Kevin Settles, President & CEO

Where Do Consumers Spend?

CATEGORY	PERCENT OF TOTAL
Housing	33%
Transportation	18
Food	**13**
Insurance/pensions	11
Healthcare	7
Entertainment	5
Clothing	3
Contributions	3
Other	7
Total	**100%**

Source: Bureau of Labor Statistics, Consumer Expenditure Survey - 2012; National Restaurant Association

Restaurant Industry's Share of the Food Dollar

1955: **25%**

2014: **47%**

Source: National Restaurant Association

Restaurant Industry 2014

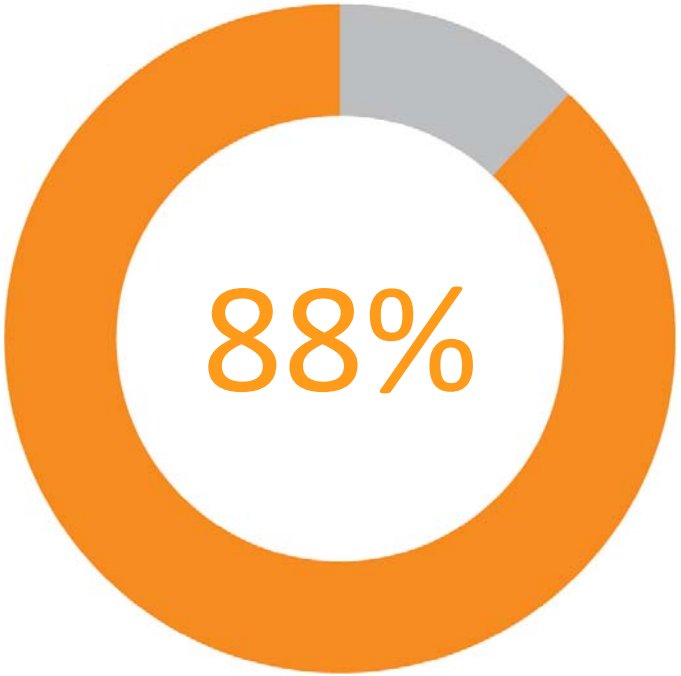
An Economic Juggernaut

- **U.S. restaurant industry annual sales are larger than 90 percent of the world's economies**

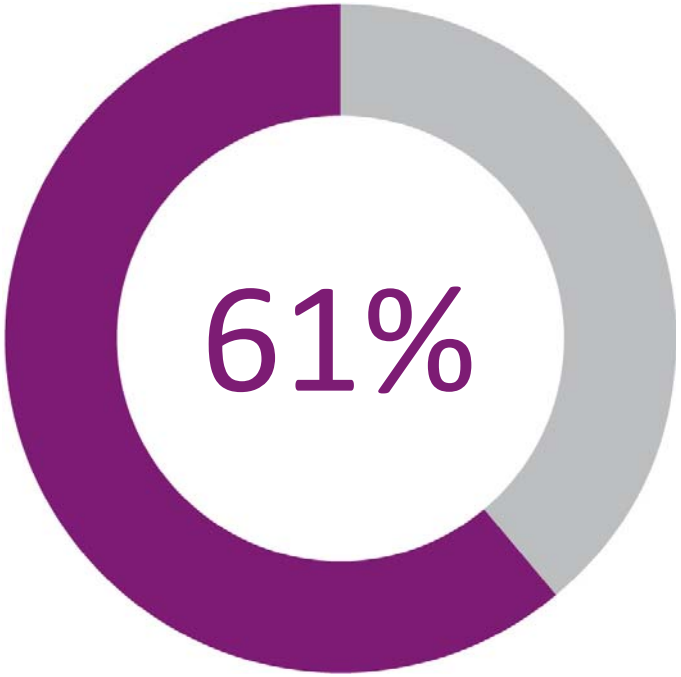
- **Ranks #20 out of 198 countries and is larger than the economic output of countries such as Saudi Arabia or Sweden**

