WEEKLY WEBINAR
Fridays @2pm CST
invite everybody!

REGISTER HERE:
https://zoom.us/webinar/register/WN_nuj54TxD50WHUrW4Ls-ZAQ
What Consumers Want
THE COVID-19 SERIES
Episode 7 // 05.15.20
NAME THAT SNAP!
NAME THAT SNAP!

CLUE #1: the devil's toothpaste
CLUE #2: red hot chili peppers
CLUE #3: north African
CLUE #4: a spicy red paste
NAME THAT SNAP!

Harissa is on 3.5% of US menus
1-year growth +8.2% | 4-year growth +69.7%

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

clue #1: the devil's toothpaste
clue #2: red hot chili peppers
clue #3: north African
clue #4: a spicy red paste
NAME THAT SNAP!

clue #1: vampire's delight
clue #2: crimson
clue #3: in cocktails & desserts
clue #4: citrus
NAME THAT SNAP!

Blood Orange is on 11.5% of US menus
1-year growth +7.8% | 4-year growth +58.7%

38% of consumers love or like it.
Most popular with Asian.
Found equally at chains and independents

clue #1: vampire's delight
clue #2: crimson
clue #3: in cocktails & desserts
clue #4: citrus
NAME THAT SNAP!

is on 7.2% of US menus
1-year growth +2.9% | 4-year growth +52.4%

17% of consumers love or like it. Most popular with Hispanics. More common at independents.

clue #1: green with tang

clue #2: land of the gauchos

clue #3: it's NOT the fried burrito

clue #4: parsley for the win!
Chimichurri is on 72% of US menus
1-year growth +2.9% | 4-year growth +52.4%

17% of consumers love or like it. Most popular with Hispanics. More common at independents.

clue #1: green with tang
clue #2: land of the gauchos
clue #3: it’s NOT the fried burrito
clue #4: parsley for the win!
NAME THAT SNAP!

sounds like tropical paradise

from the levant

open sesame

the hummus among us
NAME THAT SNAP!

Tahini is on 5.6% of US menus
1-year growth +15.2% | 4-year growth +46.0%

15% of consumers love or like it. Equally popular with all consumer types. More common at independents.

clue #1: sounds like tropical paradise
clue #2: from the levant
clue #3: open sesame
clue #4: the hummus among us
Thank you!
In the past 65 days, we’ve surveyed over 42,000 consumers.
DO INFECTIONS DRIVE CLOSURES?

$\rho = 0.07$
NEW YORK CITY
restaurant closures by zip code

Manhattan
VARIABLE
POPULATION
RATIO = \frac{\text{working population}}{\text{resident population}}
DOES VARIABLE POPULATION DRIVE CLOSURES?

