



# ENTRY FORM

THE EFFIE AWARDS AOTEAROA IN ASSOCIATION WITH TVNZ – ENTRY FORM

ENTRY ID 749-B12

ENTRY TITLE Winner Winner, Chicken Dinner: KFC's Cultural Comeback

CLIENT KFC

PRODUCT BRAND

FIRST MEDIA APPEARANCE DATE 23<sup>rd</sup> January 2024

CAMPAIGN START DATE 23<sup>rd</sup> January 2024

CAMPAIGN FINISH DATE Ongoing

CATEGORY B12. – Brand Revitalisation/Transformation

## CATEGORY DESCRIPTION

This is an award for rebirth campaigns. To enter, your brand must have experienced a significant downturn in brand equity/share, followed by a period of at least six months of upturn sales. Entrants must detail the business challenge, the situation of the brand, the competitive landscape, and how the effort succeeded.

**Note:** Your entry must address the previous marketing investment and strategy as part of the entry context. Also, provide detail on the length of the re-birth.

**WORD COUNT: 2500 MAX (2,498)**

**EXECUTIVE SUMMARY [0%]**

Give the judges an understanding of the case they are about to read by providing a brief summary for each of the items below. A one-sentence summary is recommended for each line.

(Maximum: 100 words in total – not included in total word count)

The Challenge:	KFC had gone from finger-lickin' good... to a brand no longer being craved by culture.
The Insight:	Kiwis still craved the iconic taste of KFC, but the brand no longer felt fresh or worth celebrating.
The Strategic Idea/Build:	We didn't need to change the food. We needed to change the feeling and perception of KFC.
Bringing the Strategy & Idea to Life:	<ol style="list-style-type: none"> <li>1. We earned our stripes through bold cultural acts.</li> <li>2. Reminded Kiwis of their love of KFC.</li> <li>3. Reinforced reappraisal with modern-day product and value offerings.</li> </ol>
The Results:	After 3 years of stagnation, brand consideration grew; brand buzz, health, and quality all hit multi-year highs. Sales grew 3x faster than the QSR category

Why is this entry an outstanding example for effective marketing in this Effie entry category?

(Maximum 90 words – this is not included in total word count)

KFC was slipping out of Kiwi culture - unloved, uncool, and losing ground.

We didn't need to change the food, we needed to make the KFC brand relevant.

By showing up in bold, culturally contagious ways, we reminded Kiwis why they loved KFC. From trains and airlines to supper clubs and cricket giveaways, this was a full brand reawakening.

The result? A record-breaking turnaround in buzz, love, relevance, and sales - and a finger-lickin' good revival of an iconic brand.

01.

**Challenge, Context & Objectives [20%]**

This section covers your strategic business context for your marketing activity, alongside your key business challenge and objectives.

Please provide the necessary context on your industry category, competitors, and brand so the judges, including those unfamiliar with your brand/category, can evaluate your entry. Outline the degree of ambition represented by your objectives. Including historical data may be useful here to provide judges with a clear picture of the situation the brand or organisation found itself in.

01A

Before your effort began, what was the state of the brand's/organisation's business and the overall category in which it competes? What was the strategic challenge that stemmed from this business situation? Provide context on the degree of difficulty of this challenge.

### **KFC has long held a special place in New Zealand's heart.**

From Billy T James declaring “*I’ve been brought up with radio, television and Kentucky Fried Chicken,*” to Kiwis smuggling buckets across lockdown borders, it’s a brand that feels like home. Some Kiwis even describe it as more Kiwi than American.<sup>1 2</sup>

### **But after more than 50 years, the love affair was cooling.**

Sales across Restaurant Brands (KFC’s parent company) had started to slump. Net profit after tax dropped from \$32.1m in 2022 to just \$16.3m in 2023 – a 68% decline in two years. KFC, their biggest earner, was feeling the pressure.<sup>3</sup>

The drop was driven by mounting inflationary pressures across the board, alongside several contributing factors:

#### **1. The competition was heating up.**

Trendy new fried chicken joints were popping up fast. TikTok sensation NeNe Chicken arrived from South Korea. Texas Chicken announced 20 new stores.<sup>4 5</sup>

Add to that the arrival of Popeyes (a gold Effie winner last year), and it was clear the chicken wars were escalating fast.

