

## INDUSTRY UPDATE

### Trends To Watch: 2011

To succeed in the coming year and position their businesses for the future, restaurateurs must understand the economic projections, consumer trends, and market forces that will impact their efforts. To shed some light on the year's potential challenges, opportunities, and innovations we turned to three industry experts for their invaluable insights:

The 2011 operating environment for the restaurant industry will definitely be the best in four years, forecasts **Hudson Riehle, sr. vp, research & information services, National Restaurant Association**. "When you look at the macro-economic indicators – ranging from real gross domestic product, to real disposable income, to employment growth – they are decidedly improved compared to the previous three-year period." Hudson says that real GDP growth will move into the 3% range and that, while that's not robust, "It's certainly moderate growth, and, compared to the previous period, moderate growth is exceptional growth." Employment numbers will be better too, something the NRA looks closely at because, as Hudson explains, in addition to employment driving up household incomes, "Gains in national employment translate into increased demand for restaurant services. It's the convenience factor – when more people are employed, they have less time for meal preparation at home." Employment growth within the industry has good momentum, too, having added 188,000 jobs last year – more than double that of national employment gains.

(cont'd on p.2) ➔

From all-you-can-eat spaghetti nights to "rarified" lasagna, "Old Italian is newly respectable," says **Michael Whiteman, president, Baum+Whiteman**, an international food and restaurant consulting company. And, he adds, consumers are curious – increasingly drinking and eating unfamiliar, but authentic, grape varietals and menu ingredients (think lardo, burrata, cured pig cheeks, etc.) "Olive Garden, Carraba, Macaroni Grill, and their competitors aren't playing in this ballfield, which will widen the gap between Italian for the masses and Italian for the classes, who, by the way, appear not to have been humbled by the great recession and possess serious risk money to try these unfamiliar items." And joining the "hero sandwiches with social aspirations" – which Michael sees as part of the Italian renaissance – are other sandwiches with "glorious flavor combos from around the world," served between ethnic breads, flavored flatbreads, or warm baguettes. "And seeing the success of sandwiches with far-out ingredients, several big-name chefs are toying with their own very upscale sandwich shops," he adds. Michael points to what he calls "The Offal Truth:" Innards and odd parts are popping up everywhere. Pork belly may have opened the door and now we're seeing beef tongue, pigs ears, beef cheeks, head cheese, pigs feet, oxtails, and more.

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**Andrew Freeman, president, Andrew Freeman & Co.**, which offers marketing, public relations, and consulting services for the hospitality and restaurant industry says the time is right for a new breed of do-it-yourself, "mom and pop" restaurants. "Partners are opening self-financed and self-built restaurants. These are small places with less than 40 seats, designed by friends or family, where the owners' hands touch every ingredient and every part of the restaurant. These restaurants are driven by a singular vision and can offer diners unique experiences," he explains. Andrew also sees the rise of "single-purpose restaurants," which serve variations on one thing. "Don't be surprised to see the Peanut Butter Palace, French Dippity Dog, or even The Big Biscuit, serving biscuit sandwiches and benedicts, opening soon." And speaking of partners, Andrew anticipates that restaurants and high-end quickservice food providers will join with farmers, artisans, and specialty purveyors to reinvent the food hall. Restaurants will also expand by opening quickservice windows.

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### Looking Forward

More trend resources and insights into the year ahead:

11 Crucial Consumer Trends for 2011 (TrendWatching.com)  
<http://www.trendwatching.com/briefing/>

Future Is Brighter in 2011, but Problems Linger (Wall Street Journal)  
<http://on.wsj.com/ekOMeO>

Outlook 2011: Biggest Challenges, Opportunities for Restaurants (NRN)  
<http://bit.ly/hliGYv>

11 for '11: Technomic Names Leading Restaurant Trends (Technomic)  
<http://bit.ly/efFOIJ>

The Next Idea's 2011 Food and Eating Out Forecast (Next Idea)  
<http://bit.ly/eCfYnW>

