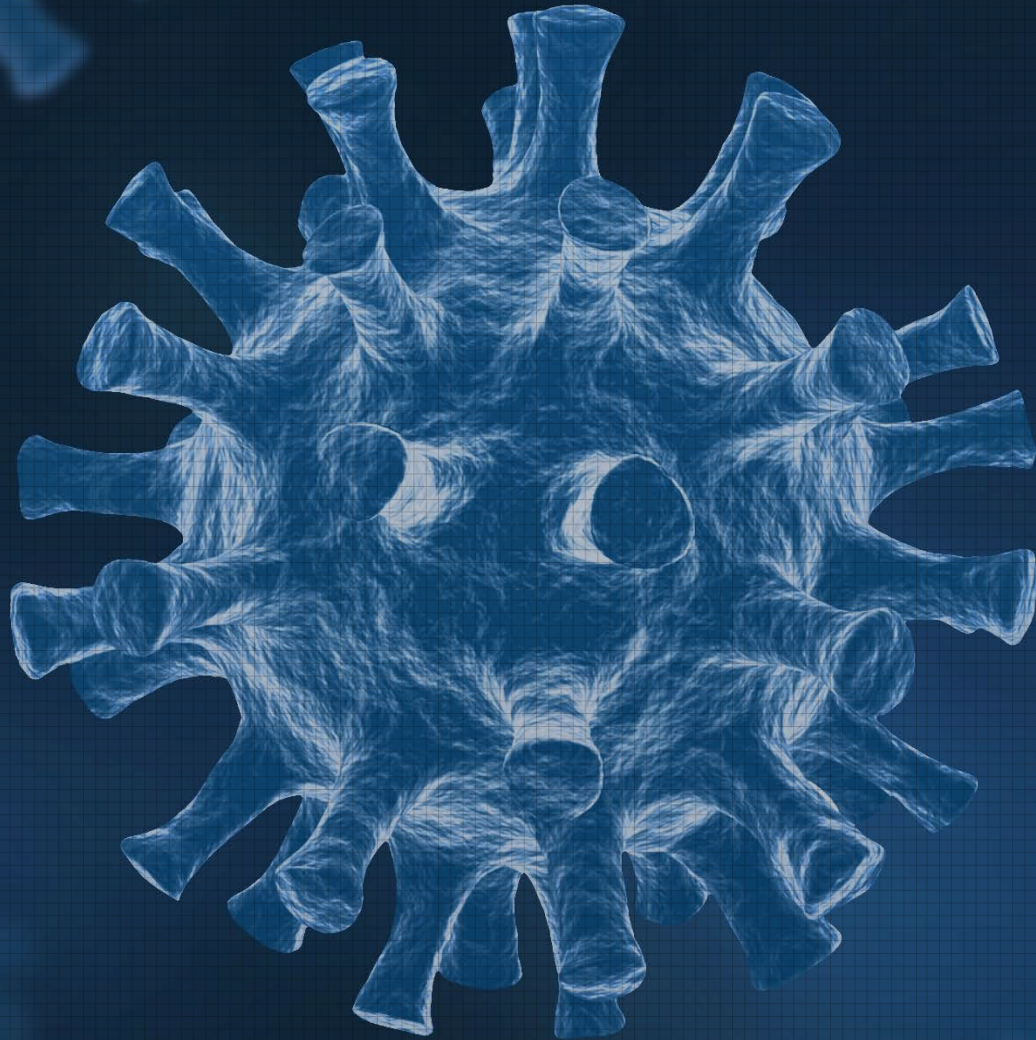




Restaurant INDUSTRY: COVID-19 SOCIAL LISTENING

MARCH 31, 2020



AS COVID-19 HAS IMPACTED U.S. RESTAURANTS OVER THE PAST MONTH, WE HAVE SEEN A SPIKE IN SOCIAL MEDIA CONVERSATIONS RELATED TO RESTAURANTS AND COVID-19.

RESTAURANTS APPEAR TO BE A LIGHT DURING THIS DIFFICULT TIME, THOUGH MUCH IS STILL UNCERTAIN. HOWEVER, PEOPLE APPEAR TO BE TURNING TO TRUSTED RESTAURANTS TO BRING SOME COMFORT EVEN IF THEY CANNOT DINE-IN.

