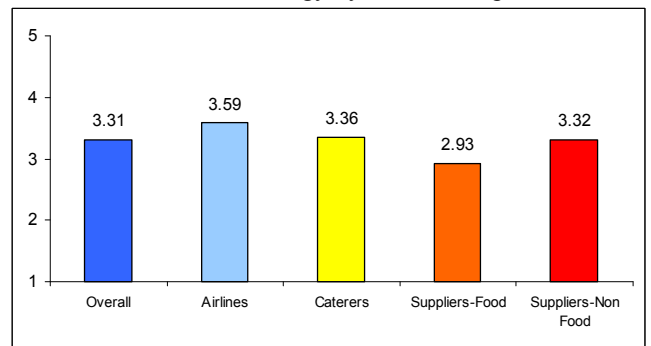


Figure 3.2.12 Increase in single seat class airlines by Level of Impact

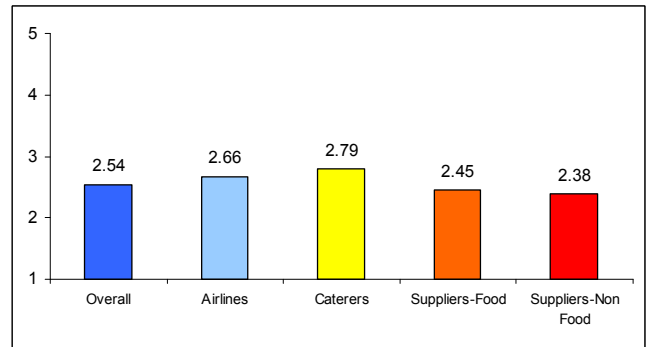


Figure 3.2.13 Increased Retail Sales on Board (RSOB) by Level of Impact

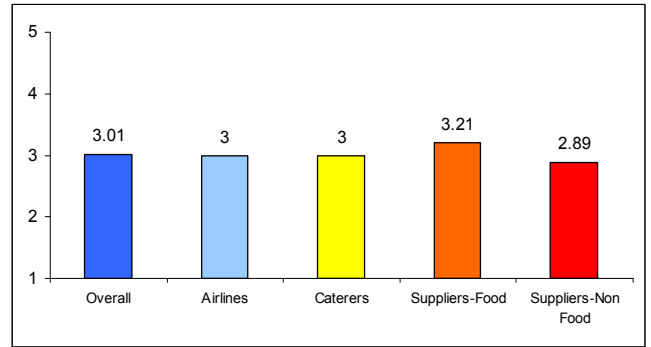


Figure 3.2.14 Increased branded food products on tray sets by Level of Impact

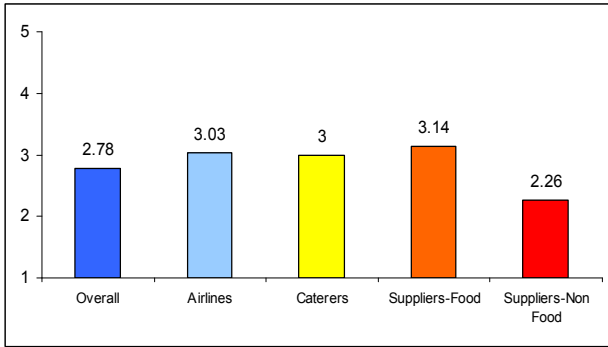


Figure 3.2.15 Reduction in packaging by Level of Impact

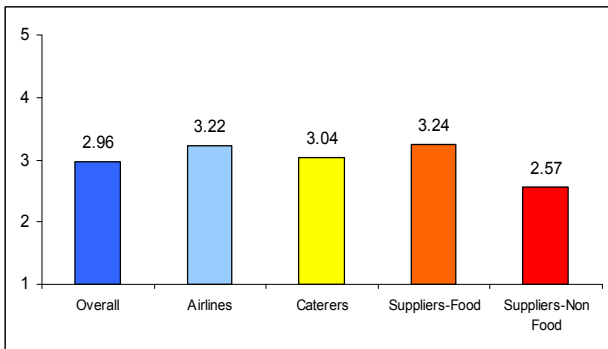


Figure 3.2.16 Increased concern on food safety and health by Level of Impact

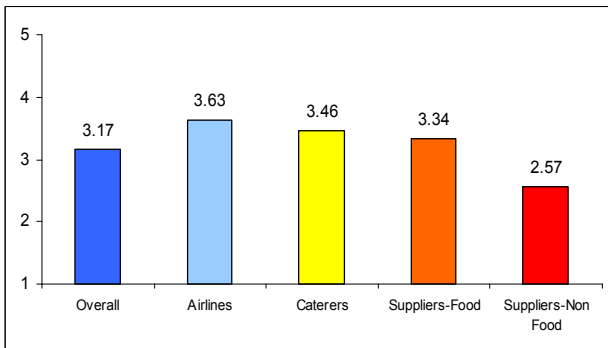


Figure 3.2.17 Increase in recycling by Level of Impact

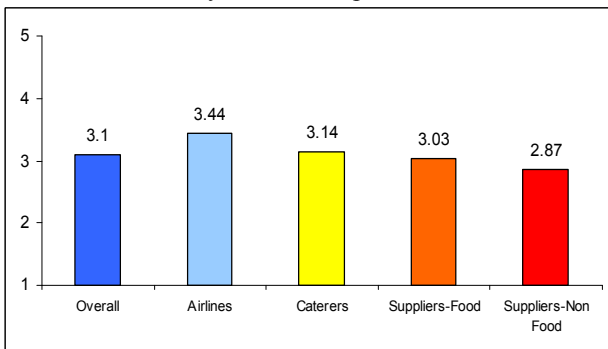


Figure 3.2.18 Growth in low cost airlines by Level of Impact

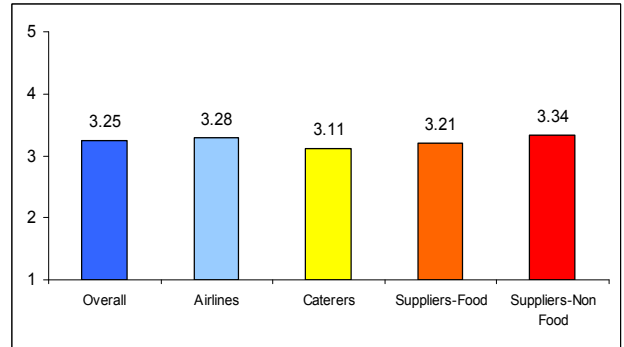


Figure 3.2.19 Adoption of RFID for equipment tracking by Level of Impact

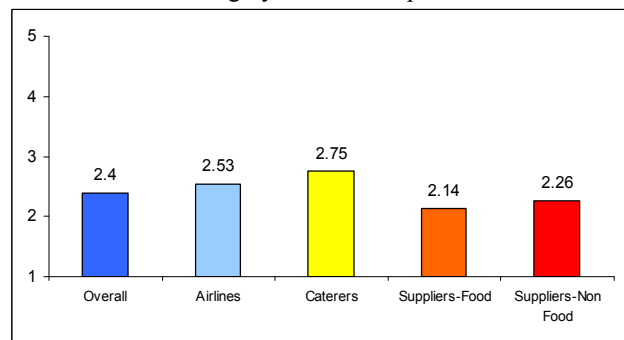
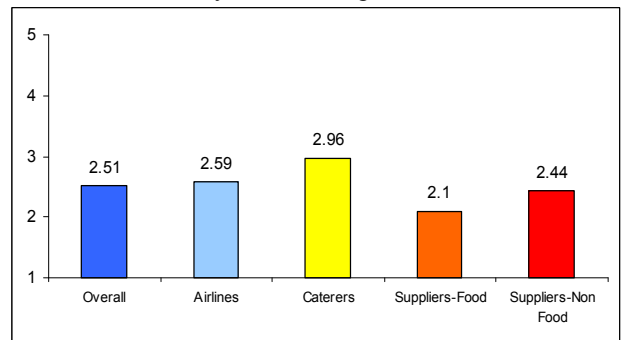