Meanwhile, McDonald’s held nearly double KFC’s share, leading the \$4.2B market at 25.6% and winning hearts through pop culture hits like Monopoly and Pokémon.<sup>6</sup>

#### **2. The brand had gone quiet.**

In a category that thrives on newness and novelty there were no bold new menu launches. No breakthrough campaigns.

#### **3. KFC’s cultural currency was in free fall.**

There was a string of unfavourable headlines in the press:

*“Hidden delivery fees...”<sup>7</sup>*

*“Nutritionist slams KFC...”<sup>8</sup>*

<sup>1</sup> Collider Lab Consumer Insights: Consumer Interviews 2023

<sup>2</sup> Stuff (2021) *Why is NZ unnaturally obsessed with KFC*

<sup>3</sup> Hospo HR (2025) *Deconstructing New Zealand’s Hospitality Giants: The Big 3: Restaurant Brands New Zealand*

<sup>4</sup> One New (2023) *Fast-growing fried chicken brand coming to NZ*

<sup>5</sup> One New (2022) *Texas Chicken to open 20 new branches in NZ*

<sup>6</sup> Ibis World *Fast Food and Takeaway Food Services in New Zealand - Market Research Report (2015-2030)*

<sup>7</sup> NZ Herald (2020) *Nutritionist reveal KFC items she won’t buy*

<sup>8</sup> NZ Herald (2022) *Consumer NZ: Diners forking out higher menu prices for fast-food deliveries*

*“Double Down returns...”<sup>9</sup>(again)*

KFC’s brand tracking showed the brand’s grip on culture and on the category was slipping.

‘Brand buzz’ dropped to an all-time low of 11.5% in 2022 and 2023.<sup>10</sup>

[REDACTED]

Worse still, Kiwis had become indifferent towards the brand:

*“They’re just sort of there.”<sup>11</sup>*

*“Not really a cool place or a lame place. Just... there.”<sup>11</sup>*

*“They haven’t released anything interesting in ages.”<sup>11</sup>*

#### 4. KFC’s relevance and quality perceptions were declining.

Brand health (KFC’s proxy for brand equity) was falling.

[REDACTED]

Perceived quality of food was in decline.

[REDACTED]

Consideration for KFC had stagnated whilst our main competitor had risen.

[REDACTED]

KFC, once a cultural icon, was starting to feel tired, dated and worst of all, **irrelevant**.

#### THE CHALLENGE WE FACED:

**KFC had gone from finger-lickin’ good... to a brand no longer being craved by culture.**

<sup>9</sup> NZ Herald (2020) Kiwis losing their minds! KFC favourite returns to menu

<sup>10</sup> KFC YouGov Brand Tracker 2022-23

<sup>11</sup> Collider Lab Consumer Insights : Consumer Interviews 2023

01B

What were the objectives you set to address your challenge? For each objective, include: KPI, benchmarks, previous outcomes and the rationale for why it was selected.

Please outline one business/organisational objective and a maximum of 3 marketing and 3 advertising/comms objectives.

**CAMPAIGN OBJECTIVES:**

Lead a total brand shift by making KFC feel modern, relevant and culturally alive again.

**1. Get KFC back in the cultural conversation**

Measured through:

- Scaled media coverage and earned attention
- +3pt uplift in 'Brand Buzz' (vs. 2023)

**2. Make KFC feel modern and relevant.**

Measured through:

+3pt uplift in 'modern' brand perceptions (vs. 2023):

- 'Feels like a modern brand'
- 'A brand that's with the times'
- 'A brand that stays on top of trends'

**MARKETING OBJECTIVES:**

Improve perceptions and relevance of KFC.