TABLE OF CONTENTS



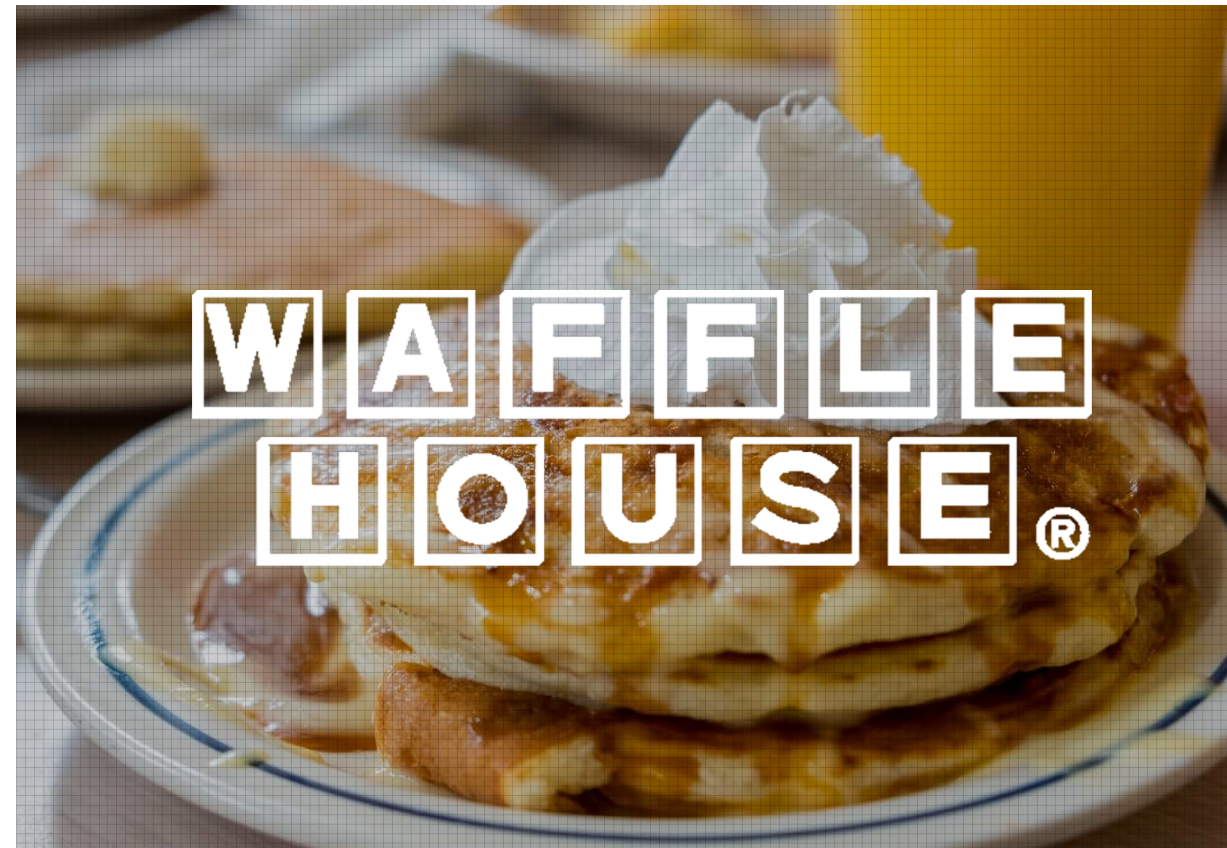
- 04 The Waffle House Index
- 06 Trended Mentions by State
- 07 State-Level Sentiment and Passion Index
- 08 Word Associations
- 09 Top Trending Questions About Food
- 10 What Are Other Restaurants Doing?
- 11 Restaurant Posts More Positive
- 12 Support of Local Restaurants
- 13 Sentiment in New York

WHAT IS THE WAFFLE HOUSE *Index*

Typically used to discuss the severity of natural disasters, the Waffle House Index is being used to determine the severity of COVID-19. FEMA coined the term in 2011 as an unusual measure of a storm's severity and its effect on the local community. It comes from **Waffle House's reputation for being well-prepared** for disasters and remaining open during disastrous weather or reopening shortly afterward.

