

FOCUSING ON REOPENING & RECOVERY

MONITORING THE SITUATION AND
PLANNING FOR THE NEXT PHASE

APRIL 28, 2020

The time has come to get back to business.

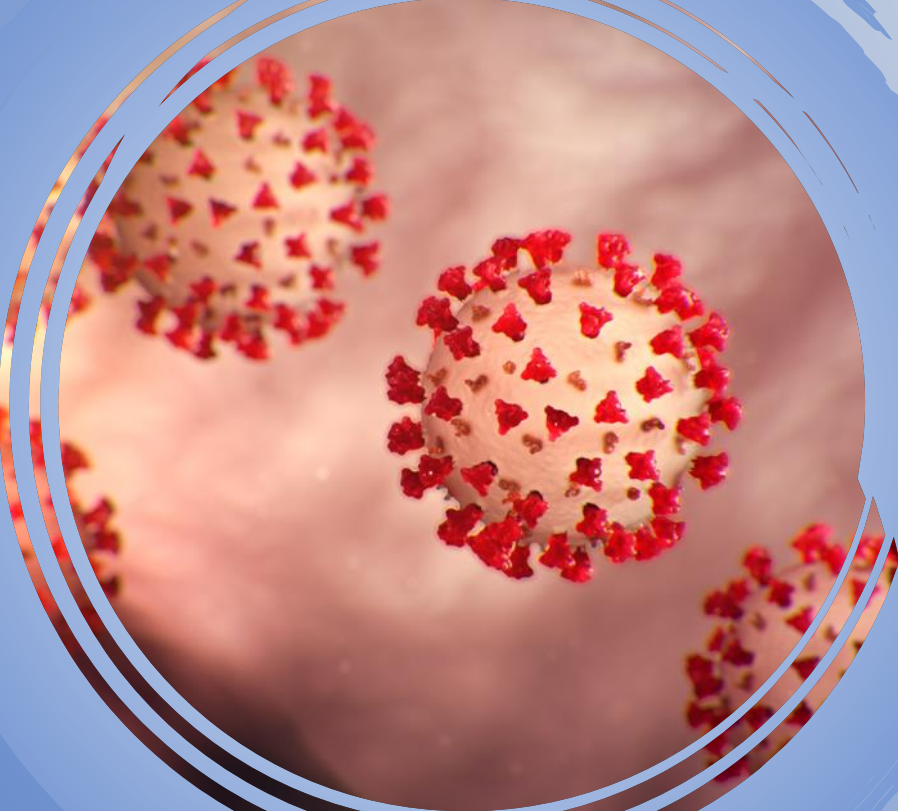
We know getting back to business won't be immediate or consistent across the country, but signs are pointing in right direction. Both state and business leaders are laying plans to reboot the economy either aggressively or more cautiously.

A second wave, or localized infection surges, are likely so nimbleness throughout this process will be critical for all hospitality segments.

There are challenges – some of them new but others exaggerated versions of what we saw prior to the crisis – but opportunities exist for exciting innovation and new revenue streams that could, once again, change our industry going forward.



CURRENT STATUS OF COVID-19



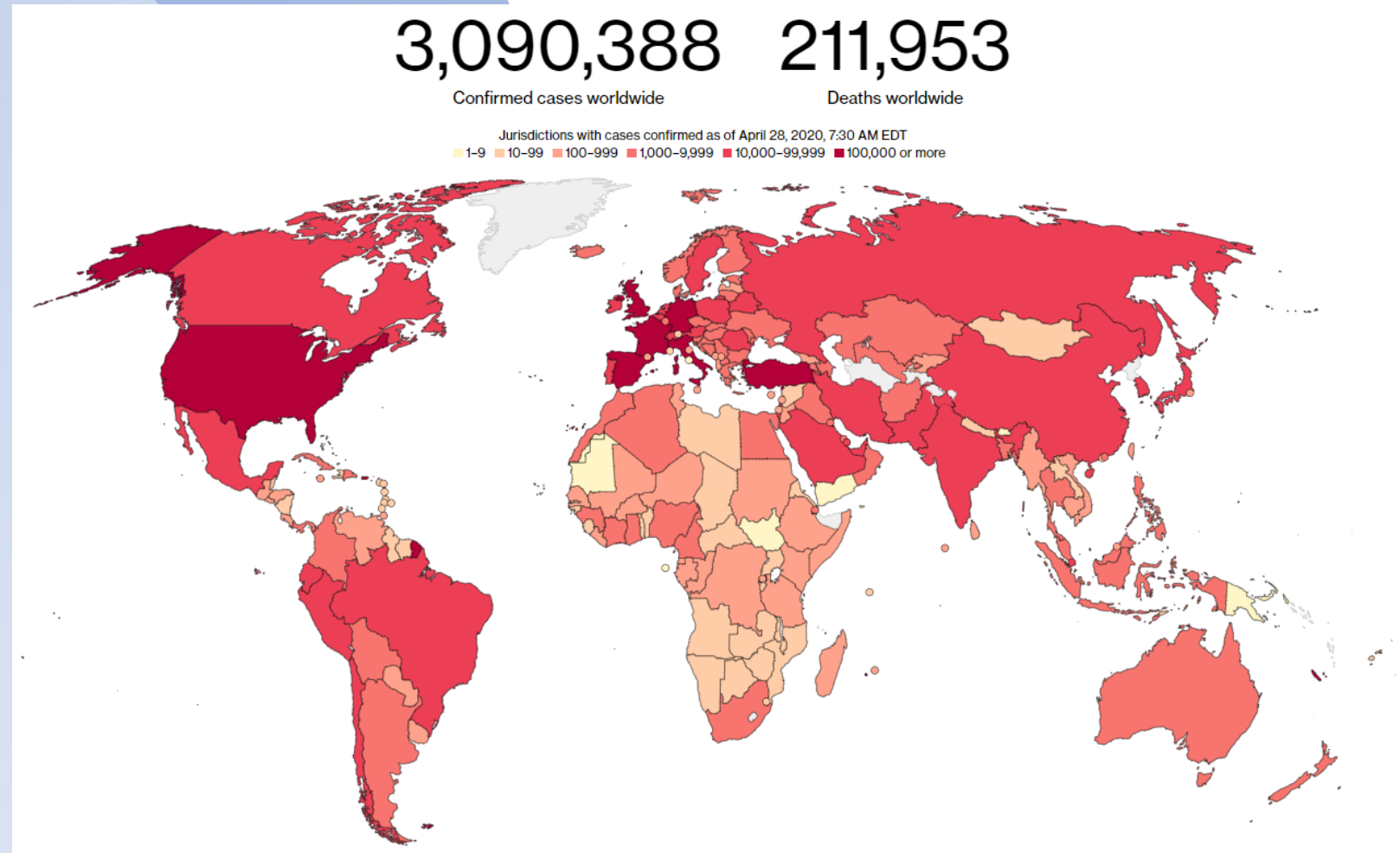


For many, the reopenings may feel very much like a fresh start – an opportunity to begin again but better. For others, the return may be painful as new challenges and hurdles must be addressed on top of the everyday trials to running a foodservice operation. But, an industry built on creativity and innovation is up for the challenge.

Worldwide Involvement

Global cases have topped 3M, rising over 500K in a week.