**3. Increase perceived strength of brand and food quality (vs. 2023)**

Measured through:

+3% lift in overall 'Brand Health'  
+3% lift in perception of quality

**4. Increase brand consideration after 3 years of stagnation**

Measured through:

+3% increase in 'Brand Consideration' (vs. 2023).

**BUSINESS OBJECTIVE:**

A brand that's more relevant and well-regarded should translate into stronger business results.

**5. Drive commercial impact for Restaurant Brands**Measured through:

- Sales growth ahead of the category
- Strong contribution to sales increase and net profit
- A positive ROI

**02.****Insights & Strategy [25%]**

This section covers the key building blocks of your strategy. Explain to the judges how you arrived at your strategy and clearly articulate that strategy. Focus on the thinking or insight(s) that unlocked your solution and tied it to successfully addressing your objectives.

**02A.**

Explain the thinking that led you to your strategy. Explain how any insights discovered were directly tied to your brand, your audiences behaviours and attitudes, your research and/or business situation.

We set out to understand why KFC was losing cultural relevance in Aotearoa through extensive consumer research.

We uncovered three truths:

**Insight 1: Craving the past was costing us the future**

As we outlined at the start, KFC had earned a special place in Kiwi culture over the past 50 years.

But those powerful memory structures made it hard for people to imagine the brand as fresh or exciting.<sup>12</sup>

They remembered what KFC used to be, but struggled to see how it fit into their lives today—

*“How are they keeping things interesting? They haven’t released anything new in ages. The last thing I can think of were the Krushers.”<sup>13</sup>*

*“McDonald’s has Monopoly, Happy Meals, play areas... but nothing springs to mind for KFC.”<sup>13</sup>*

**Insight 2: Fast food had evolved, but KFC hadn’t**

Once, fast food was all about taste, speed, and affordability. But today, people expect more.

They still want indulgence but they also want food that aligns with their values, fits with how they live and rides cultural trends e.g. the McDonald’s Despicable Me 4 collectibles.

KFC hadn’t kept up. Instead, it was stuck in outdated codes of fast food: greasy, guilty, retro.

<sup>12</sup> Collider Lab (2023) Consumer Insights: Qualitative & Quantitative Findings

<sup>13</sup> Collider Lab Consumer Insights : Consumer Interviews 2023

*“KFC is hangover food”<sup>13</sup>*

*“It’s my guilty little pleasure...it’s the grease... and the price.”<sup>13</sup>*

*“It’s like a 50s pot-bellied man in sweatpants, in a beat-up car.”<sup>13</sup>*

### **Insight 3: People craved the food, not the brand.**

Despite the shift, one thing hadn’t changed: people still craved KFC. It was still consistently ranking as the most craveable QSR choice for Kiwis.<sup>14</sup>

Kiwis would drive for hours, sneak it through airport security, and smuggle it across lockdown borders just to get their fix.

But while the desire was strong, the pride was missing. Only 1 in 4 said they’d feel proud carrying a KFC bag.<sup>15</sup>

KFC was still craved, just not in a way that felt fresh, relevant, or worth celebrating.

### **THE CORE INSIGHT:**

We didn’t need to change the food.

We needed to change the feeling and perception of KFC.

### **STRATEGIC APPROACH**

To change the feeling we focussed on three key pillars:

**1. Earn our stripes**

Show up in bold, unexpected ways that prove KFC understands Kiwi life and is willing to go the extra mile to be part of it.

**2. Remind Kiwis of their love**

Celebrate the lengths people have always gone to for KFC. It’s how the brand became iconic in the first place.

**3. Reinforce with food and value**

Support this reappraisal with clear messaging that reflects today’s taste and value expectations.

**02B.**

What was the Core Idea or strategic build that enabled you to reach your solution?

(Be succinct. A maximum of 50 words.)

<sup>14</sup> YouGov (2023) ‘Craveable for Chicken’ Tracking

<sup>15</sup> YouGov Sentiment Tracking ‘I’d be proud to be seen carrying a bag of food from this brand.’

