emerging & growth chain connection

ONE YEAR SUBSCRIPTION to Quarterly Insight Reports & Regional Operator-Supplier Connection Roundtables

What is an Emerging & Growth Chain?

20-500 Units + Innovative + Growing + Differentiated + Influential

WHY EMERGENCE IS DIFFERENT

FRESH INSIGHT: Quarterly insight reports based on current and timely insights and business implications from senior-level operators interviews and surveys

RELEVANT OPERATORS: The Emergence Operator Group consists of more than 130 relevant, Emerging & Growth chains 20 - 500 units in size.

COLLABORATION OPPORTUNITIES: Suppliers attend 2 of the quarterly regional roundtables and connect and collaborate with operators one-on-one
### EMERGENCE CHAIN RESTAURANT:
#### 2024 Operators Partial List

<table>
<thead>
<tr>
<th>Portillo's</th>
<th>Eggs Up Grill</th>
<th>Fuzzy's Taco Shop</th>
<th>Brooklyn Burger Co.</th>
<th>Little Greek Fresh Grill</th>
<th>Nando's</th>
<th>Mellow Mushroom</th>
<th>Dog Haus</th>
<th>Frisbee Dogs</th>
<th>Papa John's</th>
<th>Bar Louie</th>
<th>Fat Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Golden Chick</td>
<td>Chick-fil-A</td>
<td>7 Leaves</td>
<td>Fish Grill</td>
<td>Tender Greens</td>
<td>Wow Bao</td>
<td>Mellow Mushroom</td>
<td>Dog Haus</td>
<td>Frisbee Dogs</td>
<td>Papa John's</td>
<td>Bar Louie</td>
<td>Fat Brands</td>
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<tr>
<td>WOW Cafe</td>
<td>Ninety Nine 99 Restaurant &amp; Pub</td>
<td>Dunn Brothers Coffee</td>
<td>Char Crust</td>
<td>Lee's</td>
<td>Brix</td>
<td>Eat'n Park</td>
<td>Twin Peaks</td>
<td>Broken Egg Cafe</td>
<td>Bar Louie</td>
<td>Fat Brands</td>
<td>Eureka!</td>
</tr>
<tr>
<td>Hopdoddy Burger Bar</td>
<td>Salata</td>
<td>Metro Diner</td>
<td>PJ's Coffee</td>
<td>Chevoworthy</td>
<td>WaBar</td>
<td>Garbanzo Mediterranean Grill</td>
<td>MooYah</td>
<td>Rusty Taco</td>
<td>Bar Louie</td>
<td>Fat Shack</td>
<td>Goodtimes</td>
</tr>
<tr>
<td>Taziki's Mediterranean Cafe</td>
<td>Subway</td>
<td>Pizza 42</td>
<td>Piada</td>
<td>Your Pie</td>
<td>Anthony's</td>
<td>Smokey Bones</td>
<td>Romeo's Pizza</td>
<td>True Food Kitchen</td>
<td>Melting Pot</td>
<td>Snooze Al Ameer</td>
<td></td>
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<tr>
<td>Primanti Bros.</td>
<td>Freebirds</td>
<td>Luna Grill</td>
<td>Jinn &amp; Nicks</td>
<td>Foxxy's Bar-B-Q</td>
<td>Pepe's Pizza</td>
<td>Potbelly Sandwich Works</td>
<td>Sharis</td>
<td>Buddy's Pizza</td>
<td>Frisbee Dogs</td>
<td>Top Golf</td>
<td>Quiznos</td>
</tr>
<tr>
<td>Urbane Cafe</td>
<td>Wich it</td>
<td>Layne's</td>
<td>BIBiBOP</td>
<td>Saladworks</td>
<td>LaRosas</td>
<td>City Barbeque</td>
<td>Lazy Dog</td>
<td>Fajita Pete's</td>
<td>Frisbee Dogs</td>
<td>Top Golf</td>
<td>Quiznos</td>
</tr>
<tr>
<td>Cava</td>
<td>Campero</td>
<td>Casa Nota</td>
<td>Rumi's</td>
<td>Wildflower</td>
<td>California Macaroni Grill</td>
<td>Former Boys</td>
<td>Pal's</td>
<td>Juice It Up</td>
<td>Sharky's</td>
<td>Quiznos</td>
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</table>

Emergence Chain Restaurant®
4 Quarterly Insight Reports
- 60 pages - based on quarterly surveys & interviews

2 Personalized Connections
- Kinetic12 facilitates 1/1 connections/ introductions to new operators
- Operator introductions to suppliers they want to meet

2 Quarterly Live Roundtables
- Attendance at up to two roundtables included (1 person)

What’s Next Predictions For The New Year Report
- Annual report
- Top drivers of the Emerging & Growth chains Restaurant of the Future
INTRODUCTION

- The Emergence Group of Operators
- Why Emerging and Growth Chains Are Different
- Methodology
- 3 Things to Know
  - Traffic Turnaround: Reviving Restaurant Visits
  - Value: Service & Savings Win
  - Work-Life Balance: The New Menu for Success

PART 1: THE BIG PICTURE
- Top Business Issues
- Improve Customer Counts
  + 3 Things to Know #1
- Value Defined
  + 3 Things to Know #2

PART 2: LABOR & SIMPLIFICATION
- Successful Labor Retention Tactics
  + 3 Things to Know #3
- Simplifying Prep

PART 3: SUPPLIER INTERACTION
- Supplier Capabilities
- Distributor Capabilities
- Long-term Supply Chain Fixes

PART 4: INNOVATION
- Menu & LTO Strategies
- Who’s Involved In The Menu Innovation Process
- Reducing Food Waste
- Equipment Investment Priorities

PART 5: BRAND & CONSUMER CHANGES
- Changes To Your Restaurant Brand
- Greatest Expectations Of The Consumer

PART 6: LOOKING FORWARD
- Biggest Changes In Foodservice Today
- Obstacles To Growth 2024
- Optimism For 2024
Q. What are the 5 greatest over-arching business issues you are facing today?