Developing nations in South America and Africa are now involved with cases growing, risking significant health disasters in these countries. Aid will prove challenging with Western nations still dealing with the virus and ongoing issues.





Beijing, once again, was forced to close down gyms as it grapples with ongoing spikes in cases. This situation has played out across the country with businesses forced to close again as infection rates are managed.

Unite against COVID-19



By contrast, New Zealand announced they have effectively eliminated community spread of COVID-19.

Most Curves are Flattening

Most of the countries initially caught up in the crisis are now showing signs of flattening curves. The exceptions are Japan and Singapore, which continue to struggle with outbreaks.

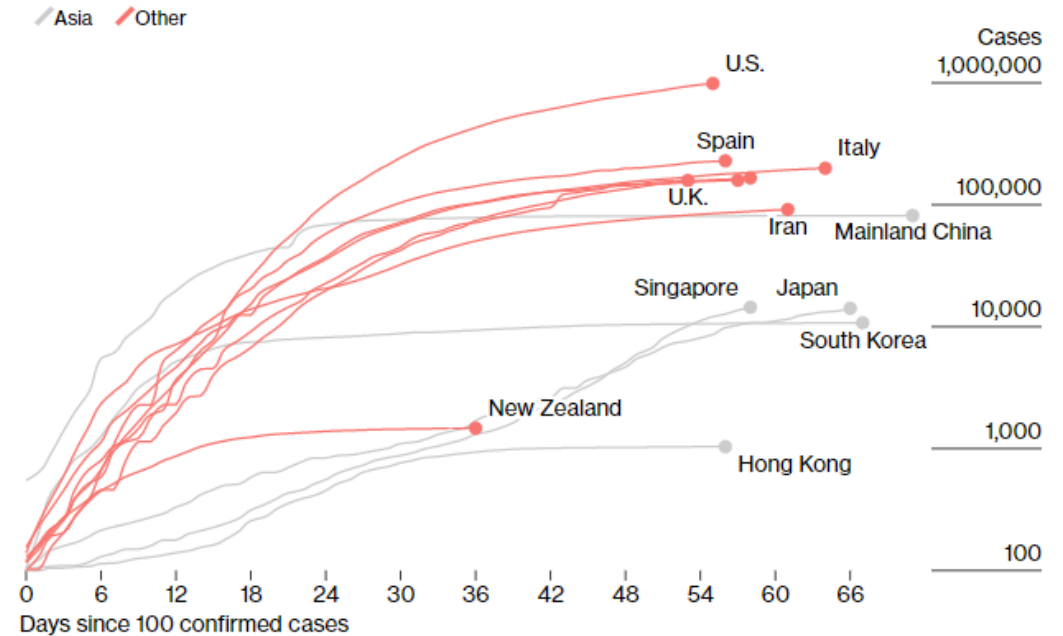
Researchers say the prolonged peak period is causing recalculations of the overall impact and potential schedule for openings.

Spain	Italy	France	U.K.	U.S.	Germany	South Korea	Mainland China	Japan
479.5 deaths / mil.	432.8	345.0	323.3	170.3	76.3	4.7	3.3	3.1
4,754.1 cases / mil.	3,199.1	2,836.0	2,419.9	2,992.9	1,976.7	208.2	59.6	112.5
20.8 tests / 1,000	28.2	8.8	10.2	16.5	25.8	11.7	N/A	1.8
3.0 beds / 1,000	3.2	6.0	2.5	2.8	8.0	12.3	4.3	13.1
National lockdown since March 14	National lockdown since March 10	National lockdown since March 17	National lockdown since March 23	No national lockdown	National lockdown since March 23	No national lockdown	No national lockdown	State of emergency since April 7

Testing data as of April 27, 2020, 10:30 AM EDT
 Sources: OECD for number of hospital beds (2016 for the U.S., 2017 for other countries), government agencies and the COVID Tracking Project via Our World in Data for testing data (various recent dates) and the U.S. Census Bureau for population figures (2019).

Some Have Managed to Flatten the Curve

The first 72 days with more than 100 confirmed cases

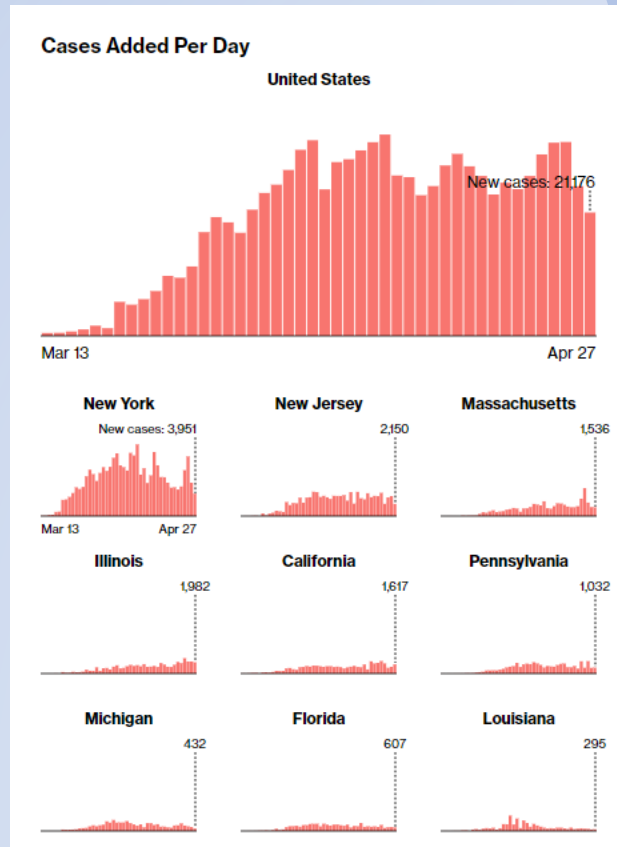


Note: JHU CSSE reporting began on Jan. 22, when mainland China had already surpassed 500 cases.
 Source: Johns Hopkins University Center for Systems Science and Engineering

National Impact

U.S. cases are close to hitting 1M, but many of the initial hot spots, particularly N.Y., are seeing steadily declining figures.

