WEEKLY WEBINAR
Fridays @2pm CST
invite everybody!

REGISTER HERE:
https://zoom.us/webinar/register/WN_nuj54TxDS0WHURw4Ls-ZAQ
Tales of the Firefly
THE COVID-19 SERIES
Episode 6 // 05.08.20
NAME THAT SNAP!
All panelists

☑️ All panelists and attendees

Alison Watson (Panelist)

To: All panelists and attendees

Type message here...
NAME THAT SNAP!

clue #1
it’s steep

clue #2
a slow process

clue #3
filter this

clue #4
drink it!
Cold Brew is on 7.3% of US menus
1-year growth +25.4% | 4-year growth +356.2%

37% of consumers love or like it.
Most popular with Asian, Millennials.
More common at chains.

NAME THAT SNAP!

clue #1: it’s steep
clue #2: a slow process
clue #3: filter this
clue #4: drink it!
NAME THAT SNAP!

clue #1
it leaves

clue #2
in drinks & desserts

clue #3
the power of powder

clue #4
ceremonial or culinary

is on 2.3% of US menus
1-year growth +51.6% | 4-year growth +226.3%

19% of consumers love or like it.
Most popular with Asian.
More common at chains.

CONSUMER AFFINITY

flavor

view details
NAME THAT SNAP!

Clue #1: It leaves in drinks & desserts
Clue #2: The power of powder
Clue #3: Ceremonial or culinary
Clue #4: Matcha is on 2.3% of US menus:
- 1-year growth +51.6%
- 4-year growth +226.3%

19% of consumers love or like it.
Most popular with Asian.
More common at chains.
NAME THAT SNAP!

is on 2.4% of US menus
1-year growth +21.8% | 4-year growth +101.4%

4% of consumers love or like it. Equally popular with all consumer types. More common at independents.

clue #1: have a ball
clue #2: it comes from the boot
clue #3: stuff & fry it
clue #4: risotto another way
NAME THAT SNAP!

Arancine is on 2.4% of US menus
1-year growth +21.8% | 4-year growth +101.4%

4% of consumers love or like it.
Equally popular with all consumer types.
More common at independents.

clue #1: have a ball
clue #2: it comes from the boot
clue #3: stuff & fry it
clue #4: risotto another way
NAME THAT SNAP!

is on 2.0% of US menus
1-year growth +6.5% | 4-year growth +88.2%

41% of consumers love or like it.
Equally popular with all consumer types.
More common at chains.

clue #1
let the LTOs begin!

clue #2
it's easy to fall for it

clue #3
ultimate seasonal flavor

clue #4
lattes were just the start
Pumpkin Spice is on 2.0% of US menus
1-year growth +6.5% | 4-year growth +88.2%

41% of consumers love or like it.
Equally popular with all consumer types.
More common at chains.

NAME THAT SNAP!

clue #1: let the LTOs begin!
clue #2: it's easy to fall for it
clue #3: ultimate seasonal flavor
clue #4: lattes were just the start
NAME THAT SNAP!

is on 8.6% of US menus
1-year growth +8.2% | 4-year growth +48.5%

28% of consumers love or like it.
Equally popular with all consumer types.
More common at regional chains.

clue #1
often orange

clue #2
Latin America

clue #3
350,000 SHU

clue #4
jalapeno's spicier brother
NAME THAT SNAP!

Habanero
is on 8.6% of US menus
1-year growth +8.2% | 4-year growth +48.5%

28% of consumers love or like it.
Equally popular with all consumer types.
More common at regional chains.

clue #1: often orange
clue #2: Latin America
clue #3: 350,000 SHU
clue #4: jalapeno's spicier brother
Thank you!
THANK YOU!
In just the past 60 days, we’ve surveyed over 38,000 consumers.
“very concerned” about Coronavirus

Mar 10: 41%
Mar 14: 49%
Mar 18: 60%
Mar 22: 61%
Mar 25: 61%
Mar 29: 59%
Apr 1: 67%
Apr 3: 65%
Apr 7: 64%
Apr 10: 61%
Apr 15: 60%
Apr 17: 61%
Apr 20: 60%
Apr 27: 56%
May 1: 54%
May 7: 56%
“definitely avoid” eating out
What concerns you most?

- Economic Crisis: 43%
- Health Crisis: 57%
It’s a poll!

what % think they’ve already had Coronavirus?
21% believe they have already had Coronavirus.
MEAT SHORTAGE?
How much meat do you have at home?

