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**Strategic Plan:
January 1, 2020–December 31, 2022**

Prepared by,

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National Association of Concessionaires

July 30, 2019

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EXECUTIVE SUMMARY

The National Association of Concessionaires (NAC) completed its next strategic plan that covers three-years from January 1, 2020-December 31, 2022. The NAC Strategic Plan was developed by Dan Borschke, Executive Vice President of NAC, with the assistance of management consultant, Mick Weltman.

The critical issues approach to strategic planning was used in which the key challenges facing NAC during the next three years were identified and strategies and key tasks for dealing with those issues were developed. Three critical issues were identified:

1. **How can NAC best monitor and adapt to change?**
2. **How can NAC membership develop and grow?**
3. **How can the upcoming NAC leadership transition happen most effectively?**

For each Critical Issue, contingency plans with possible alternative strategies were developed.

The critical issues were similar to this in the NAC Strategic Plan 2017-2019 but with the issue of change becoming most important, membership still a concern, and the transition to new leadership being raised as an important critical issue in the near future.

The Board of Directors will review this strategic plan, revise as needed, and approve it at their July 30, 2019 board of directors meeting to serve as NAC's guide during the next three years, 2020-2022.

OVERRIDING MESSAGE TO LEADERSHIP AND MEMBERSHIP

When an individual exceeds their 75th year many have been said to have "seen better times." NAC, now exceeding its Diamond Anniversary, is racing to remain relevant. An organization, unlike individuals, doesn't necessarily need to be put out to pasture or retired, a trade association like NAC needs to continue to evolve and meet the needs of society's changing population and the evolving culture of the industry while satisfying the ultimate purchasing consumer.

The challenges that await NAC are not unique, we see a myriad of corporations, associations and communities addressing these ever-present tasks daily but what is unique is the communal approach that NAC leadership and membership have always implemented to advance the industry. First, and foremost, is the understanding that without a vibrant concession and hospitality community there is no benefit in improving one's own stance.

The concession and hospitality channel can't advance without a strong and vibrant NAC. The association of interested parties within the channel needs to continue to progress and represent all aspects of the channel. Operators and Suppliers working together to improve and advance the community will only happen through a strong and encompassing intermediary, and that is NAC. This third three-year Strategic Plan is our pledge to continue the growth of the concession and hospitality community while addressing NAC's vital role in that progression.

PROCESS

The National Association of Concessionaires developed this three-year strategic plan during June-July 2019. NAC engaged management consultant, Mick Weltman, to assist Dan Borschke, NAC Executive VP, in this process. The strategic plan, to be reviewed and approved by the NAC Board of Directors during their board meeting in July 30, 2019, covers January 1, 2020-December 31, 2022

Key tasks for the planning process were to:

1. Research the SWOT: Strengths/Weaknesses (internal) and Opportunities/Threats (external)
2. Determine the critical issues that need to be addressed
3. Create strategies (the "how" to address those critical issues and reach the goals sought)
4. Develop contingency plans (what to do if things don't go according to plan)

This approach had the following advantages; it:

- Provides a simple process for the Board of Directors to think strategically
- Creates tools for leading and managing NAC during the next three years
- Requires only a limited time and respects the Board's limited availability
- Empowers both the Board of Directors and staff to create and manage their future
- Allows NAC's new leadership to create a more directional strategic plan when comfortably on-board

Four key research tools were used:

1. Reviewing NAC material
2. Surveying all NAC members through on-line tools (25 responded)
3. Interviewing the Board of Directors and other key people (11 interviewees)
4. Developing strategies and contingency plans

Survey data (unedited) and interview comments are in the attached appendix and, for the most part, are verbatim. For both, what was said was recorded but not who said it.

BACKGROUND

Founded in 1944, the National Association of Concessionaires is a 501(c)(6) non-profit trade association for the recreation and leisure-time food and beverage industry. Members are the owners and operators of entertainment and recreational venues, suppliers of food, beverages and services to those venues, and food service companies who provide the end product to consumers.