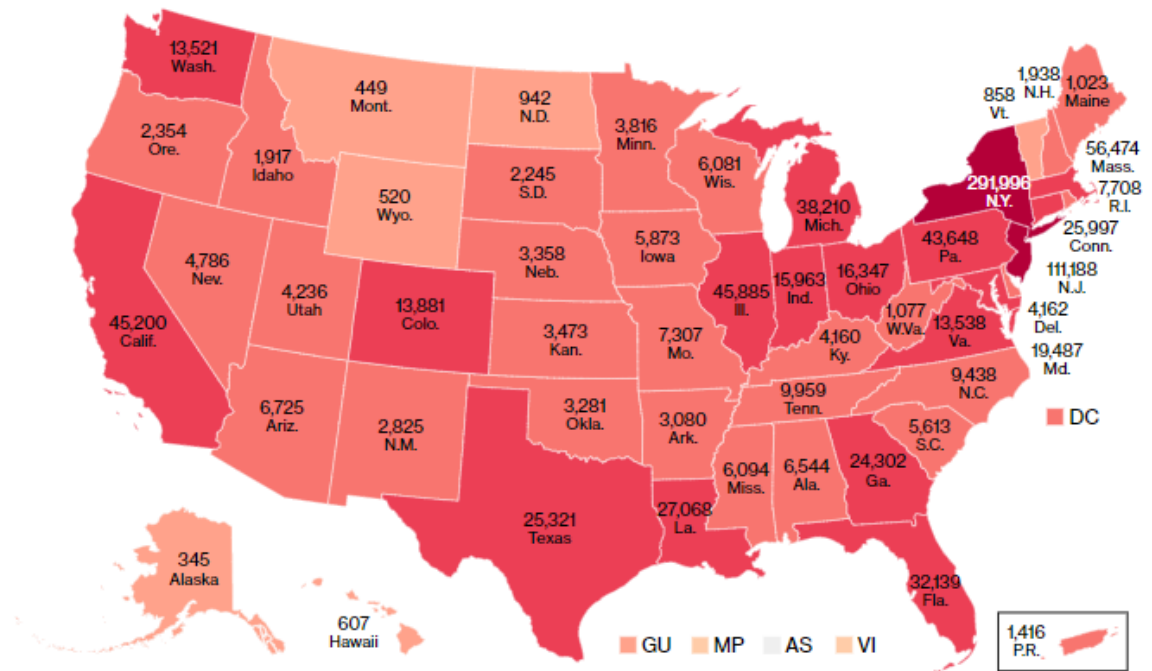
Massachusetts and Connecticut, however, may be experiencing a late spike which could complicate opening up the New England area.



988,479 Confirmed cases in U.S.
56,209 Deaths in U.S.

Confirmed Cases in U.S. by State and Territory
 As of April 28, 2020, 2:30 AM EDT

1-9 10-99 100-999 1,000-9,999 10,000-99,999
 100,000 or more



Note: State figures may not reflect repatriated patients from the Diamond Princess cruise ship or those evacuated from Wuhan, China.



The Coalition for Epidemic Preparedness Innovations, a group funding nine different vaccine projects, said yesterday a vaccine for vulnerable groups may be available as early as later this year.



Data from both New York and California suggest between 20% and 25% of the population has been exposed to COVID-19, much higher than original expected. These exposure percentages reduce the assumed fatality rate to approximately 0.5%.



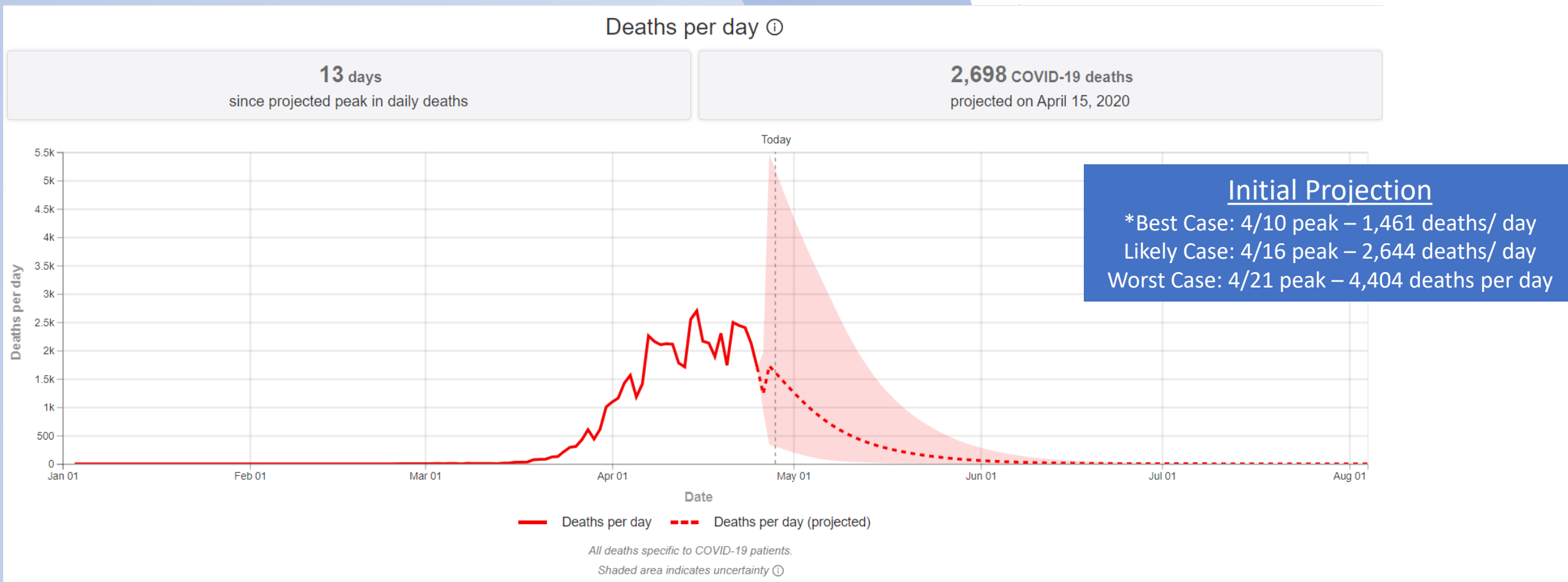
Nursing homes have been hit particularly hard, accounting for more than quarter of all U.S. cases. This will have long-term implications for nursing home management going forward.



Tyson became the latest meat processor to close a key plant due to a significant rise in cases. Its full-page ad in *The New York Times* noting “the food supply chain is breaking” will have repercussions for retail as consumer confidence slips and stockpiling begins again as inconsistent supply issues make restaurant reopenings more difficult.

Extended Peaks

Peaks have proved challenging as most are lasting far longer than anticipated, creating issues with modeling. From the initial model, we've already surpassed the "likely" scenario but remaining far from the worst case projection.





From coast to coast, quarantine fatigue was evident as “quarantine quitters” came out to enjoy improving weather and, in some cases, relaxed outdoor activity restrictions. For the hospitality industry, it’s important to note this fatigue won’t immediately result in increased traffic but that the industry needs to work to increase confidence and create compelling reasons for patrons to return.