Go to great lengths for Kiwis through bold, modern experiences that prove KFC gets them and then remind them just how far they've always gone for us.

03.	<b>Bringing the Strategy &amp; Idea to Life [20%]</b>
03A.	Describe the creative solution and how it helped the idea break out of the category and resulted in unexpected solutions.
<p><b>Our strategic principles guided how we brought this to life:</b></p> <p><b><u>#1 Earn our stripes</u></b></p> <p>To make KFC culturally relevant again, we started with an earned-first approach, that proved just how far we'd go for Kiwis.</p> <p>Over 15 months, we launched six activations:</p> <ol style="list-style-type: none"> <li><b>1. Wicked Wing Taste Tester</b> KFC went the extra mile by turning love for Wicked Wings into NZ's most coveted job. We created the dream role: an official Wicked Wings taste tester, launched on Trade Me during 'Job Hunt January'. It drew 900+ applications and made national headlines.</li> <li><b>2. Mr. Sanders' Supper Club</b> KFC went the extra mile by reimagining fast food as fine dining with a late-night supper club hosted by Instagram-favourite chef Hercules Noble. A five-course gourmet menu spotlighted 'boneless' chicken for a new generation of foodies.</li> <li><b>3. KFC Gravy Train</b> KFC went the extra mile by launching a world-first for KFC – a wrapped locomotive that delivered fans (and hot chicken) straight to Eden Park to promote KFC's ongoing sponsorship of the Super Rugby and their delivery service.</li> <li><b>4. KFCurrency</b> We went the extra mile by changing the rules of the value game by letting Kiwis use Monopoly money to buy KFC...hijacking McDonald's iconic promo for a day.</li> <li><b>5. KF&amp;C (Kentucky Fish &amp; Chips)</b> KFC went the extra mile by stretching the product into a Kiwi favourite with KFC's first ever pop up fish and chips shop that used KFC's famous coating on a Kiwi classic to raise awareness and funds for Surf Life Saving (SLS).</li> </ol>	

## 6. Zing Air

KFC went the extra mile by turning an order of chicken into a boarding pass. The world's first private KFC airline jetted fans across the country to support their Super Rugby teams, booked via the app.

### #2 Remind Kiwis of their love

#### **We launched 'The Power of KFC',**

Our first major brand campaign celebrated the lengths Kiwis will go to for KFC. It follows two mates on a mission to deliver KFC to a mate in the remote South Island. This received a 4.6 Star Rating from System 1 (above global bench 2.5-3 star).

It became NZ's #5 most-loved ad (TRA), ahead of McDonald's.<sup>16</sup>

#### **We deepened love through fan-fuelled sponsorship activations:**

- **Catch the Colonel** was real-time race against a digital Colonel at Super Rugby matches with \$500 KFC vouchers for those who won.
- **6 & Shout** gave away free chicken nationwide every time a six landed in the KFC zone during summer cricket.
- **Married at First Bite** gave fans of MAFS AU & KFC a chance to keep on-screen excitement going with a limited-time sharing pack.

### #3 Reinforce with food and value

We backed up reappraisal with product comms and smarter value storytelling that reflected modern Kiwi tastes.

- We elevated formats like the FLG Wrap and 'Hot & Crispy' in ATL media, modernising their look with edits that dialled up the modern format cues and food porn appeal.
- 'Save Like A Boss' KFC's value offering (\$9.99 deals), reframed value to suit the cost-of-living climate.
- A refreshed brand world doubled down on distinctive, modern brand assets like "It's Finger Lickin' Good", the 3 stripes and KFC logo.

03B.

#### WHAT WAS THE COMMUNICATIONS STRATEGY?

This section relates to the media and communications thinking and strategy that brought the creative solution to life in the most powerful and relevant way for the target audience. Include all significant touchpoints and channels in this section.

