The background image shows a person walking up a long, wide staircase that recedes into the distance. The staircase is flanked by two massive, textured concrete walls that rise steeply on either side. At the top of the stairs, a bright, hazy sky with some clouds is visible, creating a strong sense of perspective and upward movement. The lighting is warm, suggesting a sunrise or sunset, with the light source positioned directly ahead of the person at the top of the stairs.

The Evolution of Foodservice

Moving from
Survival to Bold
Innovation

Introducing The New Consumer



Desperate for, demanding
optimism

Avoiding the post-pandemic
hangover

Ongoing labor, supply chain,
inflation flying in face of optimism
desperately needed



Pandemic created an inflection point, leading to reassessed priorities

Sourcing goods, services, entertainment, information in new ways

45% don't want to go back to how they lived pre-pandemic

VALUES



YOGABABBLE

Some pandemic behaviors are
“sticky”

Work from home, athleisure
wear...continue

Homebodies – need reasons to
leave the house



Revenge spending

51% report desire to splurge on self

Online spending remains, but brick-and-mortar isn't being replaced

Spending around time of need vs venue or format





Brand loyalty shattered

75% tried new behavior, 39%
abandoned trusted brands

Ongoing search for brands that
align with new, evolving values



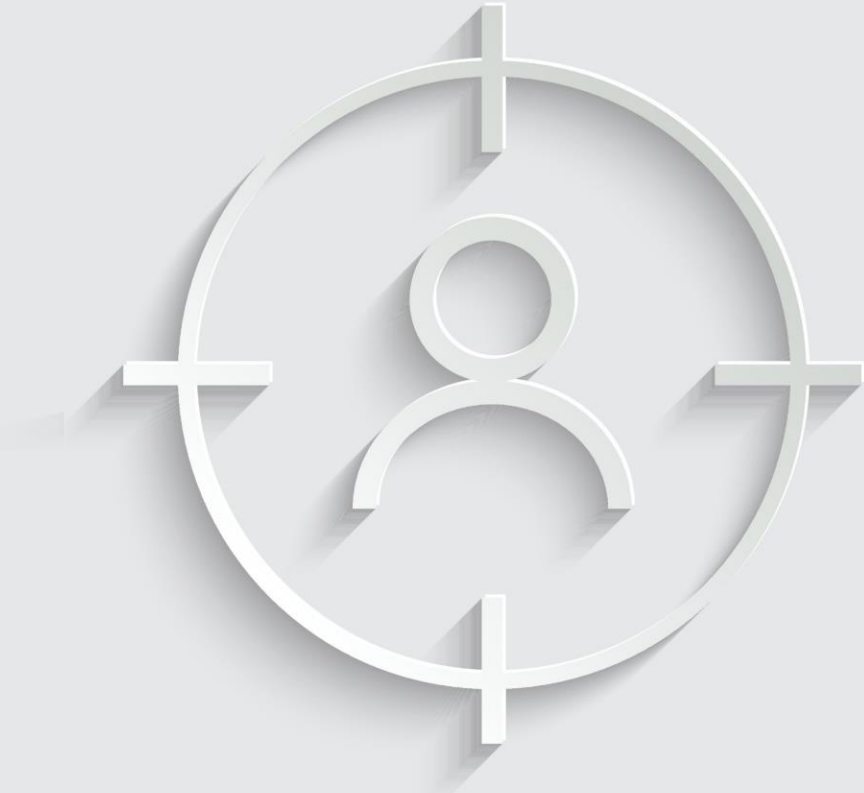
New behavior driven by “enjoyment”
– cost effectiveness, personally
rewarding follow

Increased at home food prep,
entertaining is both a challenge and
opportunity

Returning to hospitality

Consumer-centric innovation

Avoid “all you have to do”...



Post-pandemic Approach to Health & Wellness





The pandemic made all consumers “near-sighted”

As it recedes, long-distance vision
returns...focus on long-term health,
wellness





New focus on mental,
emotional health

Sleep, cognition, stress



45%

Of Gen Z report their mental health as very good or excellent

44%

Of Gen Z exhibited elevated depressive symptoms



Share of Gen Z reporting COVID made it more difficult to...