ρ = 0.43
<table>
<thead>
<tr>
<th>Zip</th>
<th>Neighborhood</th>
<th>Resident Population</th>
<th>Worker Population</th>
<th>Variable Pop Ratio</th>
<th>Closure Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>60606</td>
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<td>126,936</td>
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<td>92121</td>
<td>Marine Corps</td>
<td>4,503</td>
<td>180,888</td>
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<td>21.6%</td>
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<td>89109</td>
<td>Las Vegas Strip</td>
<td>7,341</td>
<td>145,364</td>
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<td>60.3%</td>
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<td>94105</td>
<td>East Cut (SF)</td>
<td>6,108</td>
<td>80,414</td>
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<td>10018</td>
<td>Manhattan</td>
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<td>116,004</td>
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<tr>
<td>10017</td>
<td>Manhattan</td>
<td>16,472</td>
<td>130,632</td>
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<td>77002</td>
<td>Skyline District (Houston)</td>
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<td>84,225</td>
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<td>77030</td>
<td>University Place (Houston)</td>
<td>10,279</td>
<td>66,701</td>
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<td>12.8%</td>
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<td>60601</td>
<td>Chicago Loop</td>
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<td>74,196</td>
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<td>10001</td>
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<td>23,537</td>
<td>136,948</td>
<td>5.8</td>
<td>53.9%</td>
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<tr>
<td>98101</td>
<td>First Hill (Seattle)</td>
<td>11,291</td>
<td>65,336</td>
<td>5.8</td>
<td>49.8%</td>
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<td>10036</td>
<td>Manhattan</td>
<td>25,799</td>
<td>142,385</td>
<td>5.5</td>
<td>48.8%</td>
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<td>80202</td>
<td>LoDo (Denver)</td>
<td>12,386</td>
<td>67,208</td>
<td>5.4</td>
<td>45.4%</td>
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<td>45202</td>
<td>East End (Cincinnati)</td>
<td>13,623</td>
<td>64,775</td>
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<td>25.9%</td>
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<td>90245</td>
<td>Manhattan Beach (CA)</td>
<td>16,929</td>
<td>74,948</td>
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<tr>
<td>10022</td>
<td>Manhattan</td>
<td>30,607</td>
<td>124,710</td>
<td>4.1</td>
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<td>10019</td>
<td>Theater District (NY)</td>
<td>38,830</td>
<td>138,789</td>
<td>3.6</td>
<td>47.6%</td>
</tr>
<tr>
<td>19103</td>
<td>Rittenhouse (Philadelphia)</td>
<td>23,154</td>
<td>75,660</td>
<td>3.3</td>
<td>35.7%</td>
</tr>
<tr>
<td>77056</td>
<td>Uptown (Houston)</td>
<td>18,685</td>
<td>57,916</td>
<td>3.1</td>
<td>23.7%</td>
</tr>
<tr>
<td>22102</td>
<td>West McLean (VA)</td>
<td>23,806</td>
<td>73,335</td>
<td>3.1</td>
<td>37.5%</td>
</tr>
<tr>
<td>30339</td>
<td>Vinings (Atlanta)</td>
<td>21,250</td>
<td>63,310</td>
<td>3.0</td>
<td>17.6%</td>
</tr>
<tr>
<td>92618</td>
<td>Quail Hill (Irvine)</td>
<td>25,043</td>
<td>72,910</td>
<td>2.9</td>
<td>25.7%</td>
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<tr>
<td>32819</td>
<td>Kirkman South (Orlando)</td>
<td>27,248</td>
<td>76,631</td>
<td>2.8</td>
<td>29.7%</td>
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<tr>
<td>10013</td>
<td>Lower Manhattan</td>
<td>27,415</td>
<td>71,714</td>
<td>2.6</td>
<td>44.6%</td>
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<tr>
<td>98108</td>
<td>Georgetown (Seattle)</td>
<td>24,681</td>
<td>59,040</td>
<td>2.4</td>
<td>30.2%</td>
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<tr>
<td>19406</td>
<td>King of Prussia (PA)</td>
<td>23,417</td>
<td>55,705</td>
<td>2.4</td>
<td>24.7%</td>
</tr>
<tr>
<td>53202</td>
<td>Historic Third Ward (Milwaukee)</td>
<td>24,684</td>
<td>58,235</td>
<td>2.4</td>
<td>25.6%</td>
</tr>
<tr>
<td>70809</td>
<td>East Baton Rouge</td>
<td>24,399</td>
<td>55,728</td>
<td>2.3</td>
<td>13.6%</td>
</tr>
<tr>
<td>60611</td>
<td>Near North Side (Chicago)</td>
<td>31,165</td>
<td>70,743</td>
<td>2.3</td>
<td>38.3%</td>
</tr>
</tbody>
</table>
Stores in areas with high variable population will be challenged even as the reopening process continues.
Variable population ratio
Urban / suburban / rural units
Standalone vs. hosted stores
State opening status
Resident population
The chain restaurant landscape and its prevailing trends.
The wide-ranging impact of COVID-19, and key takeaways for reopening day.

**Firefly 500+**

The Chicken's Eye View on America's Top Restaurant Chains

**CHAIN RESILIENCEY**

30+ pandemic factors across 8 key areas

1. location
2. enthusiasm
3. value
4. service
5. menu
6. formats
7. agility
8. trust

want more details?
“very concerned” about Coronavirus
"definitely avoid" eating out
It’s a poll!
which “non-essential” places?
How do you feel about Americans going to the following "non-essential" places right away?

