WEEKLY WEBINAR
Fridays @2pm CST
invite everybody!

REGISTER HERE:
https://zoom.us/webinar/register/WN_nuj54TxDS0WHURw4Ls-ZAQ
A New Chapter
further lessons from ONE TABLE and beyond

June 5 @2pm CST

REGISTER TODAY AT:
datassential.com/coronavirus
NAME THAT SNAP!
clue #1: named in Brazil
clue #2: so many seeds
clue #3: the most romantic flavor
clue #4: teas and desserts

NAME THAT SNAP!

is on 12.4% of US menus
1-year growth +6.1% | 4-year growth +41.7%

37% of consumers love or like it.
Most popular with Asian, Hispanics.
Found equally at chains and independents.

CONSUMER
AFFINITY

TOTAL US 12.4%

- Fine Dining 27.3%
- Casual Dining 12.4%
- Mid-Range 8.3%
- Fast Casual 4.1%
- QSR 5.2%

view details
Passion Fruit is on 12.4% of US menus
1-year growth +6.1% | 4-year growth +41.7%

37% of consumers love or like it. Most popular with Asian, Hispanics. Found equally at chains and independents.

clue #1: named in Brazil
clue #2: so many seeds
clue #3: the most romantic flavor
clue #4: teas and desserts
brassica
it's all in the head
trendy as a rice or crust
broccoli says hi
NAME THAT SNAP!

Cauliflower is on 20.1% of US menus
1-year growth +9.0% | 4-year growth +35.7%

59% of consumers love or like it. Most popular with Asian, Boomers. More common at independents.

clue #1: brassica
clue #2: it's all in the head
clue #3: trendy as a rice or crust
clue #4: broccoli says hi
NAME THAT SNAP!

is on 8.3% of US menus
1-year growth +6.3% | 4-year growth +19.1%

34% of consumers love or like it. Most popular with Asian. More common at regional chains.

clue #1: uncrusted
clue #2: it's pretty crumby
clue #3: light & flaky
clue #4: tonkatsu and more
Panko
is on 8.3% of US menus
1-year growth +6.3% | 4-year growth +19.1%

34% of consumers love or like it. Most popular with Asian. More common at regional chains.

clue #1: uncrusted
clue #2: it's pretty crumby
clue #3: light & flaky
clue #4: tonkatsu and more
WE EXTENDED THE WEBINAR SERIES, SO...

YOU MUST MANUALLY ADD IT TO YOUR CALENDAR!

same link every week
please take 30 seconds to add it now
“definitely avoid” eating out
ABOLISH THE POLICE
BLACK LIVES MATTER
JUSTICE FOR FLOYD
WHY IS VIOLENCE
I hope the media focuses on non-coronavirus news... there are more important issues that need coverage right now.
58%
seeing the coverage of protests has reminded me we should focus on other things besides coronavirus
Which event will history most remember?
<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Been outside in public without a mask</td>
<td>43%</td>
</tr>
<tr>
<td>Exercised in public</td>
<td>38%</td>
</tr>
<tr>
<td>Socialized without being 6-feet apart</td>
<td>34%</td>
</tr>
<tr>
<td>Gone shopping in-person for &quot;non-essential&quot; items</td>
<td>33%</td>
</tr>
<tr>
<td>Got a haircut / spa / beauty treatment</td>
<td>27%</td>
</tr>
<tr>
<td>Socialized inside of a friend's house</td>
<td>26%</td>
</tr>
<tr>
<td>Eaten inside of a restaurant</td>
<td>23%</td>
</tr>
<tr>
<td>Exercised without being 6-feet apart</td>
<td>21%</td>
</tr>
<tr>
<td>Gathered with a big group</td>
<td>20%</td>
</tr>
<tr>
<td>Been part of a large, public crowd</td>
<td>17%</td>
</tr>
</tbody>
</table>

**WHAT HAVE PEOPLE DONE IN THE PAST 2 WEEKS?**
In The Past 2 Weeks.

- Been outside in public without a mask
- Exercised in public
- Socialized without being 6-feet apart
- Gone shopping in-person for "non-essential" items
- Got a haircut / spa / beauty treatment
- Socialized inside of a friend's house
- Eaten inside of a restaurant
- Exercised without being 6-feet apart
- Gathered with a big group
- Been part of a large, public crowd
In The Past 2 Weeks.