**Outline the rationale behind your communications strategy.** Explain how the key elements worked together to drive results:

<sup>16</sup> TRA NZ's Favorite Ads December 2024

Our comms strategy was grounded in three principles:

### **#1 Lead with earned to drive talkability**

We adopted an **earned-first approach**. Every activation followed a three-phase media model that transformed ideas into nationwide conversation:

#### **1. Announce**

We built anticipation and primed the cultural conversation before launch, through tailored PR, teaser content, influencer seeding, and platform-specific storytelling.

#### **2. Activate**

We delivered high-impact, culturally contagious experiences that turned everyday brand moments into content gold. This drove sharing, headlines, and genuine fan engagement.

#### **3. Amplify**

We extended the life and reach of each activation through paid social, hero content, influencer integrations, and media partnerships ensuring our ideas travelled beyond the moment.

Where relevant, we layered in ATL to maximise attention. For example:

- **KF&C** was supported with our highest-performing Surf Life Saving TVC and localised OOH near surf clubs across summer.
- **Zing Air** was backed by ATL and social to drive awareness and entries.

### **#2: Cement cultural relevancy through brand building & sponsorships**

To complement activation-led bursts, we built a brand layer with high-attention storytelling:

#### - **Brand Campaign – ‘The Power of KFC’**

We led with cinema, 60" TVCs, and 30" OLV, complemented by TikTok formats that let users choose their own adventure, mirroring the campaign story arc.

#### - **Sponsorships**

We moved beyond traditional badging to create immersive, fan-led experiences that were amplified through social content and in-show integration.

### **#3: Embed reappraisal through a sustained always on product and value layer.**

- Crave-led product messaging was supported with bold AV and hyper-localised OOH, driving presence in key hunger zones and reaching over 90% of light/lapsed users.<sup>17</sup>
- Value platforms like ‘Save Like A Boss’ were supported with by an always on broad-reaching AV, path-to-purchase presence, and digital targeting for scale and relevance.

<sup>17</sup> Media Agency Post Analysis Report

<p><b>List all supplementary communications touch points</b> used in this campaign (the touchpoints that were not central to the campaign).</p>	
<p>Website Direct marketing In-store</p>	
<p><b>What was the \$ Spend?</b> Outline the media and production spend on the campaign within the campaign period. Use actual spend rather than ratecard. In the case of donated media please list the rate card value separately from the paid media spend.</p>	
Media Spend	[REDACTED]
Outline the media spend in relation to competition and versus last year	<ul style="list-style-type: none"> <li>• Category media spend increased +10% YOY (2024 vs 2023)<sup>18</sup></li> <li>• [REDACTED]</li> <li>• [REDACTED]</li> <li>• Next biggest competitor: 23% of category spend (2024)</li> </ul>
Creative Production Spend	[REDACTED]

<h1>04.</h1>	<p><b>WHAT WERE THE RESULTS? [20% for 4A and 15% for 4B].</b></p> <p>Outline the results achieved by the campaign against the short and long-term objectives set, provide conclusive proof that it was the campaign that drove the results.</p> <p>In this section, the judges will be looking to see a clear cause and effect between the communication activity and business performance over time. Show the compelling evidence that will convince even the most cynical finance director.</p> <p><b>Please Note:</b> All results must be sourced to be judged; any unsourced results will not be considered by judges.</p>
<h1>04A</h1>	<p><b>Overall achievement against objectives [20%].</b></p> <p>Clear proof that the objectives established in section one have been achieved. Judges will be seeking quantified results. Successful entries ensure that results can easily be aligned against objectives established in section one.</p> <p>Note: Please ensure all data is sourced, and is specific to the results period outlined in the Call for Entry, and geographically isolated to Aotearoa.</p>
<p>Across every measure, from fame and buzz to modernity, consideration and ROI, the work delivered.</p>	