(%) who feel it’s appropriate

- Public parks / libraries / beaches: 51%
- Retail stores / shopping malls: 42%
- Salons & barber shops: 37%
- Hotel restaurants & bars: 35%
- Cafeterias: 34%
- Full-service restaurant dining: 34%
- Food courts / food halls: 27%
- Gyms / fitness centers: 26%
- Theaters / stadiums / concert halls: 18%
- Bars / nightclubs / lounges: 16%
<table>
<thead>
<tr>
<th>Food Service Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant takeout</td>
<td>46%</td>
</tr>
<tr>
<td>Restaurant delivery</td>
<td>43%</td>
</tr>
<tr>
<td>Assembled-to-order restaurant</td>
<td>26%</td>
</tr>
<tr>
<td>Dining at FSR</td>
<td>23%</td>
</tr>
<tr>
<td>C-store hot foods</td>
<td>23%</td>
</tr>
<tr>
<td>Dining inside QSR</td>
<td>22%</td>
</tr>
<tr>
<td>Cafeteria line (staff served)</td>
<td>18%</td>
</tr>
<tr>
<td>Grocery salad / soup bar</td>
<td>17%</td>
</tr>
<tr>
<td>Salad bar restaurant</td>
<td>15%</td>
</tr>
<tr>
<td>Buffet restaurant</td>
<td>14%</td>
</tr>
</tbody>
</table>

**GOOD WITH IT**

what consumers consider
NOT RISKY at all
what consumers consider NOT RISKY at all
“Call me Ishmael. Some years ago - never mind how long precisely - having little or no money in my purse, and nothing particular to interest me on shore, I thought I would sail about a little and see the watery part of the world. It is a way I have of driving off the spleen and regulating the circulation. Whenever I find myself growing grim about the mouth; whenever it is a damp, drizzly November in my soul; whenever I find myself involuntarily pausing before coffin warehouses, and bringing up the rear of every funeral I meet; and especially whenever my hypos get such an upper hand of me, that it requires a strong moral principle to prevent me from deliberately stepping into the street, and methodically knocking people's hats off - then, I account it high time to get to sea as soon as I can. This is my substitute for pistol and ball. With a philosophical flourish Cato throws himself upon his sword; I quietly take to the ship. There is nothing surprising in this. If they but knew it.”
“Will Buffets be able to come back from this?”

“Jack-No one is talking about Buffets. Please discuss!”

“How do Buffets reinvent themselves after COVID-19?”

“How do buffet concepts like survive after this pandemic?”

“Why will you not talk about the Buffet segment?”

“That is exactly why I want you guys to talk about the Buffet segment!”
BUFFETS
what consumers ABSOLUTELY REQUIRE to consider a buffet

- Sneeze guards: 69%
- Limit guests at each station: 59%
- Food rotated regularly: 58%
- Staff monitors guests: 56%
- Only single-serve condiments: 56%
- Lids for food: 55%
- Single use serving utensils: 55%
- Gloves / masks available: 54%
- Staff serves at each station: 46%
- Staff brings food to your table: 39%
Sneeze guards

Limit guests at each station

Food rotated regularly

Staff monitors guests

Only single-serve condiments

Lids for food

Single use serving utensils

Gloves / masks available

Staff serves at each station

Staff brings food to your table
What types of face coverings?
IMMUNITY
Since the pandemic began, has leading a HEALTHY LIFESTYLE become...?

- 35% more important
- 9% less important
- 56% no change
HEALTH LIFESTYLE GOALS

- Age better
- Increase energy
- Looking good
- Longevity
- Mental sharpness
- Weight management
- Detoxifying
- Building immunity
- Mood improvement
- Sleep better
- Muscle / fitness
- Nutritional balance
- Avoiding cancer
1.0 weight management
2.0 feel good foods
3.0 functional foods
consumers believe these foods boost their immunity
consumers believe these **nutrients** boost their immunity
FAMILY MEALS
what consumers want included in their family meal