- 7% have already run out
- 16% have enough for a couple days
- 27% have enough for a week
- 26% have enough for 2 to 3 weeks
- 13% have enough for a month
- 12% have more than one month's supply

77% have at least one week's supply on hand.
what type of meat are you stocking up on (or plan to)?

- Chicken: 79%
- Ground beef: 60%
- Steak: 45%
- Bacon: 44%
- Sausage: 40%
- Pork chops: 37%
- Seafood: 31%
- Turkey: 26%
- Large cuts: 24%
- Ribs: 24%
- Lamb: 10%

are you stocking up on meat at home?

- already did: 31%
- no plans to: 47%
- plan to: 22%
If you went to a restaurant for burgers and found they weren’t available, what would you do...?

- 43% order another type of burger or sandwich
- 12% order a plant-based or meatless burger
- 26% order another food item entirely
- 19% would leave and go somewhere else
<table>
<thead>
<tr>
<th>Food Type</th>
<th>Crave/Miss Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexican food</td>
<td>36%</td>
</tr>
<tr>
<td>Seafood</td>
<td>31%</td>
</tr>
<tr>
<td>Asian food</td>
<td>30%</td>
</tr>
<tr>
<td>Pizza</td>
<td>29%</td>
</tr>
<tr>
<td>Burgers</td>
<td>29%</td>
</tr>
<tr>
<td>Italian food</td>
<td>29%</td>
</tr>
<tr>
<td>Steak</td>
<td>27%</td>
</tr>
<tr>
<td>BBQ</td>
<td>19%</td>
</tr>
<tr>
<td>Fries</td>
<td>18%</td>
</tr>
<tr>
<td>Sushi</td>
<td>18%</td>
</tr>
<tr>
<td>Pasta</td>
<td>17%</td>
</tr>
<tr>
<td>Fried chicken</td>
<td>17%</td>
</tr>
<tr>
<td>Desserts</td>
<td>15%</td>
</tr>
<tr>
<td>Wings</td>
<td>14%</td>
</tr>
<tr>
<td>Salads</td>
<td>13%</td>
</tr>
<tr>
<td>Breakfast entrees</td>
<td>12%</td>
</tr>
<tr>
<td>Grilled chicken</td>
<td>12%</td>
</tr>
<tr>
<td>Greek food</td>
<td>11%</td>
</tr>
<tr>
<td>Sub sandwiches</td>
<td>11%</td>
</tr>
<tr>
<td>Frozen treats</td>
<td>10%</td>
</tr>
<tr>
<td>Chicken strips / nuggets</td>
<td>10%</td>
</tr>
<tr>
<td>Pancakes / waffles</td>
<td>9%</td>
</tr>
<tr>
<td>Lasagna</td>
<td>9%</td>
</tr>
<tr>
<td>Breakfast sandwiches</td>
<td>7%</td>
</tr>
<tr>
<td>Soul food</td>
<td>6%</td>
</tr>
<tr>
<td>Soups</td>
<td>6%</td>
</tr>
<tr>
<td>Mac &amp; cheese</td>
<td>6%</td>
</tr>
<tr>
<td>Cold deli sandwiches</td>
<td>6%</td>
</tr>
</tbody>
</table>

**what do you crave / miss the most from restaurants?**
Mexican food
Asian food
Pizza
Burgers
Italian food
Steak
French fries
Sushi
Pasta
Fried chicken
Wings
Salads
Grilled chicken
Greek food
Sub sandwiches
Chicken strips
Pancakes
Lasagna
Breakfast sandwiches
Soups
Mac & cheese
love that item
miss it from restaurants
11.5% of restaurants are confirmed closed
3.3% are permanently closed
8.2% are temporarily closed

57,134 restaurants are due to reopen
“CLOSED” can be fuzzy as restaurants are in flux

This data focuses on confirmed closures only
8 months of restaurant closures squeezed into 6 weeks
Which state has had the highest rate of restaurant closures?
(either temporarily or permanently closed)
% OF RESTAURANTS CLOSED
(permanent + temporary)

THE CLOSURE LANDSCAPE

PERMANENT RATIO
(% of closures that are permanent)

DC  NV  HI
CA  TX  WA
OR  NY  NV
ND  NE  IA
Temporary closures are the main source of volatility between states.