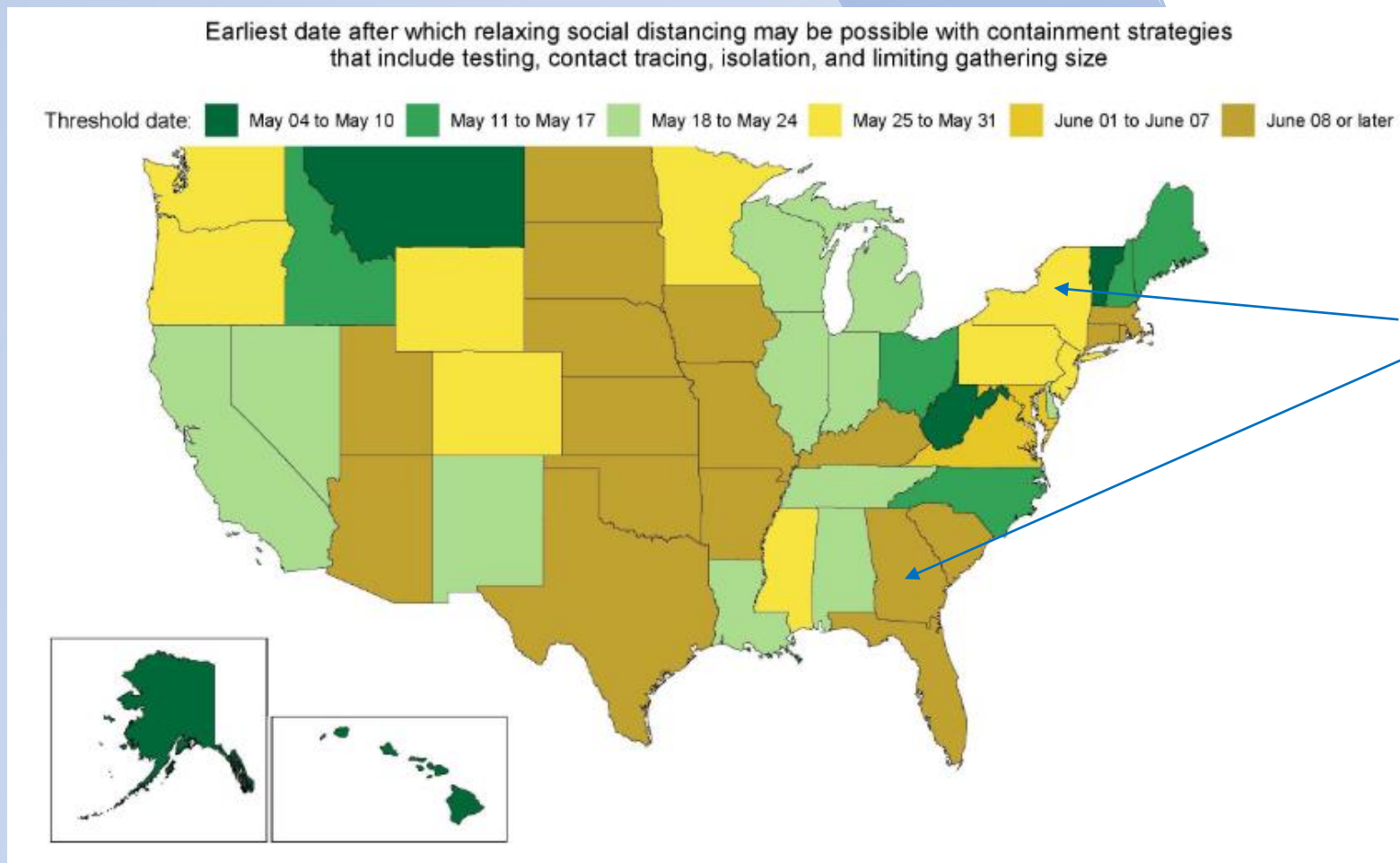
To make ongoing mitigation efforts more bearable, New York City will close 40 miles of streets to cars in May, providing more area for recreation and pedestrians as the weather improves.



Drive-in movie theaters are making a comeback nationwide as a safe form of entertainment. In some areas of the country, these venues were used to host Easter services. (Source: Quartz, 4/28/2020) This represents how consumers may seek to experience what they used to enjoy prior to the crisis but in novel ways that feel safer. This will have implications going forward for the hospitality industry.

Calculated Reopenings

The IHME created a model to project safe reopening dates based on a threshold of one case per million residents, the point at which other containment measures (testing, tracing, isolation) may take the place of social distancing.



Based on these projections New York, far harder hit, is set to reopen before Georgia



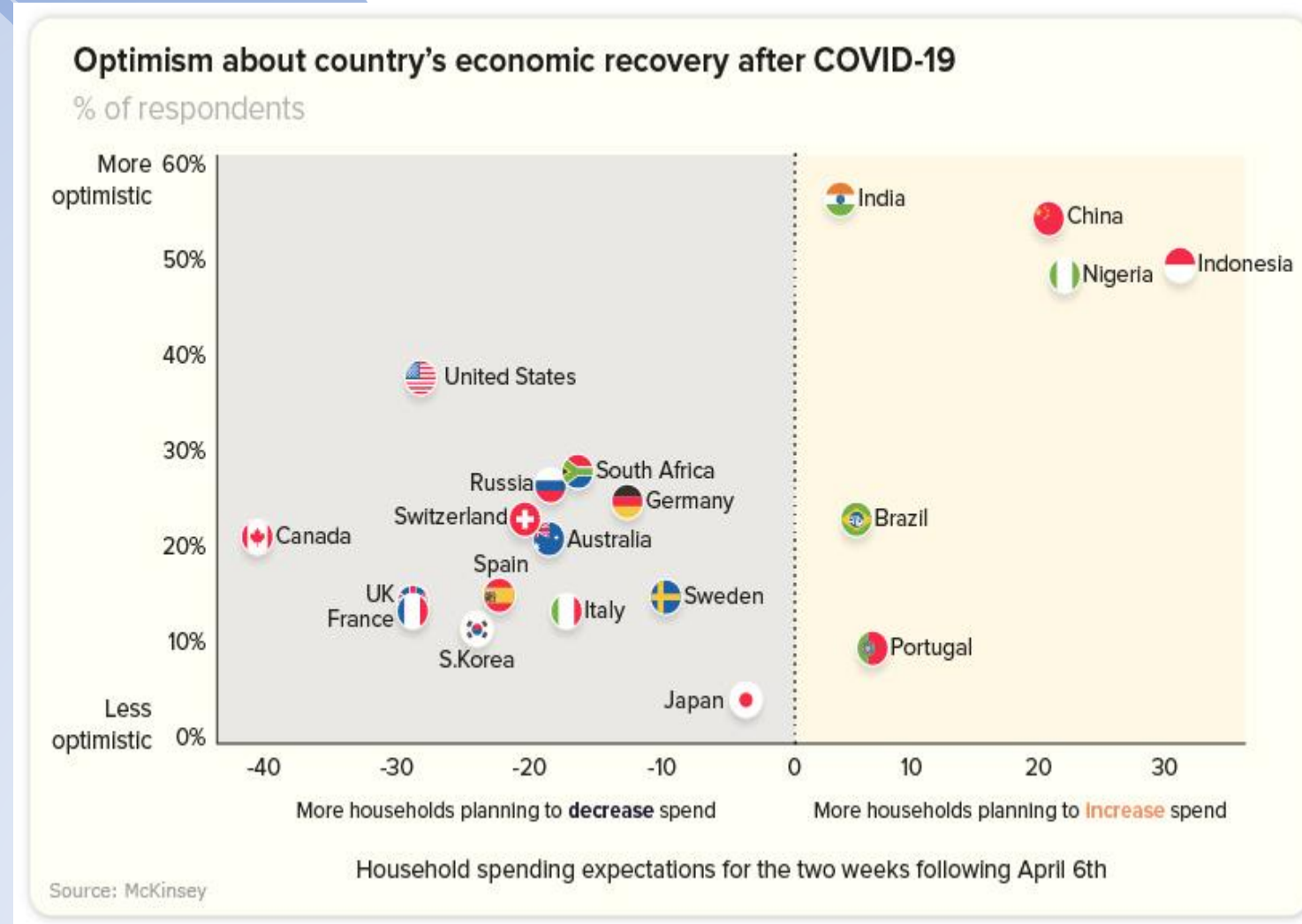
The Great Georgia Experiment began Monday, as the state allowed dine-in services to resume at restaurants across the state. Several, like Waffle House, reopened but many remained closed. We won't know how this will impact the states case count until the week of May 18th.