Americans Love Restaurants

Percent of consumers who say they enjoy going to:



Restaurants



Grocery Stores

Source: National Restaurant Association, 2013

Americans Retain Positive View of the Restaurant Industry

Rank	Industry	% Positive
1	Restaurant	67%
2	Computer	66%
3	Grocery	55%
4	Retail	53%
5	Travel	49%

Source: Gallup, September 2014

Idaho

RESTAURANT INDUSTRY AT A GLANCE

Restaurants are a driving force in Idaho's economy. Their sales generate tremendous tax revenues. They provide jobs and build careers for thousands of Idahoans. Restaurants also provide healthful options for their guests, give back to their communities and work to reduce their impact on the environment. Visit Restaurant.org for more information.

2,929
LOCATIONS

In 2012, there were 2,929 eating and drinking places in Idaho.

$2.0 billion
IN SALES

In 2014, Idaho's restaurants are projected to register $2.0 billion in sales.

61,400
IDAHOANS

In 2014, restaurants account for 61,400 jobs in Idaho — 9% of employment in the state.

EVERY $1 SPENT ...

in Idaho's restaurants generates an additional $.74 in sales for the state economy.

EVERY $1 MILLION SPENT ...

in Idaho's restaurants generates an additional 27.2 jobs in the state.

AND IN 2024 ...

Restaurants in Idaho are projected to employ 68,400 people. (11.4% job growth — or 7,000 jobs over 2014)