- Entrée only: 22%
- Entrée + Appetizer / Side: 46%
- Entrée + Appetizer / Side + Dessert: 32%
Comfort can lead for now, but remember that the American appetite is extremely diverse!
comfort / classic foods
27% 47% 43% 36%
Gen Z Millennial Gen X Boomer+

build-your-own foods
36% 42% 38% 25%
Gen Z Millennial Gen X Boomer+

healthy / better-for-you foods
24% 40% 36% 24%
Gen Z Millennial Gen X Boomer+

indulgent foods
25% 32% 32% 23%
Gen Z Millennial Gen X Boomer+

international / ethnic foods
24% 28% 27% 18%
Gen Z Millennial Gen X Boomer+

new / trendy foods & flavors
23% 31% 24% 9%
Gen Z Millennial Gen X Boomer+

upscale / chef-inspired foods
16% 24% 18% 10%
Gen Z Millennial Gen X Boomer+

specific diet-based foods
22% 24% 12% 4%
Gen Z Millennial Gen X Boomer+

meatless / plant-based foods
17% 19% 12% 8%
Gen Z Millennial Gen X Boomer+

what consumers want in their FAMILY MEAL
Mexican food: 34%
Italian food: 33%
Pizza: 28%
BBQ: 27%
Asian food: 26%
Burgers: 25%
Fried chicken: 22%
Pasta: 20%
Seafood: 18%
Wings: 18%
Grilled chicken: 17%
Lasagna: 16%
Chicken strips / nuggets: 15%
Steak: 15%
Sub sandwiches: 13%
Enterée salads: 12%
Mac & cheese: 12%
Greek food: 10%
Breakfast entrees: 8%
Soul food: 8%
Pancakes / waffles: 8%
Cold deli sandwiches: 8%

foods that consumers want in a family meal
Beverages can be a challenge. Only one-in-four want them included with their family meals. Solve this with innovative drinks that consumers don't have at home, plus single-serve options so each person can have their own drink.

24% want beverages included with their family meal.

why not?

- Already have drinks at home (46%)
- Others want to pick their own drink (18%)
- Too risky due to coronavirus (7%)
- Other reasons (3%)
Scores

every new menu item rated
Unbranded purchase intent
Branded purchase intent
Uniqueness
Frequency
Draw
Value
Daypart fit
Brand fit
Likes & dislikes

FORMAT APPEAL
Delivery
To-go
Dine-in
AVERAGE APPEAL BY DINING FORMAT
(across 414 new menu launches in March & April 2020)

<table>
<thead>
<tr>
<th>Dining Format</th>
<th>Delivery</th>
<th>To go</th>
<th>Dine in</th>
</tr>
</thead>
<tbody>
<tr>
<td>QSR</td>
<td>71%</td>
<td>52%</td>
<td>29%</td>
</tr>
<tr>
<td>Fast Casual</td>
<td>60%</td>
<td>81%</td>
<td>29%</td>
</tr>
<tr>
<td>Midscale</td>
<td>51%</td>
<td>26%</td>
<td>60%</td>
</tr>
<tr>
<td>Fine Dining</td>
<td>31%</td>
<td>46%</td>
<td>65%</td>
</tr>
<tr>
<td>Casual Dining</td>
<td>39%</td>
<td>27%</td>
<td>51%</td>
</tr>
<tr>
<td>C-Stores</td>
<td>68%</td>
<td>25%</td>
<td>63%</td>
</tr>
</tbody>
</table>
AVERAGE APPEAL BY DINING FORMAT
(across 414 new menu launches in March & April 2020)
AVERAGE APPEAL BY DINING FORMAT
(across 414 new menu launches in March & April 2020)

- QSR: Delivery 52%, To go 60%, Dine in 71%
- Fast Casual: Delivery 29%, To go 60%, Dine in 61%
- Midscale: Delivery 26%, To go 51%, Dine in 65%
- Fine Dining: Delivery 27%, To go 31%, Dine in 63%
- Casual Dining: Delivery 25%, To go 39%, Dine in 71%
- C-Stores: Delivery 29%, To go 46%, Dine in 68%
AVERAGE APPEAL BY DINING FORMAT
(across 414 new menu launches in March & April 2020)
To-go appeal exhibits the greatest variability.
Wendy’s
HONEY BUTTER CHICKEN BISCUIT
A crispy, chicken fillet, perfectly seasoned and topped with maple honey butter on a fluffy buttermilk biscuit. It’s sweet, it’s savory, and it’s a great reason to get out of bed in the morning.