- Been outside in public without wearing a mask: 51% (Republican) 38% (Democrat)
- Exercised in public: 40% (Republican) 40% (Democrat)
- Socialized without being 6-feet apart: 44% (Republican) 39% (Democrat)
- Gone shopping in-person for "non-essential" items: 30% (Republican) 29% (Democrat)
- Gotten a haircut / spa / beauty treatment: 30% (Republican) 27% (Democrat)
- Socialized inside of a friend's house: 28% (Republican) 26% (Democrat)
- Eaten inside of a restaurant: 30% (Republican) 20% (Democrat)
- Exercised without being 6-feet apart: 23% (Republican) 19% (Democrat)
- Gathered with a big group: 24% (Republican) 18% (Democrat)
- Been part of a large, public crowd: 19% (Republican) 16% (Democrat)
It’s a poll!

Coronavirus News

Killer virus now "spreading fast"

Global efforts to develop vaccines

The outbreak of 2019
Reciprocity
Commitment & Consistency
Social Proof
Liking
Authority
Scarcity

44% lots of people are breaking the distancing rules, so there's no point in following them
Do you think there will be a second wave?

- 49% major second wave
- 36% minor second wave
- 16% no second wave

What should we do if there IS a second wave?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement lockdown again</td>
<td>40%</td>
</tr>
<tr>
<td>Continue opening businesses back up, but slower</td>
<td>43%</td>
</tr>
<tr>
<td>Continue opening businesses back up as planned</td>
<td>17%</td>
</tr>
</tbody>
</table>
72% don't trust others to act responsibly when non-essential businesses reopen (including bars & restaurant dining rooms)
covidiot noun

covid-i-ot | \kəʊ-ˈvɪ-dɪ-ət\

1. a stupid person who stubbornly ignores ‘social distancing’ protocol, thus helping to further spread COVID-19.
   ‘Are you seriously going to visit grandma? Dude, don’t be such a covidiot.’

2. a stupid person who hoards groceries, needlessly spreading COVID-19 fears and depriving others of vital supplies.
   ‘See that guy with the 200 toilet paper rolls? What a covidiot.’
What should a restaurant do if patrons refuse to practice social-distancing while inside?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ask them to leave immediately</td>
<td>40%</td>
</tr>
<tr>
<td>Ask them to leave if they refuse to comply several times</td>
<td>43%</td>
</tr>
<tr>
<td>Ask them to comply, but don't ask them to leave</td>
<td>17%</td>
</tr>
</tbody>
</table>
ONE TABLE

insights to guide our path forward
The ONE TABLE Community | 200+ Companies, One Table

Datasenial brought together more than 200 leading restaurant chains and foodservice suppliers to co-design vital new research to help our entire industry recover. ONE TABLE has been community-driven, collaborative effort generating incredible new insights, and we’re ready to share the most important learnings.

ONE TABLE Consumer
Download PDF | PPTX

An exploration of how U.S. consumers are responding to COVID-19 and purchasing food away from home, and what they plan to do going forward. Learn what safety measures foodservice operations need to have in place to make consumers feel most comfortable dining in again and how to best communicate with diners.

ONE TABLE Operator
Download PDF | PPTX

An exploration of how foodservice decision-makers (restaurant and on-site owners, managers, etc.) are responding to COVID-19 restrictions, and how they plan to reopen their foodservice locations. Learn what kind of help operators say they need to reopen successfully.
Extra time is filled with TV and movies.

