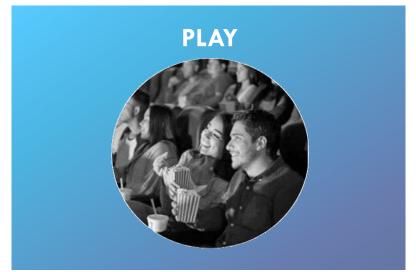


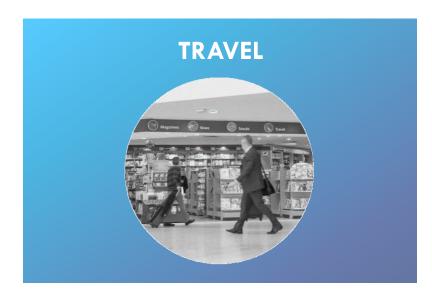
Foodservice Landscape: Trend Tracker



- In February & March, Restaurants added 485,000 jobs, the most of any industry
- According to OpenTable, restaurant traffic is returning down -20% vs. 2019, and also reports that 75% of restaurants on OpenTable are re-opened.
- OpenTable has also launched a platform called **Back to the Table**, where consumers can get info on openings, restrictions and specialties like outdoor seating.



- ➤ **Godzilla vs. Kong** debuted in theatres grossing \$48.5M in the first 5 days, despite simultaneous release on HBO
- Regal reopened 22 theaters April 2nd and anticipates all locations open by May 21st
- As part of the Disneyland Forward Initiative, **Disney** has begun **planning expansions with the city of Anaheim**, **CA** that would add more experiences to the park, including rides and hotels



- Marriott is testing vending machines at some locations as alternatives to breakfast buffets, offering complimentary AM items as well as a-la-carte items for purchase
- Delta announced as of May 1, they will no longer reserve middle seats.
- New Zealand & Australia are introducing a travel bubble, allowing for quarantine free travel between the two countries

Foodservice Landscape: Trend Tracker



- In preparation for fall 2021, some colleges like Brown Cornell and Rutgers have announced COVID vaccination requirements for all students planning to enroll
- Almost 80% of Pre K 12 teachers in the United States have received at least one dose of the COVID-19 vaccine, according to the CDC



- Target announced plans to spend \$2 Billion with Blackowned businesses, with expansion of Black-owned businesses products being a key pillar in that plan
- > 7Eleven announced two promotion plans for April that will benefit Feeding America
 - On Feeding America Fridays, a meal will be donated on behalf of every qualifying purchase
 - Through the **Round up for Rewards** program, guests can round up their purchase to the nearest dollar, with the difference going directly to Feeding America

Source: Microsoft - Work Trend Index

PEPSICO FOODSERVICE INSIGHTS



A New Kind Of Briefing Today!

The Insights Team has been so kind to lend their platform today so that we share how we have been successfully applying our 3V & 5E frameworks. These frameworks ensure we keep the consumer at the center of everything we do and build our brands away from home along the way.



Alexis Porter

Sr. Director, Prestige Brand Building AFH

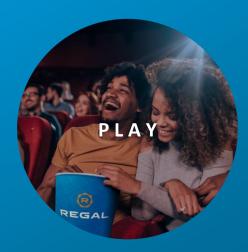
Understanding & Addressing The Changing Needs Of People In The Context of AFH Has Never Been More Important







More Restaurant **Consumption Will Be** Off-premise (Take Out, **Drive Thru, Delivery)**



Entertainment Will Entail Smaller Crowds And Safety Assurance



Shopping Will Have Less Friction, Fewer Trips/Stops, Be More **Ecomm Driven**



Business Trips Will Be Less Frequent And Recreational Travel Will Start Closer To Home

COVID Recovery Is Dynamic

Our Marketing Frameworks Have Evolved To Continue To Keep The **Consumer At The Center**