NAC holds an annual EXPO that brings together the top food and beverage concession leaders in the recreation and leisure-time industry. In addition, NAC identifies legislative issues of interest to its members and those in the recreation and leisure-time food and beverage industry. The association provides numerous forms of on-going communication and information outlets to its membership while offering networking and social opportunities for members to share best practices. Lastly, NAC offers to those in the industry an extensive array of education and certification programs either in-person and/or through on-line training.

NAC Membership currently stands at approximately 550 with 45 international members.

NAC is governed by a 37 member board of directors, with 12 standing committees, and a staff of five professionals.

The National Association of Concessionaires will use this strategic plan to help guide it for the next three years: January 1, 2020-December 31, 2022.

NAC's last Strategic Plan 2017-2019 focused on the following two critical issues:

- 1. Membership:** How can members grow their businesses through NAC support during the next three years?
- 2. Organization Effectiveness:** How can NAC stay relevant and become a stronger, more effective association during the next three years?

STRENGTHS/WEAKNESSES and OPPORTUNITIES/THREATS

The bulleted items in the following Strengths/Weaknesses and Opportunities/Threats (SWOT) table comes from both survey results and interview results and focuses on those things internal to NAC (strengths and weaknesses) as well as those things external to NAC (opportunities and threats). Some items appear as both opportunities and threats, depending on how one viewed them. A key driver for the results is the issue of change. Two major Opportunities/Threats additions for the NAC Strategic Plan 2020-2022 from the last strategic plan were technology and changing culture. Many of the same strengths/weaknesses were on the previous strategic plan.

<p style="text-align: center;"><u>Strengths (Internal to NAC)</u></p> <ul style="list-style-type: none">· Friendly caring members· Good leadership· Strong events· Service to members· Networking opportunities· Great resource, especially for education	<p style="text-align: center;"><u>Weaknesses (Internal to NAC)</u></p> <ul style="list-style-type: none">· Change in leadership coming· Membership size and diversity
<p style="text-align: center;"><u>Opportunities (External to NAC)</u></p> <ul style="list-style-type: none">· Education needed· Change occurring at fast pace in many areas· New and revised markets· Uncertainty means new and more opportunities	<p style="text-align: center;"><u>Threats (External to NAC)</u></p> <ul style="list-style-type: none">· Consolidation in industry· Labor both availability and rates· Regulations from government· Economy uncertainty in future· Technology changing at rapid pace

CRITICAL ISSUES 2020-2022

The strategic planning process focused on identifying critical issues (key challenges) that will drive NAC’s success during the next three years. It is similar to a goals approach to strategic planning by creating targeted end results but with a focus on the challenges NAC faces during the next three years rather than a focus on its long-range direction.

Three overriding issues (posed as questions) were identified based on the survey and interviews:

1. **How can NAC best monitor and adapt to change?**
2. **How can NAC membership develop and grow?**
3. **How can the upcoming NAC leadership transition happen most effectively?**

Each Critical Issue includes the goal(s) to achieve and strategies and key tasks to achieve those goal(s).

Critical Issues 2020-2022 builds upon Critical Issues 2017-2019 continuing to reflect the importance of membership (growing and diversifying it) as well the importance of change and how it is affecting NAC and its members. In addition, due to Dan Borschke (NAC Executive Vice President) retiring September 1, 2021, the issue of new leadership became one of the three critical issues. However, change and its pace, uncertainty and impact moved to the top critical issue.