Figure 3.2.20 Introduction of A380 by Level of Impact



By Regions

Figure 3.2.21 Asia Pacific Level of Impact

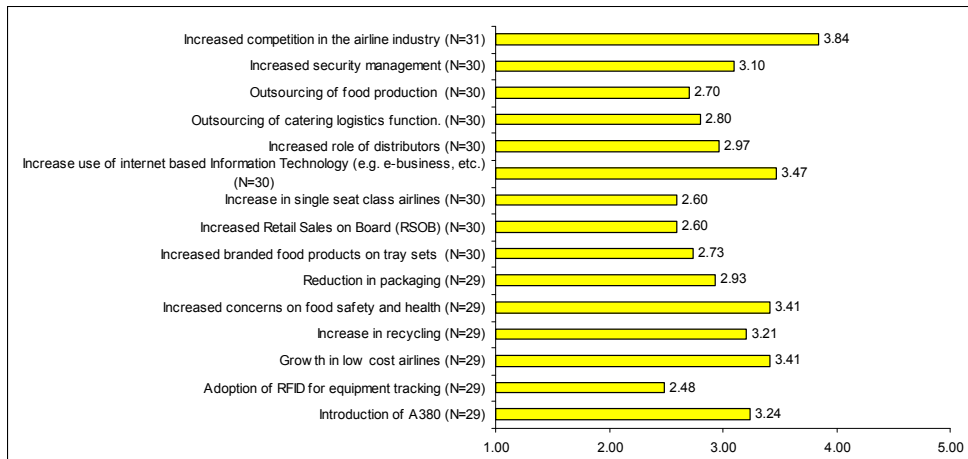


Figure 3.2.22 Europe Level of Impact

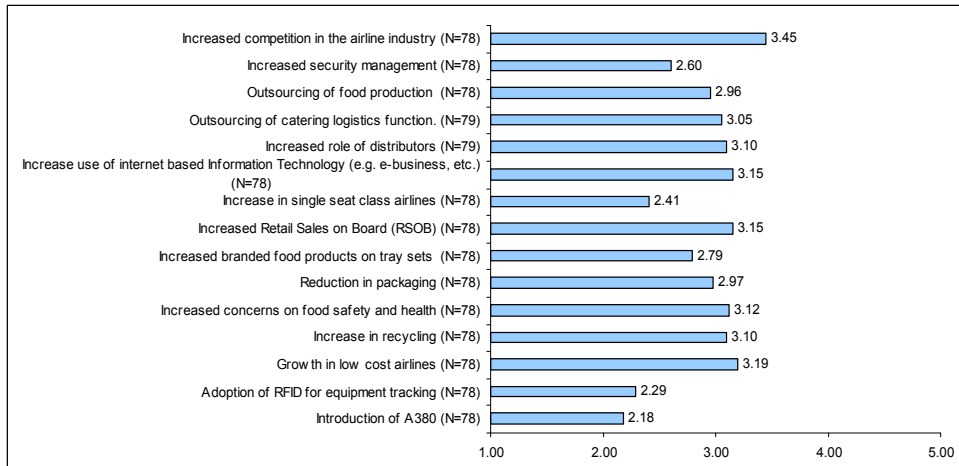


Figure 3.2.23 America Level of Impact

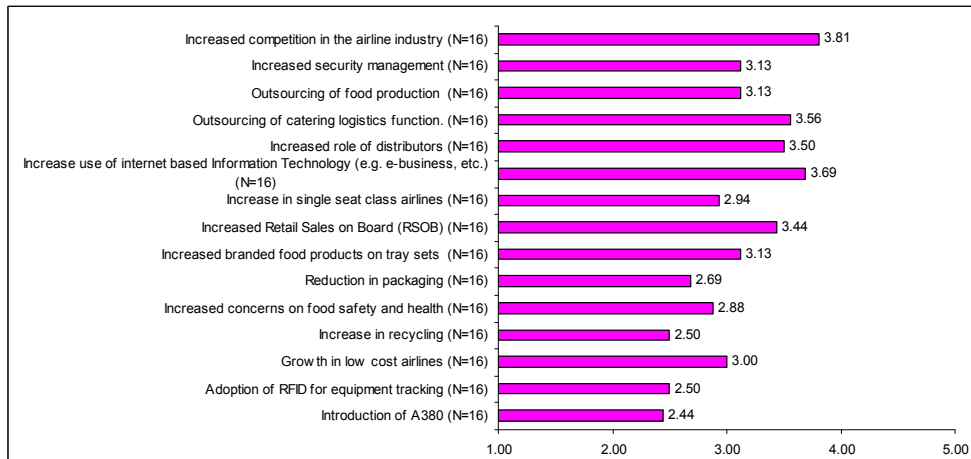
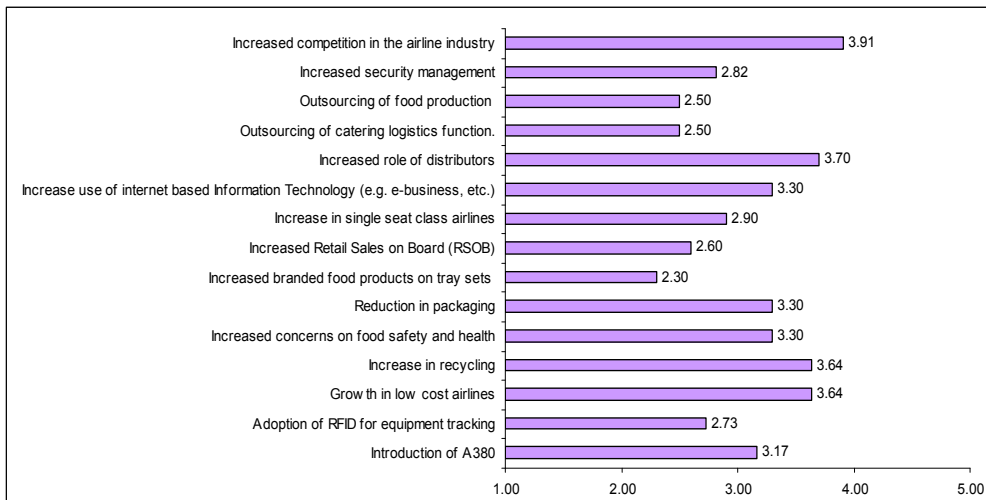


Figure 3.2.24 Middle East and Africa Level of Impact



By Factors (and Regions)