Even with increased access to some restaurants with expanded takeout and delivery, consumers aren’t trying new restaurants.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching TV / movies</td>
<td>62%</td>
</tr>
<tr>
<td>Sleeping</td>
<td>26%</td>
</tr>
<tr>
<td>Listening to music</td>
<td>23%</td>
</tr>
<tr>
<td>Doing more hobbies</td>
<td>21%</td>
</tr>
<tr>
<td>Playing video games</td>
<td>20%</td>
</tr>
<tr>
<td>Working from home</td>
<td>19%</td>
</tr>
<tr>
<td>Working out</td>
<td>16%</td>
</tr>
<tr>
<td>Ordering groceries online</td>
<td>14%</td>
</tr>
<tr>
<td>Home maintenance / improvement</td>
<td>13%</td>
</tr>
<tr>
<td>Doing DIY projects</td>
<td>11%</td>
</tr>
<tr>
<td>Trying new things / activities</td>
<td>7%</td>
</tr>
<tr>
<td>Childcare / education</td>
<td>7%</td>
</tr>
<tr>
<td>Listening to podcasts</td>
<td>6%</td>
</tr>
<tr>
<td>Growing fruits and vegetables</td>
<td>6%</td>
</tr>
<tr>
<td>Trying new restaurants</td>
<td>5%</td>
</tr>
</tbody>
</table>

Which of the following activities are you engaging in more since the start of shelter-in-place restrictions?
People are turning toward comfort food during these uncertain times.

During shelter-in-place, consumers are becoming more self-sufficient by cooking, baking, and making coffee at home over ordering takeout or delivery. They are also eating more "comfort" foods.

which THREE of the following food-related activities have you done MORE of since the start of shelter-in-place restrictions?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooking / baking &quot;from scratch&quot; at home</td>
<td>37%</td>
</tr>
<tr>
<td>Making coffee at home</td>
<td>30%</td>
</tr>
<tr>
<td>Eating &quot;comfort&quot; foods</td>
<td>26%</td>
</tr>
<tr>
<td>Ordering takeout / pick-up</td>
<td>26%</td>
</tr>
<tr>
<td>Snacking between meals</td>
<td>22%</td>
</tr>
<tr>
<td>Ordering delivery</td>
<td>20%</td>
</tr>
<tr>
<td>Stress eating</td>
<td>16%</td>
</tr>
<tr>
<td>Drinking alcohol</td>
<td>16%</td>
</tr>
<tr>
<td>Eating healthy foods</td>
<td>16%</td>
</tr>
<tr>
<td>Eating indulgent foods</td>
<td>15%</td>
</tr>
<tr>
<td>Eating smaller meals</td>
<td>12%</td>
</tr>
<tr>
<td>Skipping meals or working through meals</td>
<td>7%</td>
</tr>
</tbody>
</table>
Until a vaccine is widely available, extra safety precautions will be expected at restaurants.

A developed vaccine, testing, or even the government lifting restrictions is not enough – the vaccine needs to be widely accessible before things feel normal again.

Which three things would MOST indicate to you that things have returned to normal?
Delivery and order-ahead may be permanently accelerated.

Even once shelter restrictions are lifted, consumers anticipate a net increase in ordering online or ordering ahead. These behaviors were already trending prior to COVID, and it seems likely that the pandemic has sped up their adoption. By contrast, a net decrease is anticipated for both on-premise dining and ordering at the counter.

Compared to their PRE-COVID behavior, what consumers plan to do more / less of shelter restrictions are lifted

- **Go to the drive-thru**: 16% (↑)
- **Call to place an order**: 14% (↑)
- **Use restaurant site/app to order**: 14% (↑)
- **Use third-party site/app to order**: 13% (↑)
- **Order at the counter**: 12% (↓)
- **Eat inside a restaurant**: 12% (↓)
- **Delivery and order-ahead**: 22% (↑)
- **Eat inside a restaurant**: 9% (↓)
- **Call to place an order**: 29% (↑)

**Data Source**: Datasential
Cars are the new safe haven.

Not only is drive-thru considered a comparatively safe option, but now curbside has also emerged as a relatively new format that also ranks at the top in perceived safety. Together, curbside and drive-thru earn a majority of the safety vote as consumers find security in their cars.