<u>CRITICAL ISSUE #1</u>	
How can NAC best monitor and adapt to change?	
Goal #1	Develop change monitoring system
Strategies and Key Tasks	<ul style="list-style-type: none"> • Determine areas to monitor (I.e., consolidations, technology, labor issues, regulations, changing food and beverage tastes, etc.) • Develop monitoring process for each key area • Add standing committee to lead monitoring effort • Create and assign association member team to monitor key area • Develop a change reporting process to better get the word out
Goal #2	Develop strategies for responding to change
Strategies and Key Tasks	<ul style="list-style-type: none"> • Develop a simple green, yellow, red approach based on level of change • Develop scenarios for each level of change • Implement strategies based on level of change • Report results

<u>CRITICAL ISSUE #2</u>	
How can NAC membership develop and grow?	
Goal #1	Decide future composition of membership, i.e., size, demographics, international representatives, etc.
Strategies and Key Tasks	<ul style="list-style-type: none"> • Survey membership to determine current baseline • Define membership composition sought • Determine current membership by category and gulf from target •
Goal #2	Create strategies for informing, recruiting, and retaining membership in each area
Strategies and Key Tasks	<ul style="list-style-type: none"> • Define value proposition for each membership segment • Develop micro-segmented recruiting tools and plan for each segment • Develop tools to measure outreach and retention
Goal #3	Implement targeted strategies for informing, recruiting and retaining members
Strategies and Key Tasks	<ul style="list-style-type: none"> • Implement membership development plan • Measure results • Report to board and members regularly

<u>CRITICAL ISSUE #3</u>	
How can the upcoming NAC leadership transition happen most effectively?	
Goal #1	Define characteristics of new leader
Strategies and Key Tasks	<ul style="list-style-type: none"> • Review leadership today • Determine where NAC Is going and leadership needed to take it there • Recruit with that criteria • Develop transition model to get new leadership up-to-speed
Goal #2	Plan recruitment and transition
Strategies and Key Tasks	<ul style="list-style-type: none"> • Develop plan with timeline and team to lead • Share with board and report regularly

CONTINGENCY PLANS

Though the NAC Strategic Plan 2020-2022 was developed with the expectation that by executing the strategies and key tasks outlined in the Critical Issues section on the previous two pages, results would follow. But, results rarely happen that neatly. NAC will continually monitor the planned results but, should something interfere with their achievement, the following alternative strategies have been created and will be implemented to achieve the targeted goals for each Critical Issue. It is hoped that by thinking of these strategies prior to their need and monitoring them closely, NAC will be in a stronger position to achieve the targeted goals for the three years of 2020-2022 covered in this strategic plan.

CONTINGENCY PLAN FOR CRITICAL ISSUE #1: How can NAC best monitor and adapt to change?	
Challenge	Monitoring massive amount of change ...
Alternative Strategies	<ul style="list-style-type: none"> · Rank order the importance of segments to monitor · Narrow the scope of what to monitor · Break areas into segments and add more teams to monitor · Accept limitations and know that some monitoring is better than nothing
Challenge	Responding to change strategies ...
Alternative Strategies	<ul style="list-style-type: none"> · Define what an acceptable response is · View change is an opportunity · Accept that predicting and responding to the future is an inexact science

CONTINGENCY PLAN FOR CRITICAL ISSUE #2: How can NAC membership develop and grow?	
Challenge	Growing membership in some areas ...
Alternative Strategies	<ul style="list-style-type: none"> · Determine whether membership goals were realistic · Understand why a person/company did or did not join · Change membership value proposition as appropriate
Challenge	Retaining members ...
Alternative Strategies	<ul style="list-style-type: none"> · Determine whether membership retention goals were realistic · Understand why person/company did not remain a member · Change value proposition and membership costs as appropriate

CONTINGENCY PLAN FOR CRITICAL ISSUE #3:

How can the upcoming NAC leadership transition happen most effectively?

Challenge	Finding new leader with appropriate credentials and vision ...
Alternative Strategies	<ul style="list-style-type: none">· Use interim leader· Redefine leadership needed; what's a must and what's a maybe· Explore alternative leadership models, i.e. association management company

APPENDIX

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NAC SURVEY RESULTS

What do you see as the top three trends in the concession and hospitality industries during the next three years (2020-2022) affecting your business?