Figure 3.2.25 Increased competition in the airline industry by Level of Impact

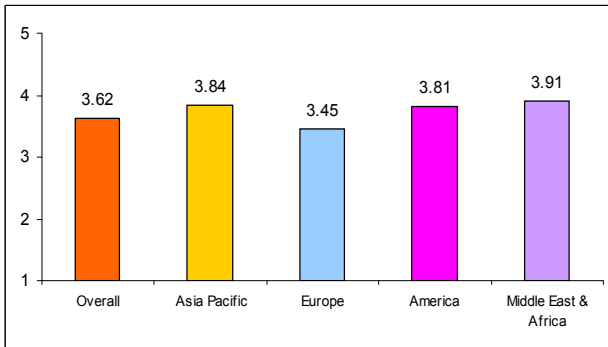


Figure 3.2.26 Increased security management by Level of Impact

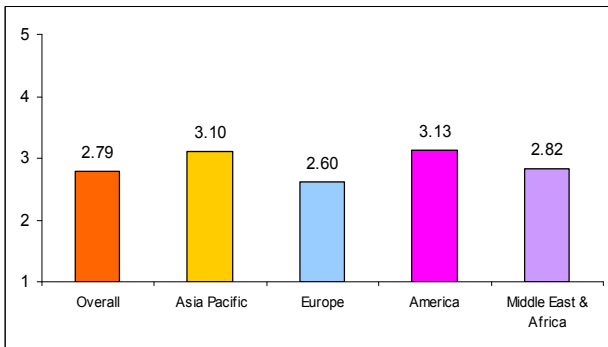


Figure 3.2.27 Outsourcing of food production by Level of Impact

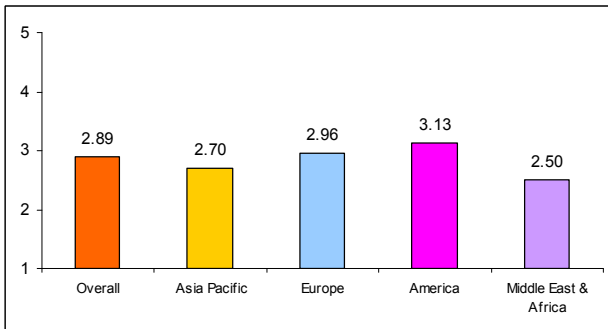


Figure 3.2.28 Outsourcing of catering logistics function by Level of Impact

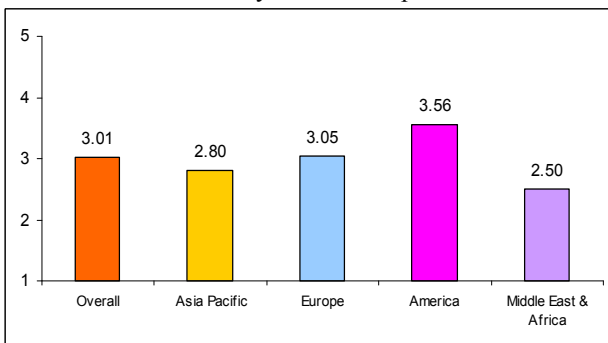


Figure 3.2.29 Increased role of distributors by Level of Impact

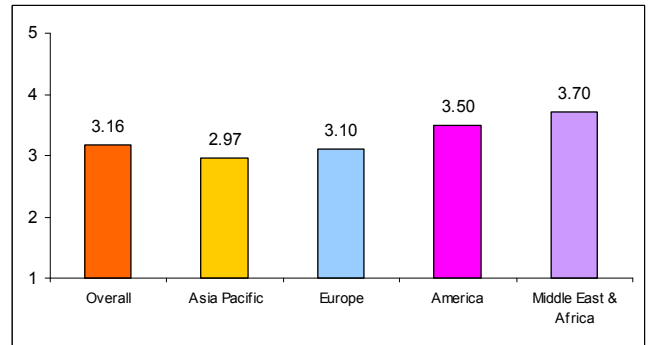


Figure 3.2.30 Increase use of internet based Information Technology by Level of Impact