It's important to remember regardless of any state or industry efforts, the only people who can reopen the economy are consumers. Without their confidence and impulse to spend, the economy in general and hospitality specifically will continue to suffer.

COVID-19 Optimism and Spending

Though Americans are among the more optimistic regarding the country's ability to recover, more are planning to decrease spending in anticipation of a recession and continued economic challenges.



A person is sitting in the driver's seat of a car, wearing a blue face mask and floral gloves. They are holding a white sign with handwritten text. The sign reads:

OPEN
Vacant Hotels
Immediately

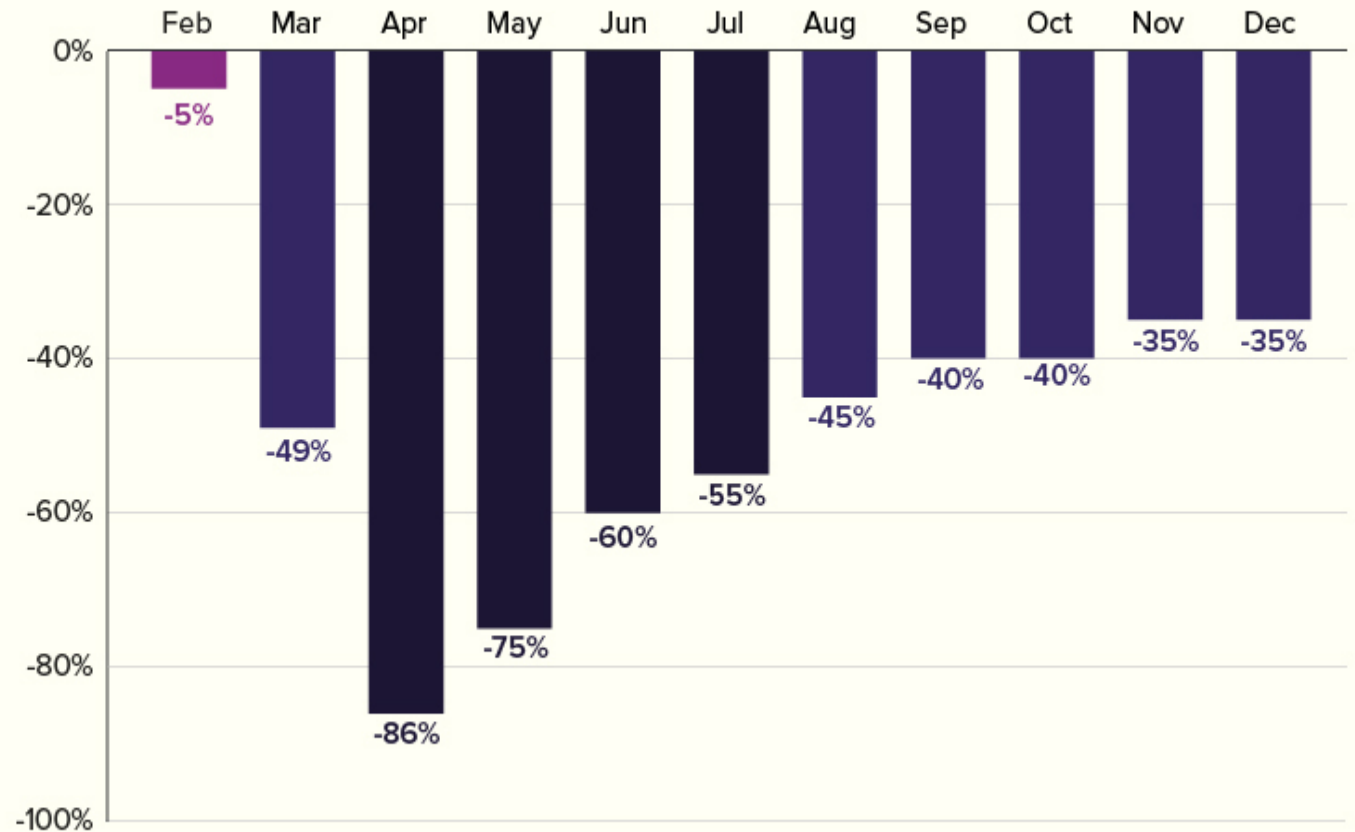
Several states have faced lawsuits over the legality of ongoing lockdowns and restrictions. An Illinois judge supported the state government, but judgments are still pending elsewhere.

Projected Impact of COVID-19 on Tourism

Ongoing concerns about crowds, planes, recession/ ongoing economic issues and outbreaks abroad are projected to depress tourism revenue well through the end of 2020.

Though tourism is more complicated than consumers' relationship with foodservice, this likely reflects the delayed recovery there restaurant industry will experience after reopenings.

Projected COVID-19 impact on tourism industry revenue



Source: Oxford Economics

State-by-State Reopening

Alabama

Stay-at-home order will remain until **4/30**
Gov. Ivey has said expanding testing needs to resume before normal economic activity

Alaska

Gov. Dunleavy allowed **restaurants to reopen in most parts of the state on 4/24 but they may only operate at 25% capacity and keep distance between tables**

Arizona

Stay-at-home order will remain until **4/30**
The state is debating whether to reopen or extend the stay-at-home order

Arkansas

Gov. Hutchinson will be easing restrictions for certain businesses over the next few weeks. If social distancing is adhered to and all goes well, more business will be allowed to reopen **5/4**

California

Stay-at-home order initiated 3/19 with **no expiration date**
Joined Western States Pact with governors of Oregon and Washington to determine reopening date
The state is withholding permits for events and gatherings, including protests, until further notice

Colorado

Replaced stay-at-home order with “safer at home” phase on **4/27**
Restaurants remain closed
Joined Nevada and West Coast states to coordinate reopening

Connecticut

Mandatory shut down extended to **5/20**
Joined coalition of Northeastern states to coordinate reopening
Decision pending “in another month”
Reopened marinas for private use

Delaware

Stay-at-home order expires **5/15** or “**until the public health threat is eliminated**”
State will only reopen after 28 days of declining cases
Joined collation of Northeastern states to coordinate reopening

D.C.

Stay-at-home order extended to **5/15**
The expiration date is a point to “check in” rather than to reopen

Florida

Stay-at-home order set to expire **4/30**
Restaurants remain closed
Some municipalities allowed to reopen beaches with limited hours

Georgia

On 4/24, Gov. Kemp began **relaxing restrictions with restaurants allowed to reopen dine-in on 4/27 with social distancing and health screening of employees**
Bars, nightclubs, and music venues remain closed

Hawaii

Stay-at-home order expires **4/30**
The city of Honolulu’s stay-at-home order will remain until **5/31**

Idaho

Original order amended to a “order to self-isolate” which expires on **4/30 unless extended**
Gov. Little said the goal is to have “most businesses open after the end of the month.”