2011's Top Restaurant Trend: Affordability (Restaurant Hospitality)  
<http://bit.ly/f3uPZa>

Top Food and Restaurant Trends for 2011 (Smartblogs on Restaurants)  
<http://bit.ly/hjDTs3>

Food Trend Predictions for 2011 (Epicurious.com)  
<http://bit.ly/gML5SI>

## HUDSON RIEHLE

➔ Also on the rise are wholesale food prices. “Wholesale food price inflation in 2010 was a sizable 4.9% after a decline of 3.8% in 2009, which was obviously a recessionary impact. But before that, in 2007 and 2008, prices were up almost 8% a year, so this is definitely a long-term challenge. When these costs continue to grow as sizably as they have historically, it indicates the importance of a continual focus on generating sales – promotion, advertising, social media, and value – to get every possible additional party into the restaurant.” And while the industry’s focus on overall cost containment in recent years will continue to be useful, “It’s very difficult to remain profitable by just cutting costs,” he says. (One of the areas of operational efficiencies that he underscores is technology. “Because restaurants are so labor intensive, using technology to increase productivity and efficiency – and create better customer experiences – will gain even greater focus.)

**Hudson says that while there is still pent-up demand among consumers for restaurants, they remain conflicted. “The intent is there – nine out of 10 consumers say they love to eat out – but they have become much more discriminating about their spending.”**

“It will take several years to regain the number of jobs lost in this downturn, and that translates into consumers still being cautious about allocating their dollars. Knowing this, it really behooves operators to think through ways they can nudge those consumers into a decision to patronize. And once there, the ability to convey an enhanced value proposition, encouraging spending, becomes critical. The question is unlocking their motivation, so that they are comfortable with their choices.”

While Hudson says the environment in 2011 for raising menu prices is better than the previous three years, he advises caution. “Not to say that consumers won’t pay for quality experiences; it’s simply that over this excruciating period of economic retrenchment, they have become smarter consumers; they are also more sophisticated about what constitutes a superior restaurant experience. Because they are making more conscious decisions to allocate their hard-earned dollars towards a restaurant experience, a misstep on the operator side is more pivotal.” For information about the NRA’s 2011 Restaurant Industry Forecast and for the 2011 What’s Hot Chef’s Survey, visit [restaurant.org/research/forecast](http://restaurant.org/research/forecast) The National Restaurant Association continually conducts research – consumer, operator, economic, market, human resources, operations, and tourism – to provide its members with data and information to help them succeed.

## MICHAEL WHITEMAN

➔ Michael predicts better times for upscale restaurants, particularly contemporary ones. Just the same, he urges restaurants not to try to save here and there in ways that will make economically gun-shy consumers feel unwelcome – eliminating reservations; upping the price of wines-by-the-glass that don’t appear on the list; trying to ration the time people can occupy a table; etc. “These tactics might generate profit in lean times but they do nothing to win the hearts and minds of customers.”

In other segments – particularly fast food, fast casual, and dinner houses that promote curbside pickup – Michael warns about new competition from drug and convenience stores that are beefing up their food departments for grab-and-go salads, sandwiches, etc. In the spirit of “if you can’t beat ‘em, join ‘em,” he predicts that fast food chains will open inside convenience stores and supermarkets. More restaurant operators and big-name chefs will also be chasing after business with their own food trucks, potentially crowding this road to expansion. Also popping up? Restaurants, like food trucks, with no location at all. “The recession created empty restaurants and chefs with no kitchens. Impromptu food places will pop up all over, some for a night, some for a week – big name chefs will trade kitchens for a night or two.” Coming next: “Rotating bartenders spreading the news about their exotic cocktails.”