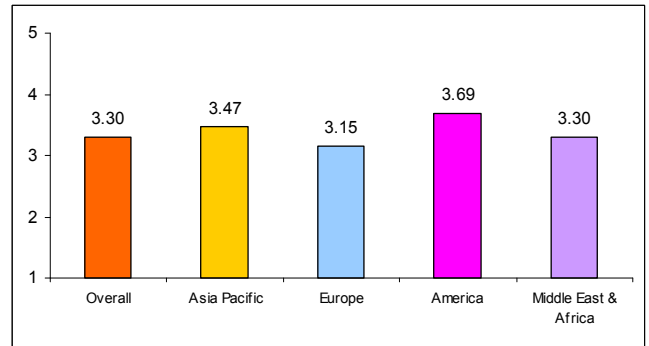


Figure 3.2.31 Increase in single seat class airlines by Level of Impact

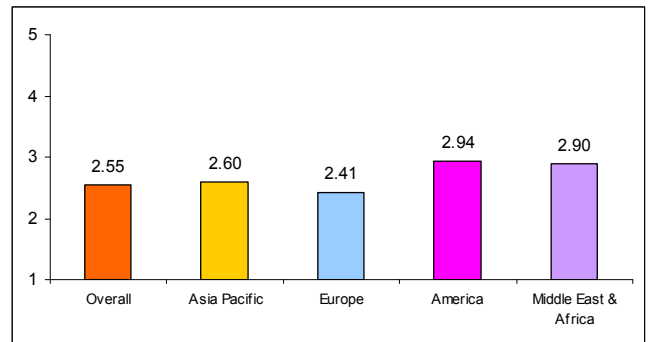


Figure 3.2.32 Increased Retail Sales on Board (RSOB) by Level of Impact

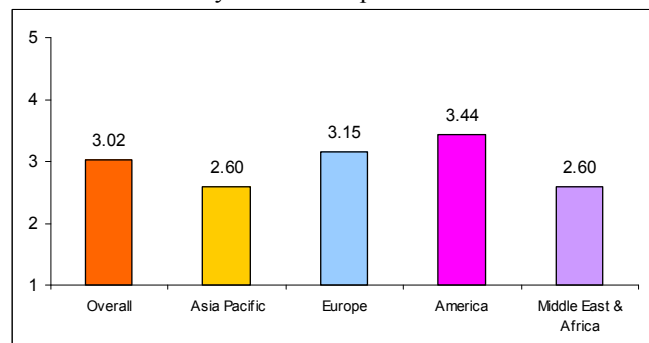


Figure 3.2.33 Increased branded food products on tray sets by Level of Impact

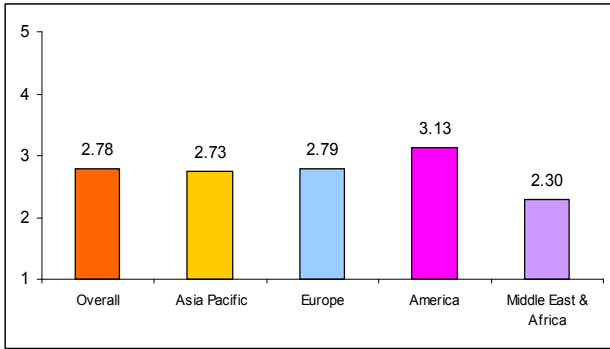


Figure 3.2.34 Reduction in packaging by Level of Impact

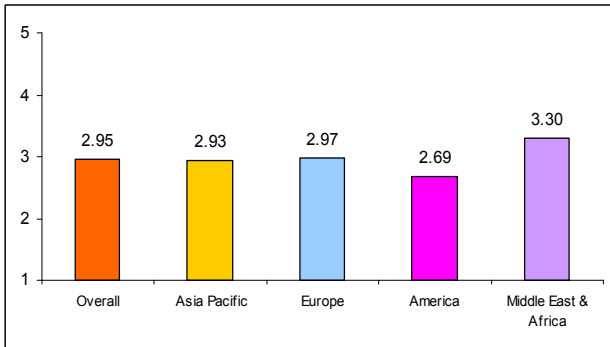


Figure 3.2.35 Increased Concern on food safety and health by Level of Impact

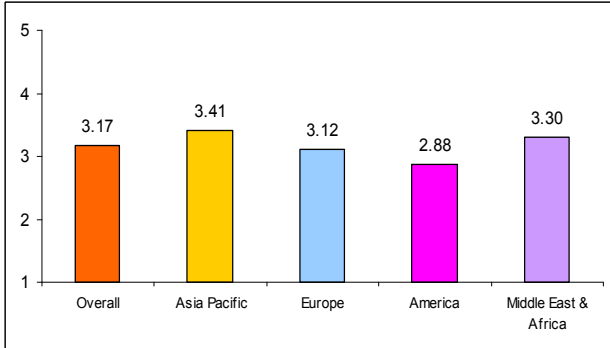


Figure 3.2.36 Increase in recycling by Level of Impact

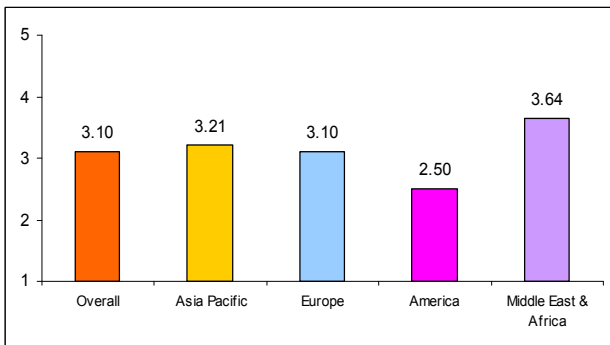


Figure 3.2.37 Growth in low cost airlines by Level of Impact

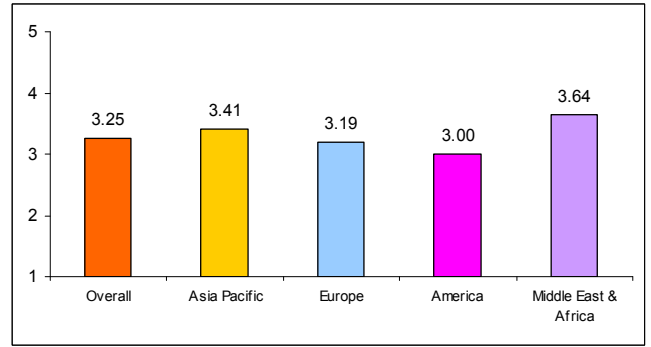


Figure 3.2.38 Adoption of RFID for equipment tracking by Level of Impact

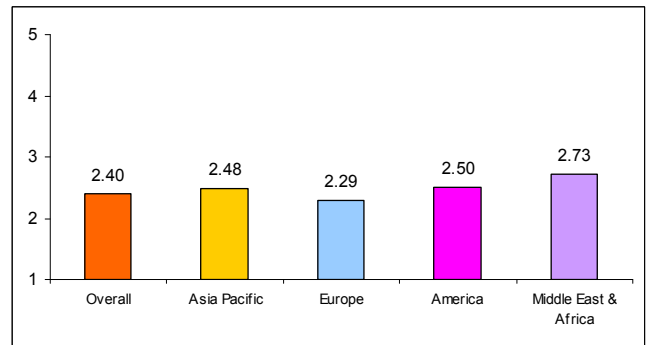
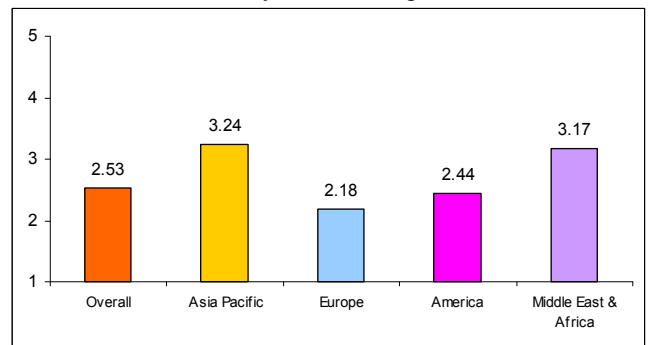


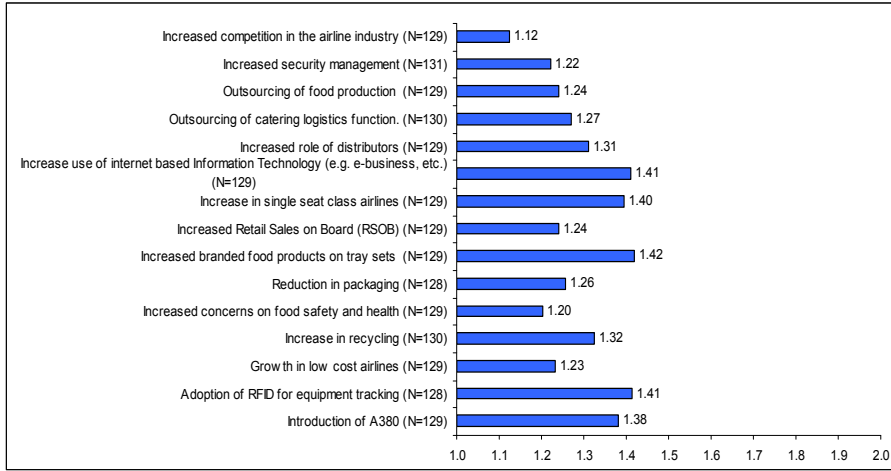
Figure 3.2.39 Introduction of A380 by Level of Impact