Average Restaurant Sales and Net Income

U.S. $825,500 x 5% = $41,275.00

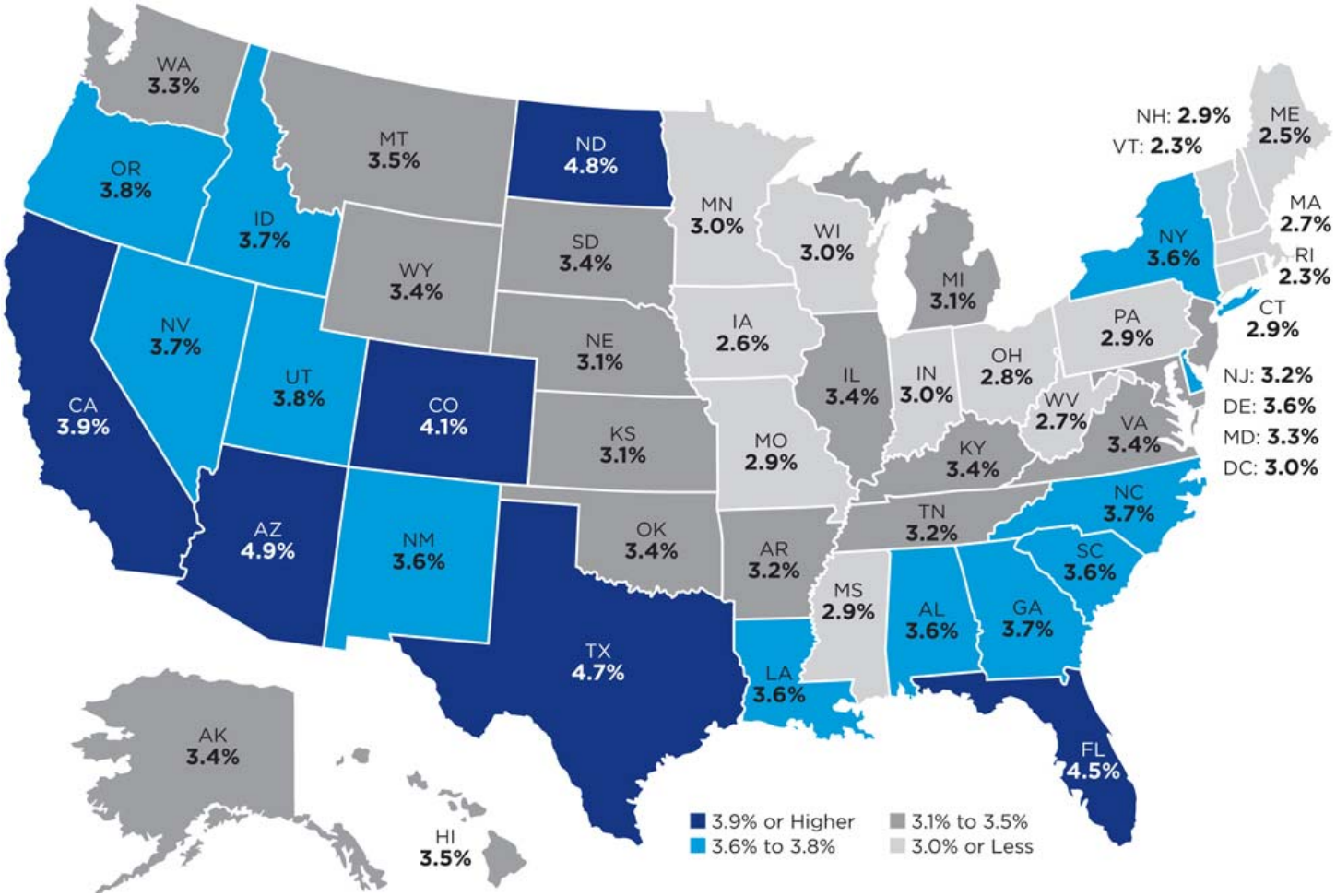
Idaho - $683,000 x 5% = $34,150.00

Average Sales Per Restaurant Employee

U.S. = $46,200.00

Idaho = $32,600.00

Restaurant Sales Growth in 2014 (*Projected*)



Source: National Restaurant Association

Dramatic Consumer Confidence Variations By Region Continue

Present Situation: October 2014

REGION	INDEX
West North Central	132.9
West South Central	128.2
New England	90.2
South Atlantic	89.5
Pacific	85.6
Mountain	84.2
East North Central	83.9
Middle Atlantic	69.0
East South Central	68.2

Source: The Conference Board

Pent-Up Demand for Restaurants Remains High

Percentage of adults NOT eating on-premises at restaurants as often as they would like

	October 2007	September 2013	October 2014	Percentage Point Change 2007 vs 2014
All Adults	31%	47%	42%	+11

Source: National Restaurant Association

BOISE

COEUR D'ALENE

EAGLE

Fiscal year 2014 gross lodging tax collections were up **8.13 percent** over the July 2012-June 2013 year.

This exceeds the forecast of **5 percent** growth:

Fiscal Year (Jul-Jun)	Change from Previous Year
2014	**8.1%**
2013	**5.9%**
2012	**6.8%**