Illinois

Stay-at-home order extended through **5/30**
Joined Midwest states coalition to coordinate reopening efforts
No current plans to reopen

Indiana

Stay-at-home order extended through **5/1**
Joined Midwest states coalition to coordinate reopening efforts

Iowa

Gov. Reynolds **announced 4/27 that restaurants may reopen at 50% capacity by 5/1 in 77 of the 99 counties. Restaurants will remain closed in the other counties until at least 5/15**
Restaurants reopening must keep tables six feet apart and limit the number of people at any one table

Kansas

Stay-at-home order extended through **5/3**
Gov. Kelly wants to see declines in cases for 14 days before the state considers reopening, but cases will be considered on the local level

Kentucky

“Healthy at Home” order issued on 3/25 with **no expiration date**
Joined Midwest states coalition to coordinate reopening efforts
Announcement on school openings will be made the week of 4/20
Will begin easing restrictions on businesses each week for four weeks beginning on 5/11.
Bars and nightclubs will remain closed until at least June

Louisiana

Stay-at-home order extended to **5/15**
Some business restrictions have been eased, with [restaurants allowed to open outdoor seating without service](#)

Maine

“Stay Healthy at Home” executive order through at least **4/30**
State’s civil state of emergency order extended through 5/15
No current plans to reopen
Coordinating with New Hampshire and Vermont on reopenings

Maryland

Stay-at-home order issued 3/30 with **no expiration date**
Gov. Hogan announced the “Maryland Strong Roadmap to Recovery” that will allow a gradual reopening, while stating cases have not hit their peak and therefore the state is not ready to reopen

Massachusetts

Emergency order requiring all nonessential businesses to close expiring **5/4**
Joined coalition of Northeastern states to coordinate reopening
State officials have begun conversations about reopening but there are no plans yet

Michigan

Stay-at-home order extended through **5/15**
Some restrictions have been relaxed, particularly with outdoor business and sports
Restaurants remain closed
Joined Midwest states coalition to coordinate reopening efforts
No current plans to reopen

Minnesota

Gov. Walz allowed some businesses to reopen 4/27 including outdoor recreational, manufacturing, industrial and some office-based businesses
Restaurants remain closed
Joined Midwest states coalition to coordinate reopening efforts

Mississippi

Gov. Reeves signed new “safer at home” order effective on 4/27, remaining in place for two weeks
Some nonessential businesses allowed to reopen with drive-thru, curbside and delivery

Missouri

“Stay Home Missouri” order expires **5/3**
Indoor businesses, when allowed to reopen, must operate at 25% capacity
Local communities may enforce stricter guidelines

Montana

Gov. Bullock announced a phased reopening for businesses beginning 4/27
[Restaurants, bars, breweries and distilleries may begin dine-in services on 5/4 but must restrict capacity and maintain social distancing](#)

Nebraska

Gov. Ricketts announced restrictions will be relaxed beginning **5/4**
[Restaurants may reopen then with dine-in services but at 50% capacity](#)
Bars remain closed until 5/31

Nevada

Shelter-in-place order expires **4/30**
No current plans to reopen

New Hampshire

Stay-at-home order expires **5/4**
State of emergency extended through 5/15
Coordinating with Maine and Vermont on reopenings

New Jersey

Stay-at-home order issued 3/21 with **no expiration date**
Joined coalition of Northeastern states to coordinate reopening
Reopened marinas for private use

New Mexico

Extended stay at home order to **5/15**
Making plans for a “gradual and safe” reopening

New York

“New York State on PAUSE” order extended through **5/15**
Joined coalition of Northeastern states to coordinate reopening
Announced plans for a phased reopening based on how essential the business is and how well it could maintain social distancing.
Phase one will focus on manufacturing and construction with phase two assessing each business based on importance and safety
There will be a minimum of two weeks between phases

North Carolina

Stay-at-home order extended through **5/8**
Planned reopening in three phases, with [restaurants and bars allowed to reopen in phase two with limited capacities](#)

North Dakota

No stay at home order in effect
Gov. Burgum announced many closed businesses may be allowed to reopen May 1

Ohio

Stay-at-home order expires **5/1**
Joined Midwest states coalition to coordinate reopening efforts
Nonessential businesses to prepare for phased reopening beginning 5/1

Oklahoma

Gov. Stitt allowed some businesses to reopen on 4/24 with a three-phase reopening plan

Restaurants and dining rooms may reopen 5/1 but maintaining strict social distancing

Bars remain closed

Oregon

Stay-at-home order issued 3/23 with **no expiration date**

Joined Western States Pact to coordinate reopening

Will not reopen until declining rate of cases, sufficient PPE, surge in hospital capacity, increased testing capacity, contact tracing, and isolating takes place

Pennsylvania

Gov. Wolf wants to reopen beginning 5/8

Reopening will occur in three phases, but will “follow the data”

Joined coalition of Northeastern states to coordinate reopening

Rhode Island

Stay-at-home order extended through 5/8

State will begin reopening parks and beaches

Joined coalition of Northeastern states to coordinate reopening

No current plans to reopen

South Carolina

State of emergency order extended through 5/12

Retailers allowed to reopen with 20% capacity or 5 people per 1,000 square feet

South Dakota

No stay at home order in effect

Tennessee

Restaurants allowed to reopen 4/27 at 50% capacity

Texas

Restaurants allowed to reopen 5/1 at 25% capacity

Utah

“Stay Safe, Stay Home” directive extended to 5/1

Schools remain closed for the remainder of the year

State is making plans for how and when restrictions will be lifted but all residents urged to stay home until further notice

Vermont

“Stay Safe, Stay Home” order extended through 5/15

Gov. Scott announced 5-point plan to reopen the state, but will not reopen until hospitals can treat cases without “crisis standard of care,” testing for all with symptoms, reduction in cases for 14 days, and active monitoring of all cases

Virginia

Shelter-in-place order expires 6/10

State will not reopen until it has 14 days of sustained downward trend

Washington

Stay-at-home order expires 5/4

Parks and outdoor recreation areas may reopen with restrictions beginning 5/5

Joined Western States Pact to coordinate reopening

West Virginia

Introduced “The Comeback Roadmap” on 4/27 for a three-phase reopening – with the first week of reopenings potentially beginning this week

Restaurants with outdoor dining allowed to reopen in week 2

Dine-in restaurants, bars, and hotels allowed to reopen weeks 3-6

Wisconsin

Extended stay at home order through 5/26

Joined Midwest states coalition to coordinate reopening efforts

No current plans to reopen

Wyoming

No stay at home order in effect

Submitted request for a federal disaster declaration on 4/9

Extended public health orders through 4/30

Travelers are required to quarantine for 14 days



Scott Miner, CIO at Guggenheim, said expecting a V-shaped recovery – reaccelerating in the third quarter – is “unrealistic.” He went on to say unemployment may reach 30% and remain in double-digits through the end of 2020.

The Promise of Herd Immunity

Herd immunity may be our greatest hope prior to the creation and distribution of a vaccine. Though movement restrictions slow the spread of COVID-19, it also limits the formation of herd immunity.