3. Timing of Impact

Overall

Figure 3.3.1 Overall Timing



By Sectors

Figure 3.3.2 Airlines Timing

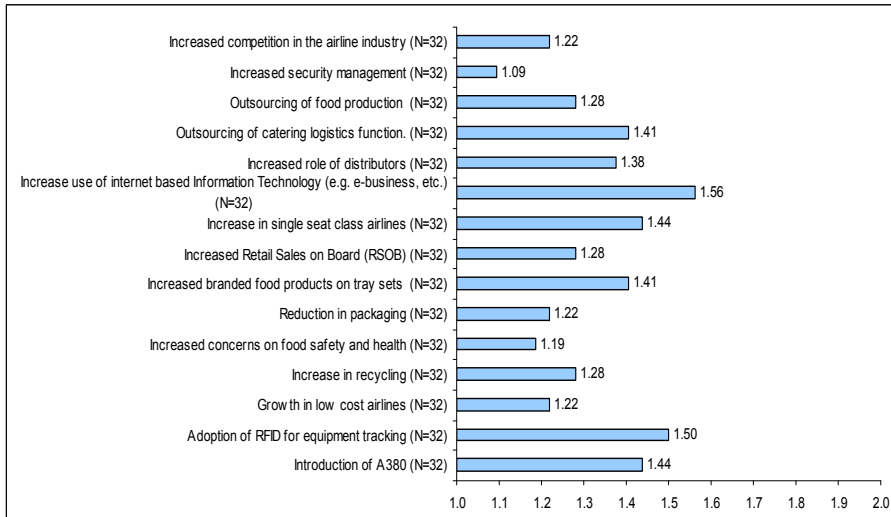


Figure 3.3.3 Caterers Timing

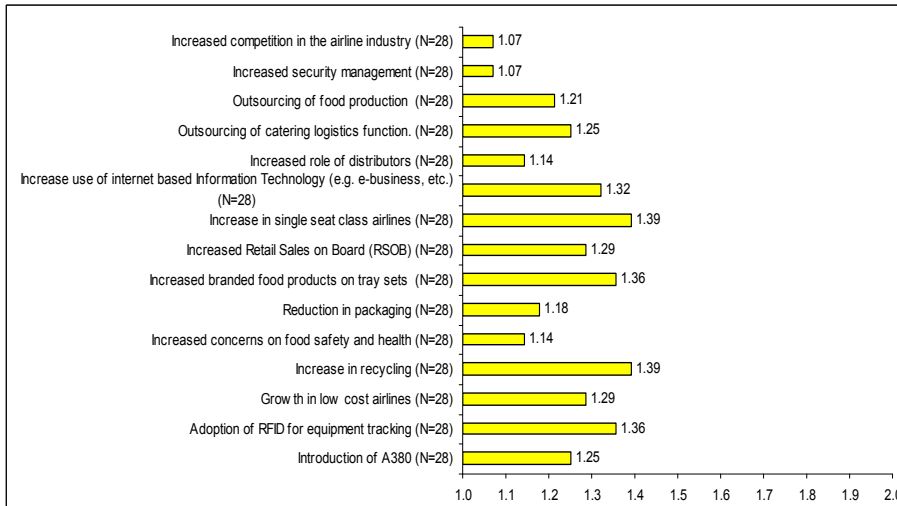


Figure 3.3.4 Food Suppliers Timing

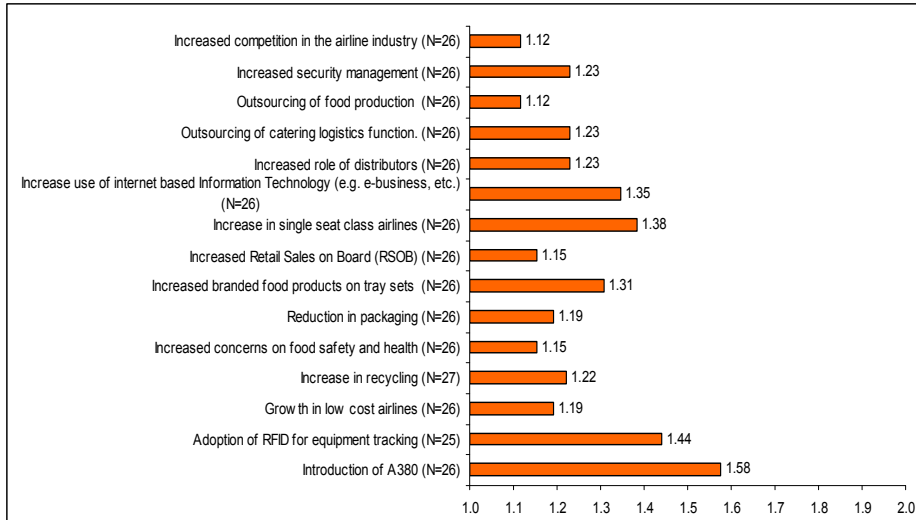
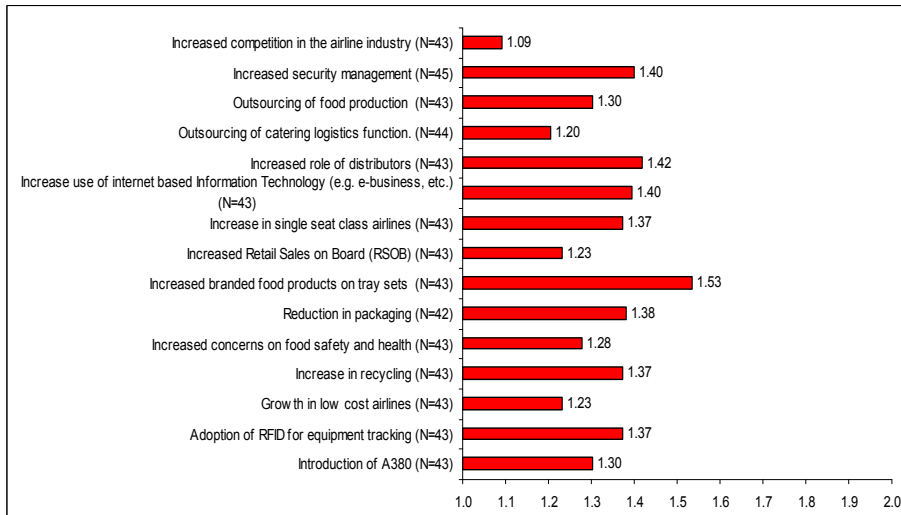


Figure 3.3.5 Non Food Suppliers Timing



By Factors (and Sectors)