**While “fancy clientele” will scale up their interest in heirlooms, organics, and the like in the fine dining arena, elsewhere “gross is good” proclaims Michael. Watch for restaurants to swell serving sizes and create calorie bombs that are “neurotically comforting” to diners who may be feeling lousy about losing their jobs and their houses.”**

But for all those opening their mouths wider and wider, there will be others, “convinced that anything added to food is objectionable,” who will become more discriminating, looking for dishes that are “free from” – free from gluten (“even though a minuscule portion of the population suffers from celiac disease”, lactose, etc. “Now that WalMart has joined with Michelle Obama against fat, salt, and preservatives, you’ll see great consumer focus on better-for-you food.” For the full Baum+Whiteman forecast, visit [baumwhiteman.com/2011trends.pdf](http://baumwhiteman.com/2011trends.pdf) Baum+Whiteman is known for creating two of the world’s highest grossing restaurants and working with numerous international food, hotel and related concepts – including fast food and casual dining chains. Baum+Whiteman are experts in understanding how food “moves” people both physically as well as psychologically.

## ANDREW FREEMAN

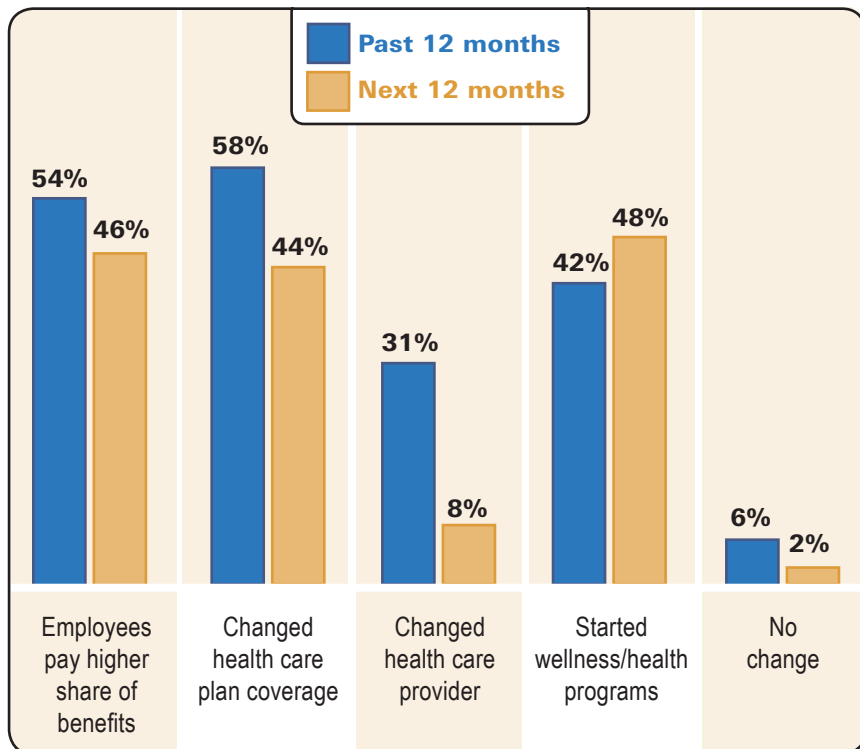
➔ For Andrew, “small is big” when it comes to menu items. “Smaller portions – less than half size – are perfect for smaller wallets and eating on the run.” Think mini-pizzettas and bagels, miniature tacos or burritos, snack-sized pot roasts and pot pies, and two-bite hotdogs. Hot dogs are among the menu items that Andrew sees chefs dressing up. “Hot dogs are the new burger as chefs re-imagine them with boutique-style sausages and gourmet toppings.” The same is true for “designer pies,” soft serve ice cream – even junk food. “We’re waiting to see what talented chefs come up with as they reinterpret Cheetos, Bugles, jerky, Slurpees, etc.” He predicts that creative chefs will also have their way with spiked, salty, sweet, and savory popsicles in exotic and alcoholic flavors, as well as sweet or spicy popcorn – which will pop up on dessert menus, bar tops, scattered across ceviche, or as crispy crusts on meats or fish. Also scattered around will be powders, crumbles, dusts, and “dirts” crafted from cookie crumbs, dried mushroom powder, dehydrated beets – and anything else that can be dried, ground, or crumbled to add intriguing texture.