Rising Food Costs is the Top Challenge Facing Restaurant Operators

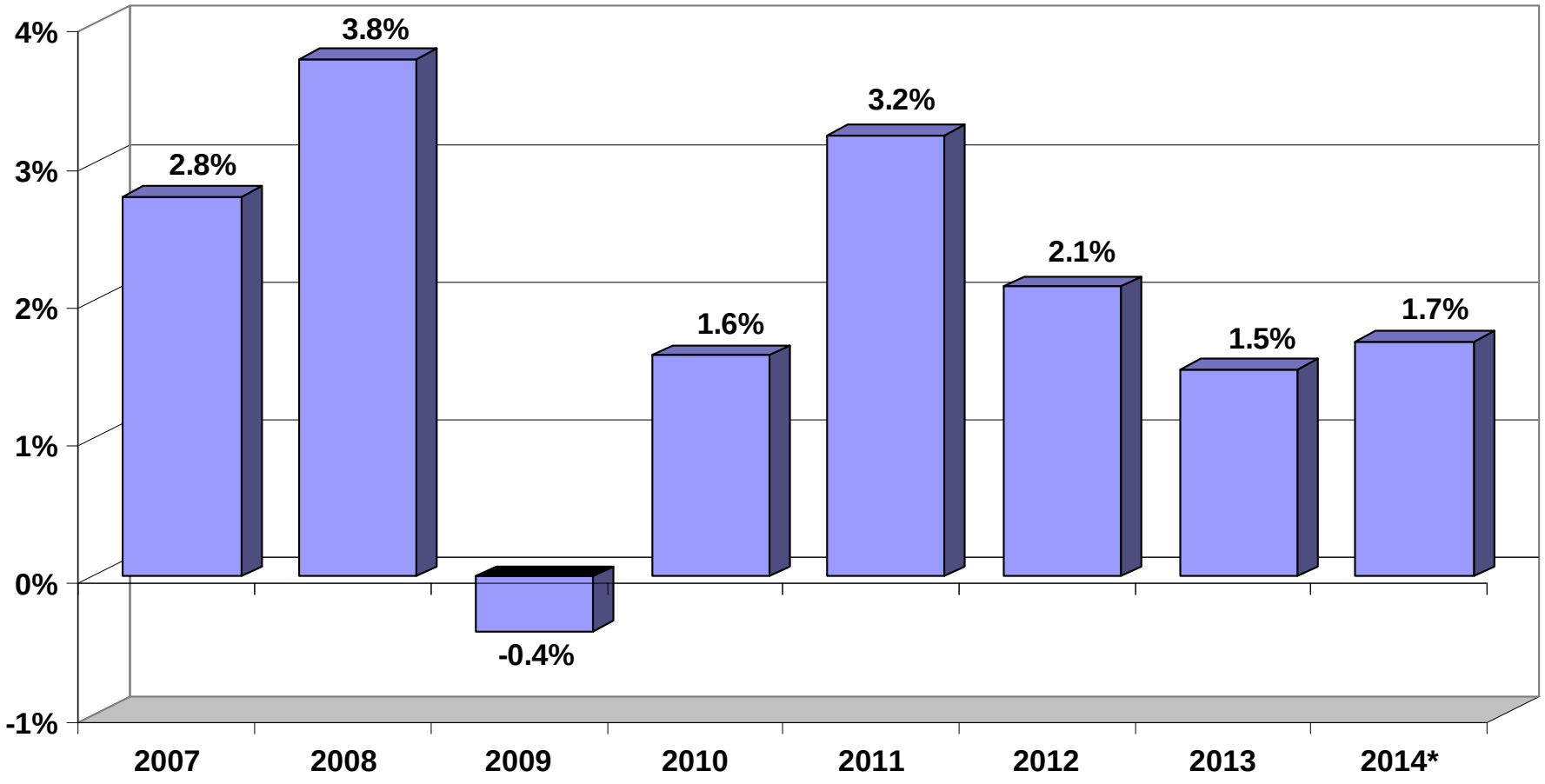
Top Challenges Facing Restaurant Operators: Oct. 2012, Oct. 2013, and Oct. 2014

OCTOBER 2012		OCTOBER 2013		OCTOBER 2014	
The Economy	28%	Government	29%	Food Costs	31%
Government	20	The Economy	21	Government	24
Food Costs	16	Sales Volume	15	The Economy	11
Sales Volume	12	Food Costs	8	Sales Volume	10
Recruiting Employees	7	Recruiting Employees	8	Recruiting Employees	8