1) (25 responses)

- full bar
- Continued need for venues to provide creative food choices
- online ordering, and trying to successfully fulfill those orders
- expansion of food offering
- addition of adult beverages in cinema to continue to grow
- New product portfolio
- Automation and Technology
- Flooding and Ag economy
- Streaming and shrinking theatrical windows
- Expanded beverage/liquor services
- Consumer questioning ingredients
- Value pricing (price reduction)
- decreasing labor pool
- dine-in theater options
- Fountain Drinks going away
- Bars / Liquor
- Consolidation
- Clients want transparent data and analytics about our business
- Upscale Options
- Food quality
- Movie releases
- Advances in Technology
- Changing dynamic of the theatre industry
- Continued Consolidation

2) (25 responses)

- kitchen
- Greater sensitivity to sugar and other highly processed / refined foods
- sugary beverage taxes
- expansion of packaging
- continued technology advancements in appliances that allow for faster prep of
- Concession business has opened to a restaurant business
- Quantity and quality level of the labor pool
- Posting of Nutritional Facts
- menu expansion to food and alcohol
- Online ordering
- consumer questioning packaging
- Staffing

- increasing digitization including AI
- AI improvements
- Ecological awareness against plastic items
- Recliner seating
- Expanding Concession Items
- Personnel, shortage of trained employees
- Healthy product/choices
- Food and Beverage constant changes
- product offerings by customer
- "Contract Feeders"
- Consolidation of suppliers
- Better, more streamlined expanded menu options with easier prep and less waste

3) (25 responses)

- seat service
- Customizability and personalization - snowflakes like to feel their meal is special and designed by them
- if unemployment remains low, obtaining satisfactory service from vendors who can't retain employees/drivers
- recycling and composting regulations
- better layouts of concessions areas allowing for faster and more efficient service
- Conversion on new experiences
- Upgraded menus causing pressure on food costs
- minimum wage
- workforce shortage
- In-seat delivery
- pricing compared to retail
- competing with in-home experience
- more menu flexibility
- move from sodas to "healthier" beverage options
- The cost of going to a major sporting event.
- Healthier Options
- Variety of Entertainment Options
- Continued push for higher quality healthier foods
- Allergen awareness
- Hospitality and Experience
- Increased Regulation
- Labor challenges
- A desire find affordable alternatives to disposable plastic and styrofoam vessels/straws

What is the biggest "wild card" (a major change no one predicted) you see possibly affecting the concession and hospitality industries during the next three years (2020-2022) and why? (24 responses)

- ticket subscription service
- Consolidation of suppliers (Aramark's of the world) may homogenize the concession experience among venues, and further reduce the value proposition of NAC
- automated in-person ordering, and attendant drop-off in levels of customer service; it's great to eliminate cashiers and just hire non-English speakers to prepare orders, but it's just another acknowledgement that our companies care little about providing acceptable, much less high-quality, service to our guests
- shrinking of the global markets-impacting film and food offerings
- adult beverages, will it continue to grow in cinema? The added income is great but the wait times have been brutal. Will theatre venues be able to streamline this process???
- Everyone is planning moneywise to attend 1 or 2 trade shows per year tops. NAC show is seriously in danger since most concession managers rather goes to NRA than to NAC (100 dollar entrance fee vs 700 of NAC)
- Gov't mandated employee benefits and the cost thereof
- Labor laws
- Government regulation due to various "green initiatives."
- Product price increases due to tariffs
- People staying home more
- Everything cashless. More kiosks - less humans interacting with humans. food and beverage orders placed from guests phone and delivered to their seat
- increasing self service due to the tight labor market and decreasing margins
- plastics bans
- Donald Trump winning a second term causing a recession!
- Legislation / Regulations / Bans of products
- Movies being released straight to Netflix, Hulu or other options.
- traditional sports attendance continues to decline as newer sports emerge like E-sports with the wild card being gambling which may bring more folks out to attend live events
- Food and beverage trends/changes in generation classifications. For example, millennials and their preferences versus the Gen Z. How they will spend their money and on what for entertainment purposes
- Live entertainment/concerts ticket pricing will lead to sharp decline in attendance. Force Fand B operations to determine how to continue to offer breadth of product and maintain profit margins
- Disney online streaming services along with other studios moving into direct to consumer sales via online
- The sentiment that a much higher minimum wage is needed, and the move to ban disposable plastic