**Even with all this wild creativity, Andrew predicts that restaurants will abandon descriptive menu jargon (like cooking method, sides, or adjectives), instead highlighting only the key ingredients.**

Increasingly key ingredients will be vegetables. “Meatless Mondays and vegetable-based tasting menus are gaining traction as guests realize it’s not all about the meat on the plate. We’ll see them roasted directly in embers and fried – look for fried cauliflower, Brussels sprout and kale chips. And forget the potato chip – try it with turnip instead. Bet you can’t eat just one.”

Restaurants will put their signatures on more items, including breads – serving special house-made breads with care, such as a butter service. Beekeepers are providing signature honey to be featured in sauces/dressings, and chefs are creating signature brews. Even with the rise of signature offerings, Andrew underscores that guests now expect the right to customize everything and advises restaurants to be flexible and go with the flow...sometimes literally, citing talented bartenders creating drinks based on guests’ taste and liquor preferences. For the complete Andrew Freeman & Co. 2011 Trend List, visit [afandco.com/index.html](http://afandco.com/index.html) With over 50 successful hotel and restaurant launches and hundreds of PR and marketing campaigns nationwide, Andrew Freeman has his finger on the hospitality pulse. Andrew Freeman & Co. offers a wide range of services in the areas of restaurants and wine, travel and hotels, and more.

## Lowering Healthcare Costs



Source: June 2010 People Report™ Special Report. Data was contributed by the corporate offices of 50 unique national restaurant companies, representing all industry segments, via an online survey. People Report provides workforce metrics, benchmarks, trends, and best people practices for the service sector workforce.

While details of healthcare reform legislation aren't yet known, operators have already taken steps to mitigate the impact. Nearly all (96%) of respondents to a June 2010 People Report Health Care Survey said they expect healthcare costs to increase because of the bill. As a result, many have begun shifting a higher share of cost to employees, changed plans and providers, and/or implemented wellness programs. While they require resources, employee health/wellness programs can have a measurable impact. "We just awarded Greg Creed, pres. and chief concept officer of Taco Bell, the 2010 Legacy Award at our recent Best Practices Conference," reports People Report ceo and founder Joni Doolin. "Much of the reason had to do with Taco Bell's 'Smart with Heart' initiatives focused on employee wellness. Greg reported improved employee engagement, productivity, retention, and loyalty – which all translates to a better bottom line."

Joni says that the uncertainty surrounding the bill makes it more difficult for operators to plan and adjust. "The bill would have to be overturned for the impact on operators to be totally mitigated – and that is very doubtful. More likely, it will continue to be a political football creating an even greater environment of uncertainty." About half (53%) of respondents said they will increase menu prices; 45% contemplate a variety of measures such as restructuring, pay freezes, limiting bonuses/benefits, etc. About a quarter (24%) said they will cut jobs; 18% will stop opening units/creating new jobs. Employer requirements for offering health insurance coverage aren't scheduled to begin until 2014, but the legislation does impose some requirements that affect all employers in the next several years. For info, visit [restaurant.org/advocacy/issues/](http://restaurant.org/advocacy/issues/) and click on Health Care.

## AROUND THE USA

### Fans of Facebook

Restaurants of all sizes and in all segments are creating Facebook pages to connect and interact with current and potential customers.

Chick Marshall, owner, Mr. Stox, **Anaheim, CA**, says he didn't take Facebook seriously at first but now he thinks it may be a more important communication channel than email. "I created our Facebook page myself last year but realized I didn't have the time to keep it up, so I hired a company to manage it," says Chick. He says their fan base is growing, now close to 200. "When hiring a social media consultant, be sure not only to look at the restaurant pages in their portfolio, but to talk to their restaurant clients," he advises. . . . "We believe people want to have a personal connection to the places where they dine," says Katie Johnson, dir. of marketing, Harbor Restaurant Group, **Destin, FL**, who created a separate Facebook page for each of their four restaurants. She posts several times a day – always before lunch and happy hour, with a couple of lines about menu specials and special offers. Katie says pictures from events are very popular and encourage people to check pages frequently and tag photos. She's also