Temporary closures: 2.7% to 23.8%
Permanent closures: 2.4% to 7.0%
Fast-Casual
75.9% open

3.8% permanently closed
20.3% temporarily closed

Share of temporarily closed fast casual locations

<table>
<thead>
<tr>
<th>Unit Size</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 500 units</td>
<td>74.5%</td>
</tr>
<tr>
<td>101 to 500 units</td>
<td>4.9%</td>
</tr>
<tr>
<td>51 to 100 units</td>
<td>2.7%</td>
</tr>
<tr>
<td>26 to 50 units</td>
<td>3.3%</td>
</tr>
<tr>
<td>11 to 25 units</td>
<td>2.0%</td>
</tr>
<tr>
<td>6 to 10 units</td>
<td>1.0%</td>
</tr>
<tr>
<td>2 to 5 units</td>
<td>1.9%</td>
</tr>
<tr>
<td>Independent</td>
<td>9.7%</td>
</tr>
</tbody>
</table>

Starbucks (91%) | all other (74.5%)
2020 FORECAST

QSR: -13%
Fast-Casual: -19%
It’s a poll!

which area type is most likely to have seen closures?
Temporary closures are particularly common in urban areas.
no drive thru
no more hanging out
professionals and students
65% have their own app or ordering platform
(versus 40% for QSR)

64% cleanliness rating
(versus 54% for QSR)

Loyalty programs common
THE CHALLENGE FOR FINE DINING

- 55% in urban locations (vs. 43% for all restaurants)
- High reliance on dine-in
- Fewer business meals & tourism
- Difficult to pivot to takeout
- Experience is greatly impacted by distancing rules
- Higher rents
- Higher food costs
It’s a poll!

which size restaurant is most likely to have closed?
SMALL & MID-SIZED CHAINS are most likely to have closed stores during the pandemic
How many restaurants chains are there in the US?

(chain = a brand with two or more stores)
10,693 different restaurant chains in the USA
# The Chain Restaurant Universe

<table>
<thead>
<tr>
<th></th>
<th>Distinct Brands</th>
<th>Total Stores</th>
<th>Perm Closed</th>
<th>Temp Closed</th>
<th>Total Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 to 5 units</td>
<td>7,567</td>
<td>21,965</td>
<td>8.8%</td>
<td>9.3%</td>
<td>18.1%</td>
</tr>
<tr>
<td>6 to 10 units</td>
<td>1,461</td>
<td>10,829</td>
<td>10.8%</td>
<td>9.7%</td>
<td>20.5%</td>
</tr>
<tr>
<td>11 to 25 units</td>
<td>922</td>
<td>14,568</td>
<td>9.9%</td>
<td>13.2%</td>
<td>23.1%</td>
</tr>
<tr>
<td>26 to 50 units</td>
<td>326</td>
<td>11,408</td>
<td>9.2%</td>
<td>12.6%</td>
<td>21.7%</td>
</tr>
<tr>
<td>51 to 100 units</td>
<td>183</td>
<td>13,051</td>
<td>7.1%</td>
<td>10.7%</td>
<td>17.8%</td>
</tr>
<tr>
<td>101 to 500 units</td>
<td>163</td>
<td>37,591</td>
<td>5.9%</td>
<td>9.8%</td>
<td>15.7%</td>
</tr>
<tr>
<td>501+ units</td>
<td>71</td>
<td>181,550</td>
<td>2.8%</td>
<td>6.8%</td>
<td>9.7%</td>
</tr>
</tbody>
</table>
Douglas Davis Pizzaworks is a small, regional chain of quick-service pizza restaurants in Texas and Oklahoma. The company was founded by David Davis Miller in College Station, Texas, in 1994. The chain expanded with more locations in Texas and states, Oklahoma. The menu features several varieties of pizza, along with the chain’s signature Ann’s deep dish varieties.

### Profiles
- HQ address
- Segment
- Menu type / focus

### Operation Details
- Unit count & growth
- Annual unit volume
- Actual menu with pricing
- Social media

### Key Contacts
- Name + email
- LinkedIn

### Market Area Details
- Unit counts by state and metro area
- Competing nearby restaurants
- Local consumer demographics
When will you be ready to talk to foodservice manufacturers about new products & innovation?

52% are ready within the next 90 days.
Which restaurant menu type is most likely to be closed right now?
Closures vary dramatically by menu type.