When it comes to delivery, consumers trust restaurant direct delivery more than they do third-party (likely because 3P introduces an additional element into the process). But however the delivery is done, look to show consumers that the process is safe, minimizes touch points, and carried out exclusively by well-trained staff.

- **Curbside pick-up**: 27%
- **Drive-thru**: 27%
- **Delivery from restaurants**: 16%
- **Order at the counter and take it to go**: 11%
- **Order ahead and pick up inside**: 11%
- **Delivery from third-party**: 9%

% who consider it the safest option
An opportunity to flatten the daypart curve.

Consumers anticipate adopting a range of long-term behavior after the pandemic has passed—including handwashing, large group dining, and avoiding communal settings. But there’s a potential opportunity in all this too; as one-third will avoid restaurants during peak hours, brands may be able to generate steadier revenue throughout the day with targeted promotions and menu offerings that reward guests for their off-peak visits.

do you plan on maintaining the following practices when eating out even after shelter-in-place restrictions have been lifted?

<table>
<thead>
<tr>
<th>Practice</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Washing your hands before eating</td>
<td>49%</td>
</tr>
<tr>
<td>Bringing hand sanitizer with you</td>
<td>40%</td>
</tr>
<tr>
<td>Avoid peak busy times at restaurants</td>
<td>35%</td>
</tr>
<tr>
<td>Avoid dining in large groups</td>
<td>34%</td>
</tr>
<tr>
<td>Avoid buffs</td>
<td>29%</td>
</tr>
<tr>
<td>Avoid communal tables / shared seating</td>
<td>27%</td>
</tr>
<tr>
<td>Avoid eating open snacks</td>
<td>24%</td>
</tr>
<tr>
<td>Bringing sanitizing supplies for the table with you</td>
<td>22%</td>
</tr>
<tr>
<td>Avoid waiting in lobby / waiting area for a table</td>
<td>21%</td>
</tr>
<tr>
<td>Avoid self-serve fountain / drink stations</td>
<td>21%</td>
</tr>
<tr>
<td>Avoid using condiments at the table</td>
<td>19%</td>
</tr>
<tr>
<td>Avoiding drinks from tap or fountain</td>
<td>18%</td>
</tr>
<tr>
<td>Eating outside</td>
<td>14%</td>
</tr>
<tr>
<td>Using phone / app to order and pay</td>
<td>12%</td>
</tr>
<tr>
<td>Avoid appetizers or dishes to share</td>
<td>11%</td>
</tr>
<tr>
<td>Use silverware even if eat with hands is easier</td>
<td>11%</td>
</tr>
<tr>
<td>Avoid items you have to eat with your hands</td>
<td>11%</td>
</tr>
<tr>
<td>Avoid cocktail parties / &quot;passed&quot; foods &amp; drinks</td>
<td>11%</td>
</tr>
<tr>
<td>Avoid using coasters, stirrers, etc.</td>
<td>9%</td>
</tr>
<tr>
<td>Item</td>
<td>%</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>----</td>
</tr>
</tbody>
</table>
| Spaced out tables                                                   | 40%
| Employees wearing masks                                             | 39%
| All common areas are visibly wiped down regularly                    | 39%
| Restrooms are extremely clean                                       | 39%
| Employees wearing gloves                                            | 38%
| Sanitizing products provided to customers                            | 38%
| Smaller capacity                                                     | 36%
| No self-serve buffets                                               | 25%
| Daily employee temperature checks                                   | 25%
| Disposable menus                                                     | 22%
| No communal / shared tables                                         | 22%
| Everything comes individually wrapped                               | 21%
| Automatic doors at entrance and restrooms                            | 19%
| No condiments bottles on the table                                  | 19%
| Self-serve areas removed                                            | 19%
| Disposable plates and utensils                                       | 19%
| Contactless payment available                                        | 19%
| Employees sanitize credit cards after touching                       | 18%
| Plexiglass dividers at check-out                                     | 16%
| Disposable table linens / coverings                                 | 16%
| Signage / communication that explains sanitation methods             | 15%
| Required reservations to manage crowd                                | 15%
| Contactless ordering available                                       | 15%
| Knowing where food and beverages come from                           | 12%
| Having a sink for customer use outside the restroom                  | 12%
| Posting / displaying last time each area was cleaned                 | 12%