Source:

<https://www.nbcnews.com/news/us-news/coronavirus-waffle-house-index-red-restaurant-chain-shutters-356-stores-n1168391>
https://en.wikipedia.org/wiki/Waffle_House_Index#cite_note-WSJ-2



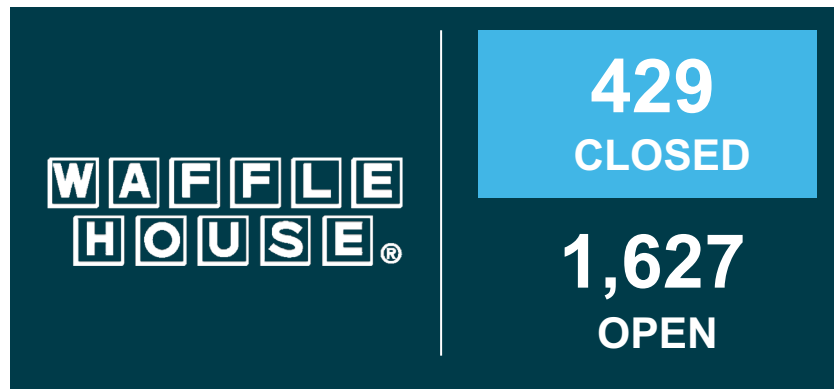
“

*If you get there and the
Waffle House is closed?
That's really bad...*



— Craig Fugate, Former Head of FEMA

THE INDEX IS CURRENTLY “CODE RED” AND IS THE HIGHEST EVER SEEN.



The previous record for the highest index was during Hurricane Katrina in 2005 with 107 closures.



“Waffle House, the restaurant chain whose open doors have become an unofficial barometer of how bad things are in times of crisis, is shuttering hundreds of stores as the coronavirus pandemic clobbers the U.S.”

-Nightline (@Nightline), March 25



“Waffle House closes 365 locations across the U.S.”

-Neil us (@basementvegan), March 25



“The Waffle House Index is more accurate than the Doomsday Clock.”

-Chris (@SpaceMufasa), March 25

Source:

<https://www.nbcnews.com/news/us-news/coronavirus-waffle-house-index-red-restaurant-chain-shutters-356-stores-n1168391>

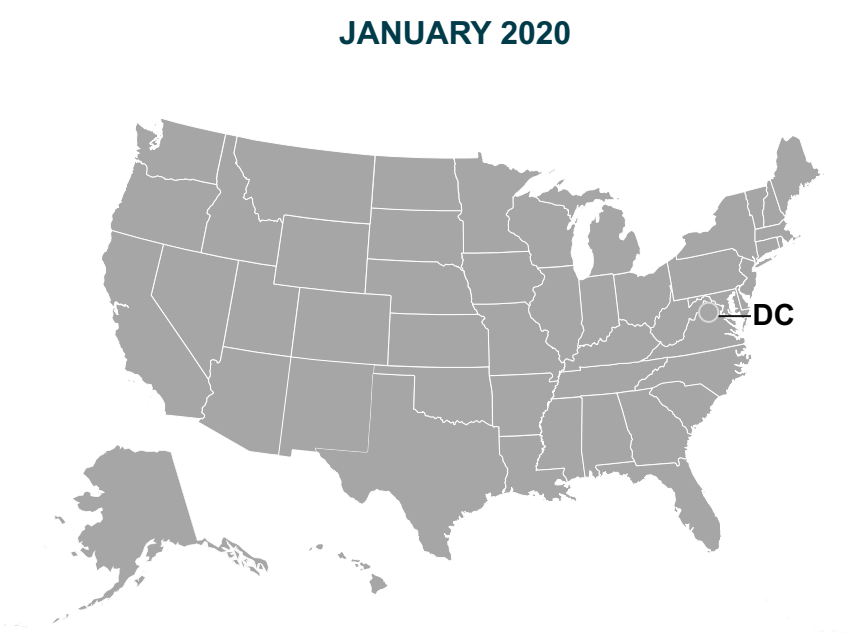
NetBase Social Media Software (captured for March 1, 2020 – March 31, 2020 for the U.S.)