What comments/suggestions do you have about the concession and hospitality industries that will help NAC as they plan for the next three years? (24 responses)

- how to execute in theater seat service
- Operators should not under value the importance of local preferences and tastes, and not just choose the cheapest solutions
- It would be helpful for NAC to study how guests actually feel about dealing with Freestyle machines, topping their own popcorn, grabbing their own candy, and now placing orders with machines. Might such study prove that guest satisfaction would be far greater with some human interaction and lead to greater profits than are being generated by constant elimination of concession attendant jobs?
- engage globally
- Consider a discussion around how to layout concession stands to accommodate and streamline traffic flow...
- Align with bigger associations to survive
- Surviving on higher food costs and higher labor costs
- Finding practical substitutes for plastic cups, lids, straws and plastic coated paper containers.
- Look at current, potential, and worst-case-scenario predictions to help members formulate pricing plans
- Studies into consumer behavior
- How do we get out ahead of this trend? How do we get out in front and be on the forefront of offering these services instead of waiting and coping what is being done (causing us to be late to the party).
- even with the move to more self service there will be a need to offer exceptional whimsy items as well that are instagrammable
- reporting to membership on how various circuits and groups are handling each
- Vote Trump out of office and then fit him and his family with orange jump suits for the rest of their lives
- We will continue to expand our offering to include adult beverages as well as continue to renovate whenever possible to provide a comfortable experience that will drive people to the cinema. Continue to be engaged through government relations committees at NAC and NATO as well as local affiliates to ensure we are in front of and opposing any band or regulations/legislation that will adversely affect the business
- invest in technology that can change as quickly as the marketplace without huge upfront investments
- Staying in touch and having a finger on the pulse of upcoming trends
- NAC should be involved in Social Media platforms and engage in those issues that this generation Z is influencing. Watching the trends, and reaching out and partnering with customers and vendors to be an educational resource
- Make a concerted effort with the major players in Cinema (Regals/AMC, etc...) and Arena/Stadium (Levy/Delaware North, etc...) to bring their analytics to assist in programming educational sessions, etc... to better prepare smaller operators
- NAC bringing in business that better show mixed use facilities such as Main Event. We need to continue to featured diversified operations
- While we wont be able to affect change in the minimum wage, or to slow the rise, we should be able to help our members find the alternatives to disposable plastic they will need

Please rank how the National Association of Concessionaires doing now as an association to support your business?

ANSWER CHOICES	RESPONSES
1-Very Good	32.00% (8 responses)
2-Good	40.00% (10 responses)
3-Average	24.00% (6 responses)
4-Poor	4.00% (1 response)
5-Very Poor	0.00% (0 responses)

What are three things NAC can do more of or better during the next three years (2020-2022) to support your business? (23 responses)

- a non additional fee buying service, or co-op. The one offered by NATO is too expensive for average small operators.
- Continue with kindness initiatives as well as young leaders
- Regarding Question #4, I know I've not yet fully taken advantage of and leveraged my membership. However, it'd be helpful if members were supported by NAC being outgoing rather than members have to seek out advantages for membership. For example, if you do a study or schedule and educational opportunity, email me about it, rather than making me seek it out.
- involvement in government regulations
- more experiential seminars, interactivity, hands on
- Better deals on equipment and supplies to NAC members
- Research and communicate trends of the above
- Add to the number of attendees at the hospitality expo
- Keep up the financial analysis and share industry benchmarks (expense percentages) and best practices.
- Studies about consumer behavior
- Sports driven section. The theater industry is the bread and butter - that is the driving force behind the NAC, but possibly create a sub-section or include more sport specific items/learning/ opportunities.
- video conferencing
- continue to inform membership and lobby legislation
- keep doing what your doing now.
- Change up committee assignments every couple of years. Make the educational options better known through regular bulletins and information.
- Have more of a presence in the hospitality industry and become a leader in education for more than just movie theaters
- anything that puts butts in seats, whether theaters or stadiums helps the NAC membership
- More participation from management teams GMs and Managers from all theaters chains in NAC.
- Actively look to recruit companies outside of what we would consider the traditional concession and hospitality venues.
- Continue to bring innovative Fand B products to the forefront of the trade show. Attempt to bring in the National Food Service Distributors (US Foods/Sysco/GFS) to better understand the business. These entities do not have an understanding of how the Concessions industry fits into their "traditional" restaurant models.
- Stay more relevant in the bigger Fand B business
- Need to continue to drive new membership, and seek out new business sectors to have join NAC so that we remain relevant to our members and the vendors who support us.