*"We've had a Facebook page for almost two years because most of our demographic has a Facebook account, and it's a more immediate way to stay in touch than our website."*

**Jim Anile, owner, Revolution, Durham, NC**

trying out Facebook Places, a location-based app that lets users check in on their mobile devices so friends know where they are. "To create loyalty at our restaurant Fishbar, we're rewarding those who check in a certain number of times during a month-long promotion with a free appetizer". . . . Last year, The Irish Restaurant Company, **MD** and **MA**, hired someone to lead its social media initiatives, including creating and updating Facebook pages for their four locations six to seven times a day. "This is the future – we want to keep ahead of the game, and the only way to do it, I feel, is to have a dedicated person on staff," says owner Anthony Clarke. Pages have tabs for music schedules, specials, coupons, photos, and quizzes. On their Brian Boru Pub's page there's a tab called "Fan Party Info." Jessica Hahn, marketing dir., says, "To enlist current fans to increase the Pub's fan base, we promised a 'fan party' once one of three goals was met – 1,000; 2,000; and 2,500+.

She says the promotion ended with 2,800+ fans, who were rewarded with a party (free drinks, food and giveaways) at the Pub. She says that feedback from new fans has been great, many of whom are becoming repeat guests. . . . "We've added an 'order online' tab to our Facebook page, which increased sales in the first five weeks by 10%," explains Geoff Alexander, exec. vp, Lettuce Entertain You and managing partner, Wow Bao, **Chicago, IL**. "When people use the 'order online' tab many choose to 'like' an item, which is added to their Facebook status – and automatically shared with their friends." To keep customers engaged and ordering on Facebook, every Wednesday a secret word is posted – tweets remind people to look for it – and if customers use the secret word when ordering, they get something free. "It's about going viral, and I believe all of this keeps people talking about us and keeps us part of the conversation – which is what we want."

## Driving Delivery

As restaurateurs look for ways to increase sales when customers aren't dining out as often – yet still seek convenience – some are adding the option of delivery.

**“Delivery is becoming an important part of our business, and we're treating it that way,”** says Terry Lawler, gm, L. Woods Tap & Pine Lodge, Lincolnwood, IL. Like many restaurants that tried but didn't execute delivery well, L. Woods turned to a company that specializes in order taking and delivery. “We wanted to work with a company that was successfully growing their business – as we hoped to grow ours. We eventually found one that was in line with our culture and we felt was looking out for our best interests,” he explains. DiningIn takes orders, faxes them to the restaurant, identifies the lead time required, and dispatches drivers. The company also provides marketing through its database and sales force, who market L. Woods' food (presenting actual samples) to decision-makers at companies that order in for employees several times a week. “We're reaching customers who would not normally know about us and, as a result, we've increased our delivery business by 75%. Our check average is higher for lunch and dinner, and our carryout business is even up 15%.” Terry says that L. Woods works closely with the delivery company, getting immediate customer feedback from them; they also set sales goals and hold each other responsible for meeting them.

*“With takeout and delivery, 60-70% is repeat business, with an average check 20-25% higher than on premise.”*

**Ron Patel, president, Restaurant Marketing and Delivery Association**

Marc Murphy, chef/owner, Landmarc, New York, NY, says **because he is a stickler for quality, he didn't begin offering takeout and delivery until customers demanded it, and now he's very glad he did.** “If it's pouring or cold outside and people aren't dining out, our numbers are still the same because of delivery.” He says they take orders online, on the phone, and through a third-party company – but do all delivery themselves. “We have a team of two-to-four people, depending on time of day, at both restaurant locations assigned to take and manage orders, pack, and deliver.” He says that 70% of the orders come from a third-party company (SeamlessWeb) that is particularly popular with businesses. Marc advises that, “One of the most important things is having people on the phones who speak and communicate well – it's worth paying a higher hourly rate because they make callers feel comfortable, plus they're good at upselling.” He also says that quality packaging is critical; that while the best packaging is the most expensive, it's worth it to maintain food quality and customers often comment on it.