Many of the already uncommon cuisines have become particularly unavailable… pushing consumers toward more typical fare.
... but much of this is driven by the balance of chains vs. independents
**CUMULATIVE SHARE OF STORES**

(% of all locations comprised of brands that size or less)
<table>
<thead>
<tr>
<th>Category</th>
<th>Permanent Closures</th>
<th>Temporary Closures</th>
</tr>
</thead>
<tbody>
<tr>
<td>French</td>
<td>18.6%</td>
<td>17.2%</td>
</tr>
<tr>
<td>Dessert / Snack</td>
<td>17.2%</td>
<td></td>
</tr>
<tr>
<td>Other European</td>
<td>17.0%</td>
<td></td>
</tr>
<tr>
<td>American</td>
<td>12.5%</td>
<td></td>
</tr>
<tr>
<td>Coffee / Bakery</td>
<td>15.0%</td>
<td></td>
</tr>
<tr>
<td>Mixed Ethnicity</td>
<td>12.6%</td>
<td></td>
</tr>
<tr>
<td>African</td>
<td>13.6%</td>
<td></td>
</tr>
<tr>
<td>Steakhouse</td>
<td>13.2%</td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td>11.2%</td>
<td></td>
</tr>
<tr>
<td>Korean</td>
<td>8.8%</td>
<td></td>
</tr>
<tr>
<td>Other Asian</td>
<td>8.1%</td>
<td></td>
</tr>
<tr>
<td>Italian</td>
<td>8.0%</td>
<td></td>
</tr>
<tr>
<td>Mediterranean</td>
<td>7.0%</td>
<td></td>
</tr>
<tr>
<td>Southern</td>
<td>6.3%</td>
<td></td>
</tr>
<tr>
<td>Burger</td>
<td>6.2%</td>
<td></td>
</tr>
<tr>
<td>Japanese</td>
<td>7.5%</td>
<td></td>
</tr>
<tr>
<td>Caribbean</td>
<td>6.0%</td>
<td></td>
</tr>
<tr>
<td>Sandwich / Deli</td>
<td>4.9%</td>
<td></td>
</tr>
<tr>
<td>Indian</td>
<td>5.5%</td>
<td></td>
</tr>
<tr>
<td>South American</td>
<td>5.6%</td>
<td></td>
</tr>
<tr>
<td>BBQ</td>
<td>4.4%</td>
<td></td>
</tr>
<tr>
<td>Chinese</td>
<td>4.1%</td>
<td></td>
</tr>
<tr>
<td>Mexican</td>
<td>3.6%</td>
<td></td>
</tr>
<tr>
<td>Pizza</td>
<td>2.8%</td>
<td></td>
</tr>
<tr>
<td>Thai</td>
<td>3.0%</td>
<td></td>
</tr>
</tbody>
</table>

*the grit of independents*
Legacy restaurants are more likely to have stayed open among restaurants that initially opened in...
80.5% open
3.2% permanently closed
16.3% temporarily closed
closures and eventual re-openings are often driven by activity at the county level.
Manhattan
41.4% closed
14.2 cases per thousand

Queens
14.3% closed
24.2 cases per thousand

Bronx
12.8% closed
27.8 infections per thousand

Westchester
11.2% closed
31.2 cases per thousand
DO INFECTIONS DRIVE CLOSURES?

\( \rho = 0.07 \)
NEW YORK CITY
restaurant closures by zip code
CHICAGO
restaurant closures by zip code
SAN FRANCISCO
restaurant closures by zip code
WASHINGTON DC
restaurant closures by zip code
LAS VEGAS
restaurant closures by zip code

The “Strip”

Primm
(entry from CA)

Laughlin
The recovery will be driven not only by people emerging from their homes, but also the areas they are returning to.
THE GREAT REOPENING IS STARTING NOW

RESTAURANTS OPEN;
MAX 50% CAPACITY

RESTAURANTS OPEN;
MAX 33% CAPACITY

RESTAURANTS OPEN;
MAX 25% CAPACITY

RESTAURANTS OPEN; NO DIRECT CAPACITY LIMIT

RESTAURANTS CLOSED

RESTAURANTS OPEN; MISCELLANEOUS GUIDELINES

RESTAURANTS OPEN; MAX 50% CAPACITY

RESTAURANTS OPEN; MAX 33% CAPACITY

RESTAURANTS OPEN; MAX 25% CAPACITY
57,134 restaurants due to reopen their doors
603,903 restaurants reopening their dining rooms

... and they need help navigating the way forward
What Consumers Want

craveable solutions for a newly opened world

Friday May 15 @2pm CST

REGISTER TODAY AT:
datassential.com/coronavirus
hello@datassential.com

GET STARTED