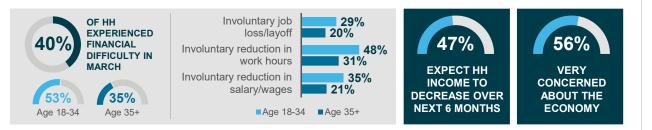
THE IMPACT OF COVID-19

POST-SHUTDOWN RECOVERY FOR THE RESTAURANT INDUSTRY WILL LIKELY **BE SLOWED BY FINANCIAL EXPECTATIONS AND LINGERING HEALTH CONCERNS**

A Burke-conducted survey from April 1-April 5, 2020 captures an early snapshot of behaviors and concerns among US Adults and Restaurant Visitors

AMERICANS ARE BEING HARD HIT FINANCIALLY DURING THE PANDEMIC, AND THEIR CURRENT EXPECTATIONS FOR THE ECONOMY ARE FAIRLY PESSIMISTIC

The impact of job loss and wage reductions hit especially hard among those <35, who are heavy fast food users.



RESTAURANT VISITORS WILL CONTINUE TO DINE OUT LESS OFTEN THAN BEFORE. EVEN AFTER THE PANDEMIC SUBSIDES

Any Sector

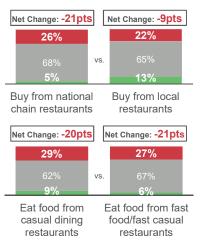
Dining

Casual

Fast Food/Fast

Q: Once the pandemic subsides and restaurants re-open for normal business, how often will you...

Less Often than Before Pandemic ■Same As Before Pandemic More Often Than Before Pandemic



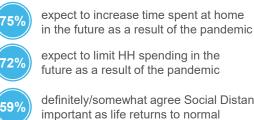
Order food using third-party delivery	-25pts
Order food for delivery directly from a restaurant's website or app	-20pts
Buy food from a restaurant to eat at home	-10pts
Dine in at casual dining restaurants	-23pts
Order food in person at casual dining for carry-out	-23pts
Order food ahead of time from casual dining for pickup inside	-22pts
Order food ahead of time from casual dining for curbside pickup	-19pts
Dine in at fast food/fast casual restaurants	-28pts
Order food ahead of time from fast food/fast casual for curbside pickup	-21pts
Order food in person at fast food/fast casual restaurants for carry-out	-21pts
Order food ahead of time from fast food/fast casual for pickup inside	-20pts
Pick up food via drive-thrus	-16pts

Net Change (% Saving More Often – % Saving Less Often)

Local Restaurants fare a bit better in retaining future visits. This is in line with general sentiments: 46% of Restaurant Visitors say it is very/somewhat important to buy from a local restaurant instead of a national chain.

SOME PANDEMIC-BASED BEHAVIORS WILL LIKELY STICK AFTER "STAY AT HOME" IS LIFTED

Among restaurant visitors:



definitely/somewhat agree Social Distancing will remain important as life returns to normal

AND LINGERING HEALTH CONCERNS WILL LIKELY REQUIRE SOME ADJUSTMENTS TO MEET CUSTOMER EXPECTATIONS

Restaurant Visitors Saying Will Be "Extremely/Very Important" When Restaurants Re-Open

Any Sector	Limit employees who touch order Employees wear gloves	0070
	Communicate how they ensure employees are not sick	51%
	Communicate cleaning procedures	44%
	Take employee temperatures before working	44%
	Offer contact-less pick up	39%
	Offer contact-less delivery	37%
	Employees wear face masks	35%
Casual Dining	Offer seating that is spaced apart	40%
	Offer ordering directly from website/app	31%
	Offer delivery	30%
	Offer online ordering from 3rd party delivery service	29%
	Offer curbside pick-up	29%
ual	Offer seating that is spaced apart	39%
Fast Food/ Fast Casual	Offer ordering directly from website/app	
	Offer delivery	
ця	Offer online ordering from 3rd party delivery service	