55%

Have fun

49%

Maintain mental health

46%

Be happy

Need intuitive health claims

Functional foods continue to flourish...speak plainly to consumers

Science important, but supporting not lead statements



Eliminate friction in healthy eating

Most consumers want balance
– not sacrifice



A top-down view of a dark-colored bowl filled with a variety of plant-based ingredients. The bowl contains sliced avocado topped with black and white sesame seeds, a sunny-side-up egg, steamed broccoli, sliced mushrooms, and shredded carrots. A person's hand, wearing a grey and white striped sweater, is holding the bowl from the right side. A pair of dark chopsticks is placed over the bowl. In the background, a small bowl of sliced radishes is visible.

Plant-forward is not a trend – it's a fundamental shift in eating

Intuitive, frictionless

Visual, textural, flavor appeal

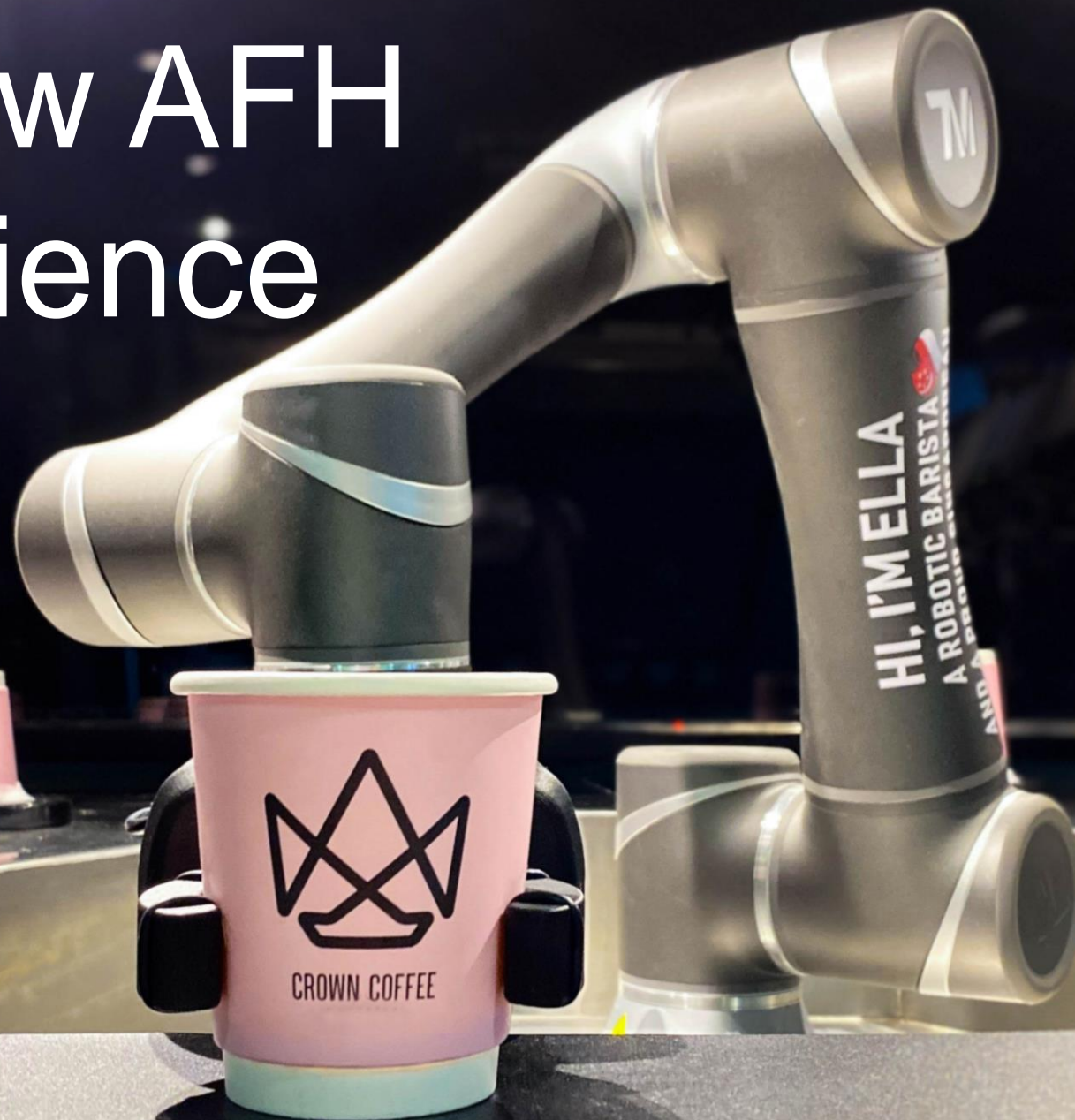
All benefits, no sacrifices

KEY TRENDS:

- Food as medicine
- Increased gut/ immunity link
- Aging-related functional benefits
- Sustainable, traceability, sourcing
– all link into health/ wellness now
- Whole ingredients, readable ingredient lists



The New AFH Experience



Operators *and*
consumers are
ready for innovation





42%

Very or extremely likely to try a new restaurant

42%

Very or extremely likely to try a new menu item

46%

Very or extremely excited about new food/ beverage experiences

Operation-centric vs consumer-centric innovation/ solutions

Decline of goodwill – “my turn” mentality





Robotics back and front of house

Mindful application of technology

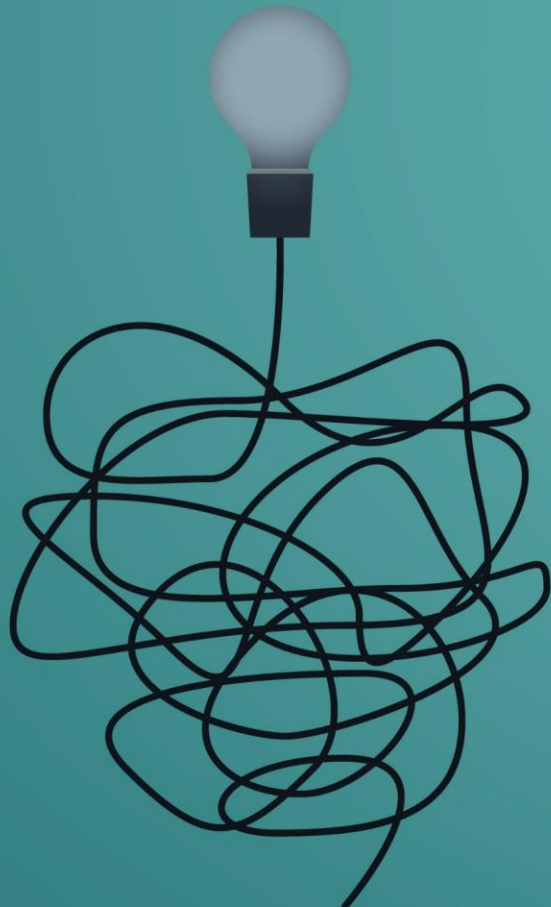
Facilitating hospitality, not replacing it

Phygital reality



Loyalty
programs return

State of the Menu



Keep it simple...

MENU

Menus shrank by

10%

between 2020 and
2021

60%

Share of operators
that reduced the size
of the menu

MENU

Less than

20%

Of ingredients,
foods, preps, formats
grew or trended

Tension between
business sense
of rationalized
menu and
consumer
demand for
variety



Rise in off-premise is driving more thoughtful development

Renewed focus on packaging – sustainability, integrity, security



PREDICTIONS



PREDICTIONS



CONSUMER

Traveling through tastebuds

Permissible indulgence

Dayparts continue to meld

Authenticity = truthfulness, honesty

Foods that excite/ inspire

Hunt for uniqueness

PREDICTIONS



BEVERAGE

Expanded off-premise relevance

Vending expands/ evolves

Flights

More experimental, experiential

Build your own

Surprise & delight

PREDICTIONS



BEVERAGE

Global takes on American classics

Health & wellness, functionality

Flavors: bold, sour, spicy

Premium

Textural

Visually engaging

PREDICTIONS



FOOD

Borderless cuisine

Bite-sized, multi-packs, portion control

No slowdown of bowl growth

Fresh-prep, complex vending

Restaurant quality at retail

Snack evolution and expansion

PREDICTIONS



FOOD

Premium

Wake up senses (pickled, blistered, aged)

Flavors: bold, sour, spicy, bitter, fermented

Sweet fusions (swalty, swicy, swokey)

Visually engaging

Textural



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