**OBJECTIVE 1** : Get KFC back in the cultural conversation

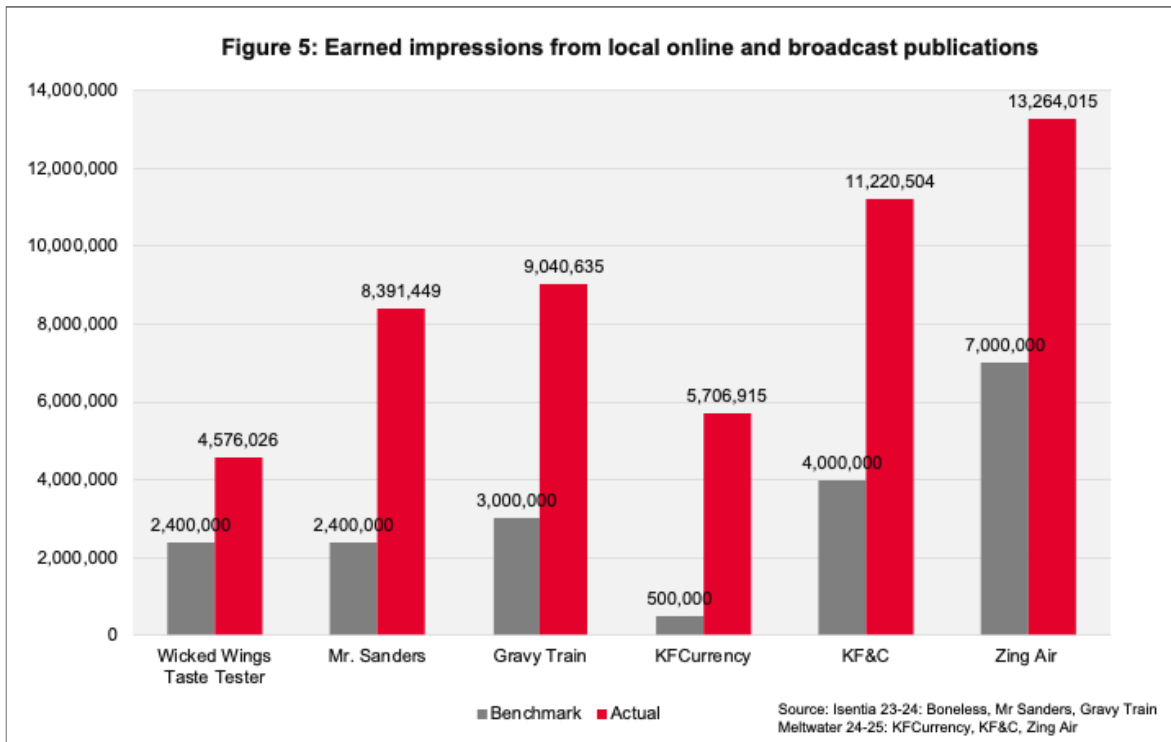
Measured through:

- Scaled media coverage and earned attention
- A 3pt uplift in 'Brand Buzz' (vs. 2023)