Figure 3.3.6 Increased competition in the airline industry by Timing

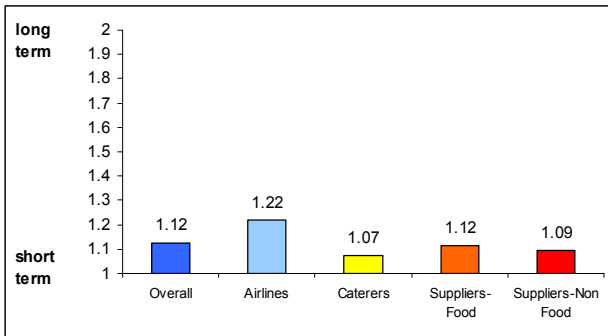


Figure 3.3.7 Increased security management by Timing

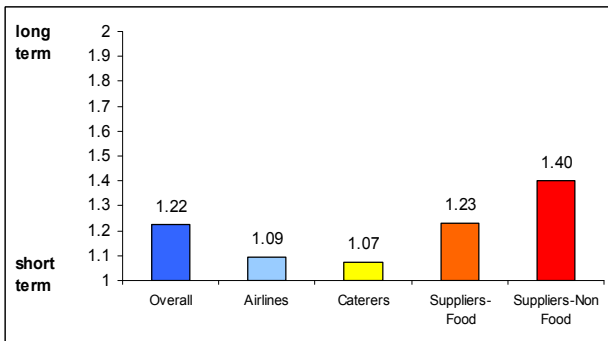


Figure 3.3.8 Outsourcing of food production by Timing

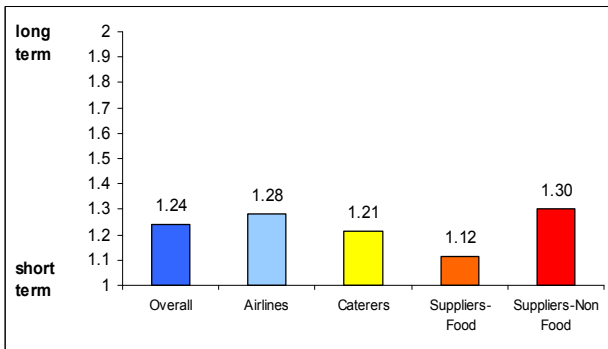


Figure 3.3.9 Outsourcing of catering logistics function by Timing

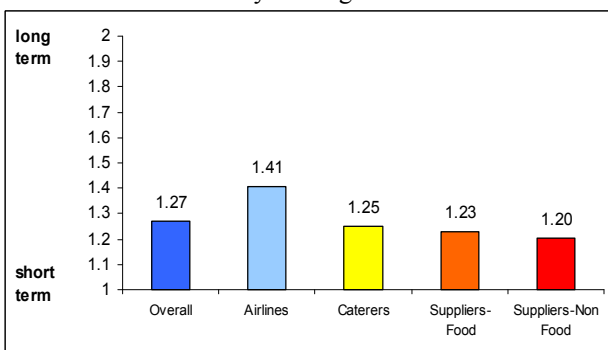


Figure 3.3.10 Increased role of distributors by Timing

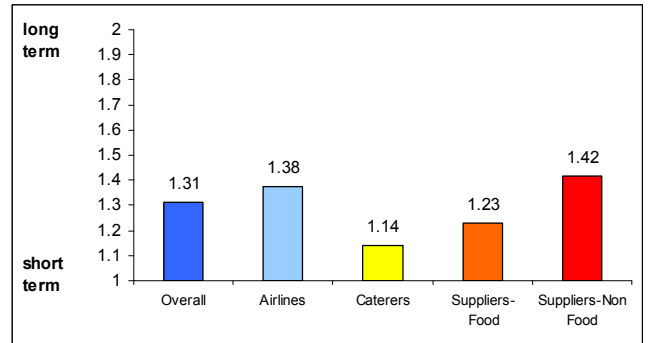


Figure 3.3.11 Increase use of internet based Information Technology by Timing

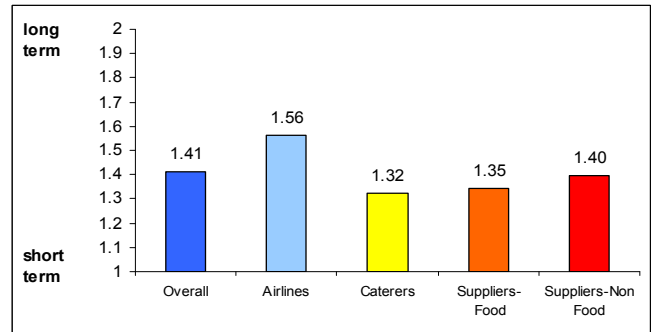


Figure 3.3.12 Increase in single seat class airlines by Timing

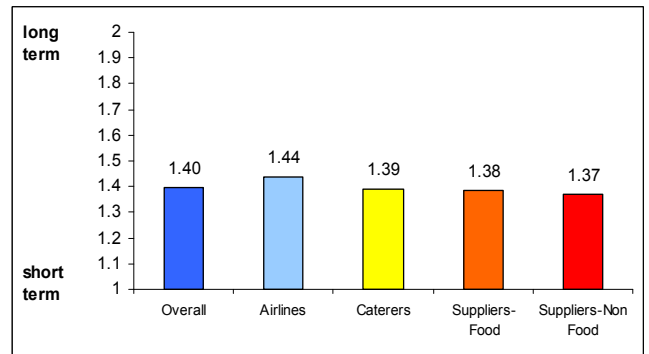


Figure 3.3.13 Increased Retail Sales on Board (RSOB) by Timing

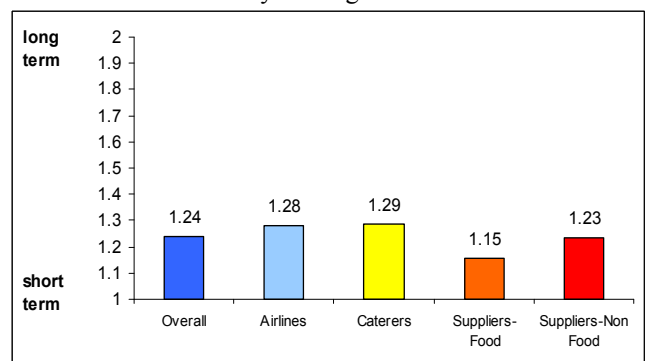


Figure 3.3.14 Increased branded food products on tray sets by Timing

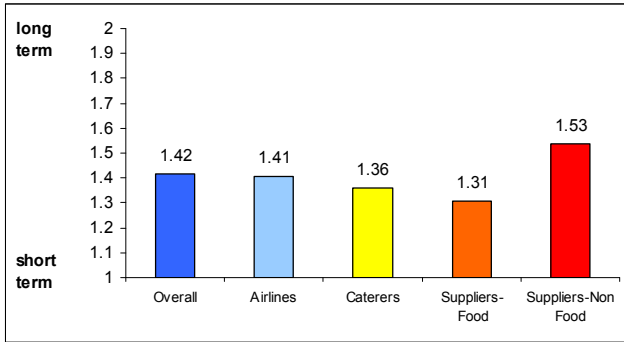


Figure 3.3.18 Growth in low cost airlines by Timing

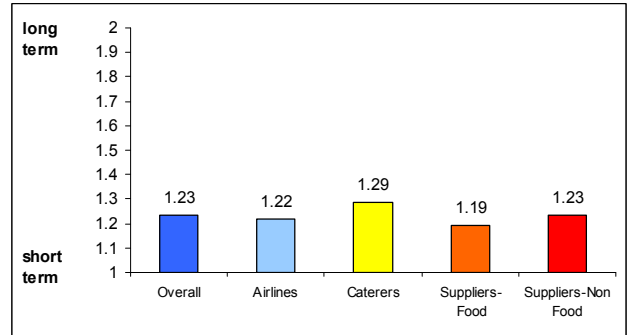


Figure 3.3.15 Reduction in packaging by Timing

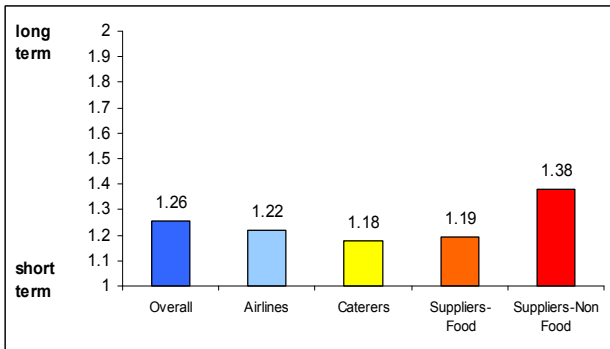


Figure 3.3.19 Adoption of RFID for equipment tracking by Timing

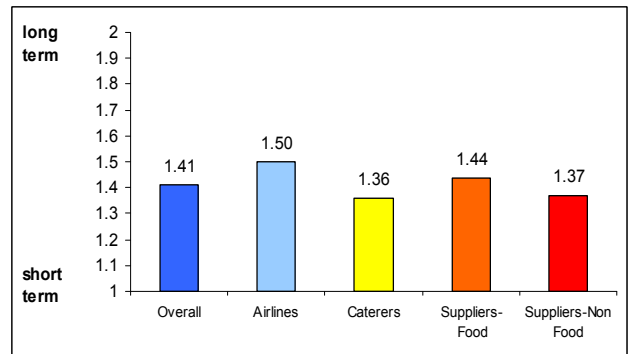


Figure 3.3.16 Increased concern on food safety and health by Timing

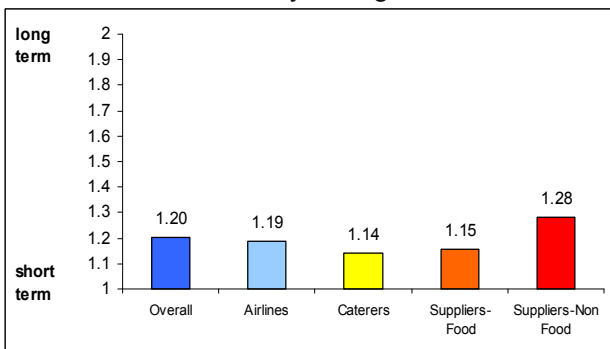


Figure 3.3.20 Introduction of A380 by Timing

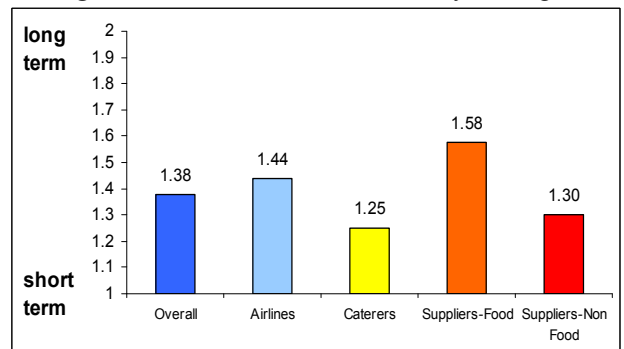
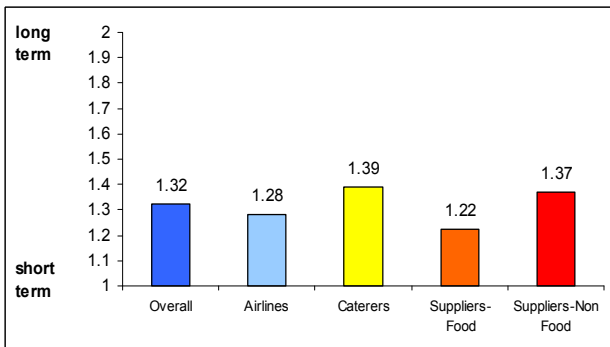