**What other comments do you have about the National Association of Concessionaires?
(19 responses)**

- Great org. Great events. Keep moving them around the country
- I've only been a member about 14 months and unfortunately I haven't been able to make it to July conventions yet. I hope to do so next year and hope that the ECM course will be offered at that time. Note: I'm a successful 'graduate' of Larry Etters' online CCM course in Spring 2018 and recommend that program to inexperienced members, though it was very basic for folks with years of hands-on experience and training. Would recommend that the process for registering and getting setup was a bit more streamlined/easy.
- Strong bond and care among members
- Great job, professional marketing!
- You have to think much how to reinvent the association with more international participation which is going to give members a richer experience on do's and don'ts on our businesses
- NAC is improving its member services and is more relevant and important.
- Only been a member for a few years, but the network connections that I have made have proven to be very valuable. Love and appreciate all the work that goes into the association and the expo. Could we move the expo up to earlier in the summer in future years? Anything after mid-July is difficult to attend due to the start of fall athletics season.
- I've been out of the Fand B business for several years and just now back in it, looking forward to seeing what has changed at the expo next month
- Good organization for a niche market
- This is a wonderful organization made up of great people and solid partnerships. Please keep doing what you do.
- NAC continues to move in a positive direction, just like this project of thinking about the future
- NAC can be a great avenue for companies as they expand into concessions and hospitality. Providing education about the trends and economics of concessions (such as local laws and tariffs) would make them a vital partner to a lot of companies in the industry.
- NAC is a terrific resource for anyone in the industry
- We need to evaluate the value of some the events NAC does such as the Expo every summer. Who is that trade show for in a consolidated supplier and exhibitors.

NAC STRATEGIC PLAN INTERVIEW RESPONSES

Participants

- Marianne Abiaad, Royal Corp.
- Dan Borschke, NAC
- Gary Butske, Emagine Entertainment
- Denise deZutter, AMC Theater
- Mark Dieffenbach, Hershey
- Christine Fellner, Vistar
- David Garretson, Gold Medal Products
- Adam Gottlieb, Adalar Group
- Bill LeClair, National Amusement Theaters
- Brian McMillan, The Lexington Center Corp.
- Rob Novak, Marcus Theater

How do you define "success" today for National Association of Concessionaires (NAC) and how will you define it three years from now (2022)?

Today

- Based on maintaining membership
- Meeting needs of individual members and industry to see value in what we offer, Partnering and networking community
- Attract new members outside arenas and theaters (membership smaller)
- Understanding changing dynamic industry and determine what is NAC's role and what value do they bring
- Broad scale and merge with other association, Look at different perspective because more of hospitality membership
- Both customers and members participate, Growth is the key
- Constant new members who are integrated into the industry, Building for the future is important so identify who they are
- Growing NAC membership
- Education work (biggest benefit and have done fantastic job)
- Grow industry and education, Industry now too much of "good ol' boy" network, Need to broaden it
- Relevance

Three years

- Growing membership
- Meeting needs of individual members and industry to see value in what we offer
- Finding new means to provide services, Continue to get exposure in Washington DC, Become bigger player and more viable
- Be here in three years
- Broaden membership based with more diversity

- Ability for NAC to stay “relevant” and make people want to attend our events
- Numbers matter but also who is part of NAC, Need to broader besides just theaters
- Both growth and presence from where currently working, Expansion beyond “normal box” (traditional modes of trade)
- Maintain what they have and grow it
- Bigger more financially strong with steadier growth in membership (both depth and breadth)
- Find additional ways to reach younger people and educate them, This is where growth will take place, We’re aging out now
- Grow size of NAC, Add new programs to better educate young leaders
- Always continue to stay relevant

During the next three years (2020-2022) what do you see changing in the Community NAC serves that may provide opportunities for National Association of Concessionaires or that may affect their work?