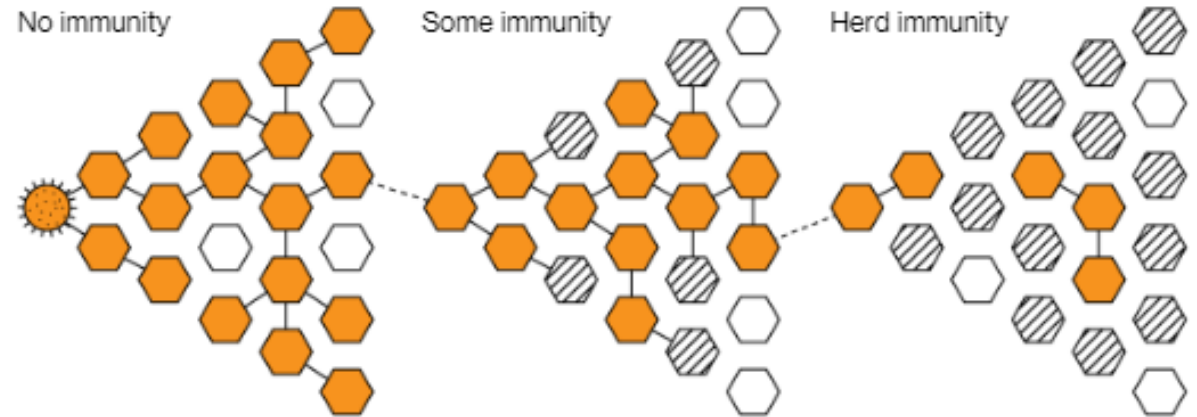
Growing concerns about a second wave of infections, either before or after fall, makes herd immunity more important. Already areas of China have had to shut down again due to a secondary rise in cases.

The Journey to Herd Immunity

① A novel pathogen is introduced to a community. Because it's new, no one has immunity and it begins to spread.

② Those who recover and those who receive a vaccine (if there is one) develop immunity, at least for a period of time. With the coronavirus, it's not known how long. So far, there is no proven vaccine.

③ Herd immunity takes hold when the pathogen can't find new hosts and stops spreading. That happens once a sufficient portion of the community is immune. For this virus, estimates range from 55% to 82%.*



*According to a study published April 7, 2020



According to WHO research, released April 25, there is no evidence to suggest that patients testing positive for COVID-19 antibodies are protected against future infections. This has significant implications for the herd immunity assumption and the resumption of day-to-day activities.

SHIFTING CONSUMER AWARENESS, INTEREST, AND CONCERN



Jan 20

First US case

Mar 05

100 cases in US

What is/are...

How to...

Google compiled the shifts in consumer searches as the crisis unfolded. Interest in COVID-19 didn't begin until after the U.S. was impacted but as it spread searches shifted from informative to action-based (how to react, how to create masks, etc.)

Feb 02

Feb 16

Mar 01

Mar 15

Mar 29

Apr 12

Jan 20

First US case

Mar 05

100 cases in US

Apr 06

42 states have issued stay-at-home orders

General Knowledge

Symptoms & Treatment

Preparedness

Economic Impact

Government Response

Gathering Remotely

It's important for the food industry to recognize the evolution of consumer interest, concern and confidence as information is released and the situation shifts. As such, messaging needs to be relevant but flexible to resonate on an ongoing basis.

Feb 02

Feb 16

Mar 01

Mar 15

Mar 29

Apr 12

OPPORTUNITIES AND HURDLES FOR REOPENING BY INDUSTRY





As the hospitality industry slowly welcomes back patrons and guests, shifting requirements, an uncertain viral situation, and changing consumer behaviors will all make the road ahead more challenging than in pre-COVID-19 conditions.

Drivers to Reopening

- Ongoing relaxation of mitigation restrictions
 - Relaxed foreign visitor restrictions
- Consumer demand/ need for return to normalcy
 - Improved weather
- Consumers returning to work outside the home
 - School closures (virtual and on-site)
- Improved supply availability/ consistency
 - Relaxed business travel restrictions
 - Relaxed immigration restrictions
- Continued/ permanent changes to alcohol delivery regulations





Hurdles to Reopening

Inconsistent reopening of supply chain nationwide

Inconsistent supply of ingredients/ products due to plant closures

Capacity limitations

Mask/ glove/ social distancing requirements delay perceived return to normal

Ongoing consumer fear of crowds

Ongoing consumer fear of high-touch/ high traffic surfaces

Travel restrictions for foreign visitors

Immigration restrictions

Labor competition from other industries

Shifting consumer behavior due to crisis and lockdown

Business travel restrictions

Future selling process for DSRs, MSRs, brokers

Thoughts: LSR Restaurants

These restaurants have the greatest immediate opportunity for recovery, as most were likely offering delivery and takeout prior to the crisis

Challenges to typically strong dayparts – breakfast and lunch – will continue as phased reopenings limit return to workplaces in the short and mid-term

Though consumers will want to return to normal, it can't be assumed prior behavior will return with state reopenings making it critical that messaging creates compelling reasons to visit throughout the day

Avoid temporary blocks to maintain social distancing requirements such as tape, bags, handmade signs, etc., which will limit the sense of normalcy craved

Empower staff to go above and beyond to offer compassion and hospitality, both of which will resonate emotionally with patrons

Consider limited menus throughout early stages of the reopening, focusing on the most popular and profitable items

Review all stations available to consumers – beverage, condiments, serveware – and reconsider with an eye to concerns over high-touch surface issues

Thoughts: FSR Restaurants

Dine-in behavior will likely take far longer to return, so creating a viable take out and/or delivery service is imperative

Consider how soft assets (curtains, plants, screens, etc) can help create required social distancing without visually obtrusive blocks (tape, signs, etc.)

As capacity remains limited and staffing potentially challenging, focus menu only on those most popular items and those strongest contributors to profitability

Work cooperatively with distributors and other key sources to identify weaknesses in the supply chain to avoid inconsistent service to patrons

Research and invest in solutions-focused technology, particularly those that address the two ongoing issues: consumer fear or high-touch surfaces and staff shortages due to labor competition and illness

Empower staff to go above and beyond with patrons, practicing compassion and true hospitality as these elements will resonate the strongest emotionally

Consider retail opportunities either on-site or through local partners to augment slow to grow on-site dining

Thoughts: Convenience Stores

Convenience stores have an excellent opportunity to grab more share from restaurants and grocery stores

These opportunities may be hampered by capacity limitations, but could be solved with curbside service, pre-ordering, etc.

Every effort to mitigate or eliminate high-touch surfaces throughout the stores must be made

Now is the time to innovate against prepared foods as restaurants look to recover, focusing on items driven by brand strategy and supportable ongoing capabilities

Kits, DIY assembly, alternative portion sizes should all be considered as options to expand prepared foods section

Where possible, operations should consider drive thru or walk-up windows to avoid in-store congestion while driving additional revenue

Consider facilitating food/ beverage ordering at pumps with order run out to the pumps/ delivered to curbside

As with restaurants, traffic patterns by daypart will shift as reopenings continue or secondary spikes occur - flexibility will be key going forward

Thoughts: Hotels/ Lodging

Years of “investigative reporting” into the cleanliness of hotel rooms will make it imperative properties can allay consumer fears

Property capacity – guests and other visitors- will create an issue for those fearful of crowds, potentially giving AirBnB and other alternative options an opportunity to grab share

Many technologies now exist to mitigate or eliminate several high-touch surfaces – others will undoubtedly be created in the short-term

Making additional sanitation products available in public spaces and in rooms (eliminating the need for travelers to carry their own) will be imperative

Shifts to bagged/ pre-packed room service offerings will accelerate to improve food security perceptions

The crisis gives many multi-unit organizations the opportunity to cull under-performing units, refocusing resources on better performing units and alternative site opportunities