**Focus on a suite of professionally executed safety measures.**

There's a nearly limitless array of precautions that restaurants can take in their dining rooms, and in practice it's simply not practical to do every single one. What consumers will value most is that brands get the basics right, and then ensure further safety with a combination of well-executed measures that together form a cohesive whole.

To do this well, brands should avoid executions that feel haphazard. It will be important to use professional signage, ensure safety messaging is both clear and consistent, and practice “overt sanitation” so guests can actually see what’s being done.

when they reopen, what would need to happen for you to feel safe dining in a sit-down restaurant again?
Who does it really well?
Even in a pandemic, craveable items are important.

Determine what cravings or desires your consumers are looking to satisfy and leverage them to help drive customers to your business. For example, Millennials want to feel “normal” while Boomers want to feel like they are supporting their local restaurants.

- Having a specific craving: 40%
- It's convenient: 39%
- Supporting my local restaurants: 36%
- Getting foods I can't make at home: 32%
- Getting tired of cooking at home: 30%
- Wanting to feel "normal": 23%
- Running out of food at home: 12%
- Something special for a holiday / occasion: 11%
- Getting something for the kids: 9%
- Want alcoholic beverages: 5%
- Want non-alcoholic beverages: 3%

What MOTIVATES you to order from a restaurant during shelter-in-place?
CURRENT SITUATION
K-12 is fairly confident they’ll be back at school in the fall, but colleges and universities are more hesitant.

Social distancing is more difficult for colleges and universities who have shared living spaces compared to K-12 schools.

are you planning to be fully open / operational for the upcoming fall 2020 semester?

- K-12: 65% expect back to normal in fall, 35% still not sure
- C&U: 38% expect back to normal in fall, 62% still not sure
## The Recovery Timeline