- Increasing variety of food and averages will continue to grow
- Also want healthy
- Labor market more difficult for industry, Low employment now, More regulations burdens, Attack on packaging, These will all affect profitability, Need to recruit and retain quality people
- Consolidation: continue to see fewer larger organizations, Always can find entrepreneurs which is good
- Recession is worry as is economy (it will impact sports side but move industry is more recession proof)
- Delivery mechanism for information is very positive, Great than can run with smaller staff
- Always known as education association which is harder to deliver and need to improve
- Biggest need now is staying current with government regulations and advocate for them
- Keep focus on education, Make sure offerings are what businesses need
- Board needs to stay engaged with members and also need to go after other segments
- Consolidation: Old days more chains and today fewer members to contribute fundraising
- Relevancy of NAC, Want to give more opportunities for vendors and purchasers
- Competing for dollars, “What value is there for me?”
- Government regulations is huge in all aspects
- Minimum wage is an issue, Competing for employees, Labor will be big issue
- Technology is affecting everything
- Health is becoming more implant
- Personalization and customization becoming more permanent
- Consolidation continues
- Regionalization
- How do we integrate all these issues
- New generation changed traditional model on head (challenge if don’t expand and keep narrow focus)
- New Challenges with tariffs, plastics, people aging out
- Fand B standpoint always new trend, “Keep on cusp and ear to the ground,” Look at bar portfolio and have key personnel involved, Need too be on time with regional and national trees

- Identify new food trends that one needs to be aware of and work with
- Opportunity to get “healthy options” that are more acceptable to general public
- Technology (purchase, Aps)
- People are on downside of careers, Need to get new people in
- Consolidation of industry (fewer people that can be involved)
- Get involved with other organizations outside concessions which is way to expand
- Biggest concern is consolidation (theaters and vendors), Need to expand
- Reach out other organizations to make us larger-perhaps merging or perhaps amusement parks
- Food environment continues to increase people eating out more
- Shrinking of global marketing, Major influence from around the world (especially food), NAC needs to be aware and keep finger on pulse of this important area
- Ever changing government regulations, Will determine much and make impact (composting and recycling for example)
- Expansion of food offerings

Based on the changes occurring in the community you just described, what direction should NAC be taking now as an organization, strategically and operationally?

- Part of value is information—keep going
- Marketing efforts to help with labor issues
- Government relations committee of NAC needs to keep sharing information for members to be as prepared as possible
- Changes in industry are dramatic, More mergers and new acquisitions (fewer players and they’re getting bigger who don’t have desire or time to be members of NAC, though interest is still there)
- See downward trend towards education, See more interest internationally but don’t want to pay for it, Find locations that are convenient to most members
- Seeing more interest from suppliers than operators, Do more work with governments, It is important to keep advocating
- Figure out future beyond Dan and start search soon, Define the key person to lead
- Great job fundraising and booth sales, Lost focus on recruiting members and need to find other places to get members
- Do better job showing how we’re spending money we raise, Get more involved with “Show East”
- Bring “value” into this relationship, What purpose is there for vendor to attend NAC events
- For NAC: What purpose does it serve the injury, How does it differentiate itself, Elevate professionally to better sell to key players
- Integrate with similar organizations (much can be learned from others)
- Need to “deliver an experience”
- Provide more education to stay relevant, Continue to evolve with latest trends
- Need more community involvement around the country with NAC
- Identify key national account representatives for trade shows and education, Have these people out in front, Educate and need to “stay ahead of the curve”
- NAC very good on having finger on pulse on concessions but also need to do so in “bar” area, Need to let more people know what’s happening

