Re-Opening Stronger.
The fundamentals of a comeback
Approximately 2-in-5 consumers purchased food from a restaurant the prior day. (versus a pre-Coronavirus average of ~50%)

Dinner is now the top restaurant daypart. (before Coronavirus, lunch had always been #1)

<table>
<thead>
<tr>
<th></th>
<th>Mar 25</th>
<th>May 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Lunch</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Dinner</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>Snack</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Restaurants should consider optimizing their menu for dinner traffic, including a focus on family meals or packages that provide the consumer additional meals for tomorrow.

Almost all traffic is outside the dining room.

In addition to delivery and drive-thru, many Americans are also ordering ahead to reduce their potential exposure. Restaurants that offer this option should promote it heavily.

Two-thirds of those who thought about getting restaurant food went on to do so. We do view these stats as mostly encouraging, showing that restaurants are in the consideration set for most Americans.

LSRs capture two-thirds of restaurant traffic.

Even with mandatory closings of dining rooms, FSRs are down, but not out. Buoyed by delivery and creative approaches to pickup, FSRs still account for a third of restaurant traffic.

People are heading more often to chains.

We update these stats every few days. We’re also publishing 2 new topical COVID-19 reports each week, provided free of charge to support the food industry.

Download the latest at datassential.com.
Turn fear into confidence.

- Heightened and Visible Sanitation Practices
- Employee PPE & Hygiene
  - Staff Training
- Restroom Cleanliness Audit
- Floor Plan / Distancing
- Single Use Options
  - Menus, Condiments, Utensils, Pens, etc.
Diners are inching their way back in.

Although options that allow for social distancing are still considered the safest, diners seem to be getting more comfortable with the notion of going inside restaurants. Most feel comfortable going in to pick up their orders or even waiting inside while it is prepared. Just under half are ready for a full dine-in experience. Open and shared food options like salad bars and buffets will take more time to feel safe.

<table>
<thead>
<tr>
<th>Option</th>
<th>Comfortable/Safe (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order ahead for curbside pickup</td>
<td>80%</td>
</tr>
<tr>
<td>Drive-thru</td>
<td>80%</td>
</tr>
<tr>
<td>Delivery</td>
<td>75%</td>
</tr>
<tr>
<td>Order ahead—go inside to pick up</td>
<td>71%</td>
</tr>
<tr>
<td>Order at restaurant and wait until ready</td>
<td>59%</td>
</tr>
<tr>
<td>Assembly line (Subway, Chipotle)</td>
<td>44%</td>
</tr>
<tr>
<td>Dine in</td>
<td>42%</td>
</tr>
<tr>
<td>Salad/Hot bar</td>
<td>26%</td>
</tr>
<tr>
<td>Buffet restaurant</td>
<td>25%</td>
</tr>
</tbody>
</table>

More likely among men:
- Assembly line (Subway, Chipotle) (31%)
- More likely among men (69%)
- Salad/Hot bar (24%)
- More likely among men (32%)
what do you crave / miss the most from restaurants?

- Mexican food: 36%
- Seafood: 31%
- Asian food: 27%
- Pizza: 29%
- Burgers: 24%
- Italian food: 24%
- Steak: 29%
- BBQ: 19%
- Fries: 16%
- Sushi: 18%
- Pasta: 17%
- Fried chicken: 17%
- Desserts: 15%
- Wings: 14%
- Salads: 13%
- Breakfast entrees: 13%
- Grilled chicken: 12%
- Greek food: 12%
- Sub sandwiches: 11%
- Frozen treats: 10%
- Chicken strips / nuggets: 10%
- Pancakes / waffles: 9%
- Lasagna: 9%
- Breakfast sandwiches: 7%
- Soul food: 6%
- Soups: 6%
- Mac & cheese: 6%
- Cold deli sandwiches: 6%
In order to win, you must play the game.

Revenue Streams
- Carryout
- Curbside
- Delivery
- Dine-in
- Drive-Thru
- Catering
- Meal Kits
- Restaurmarts
- Ghost Concepts

Robust Marketing
- Website
- Menus
- Mobile / Online Ordering
- Social Media
- Loyalty Programs /CRM
- Waitlist Management
- Charitable Causes
- Community Engagement
- “Old School”
For additional information...

www.performancefoodservice.com/restart

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