**RESULT:** Exceeded

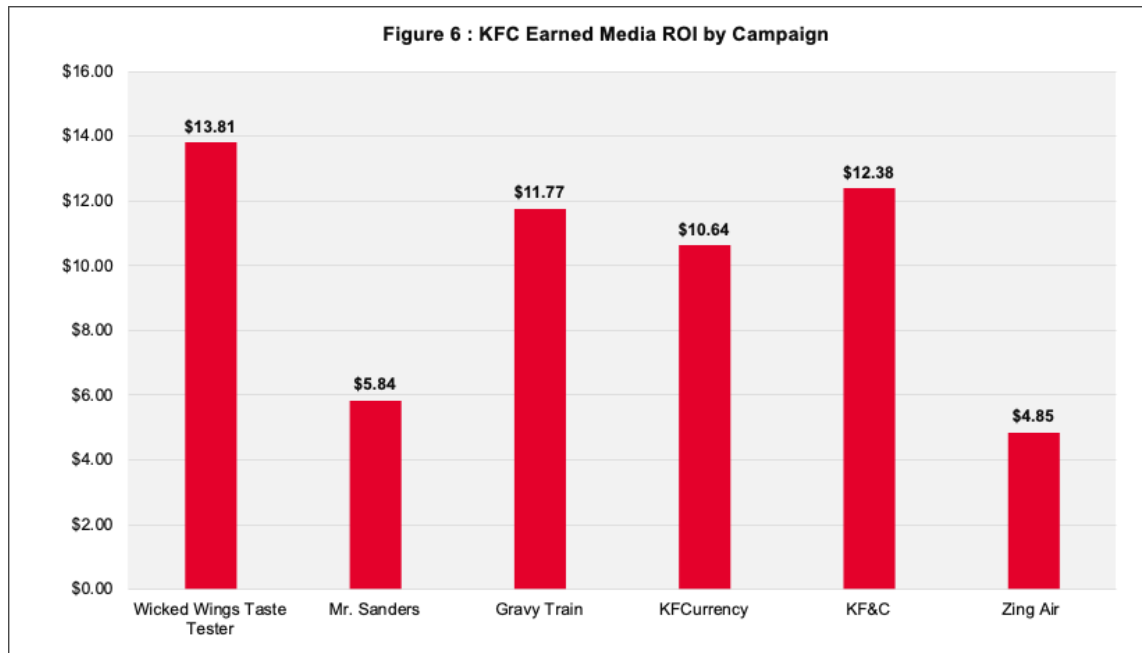
Our earned media strategy played a pivotal role in driving cultural conversation, generating **over 200 pieces of coverage** and across NZ.<sup>19 20</sup>

In total, we generated **52M local earned impressions and \$7M in earned value.**



<sup>19</sup> Isentia Media Monitoring 2023-24

<sup>20</sup> Meltwater Media Monitoring 2024-25



As a result, Brand Buzz rose [REDACTED]— a 7pt increase and the highest it's been in two years.<sup>21</sup>

[REDACTED]

**OBJECTIVE 2: Make KFC feel modern and relevant.**

Measured through: +3pt uplift in 'modern' brand perceptions (vs. 2023)

- 'Feels like a modern brand'
- 'A brand that's with the times'
- 'A brand that stays on top of trends'

**RESULT: Exceeded**

All perceptions of KFC as a modern brand lifted, signalling a clear shift in KFC being seen as modern and culturally in tune.<sup>22</sup>

[REDACTED]

**OBJECTIVE 3: Increase perceived strength of brand and food quality (vs. 2023)**

Measured through:

- +3% lift in overall 'Brand Health'
- +3% lift in perception of quality

<sup>21</sup> YouGov (2023-25) Brand Buzz Tracker

<sup>22</sup> YouGov (2023-2025) Brand Metrics Tracker

**RESULT: Achieved**

Brand Health has seen a **6pt uplift from 2023**.

[REDACTED]

**Perceptions of food quality are at a 5 year high.**

[REDACTED]

**OBJECTIVE 4: Increase brand consideration**

Measured through: A 3% increase in 'Brand Consideration' (vs. 2023).

**RESULT: Achieved**

Brand consideration rose 3.5pts, [REDACTED]— **the highest score in 5 years.** <sup>23</sup>

[REDACTED]

**OBJECTIVE 5: Drive commercial impact for Restaurant Brands**

Measured through:

- Sales growth ahead of the category
- Strong contribution to overall commercial performance
- A positive ROI

**RESULT: Achieved**

**CONFIDENTIAL**

**Sales grew ahead of the category**

[REDACTED]

<sup>23</sup> YouGov (2022-2025) Brand Consideration Tracking

### **Strong contribution to overall commercial performance**

Restaurant brands (the owner of KFC), reports their financial performance as a group of brands<sup>24</sup> rather than individual entities. Whilst we cannot report on an individual level by each brand, we can say that KFC made a significant contribution to a strong commercial performance:<sup>25</sup>