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total FS</td>
<td>-56%</td>
<td>-55%</td>
<td>-46%</td>
<td>-36%</td>
<td>-26%</td>
<td>-18%</td>
<td>-13%</td>
<td>-12%</td>
<td>-12%</td>
<td>-52%</td>
<td>-27%</td>
<td>-12%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>-58%</td>
<td>-56%</td>
<td>-45%</td>
<td>-32%</td>
<td>-20%</td>
<td>-14%</td>
<td>-11%</td>
<td>-11%</td>
<td>-11%</td>
<td>-53%</td>
<td>-22%</td>
<td>-11%</td>
</tr>
<tr>
<td>QSR</td>
<td>-42%</td>
<td>-40%</td>
<td>-28%</td>
<td>-14%</td>
<td>-2%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>-37%</td>
<td>-5%</td>
<td>0%</td>
</tr>
<tr>
<td>Fast Casual</td>
<td>-51%</td>
<td>-49%</td>
<td>-38%</td>
<td>-24%</td>
<td>-12%</td>
<td>-10%</td>
<td>-10%</td>
<td>-10%</td>
<td>-10%</td>
<td>-44%</td>
<td>-15%</td>
<td>-10%</td>
</tr>
<tr>
<td>Midscale</td>
<td>-70%</td>
<td>-69%</td>
<td>-60%</td>
<td>-50%</td>
<td>-40%</td>
<td>-30%</td>
<td>-25%</td>
<td>-25%</td>
<td>-25%</td>
<td>-66%</td>
<td>-40%</td>
<td>-25%</td>
</tr>
<tr>
<td>Casual Dining</td>
<td>-73%</td>
<td>-72%</td>
<td>-61%</td>
<td>-49%</td>
<td>-36%</td>
<td>-24%</td>
<td>-18%</td>
<td>-18%</td>
<td>-18%</td>
<td>-69%</td>
<td>-36%</td>
<td>-18%</td>
</tr>
<tr>
<td>Fine Dining</td>
<td>-82%</td>
<td>-81%</td>
<td>-73%</td>
<td>-65%</td>
<td>-56%</td>
<td>-47%</td>
<td>-38%</td>
<td>-31%</td>
<td>-30%</td>
<td>-79%</td>
<td>-56%</td>
<td>-33%</td>
</tr>
<tr>
<td>Retail Foodservice</td>
<td>-18%</td>
<td>-18%</td>
<td>-15%</td>
<td>-10%</td>
<td>-4%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>-17%</td>
<td>-5%</td>
<td>0%</td>
</tr>
<tr>
<td>Grocery perimeter</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>C-Store</td>
<td>-45%</td>
<td>-45%</td>
<td>-39%</td>
<td>-24%</td>
<td>-8%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>-43%</td>
<td>-11%</td>
<td>0%</td>
</tr>
<tr>
<td>Education</td>
<td>-77%</td>
<td>-77%</td>
<td>-77%</td>
<td>-77%</td>
<td>-42%</td>
<td>-9%</td>
<td>-9%</td>
<td>-9%</td>
<td>-9%</td>
<td>-77%</td>
<td>-66%</td>
<td>-9%</td>
</tr>
<tr>
<td>K-12</td>
<td>-71%</td>
<td>-71%</td>
<td>-71%</td>
<td>-71%</td>
<td>-34%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>-71%</td>
<td>-59%</td>
<td>0%</td>
</tr>
<tr>
<td>C&amp;U</td>
<td>-85%</td>
<td>-85%</td>
<td>-85%</td>
<td>-85%</td>
<td>-51%</td>
<td>-20%</td>
<td>-20%</td>
<td>-20%</td>
<td>-20%</td>
<td>-85%</td>
<td>-74%</td>
<td>-20%</td>
</tr>
<tr>
<td>B&amp;I</td>
<td>-73%</td>
<td>-72%</td>
<td>-59%</td>
<td>-43%</td>
<td>-28%</td>
<td>-23%</td>
<td>-20%</td>
<td>-16%</td>
<td>-15%</td>
<td>-68%</td>
<td>-31%</td>
<td>-17%</td>
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<td>-67%</td>
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<td>-60%</td>
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<td>0%</td>
<td>-9%</td>
<td>-5%</td>
<td>-1%</td>
</tr>
</tbody>
</table>
The Recovery Timeline

cumulative spend vs. original 2020 forecast

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

- Steep decline
- recovery begins
- closing the gap
Most operations have had to reduce staff. Healthcare and K-12 segments have continued limited operations during this time and have not had to make as many staff cuts as other segments. Whereas, fine dining and college and universities have been hit hard with a major drop in customer traffic and have had to make more staff cuts than other segments.

have you laid off staff in response to covid-19 / coronavirus?

- 37% No staff cuts due to coronavirus so far
- 12% We let go of up to 25% of our staff
- 11% We let go of up to 50% of our staff
- 11% We let go of up to 75% of our staff
- 29% We let go of more than 75% of our staff

63% have laid off staff
Average Staff Reductions.
% laid off or furloughed

- QSR: 42%
- Fast casual: 25%
- Midscale: 47%
- Casual dining: 52%
- Fine dining: 61%
- Healthcare: 6%
- Lodging: 47%
- Business & Industry: 42%
- College & University: 53%
- K-12: 8%
Full-service restaurants were the largest users of PPP. With PPP's strict rehiring and repayment rules, operators didn't always find it a viable option, since they were not confident they'd be able to put all the employees necessary back to work in time.

35% enrolled in PPP

- 39% of limited-service restaurants
- 53% of full-service restaurants
- 20% of on-site operations
For operators who faced cuts, they may keep the reduced staffing.

Though many would like to hire back the same number of staff, many may need to consider keeping some amount of reduction. Fine dining establishments are more likely to no longer need the same amount of staff as before COVID-19.