Foodservice operations provide an opportunity for immediate, and greater than typical, revenue streams making it a more critical element for the short and mid-term as travel (domestic and foreign) slowly returns



Thoughts: Healthcare

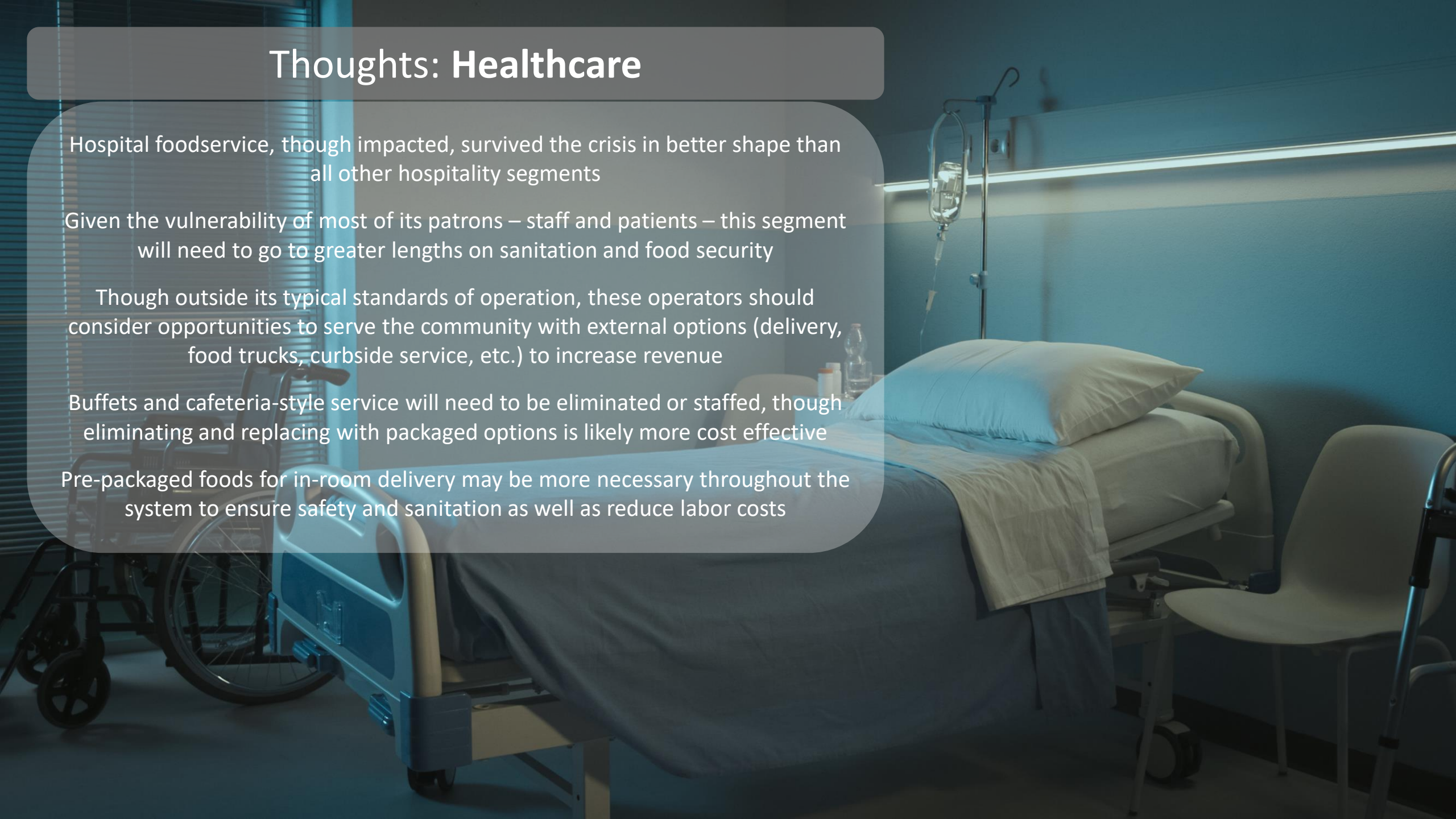
Hospital foodservice, though impacted, survived the crisis in better shape than all other hospitality segments

Given the vulnerability of most of its patrons – staff and patients – this segment will need to go to greater lengths on sanitation and food security

Though outside its typical standards of operation, these operators should consider opportunities to serve the community with external options (delivery, food trucks, curbside service, etc.) to increase revenue

Buffets and cafeteria-style service will need to be eliminated or staffed, though eliminating and replacing with packaged options is likely more cost effective

Pre-packaged foods for in-room delivery may be more necessary throughout the system to ensure safety and sanitation as well as reduce labor costs



A black graduation cap and a rolled-up white diploma tied with a red ribbon are resting on a stack of books in a field of green grass. The background is a soft-focus green field.

Thoughts: College/ University

Colleges/ universities will face ongoing challenges to enrollment given closures (some of which may last through the end of 2021), frustration with online learning and concerns with living on campus

The trend toward smaller college closures that began prior to the crisis will likely continue and accelerate, culling out weaker performing campuses

For those campuses still focusing on buffet/ cafeteria-style service will need to eliminate these options replacing with packaged items or staff, creating cost and labor issues

On-campus delivery, grab-and-go and extended hours will become more important, allowing students to avoid crowded dining halls/cafeterias

Ghost kitchens and other alternative operations for both on-campus and off-campus service may provide needed additional revenue streams

New dorm constructions and renovations may need to consider kitchens, pantries and other options that offer food outside the cafeteria for smaller dining settings

Colleges/ universities have a unique opportunity for more impactful education on the role of food in pandemics and stronger immune systems

A photograph of a desk setup. On the left is a silver laptop. In the center is a small succulent plant in a metal tin can. To the right of the plant is a glass mug of coffee. Below the mug is a red pen and a smartphone. The background is a wooden desk.

Thoughts: Business/ Industry

B&I foodservice will continue to be hampered by phased reopenings throughout the remainder of 2021

Many businesses may find it difficult to get employees to work full time in the office both due to ongoing concerns and shifting work/life balance after months working at home

Capacity limitations, both for office spaces and supporting dining areas, will challenge revenue and make cost management difficult

Those still relying on buffets/ cafeteria-style service must consider eliminating these options in favor of pre-packaged and grab-and-go items

At-desk/ alternative location delivery and extended hours may be necessary to avoid capacity issues in the dining area while making foodservice available to all workers

Those featuring off-campus restaurants may need to rethink how those programs are managed to avoid external “contamination” issues

Retail-focused perks, in the case of ongoing supply issues at retail, may be considered to increase employee morale, assist employees return

About Menu Matters

Maeve Webster, President of Menu Matters, is a leading consultancy working with manufacturers, operators, agencies and commodity boards.

She has spearheaded hundreds of major industry studies during her 20 years as a foodservice specialist, and today runs a private consultancy focused on helping manufacturers and operators understand how trends in consumer behavior and operations can be leveraged for strategic planning. Maeve's expertise is in the areas of trend analysis and evaluation, opportunity assessment, consumer and operator behavior, concept testing, and menu optimization and strategy.

At all times, the primary purpose of Menu Matters is to contextualize findings for clients so the "so what" is apparent, relevant and actionable.



MENU MATTERS

Food Insights That Matter

THANK YOU



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