Building customer traffic is the #1 priority for operators and has grown nearly 25% in its level of importance since last quarter.

Managing costs amid continued traffic turbulence has been a challenge, and operators are getting increasingly focused on balancing profitability with providing customers the value they expect, without causing further negative impacts on traffic. For suppliers, that means that cost increases may not be fully passed on to the end consumer. If you want to sell more and solve the traffic issues, menu ideas with broad applicability and differentiation are essential.

Building customer traffic
Customers value focus at the same time as managing costs
Declining profitability & margin optimization
Cost inflation & uncertainty on cost of goods
Building and opening new stores on time
Maintaining & improving customer loyalty
Labor - hiring quality staff
Lack of consistent menu execution
Managing franchisee relationships
Labor - retaining staff
Staff shortages affecting service level standards
Distributor fill rate issues & overall execution not up to standards
Difficult to find quality real estate
Manufacturer supply chain communication issues
Off-premise optimization

(Choose up to 5, n = 116)
3 Things to Know – Top Learnings for Q4 2024

Traffic Turnaround: Reviving Restaurant Visits:
Insufficient traffic continues to be a lingering issue for many operators, and the #1 identified business issue for operators overall.

Value: Service and Savings Win:
Between the increased cost of living to the consumer, wages not keeping pace with the rate of inflation, and operator’s maxing out pricing increases, value is now a top concern for consumers.

Work-Life Balance: The New Menu for Success:
Our new reality is that managing labor has become more complicated, which has dramatically changed how operators approach managing their teams.
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Operator-Supplier Quarterly Roundtables

✓ For active subscribers
✓ 5 events throughout 2024
✓ One-on-one networking meetings, connections, insights, and operator panels

“Thank you very much for a productive year of roundtables. We came away with better connections with our customers and many new introductions as a result.”

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Location</th>
<th>Dates</th>
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<tbody>
<tr>
<td>Q1 2024</td>
<td>Atlanta</td>
<td>Feb 27-28</td>
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<tr>
<td>Q1 2024</td>
<td>Charlotte</td>
<td>April 30-May 1</td>
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<tr>
<td>Q2 2024</td>
<td>Denver</td>
<td>May 29-30</td>
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<tr>
<td>Q3 2024</td>
<td>Chicago</td>
<td>September 10-11</td>
</tr>
<tr>
<td>Q4 2024</td>
<td>Dallas</td>
<td>December 3-4</td>
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</tbody>
</table>
### Agenda Day One – Dec 5, 2023

- **Noon-1pm Networking Lunch**
- **1:00pm Emergence Report Overview & Kinetic12 Insight Presentation - Kinetic12**
- **1:20** - Operator Introductions
- **1:45** - Supplier Introductions - First Half
- **2:00** - Operator-Supplier Connections - **Rotations 1-4**
- **2:50** - Networking BREAK
- **3:10** - Supplier Introductions - Second Half
- **4:00** - Operator-Supplier Connections - **Rotations 5-8**
- **4:15** Networking BREAK
- **4:15** Operator Panel 1
- **4:45** Operator-Supplier Connections - **Rotations 9-12**
- **5:05** Recap of Day 1 + Preview of Day 2
- **5:45** Bus Pick Up to Avocados from Mexico
- **6:00-7:30** Networking Reception

### Agenda Day Two – Dec 6, 2023

- **7:00-8:00am Continental Networking Breakfast**
- **8:00** Emergence Report Overview & Kinetic12 Insight Presentation - Kinetic12 (20 min)
- **8:30** Operator-Supplier Connections - **Rotations 13-16**
- **10:25** Networking BREAK
- **9:20** Operator Panel 2
- **9:35** Operator-Supplier Connections - **Rotations 17-20**
  -- Networking BREAK
- **10:40** Operator-Supplier Connections - **Rotations 21-24**
- **12:00 Recap Roundtable and Upcoming Meetings**
- **12:15** Networking LUNCH
Operator-Supplier Quarterly Roundtables

20 Suppliers - 20 Operators
Matching operators needs with supplier capabilities

“I enjoyed the event and thought it was well thought out and well managed.”
Value to Operators

✓ Four 60-page quarterly insight reports
✓ Relevant insight & data
✓ 1/1 roundtables with 20-30 suppliers
✓ Full year of connections with potential suppliers
✓ Access to personal introductions to other chains
✓ New business connections
✓ Unbeatable return on your time

“The Emergence Group allowed me to meet 1/1 with many suppliers we have not done business with. I also met some very knowledgeable operators. This is well worth the time investment.”

Survey TOPICS

1. Top Business Issues
2. Food & Labor Cost Recovery
3. Off-Premise Optimization
4. Manufacturer Support
5. Best-in-Class Manufacturer
6. LTO Strategies
7. Innovation Mindset
8. Employee Engagement
9. Virtual Brands & Ghost Kitchens
10. Automation & Robotics
11. Restaurant Prototypes
12. Technology Adoption
13. Outside 3rd Party Support
14. New Streams of Revenue
15. Off-Premise %
✓ Quarterly emerging growth chain insight reports
✓ Live regional roundtables
✓ Potential new supplier connections based upon needs and capabilities

Sign Up to Participate
• Agree to participate for 1 year, 4 surveys:
  • 15 min to complete each survey
  • Information is confidential

Optional
• Supplier Connections:
  • Personal introductions based upon operator needs & supplier capabilities/differentiation
  • Live Regional-Roundtables every quarter