- Technology is double-edged sword as public gets more used to it, Problem is for people who can't adopt
- Continue with attempts to look at contract theaters, Get more involved with education so they share more of their expertise and educate others and bring financial resources
- Reach out to other associations: NACC, NATO (some cross pollination)
- Look outside traditional industry, Companies that are on periphery of what we do is key to grow (who will do this?)
- Need to spread work to all—not just the people who used to do it
- Concern is size of NAC and not bringing in enough new people especially younger ones and make education more relevant to them
- Keep eye on how do we engage globally
- Follow government regulations

How can National Association of Concessionaires better support you going forward?

- Keep talking with others (partners, operators, distributors) at conferences which is unique among associations
- For membership help with government and education
- Tough question: Bring people together is still relevant and good ideas come from this
- Stay relevant on trends
- Be aligned with or merge with more associations to be engaged (will provide more resources)
- Great time with Dan's retirement how to make decision how to change leadership model
- Come up in more conversations, Provide information and exposure (regionally and larger trade shows), Stay involved
- Tough question: Good at networking
- Every time go to conference don't see much about "bar" business
- Continue to keep programming and opportunities out there, Maybe use technology for webinars and podcasts on more regular basis
- Will support NAC's effort to gain new members who are not suppliers, Struggle to get new faces in
- Branch out more locally as too condensed now
- Education needs to be relevant to other markets
- Strongest element is strong bond between members—network really cares about each other
- Helpful if NAC more involved with government regulations issue

What do you see as NAC's top three strengths as an organization, and what is one area they can improve?

Strengths

- Government regulations committee has done good work
- Educational speakers
- Board and engagement (they want to be involved)
- Government relations (board doing great job)
- Education programs offered and tailored to what's needed,

- Loyalty to NAC, "Deep" membership but not as participatory
- Leadership, Dan has done wonderful job
- Current partners/members all great people, Did good job cultivating
- Networking and connections
- Availability of experience and ready answers as needed
- Many relevant people in NAC

To Improve

- Increase membership
- Letting go of the past and doing things the way they always have
- Aligning with theater segment
- Do work better from communication and PR perspective
- Limited staff on "bar side," Focus more on this
- Get new products at trade shows

What additional suggestions do you have for the National Association of Concessionaires to make them a more effective and impactful organization?

- "Embrace change" (in past seemed hesitant to change but doing more)
- "Bigger is better" is not as important anymore, Need to deliver on needs for both small and large organizations
- Become more upscale food delivery system
- Alcohol is playing greater pool
- Work closely with sister organizations
- Need to find next set of leadership
- Need to get word out of what we do to a broader base
- Think in different ways (stuck where we are now)
- Expand horizons and get new blood
- NAC is at crossroads now, Difficult time with so much change in the industry, NAC has not changed with the industry
- Expand education and community involvement
- Impactful in industry already
- Biggest thing that can impact NAC is the challenge of replacing Dan as well as staff
- Need sustainability, Need to figure out how to do so, How can we change things and make them better for us and the world
- Change meeting format as there is a lot of redundancy with trade shows, Make more relevant that will get more to attend
- Engage more young people

Misc. comments and other suggestions

- To deliver value make sure message is heard
- Amazing group of talented and dedicated and nice people
- Rather than have members involved just have members
- Need to meet news of industry, Can we do so a different way
- Need more board involvement
- NAC can't live on ratios of yesteryear but need to find newer revenue sources
- Too many organizations out there now and fighting for same dollars
- Key question: Need to ask new persons why they want to join
- Should be three year strategic plan that is "bridge" to the future
- Need to be in alignment with sister organizations to learn
- Evolve more "grassroots advocacy"
- Broader portfolio of groups working with scale that gives us more ability to reach more people
- Membership needs to be better engaged
- Just be more efficient as organization but very good now
- Can't think of other ideas as do a lot for me already
- Education is top notch
- Try to find appropriate new leader, Dan has done great job
- Need to lay out what we stand for
- Convince Dan not to retire