Figure 3.3.17 Increase in recycling by Timing



By Regions

Figure 3.3.21 Asia Pacific Timing

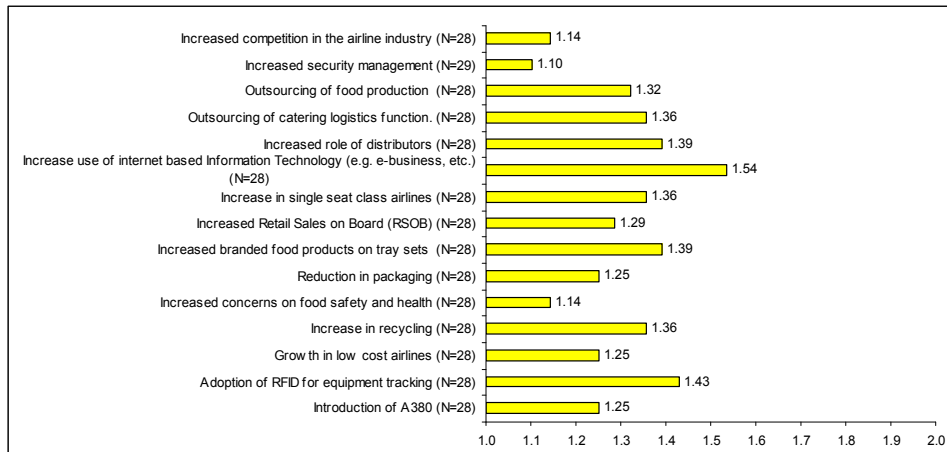


Figure 3.3.22 Europe Timing

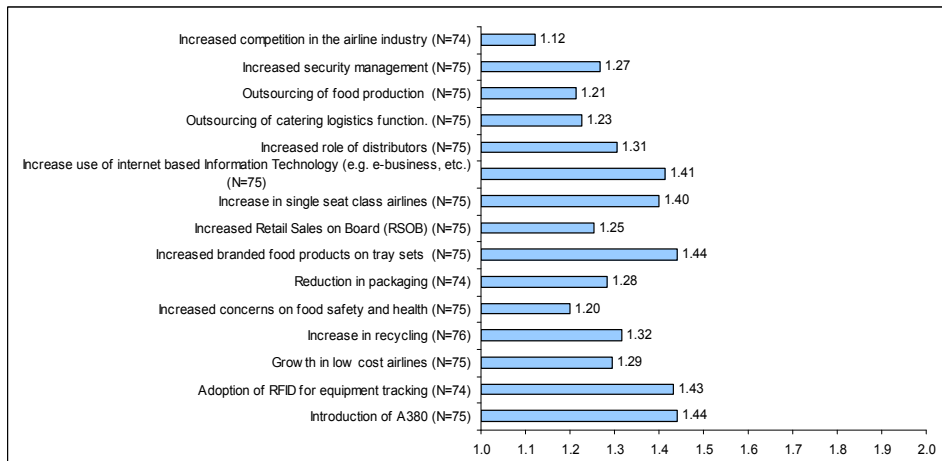


Figure 3.3.23 America Timing

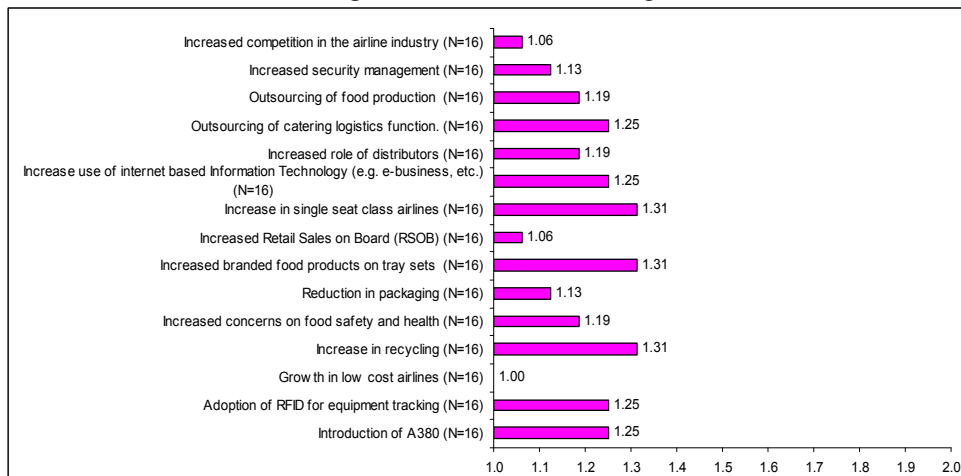
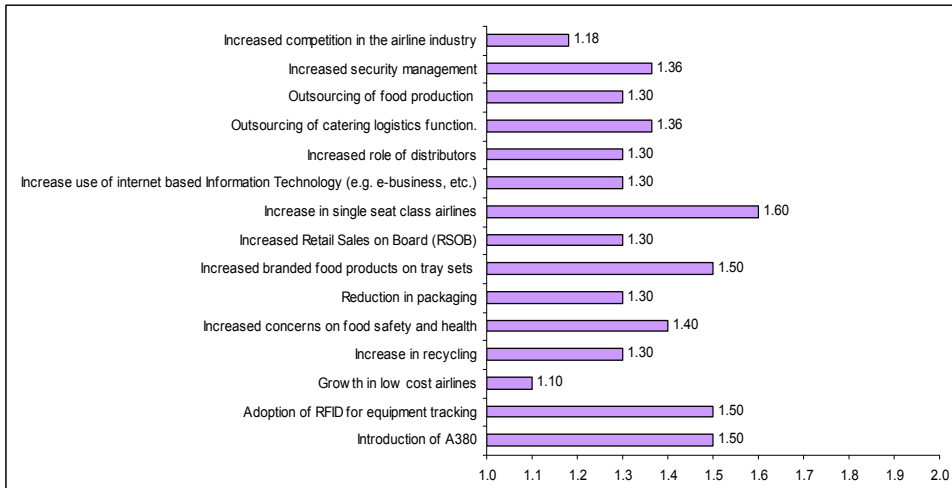


Figure 3.3.24 Middle East and Africa Timing



By Factors (and Regions)