Source: National Restaurant Association, Restaurant Industry Tracking Survey

Inflation Remains Relatively Modest

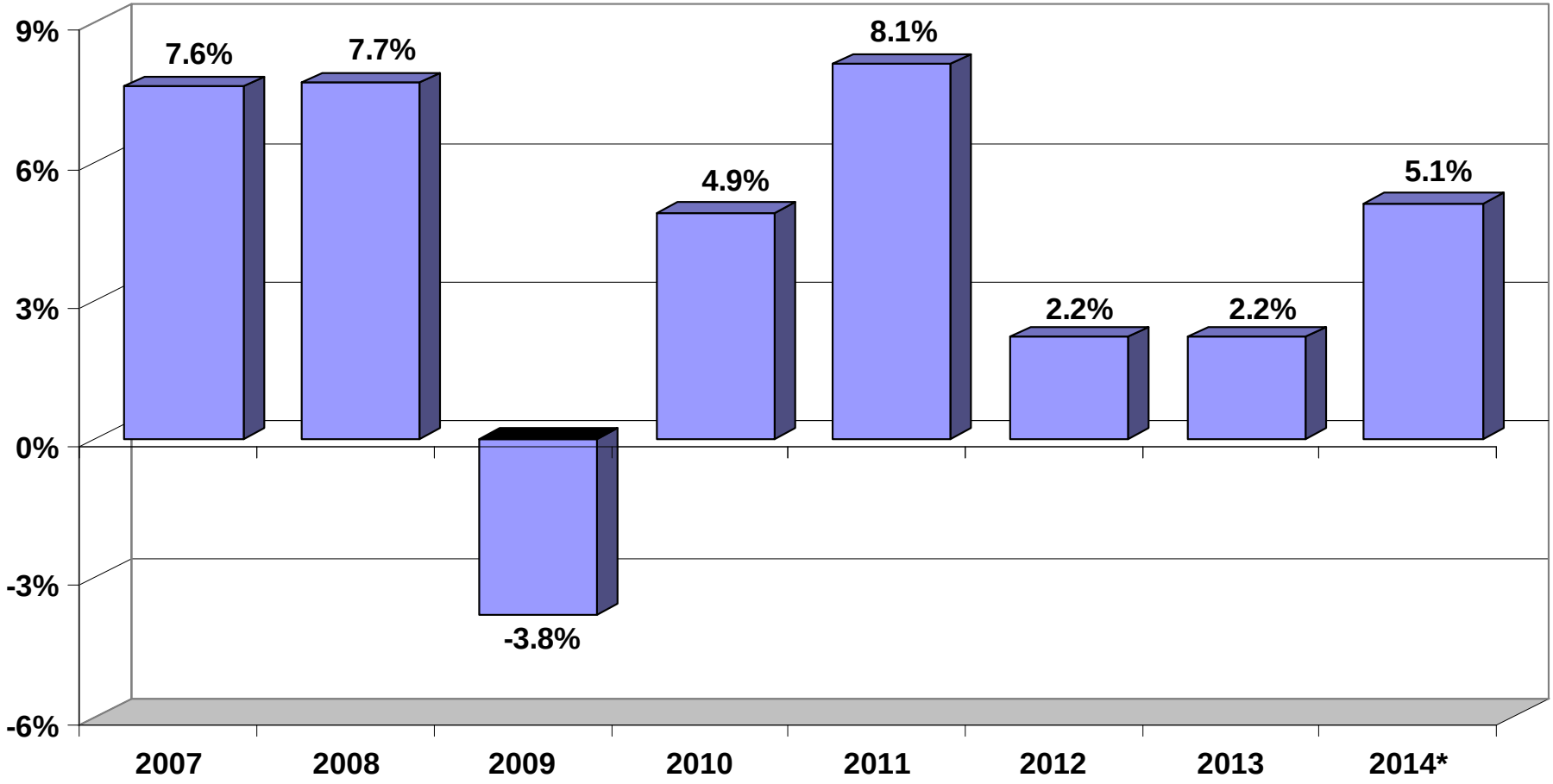
Annual Growth in Consumer Price Index – All Items