Are you planning on having the same amount of staff as before this pandemic?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>46%</td>
<td>Yes, I plan to have the SAME number of staff</td>
</tr>
<tr>
<td>48%</td>
<td>No, I plan to have LESS staff</td>
</tr>
<tr>
<td>6%</td>
<td>No, I plan to have MORE staff</td>
</tr>
</tbody>
</table>
Long-Term Reductions.
anticipate lower levels of staffing even after shelter is lifted
We are all in this together.

Operators care about their employees and want to hire them back as soon as possible. This is not an easy time and bringing back employees that have been laid-off may help with employee moral and give them a sense of belonging.

92%
I plan to hire the same people back whenever possible

8%
I will use this as an opportunity to hire new staff members

do you plan to hire back the same people that were laid-off or bring in new employees?
unemployment benefits

additional $600 federal

max state benefit (individual)
Operators are in the fight for the long haul. Reducing hours or menu variety are the first things operators would do before laying off staff or temporarily closing their operations.

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduce operating hours</td>
<td>43%</td>
</tr>
<tr>
<td>Simplify menu</td>
<td>43%</td>
</tr>
<tr>
<td>Lay-off staff</td>
<td>34%</td>
</tr>
<tr>
<td>Temporarily close operation</td>
<td>16%</td>
</tr>
<tr>
<td>Permanently close operation</td>
<td>4%</td>
</tr>
<tr>
<td>Will continue business as normal</td>
<td>27%</td>
</tr>
</tbody>
</table>
Sanitation and separation are key. Creating a dedicated pick-up area saves customers the stress of having to navigate their biggest worry: other customers. This has been one of the most successful strategies for operators.

**during the COVID-19 restrictions, what is working well with your current takeout and delivery system? among restaurants offering takeout or delivery**

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementing increased sanitation practices</td>
<td>53%</td>
</tr>
<tr>
<td>Creating separate pick-up area</td>
<td>51%</td>
</tr>
<tr>
<td>Maintaining social distancing between staff</td>
<td>36%</td>
</tr>
<tr>
<td>Setting up a system to create distance between customers</td>
<td>36%</td>
</tr>
<tr>
<td>Transitioning to online ordering</td>
<td>22%</td>
</tr>
<tr>
<td>Adding tamper-proof seals / measures</td>
<td>19%</td>
</tr>
<tr>
<td>Transitioning to using third-party apps for ordering</td>
<td>18%</td>
</tr>
<tr>
<td>Switching to new packaging that is easier to sanitize/safer and/or reheat</td>
<td>15%</td>
</tr>
<tr>
<td>Tools to make forecasting number and type of orders easier</td>
<td>10%</td>
</tr>
</tbody>
</table>
Gloves, masks, and safety training will be the new normal for the time being.

Operators are adapting to the new normal and are ready to make the changes necessary to keep employees and customers safe. Whether that’s additional employee training or daily temperature checks, they are willing to do what is necessary to protect employees.

Are you planning to implement any of the following safety measures to protect employees?

- 80% Providing employees gloves
- 79% Providing employees masks
- 56% Adding additional employee safety training
- 53% Instituting social distancing within the workspace
- 46% Daily employee temperature checks
- 39% Installing clear coverings at registers to provide a barrier
But many restaurants will shave down their hours. This will help operators manage the decreased demand from consumers for eating out.

38% Will initially reduce operating hours

- 33% of limited-service restaurants
- 47% of full-service restaurants
- 32% of on-site operations
Operators think they’ll be fully reopened this summer, but don’t expect to be back to normal for a long time. Consumers expect to return to normal in the next 2-3 months, so while operators may not see 100% before September, hopefully they will get some relief before the fall.

- **Expect to be fully reopened**
- **Expect traffic to be back to normal**

![Chart showing expected timelines for business reopening and traffic return](chart.png)

- **When do you think your business will be fully reopened with dine-in again?**
- **When do you think your business will be back to normal (with similar traffic as you had before restrictions were put in place)?**
United + Inspired
food, humanity, and a better way forward

June 12 @2pm CST

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hello@datassential.com