[REDACTED]

KFC's contribution was explicitly credited in Restaurant Brands' Annual Report:

*"In 2024, the NZ KFC business delivered record sales driven by innovative new products and viral marketing initiatives that contributed to weekly sales records."*<sup>26</sup>

### **A Positive ROI**

Using estimates based on public reporting:<sup>27</sup>

[REDACTED]

**Total Campaign Investment:** [REDACTED]

**ROI Calculation:**

[REDACTED]

04B

### **Convincing proof that the results were a direct result of your campaign [15%].**

Outline other external factors that could account for the results outlined in 04A and provide compelling evidence and rationale for why these did not contribute significantly to those results. There are almost always other factors that could have affected your results, such as product changes, pricing, distribution, stock levels, competitive activity, weather, etc. You need to convince the judges that these factors were not responsible for your results, or estimate their contribution and/or demonstrate how they needed the campaign to amplify their impacts.

<sup>24</sup> KFC, Taco Bell, Pizza Hut and Carl's Jnr

<sup>25</sup> Restaurant Brands Annual Report. (For the year ended 31<sup>st</sup> December 2024)

<sup>26</sup> Restaurant Brands Annual Report. (For the year ended 31<sup>st</sup> December 2024)

<sup>27</sup> Yahoo Finance, Zack's Equity Research (2025) KFC's Global Strength: Is it a Key Growth Lever for Yum! Brands?

Ruling out drivers of growth:**Product quality or taste?**

No. KFC's core recipes and ingredients remained unchanged throughout the campaign period.

**Menu innovation?**

No. There were no new menu innovations in 2024 with the brand opting to use product extensions from the core range.

- *Boneless Chicken* had been on the menu previously.
- *KF&C* was a pop-up experience, not a menu item.

**Price cuts or promotions?**

No. There was no value menu under \$5, unlike competitors. The brand sits at the premium end of the QSR spectrum (e.g. the Jumbo Bucket retails for \$94.99 on Delivery aggregators).

**Media spend?**

Yes, spend increased but in line with IPA's best in class Share of Voice (ESOV) principles.<sup>28 29</sup>

**Delivery growth?**

Minimal. While KFC offers delivery via its own app, it has lower share than third-party platforms like Uber Eats (51.7%) limiting its impact on growth.<sup>30</sup> It still accounts for a small proportion of the KFC business.

**Store expansion or competitive closures?**

KFC opened just 5 new stores in 2024. McDonald's has a larger footprint with 171 stores, compared to KFC's 121. New competitors like Popeyes and NeNe Chicken entered the market, increasing competition.

**Category growth?**

The cost of living crisis was biting in FY24 and the category was challenged growing a very modest 0.6% in sales. As we outlined, KFC sales grew [REDACTED] faster than the QSR category.<sup>31</sup>

**Guidance Notes**

Please refer to the guidance notes below, to ensure your entry conforms to eligibility criteria.

Eligibility: Data presented must be isolated to Aotearoa, and work must have run between 1 June 2023 and 30 June 2025. Results may be included up to 22 July 2025. Results data that fails to isolate or identify data specific to the eligibility period and/or Aotearoa New Zealand risks low marks and/or being ineligible.

Data Sources: All data referenced in the entry requires sources (recommended as footnotes on the page referenced or at the end of the entry).

<sup>28</sup> Field/Binet, IPA, Marketing in the Era of Accountability, 2007

<sup>29</sup> Master of Advertising Effectiveness (2022) Module 2: Investing for Growth

<sup>30</sup> Restroworks (2025) New Zealand Restaurant Statistics: *Industry Growth, Market Trends & Consumer Insights*

<sup>31</sup> Datamine (2024) Based on Worldline electronic payment data combined with Westpac data via Datamine measures category growth and performance

Charts and Graphs: Entrants are encouraged to display data via charts & graphs within the limits allocated in each question. Sources required for all data including charts and graphs.

Agency names: No agencies, of any kind, are to be included in the entry.