Source: Bureau of Labor Statistics *Year to date through September

Wholesale Food Prices on Pace for Strongest Growth in 3 Years

Annual Growth in Producer Price Index – All Foods

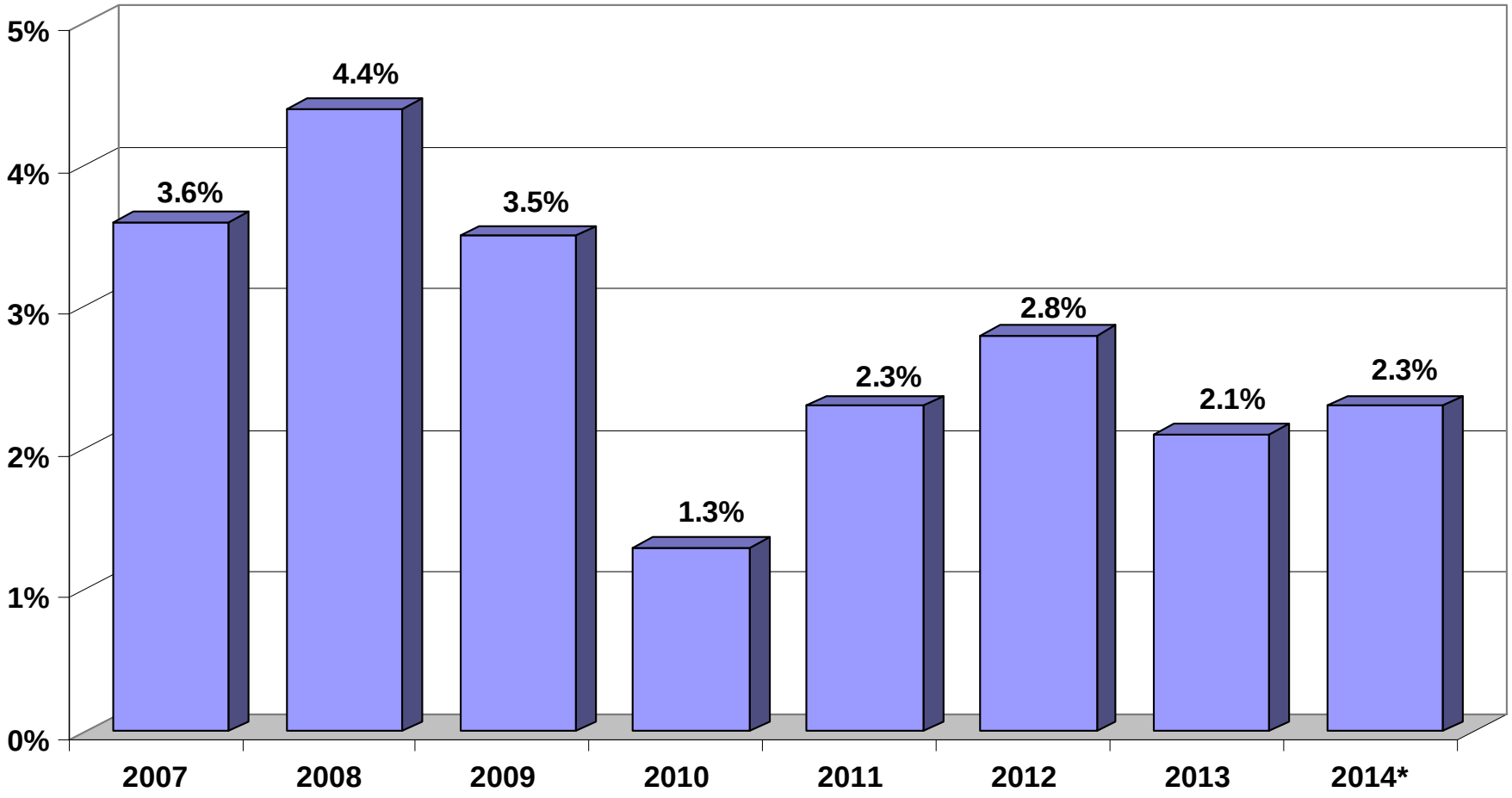


Source: Bureau of Labor Statistics

*Year to date growth through September

Menu Price Growth Remains Moderate

Annual Growth in Consumer Price Index – Food Away From Home



Source: Bureau of Labor Statistics *Year to date through September

Travel and Tourism Outlook 2014

	2013	2014
Business*	+0.7%	+1.0%
Leisure*	+1.4%	+1.9%
Overseas Arrivals	+4.3%	+5.5%