Figure 3.3.25 Increased competition in the airline industry by Timing

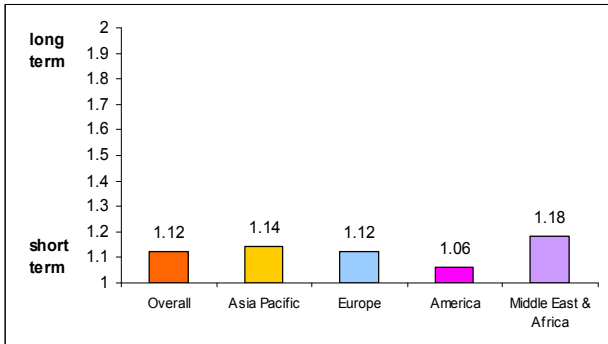


Figure 3.3.26 Increased security management by Timing

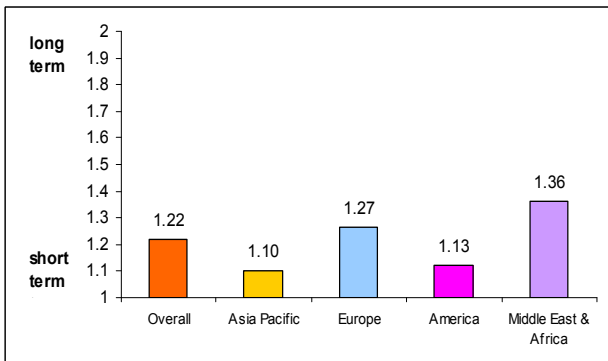


Figure 3.3.27 Outsourcing of food production by Timing

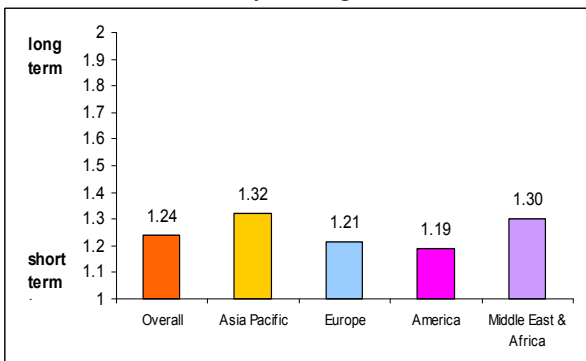


Figure 3.3.28 Outsourcing of catering logistics function by Timing

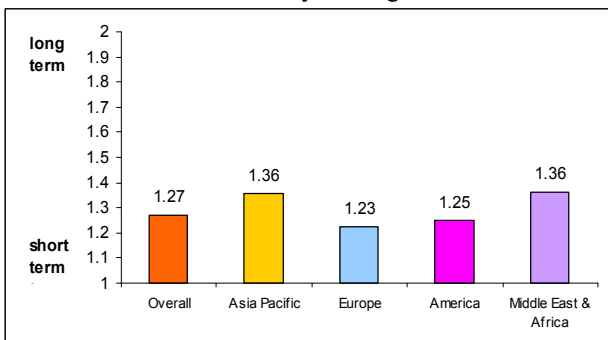


Figure 3.3.29 Increased role of distributors by Timing

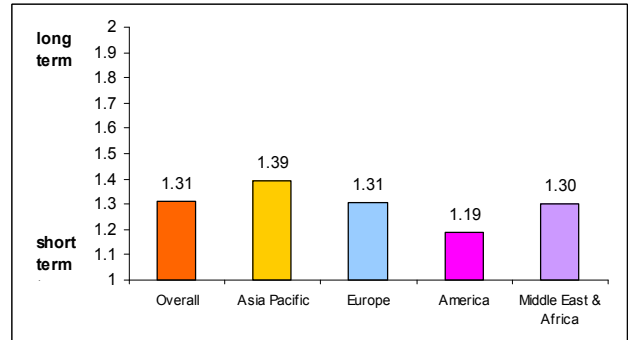


Figure 3.3.30 Increase use of internet based Information Technology by Timing

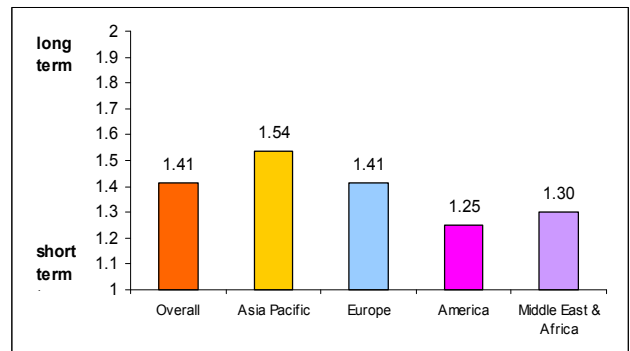


Figure 3.3.31 Increase in single seat class airlines by Timing

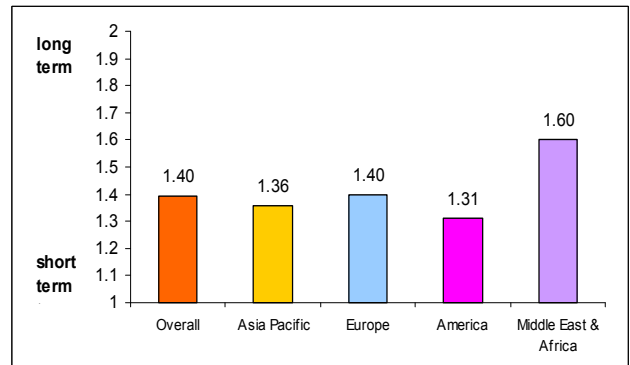


Figure 3.3.32 Increased Retail Sales on Board (RSOB) by Timing

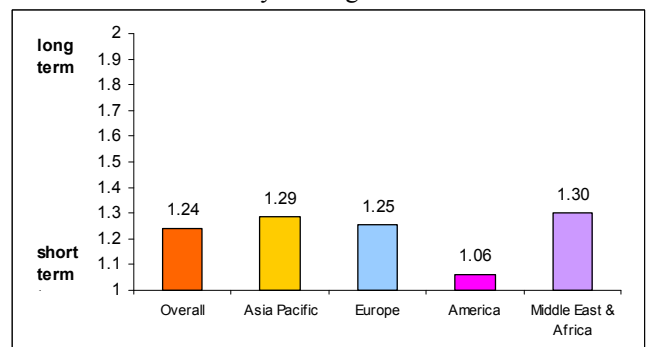


Figure 3.3.33 Increased branded food products on tray sets by Timing

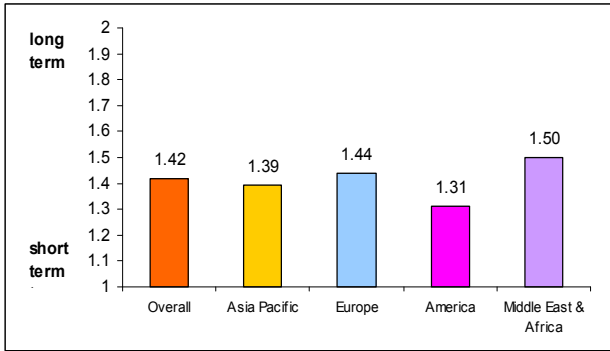


Figure 3.3.37 Growth in low cost airlines by Timing

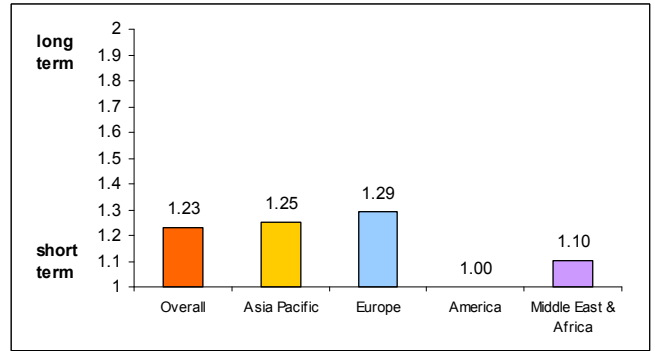


Figure 3.3.34 Reduction in packaging by Timing

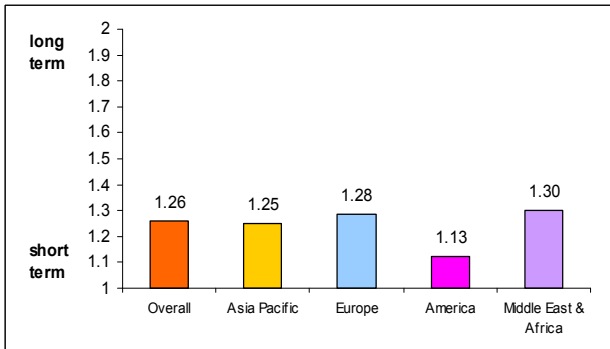


Figure 3.3.38 Adoption of RFID for equipment tracking by Timing

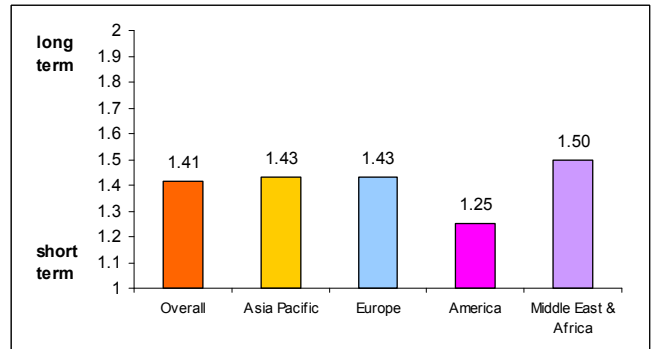


Figure 3.3.35 Increased Concern on food safety and health by Timing

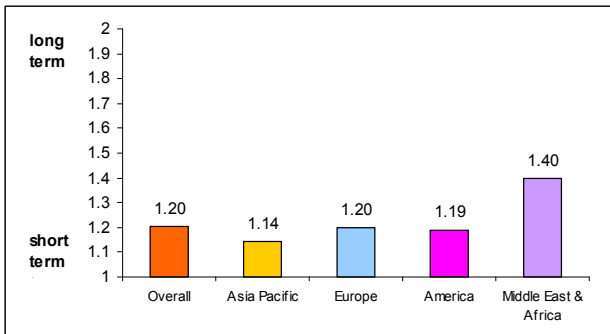


Figure 3.3.39 Introduction of A380 by Timing

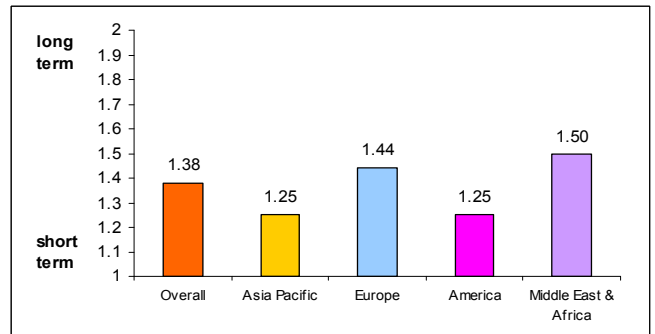


Figure 3.3.36 Increase in recycling by Timing