**There are several types of companies that manage and perform restaurant delivery,** including 200+ that do actual deliveries in the U.S., each with its own network of restaurants for whom it delivers food (DiningIn, Waiter.com). There are some companies that take orders through their own websites and on the phone, (GrubHub, Delivery.com, SeamlessWeb), but don't handle delivery. Others (ordertalk, Exit 41, Kudzu, NetWaiter, TakeoutTech.net) provide order-taking software for restaurants to use on their own websites. Some, like CampusFood (handles orders for restaurants that do their own delivery) and Restaurants on the Run (an order and delivery company) focus specific markets, e.g. college campuses and businesses. Many are also sophisticated sales and marketing channels offering smartphone apps, text message-ordering capability, call centers, and Facebook integration (Exit 41). Costs vary – some charge commissions per order, others have monthly rates. Services of these companies can include order and menu management, hosting customer and order data (making reorders easy), driver dispatch, billing, credit card processing, and sales/marketing (including loyalty programs). Most online ordering systems link to POS systems.

**When choosing a company to make deliveries, some things to consider:** percentage of on-time delivery, error rate, the system to provide customer feedback, how problems are handled, how drivers are dressed, the kind of delivery materials used (such as insulated bags). Ron Patel, president, Restaurant Marketing Delivery Association, also recommends speaking with current clients. (To locate a delivery company in your area, visit the Restaurant Marketing Delivery Association at [rmda.info](http://rmda.info)).

## Weaving the Mobile Web

Fueled by the availability of sophisticated smartphones, PDAs, and tablets – and by more powerful networks, **the share of consumers accessing the Internet from mobile devices is growing by leaps and bounds.** Opinions vary as to when connecting from mobile devices will surpass desktop computers – some predict it will be within the next five years – but most agree that it's inevitable.

There is debate about whether businesses should keep pace by focusing on custom apps that consumers download, or on mobile-friendly websites...or both. “If you don't have the resources to do both, **there's more value putting a budget towards a mobile-friendly website,**” advises Magnus Hultberg, strategic advisor at Livebookings, a global online marketing and reservations service for restaurants. “Apps must be specific to operating platforms, which makes it expensive to reach a broad spectrum of users. Restaurants need to be where their customers are, and increasingly they are doing web searches on the go.”

Another debate is whether a business' mobile site should be a streamlined version or the entire site, designed or optimized for viewing on mobile devices. “At a minimum, **it's essential that someone using a mobile device can easily access a restaurant's phone number, hours, booking information, map with directions, etc.,**” says Magnus, “and better if there is more information, such as menus, photos, etc.”

Magnus says that restaurants with large, feature-rich sites may need to build new, mobile-friendly sites. “But most restaurants don't have big sites, and today's smart phones are pretty good at displaying them, so **while this is important for restaurants, it doesn't need to be enormously expensive.**” His advice? First, make sure that important content people will want to access using a mobile browser is front and center on your website. Then, view your site from a mobile device to confirm pages fit on the screen and are easy to download and navigate. If your site falls short and your budget is limited, Magnus suggests, “Find a web developer you trust to help build or rebuild your site with existing platforms such as Wordpress or Tumblr – where there are ready-made templates adapted to mobile – and to help you make the most of it.”