***person trips**

Source: U.S. Travel Association

Idaho State Police
Alcohol Beverage Control Bureau
700 S. Stratford Dr. Ste 115
Meridian, ID 83642
Ph. (208) 884-7060 Fax (208) 884-7096
www.isp.idaho.gov/abc

Premises File Number: _____

License Number: _____

Opening Date: _____

See Instruction Sheet

Liquor License Application

1. Application Type

☐ **New** ☐ **Transfer** [☐ Applicant ☐ Location]

☐ **Change Current Application** [☐ 'Doing Business As' Name (See #3) ☐ Floor Plan ☐ License Types (See #2)]

2. License Type and Fees *See Instruction Sheet for Fees*

☐ Beer $50.00

☐ Wine by the bottle - *Included*

☐ Wine by the Glass - *Included*

☐ Liquor by the drink: $_____

☐ Keg Beer to Go $20.00

☐ On-Premises Consumption $0.00

☐ Restaurant $0.00

☐ Multi-purpose Arena Endorsement

Total Fees: _____

➢ This place of business is applying for an incorporated city liquor-by-the-drink license, **OR** per Idaho Code Title 23 Chapter 9 an exception, as listed:

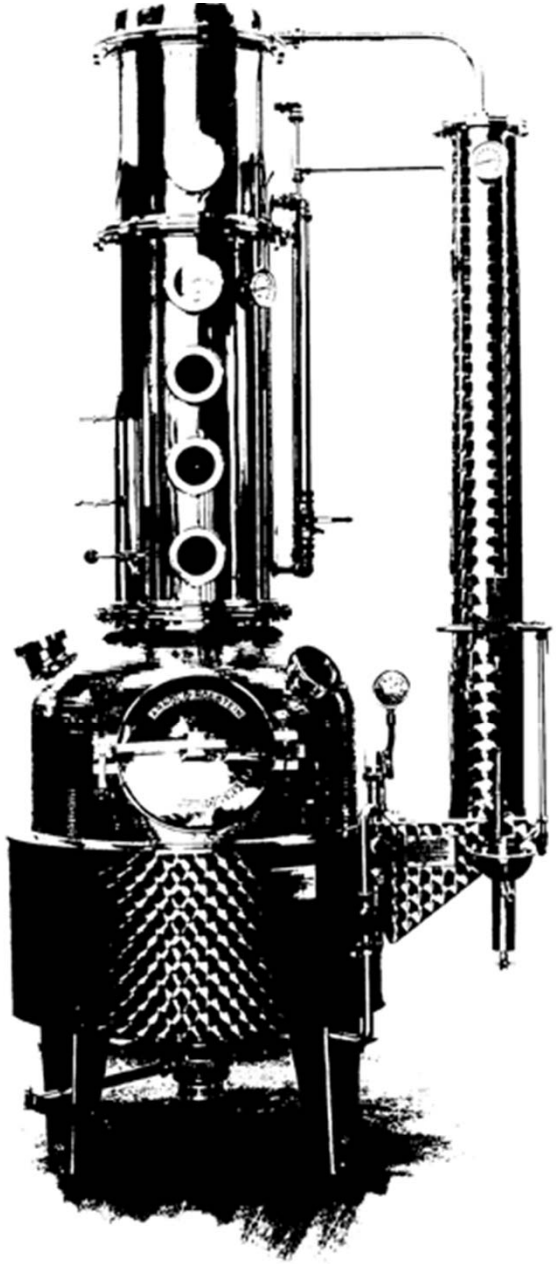
☐ Airport Restaurant
☐ Theme Park
☐ Racing Facility
☐ Year Round Resort
☐ Ski Resort

☐ Railroad
☐ Club
☐ Common Carrier Boat
☐ Gondola
☐ Continuous Operation

☐ Equestrian
☐ Airline
☐ X-Country Ski Resort
☐ Golf Course
☐ Waterfront Resort

☐ Split Ownership Facility
☐ Rural Lodging Facility
☐ Indian Tribe

BARDENAY



SMALL BATCH LIQUORS
BARDENAY DISTILLERIES
BOISE, IDAHO