Unbranded PI
- Value: 66
- Frequency: 34
- Uniqueness: 31

Branded PI
- Value: 78
- Frequency: 84
- Uniqueness: 45

March 2020
$3.79

Delivery: 24%
To-Go: 85%
Dine In: 52%

Joe’s Crab Shack
HOOK & CATCH
Salmon, snow crab, grilled shrimp skewers, stuffed bacon-wrapped shrimp served with white rice and seasonal vegetables.

Unbranded PI
- Value: 26
- Draw: 99
- Frequency: 84
- Uniqueness: 45

Branded PI
- Value: 94
- Draw: 46
- Frequency: 77
- Uniqueness: 13

March 2020
$28.99

Delivery: 13%
To-Go: 25%
Dine In: 78%

Pizza Hut
NASHVILLE HOT WINGS
Inspired by the mouthwatering, sweet- and heat-flavored Nashville-style sauce, the Nashville Hot Wings feature a bold cayenne pepper sauce with the perfect blend of tangy, savory and sweet flavors.

Unbranded PI
- Value: 55
- Draw: 91
- Frequency: 77
- Uniqueness: 13

Branded PI
- Value: 57
- Draw: 18
- Frequency: 77
- Uniqueness: 18

March 2020
$6.99

Delivery: 45%
To-Go: 69%
Dine In: 46%
Hi, my name is COVID.
POLL: Will trends resume as the economy reopens?
<table>
<thead>
<tr>
<th>Ingredient</th>
<th>% Interest Prior to Coronavirus</th>
<th>% Interest After Pandemic</th>
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<tbody>
<tr>
<td>Simple ingredients</td>
<td>88%</td>
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<tr>
<td>Plant-based foods</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Smoothie bowls / acai bowls</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Functional foods</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Avocado toast</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Plant-based meat</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>Housemade beverages</td>
<td>80%</td>
<td></td>
</tr>
<tr>
<td>Kombucha</td>
<td>78%</td>
<td></td>
</tr>
<tr>
<td>Overnight oats</td>
<td>75%</td>
<td></td>
</tr>
<tr>
<td>Gluten-free</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>&quot;Instagram-able&quot; foods</td>
<td>72%</td>
<td></td>
</tr>
</tbody>
</table>
Declining: 18.0%
Flat: 48.8%
Trending: 26.1%
Super growth: 7.1%
5,090 foods, flavors & ingredients experiencing super growth

363 trends to choose from
TREND FRAGMENTATION

hundreds of trends, dozens of themes
Classic foods reinvented in often surprising ways

Almond butter
Cashew cheese
Avocado oil
Oat milk
Plant-based
Cauliflower rice
Quinoa
Kale chips
Mushroom coffee
Almond milk
Coconut milk yogurt
... and many more

can you name a few others?
Almond Milk is on 3.1% of US menus
1-year growth: +15.7% | 4-year growth: +68.8%
43% of consumers love or like it.
Most popular with Asian.
More common at chains.

Quinoa is on 13.0% of US menus
1-year growth: +6.5% | 4-year growth: +75.8%
27% of consumers love or like it.
Equally popular with all consumer types.
More common at regional chains.

Almond Butter is on 1.3% of US menus
1-year growth: +12.3% | 4-year growth: +85.0%
30% of consumers love or like it.
Equally popular with all consumer types.
More common at chains.
post-pandemic mindset

rethinking food
functional properties
anything’s possible!
NEW DRINKS
Kombucha is on 2.5% of US menus
1-year growth +34.0% / 4-year growth +387.2%
13% of consumers love or like it.
Most popular with Gen Z.
More common at regional chains.

Boba is on 0.9% of US menus
1-year growth +9.5% / 4-year growth +108.7%
11% of consumers love or like it.
Most popular with Asian, Hispanics, Gen Z, West.
More common at chains.

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.
post-pandemic mindset

compete with what’s in the fridge
cans & bottles
easy customization
launchpad for functional ingredients
Here I Come!
lessons and surprises from the grand reopening
Friday May 22 @2pm CST

REGISTER TODAY AT:
datassential.com/coronavirus