## Wines on Tap

Ronn Wiegand, publisher, *Restaurant Wine*, estimates that **there are over 200 establishments in the U.S. pouring wines on tap** – dispensing wine from kegs, like beer. Those who cite many benefits – including **cost savings** (owing to reduced packaging, transport, and garbage/recycling), **less of an environmental impact, and wines that are fresh from the first to last glass**. One of the pioneers behind wines on tap, Sang Yoon, owner, Father's Office, Santa Monica/Los Angeles, CA, has 12 taps – six for rosés, six for whites (which he feels pair best with his Asian cuisine) – from five gallon kegs. “Serving wines from five gallon kegs not only reduces wine costs because much of the packaging has been eliminated and deliveries are fewer, but it speeds up service because bottles don't need to be opened and dealt with,” says Sang. He adds that serving wines by the glass from bottles is especially wasteful, not only because of all the packaging, but the spoilage, which he estimates can be as much as one-third of a bottle. Todd Rushing, owner, TWO Urban Licks, Atlanta, GA, is another wines on tap pioneer and an advisor to Silvertap, a Sonoma vineyard that he convinced to sell premium wine in kegs six years ago. “I want to give our guests the freshest, highest quality wine, and when wine is in a bottle, all kinds of things can happen,” he says. “We've created a wonderful beverage service experience for customers using great glassware and decanters.” Todd says **wines in a keg are at least 10-15%, and as much as 25%, less expensive** – savings that he and other operators pass along to customers. The restaurant displays 42 stainless barrels in a 26-foot glass and steel, temperature-controlled tower and the wines are drawn by gravity. The only wines not on tap are sparkling wines and Champagnes. Todd buys from 74 different wineries, primarily on the West Coast; when new kegs are delivered, empty kegs are returned for cleaning and reuse.

Robert Newton, chef/owner, Seersucker, Brooklyn, NY, serves wine on tap as an extension of his locavore philosophy. Robert buys direct from regional wineries that deliver and pick up the kegs. “Right now I'm serving a Paumonack Chardonnay for \$10 a glass, and last summer I featured a Red Hook rosé for \$6 glass – both great deals for customers. I'd serve more, but the availability of wines in kegs from local and regional wineries in New York State is limited to only five or six wineries,” he says.

Robert retrofitted one of his beer lines for wine; like beer on tap, these systems use inert gas to displace oxygen and push wine through the lines. According to Dave Moore owner, Pipe Dreams, a company that handles draught beer systems installation and maintenance for Robert, the technology for retrofitting beer systems and building brand new systems for wines on tap is evolving quickly. He says that the cost of converting beer lines to wine depends on the age of the system, the types of lines, etc. If the system is relatively new, he estimates the cost at about \$200 per line. (To get started, contact the company that handles your beer system, and your wine distributor. To view TWO Urban Licks' wines on tap, go to <http://bit.ly/hDwddH>.)

## TODAY'S CONSUMER

### Do-It-Yourself

**TREND:** Today's Consumers are prioritizing their spending and as they consider what's truly worth it, “Do It Yourself” (DIY) is emerging as an attractive alternative – including preparing more meals at home. The majority (63%) say they eating out less given concerns about finances, which is not news; what's meaningful is that 40% actually prefer making something themselves. This underscores an important element of appeal of DIY – it isn't just a strategy for controlling spending; it can also provide emotional rewards. Among those who identify themselves as Do-It-Yourselfers, 50% say that cooking from scratch is way they express themselves.

**OPPORTUNITY:** One way restaurants can work with the DIY cooking mindset is to provide options that fall between dining on-premise and cooking from scratch at home. Consider offering your own brand of “speed scratch” cooking for takeout – basic

ingredients and/or parts of preparations already prepared, as well as instructions, for customers to complete at home. In take-out packaging, provide ideas for customers to add their own touches; in doggy bags, add tips to create something from the leftovers. Create deeper relationships by positioning your restaurant as customers' cooking resource with recipes and information about ingredients, wines, wine and food pairings, etc. available on your website or at the restaurant (even interactive, as with an in-house iPad and menu/wine apps). Consider cooking classes and a channel (email, social media, etc.) to ask questions of your chefs.

**CAUTION:** On premise, guests looking for knowledge or inspiration may turn to servers with questions they aren't able to answer. Make sure that staff understand the importance of passing questions along and of responding to guests.

(SOURCE: 2010 YANKELOVICH MONITOR®)

## MAKE PARTNERSHIP REWARDING<sup>SM</sup> with American Express

Register now for the 22nd Annual American Express® Restaurant Trade Program at the Food & Wine Classic in Aspen, June 17 - 19, 2011.

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