CHAT ABOUT RESTAURANT AND COVID-19 HAS GROWN RAPIDLY, WITH MOST TALK IN DC

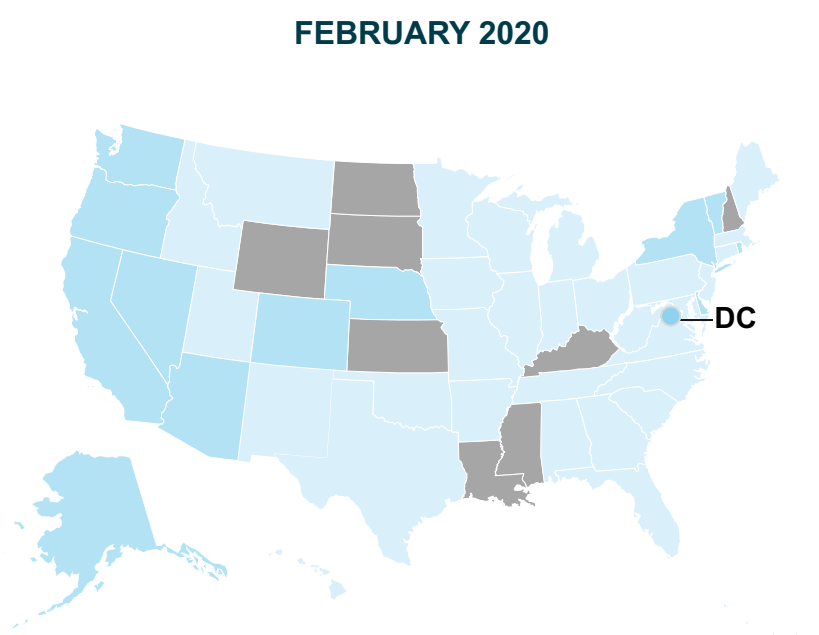
Per capita, restaurant and COVID-19 mentions are relatively consistent across the country, picking up as restaurants around the country began to close for dine-in service in March.

GEOGRAPHICAL VIEW OF SOCIAL LISTENING

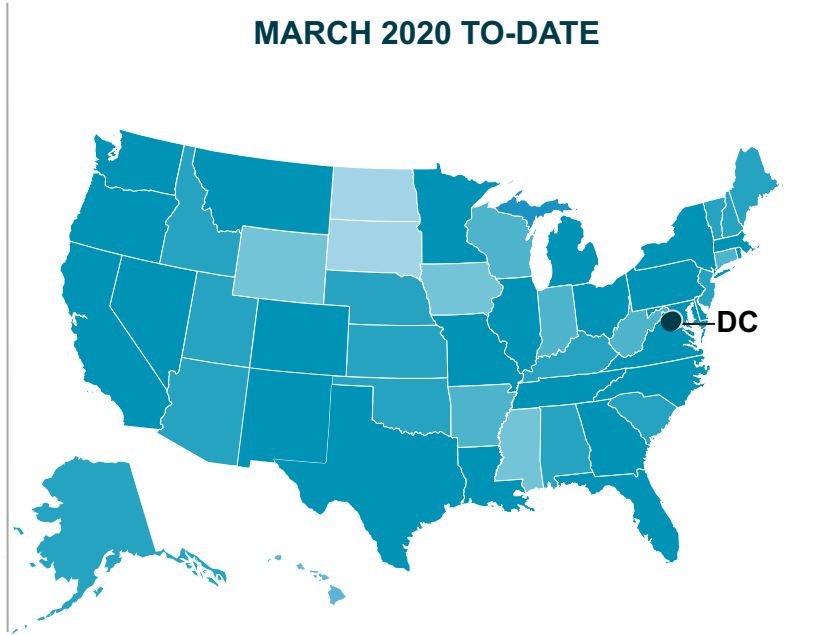
JANUARY 2020



FEBRUARY 2020



MARCH 2020 TO-DATE



Note: Darker blue shading indicates greater volume of conversation per capita, gray means there were no comments for the state for that time period
Source:
NetBase Social Media Software (captured for January 1, 2020 – March 31, 2020, looking at conversations related to both COVID-19 and restaurants in the U.S.)

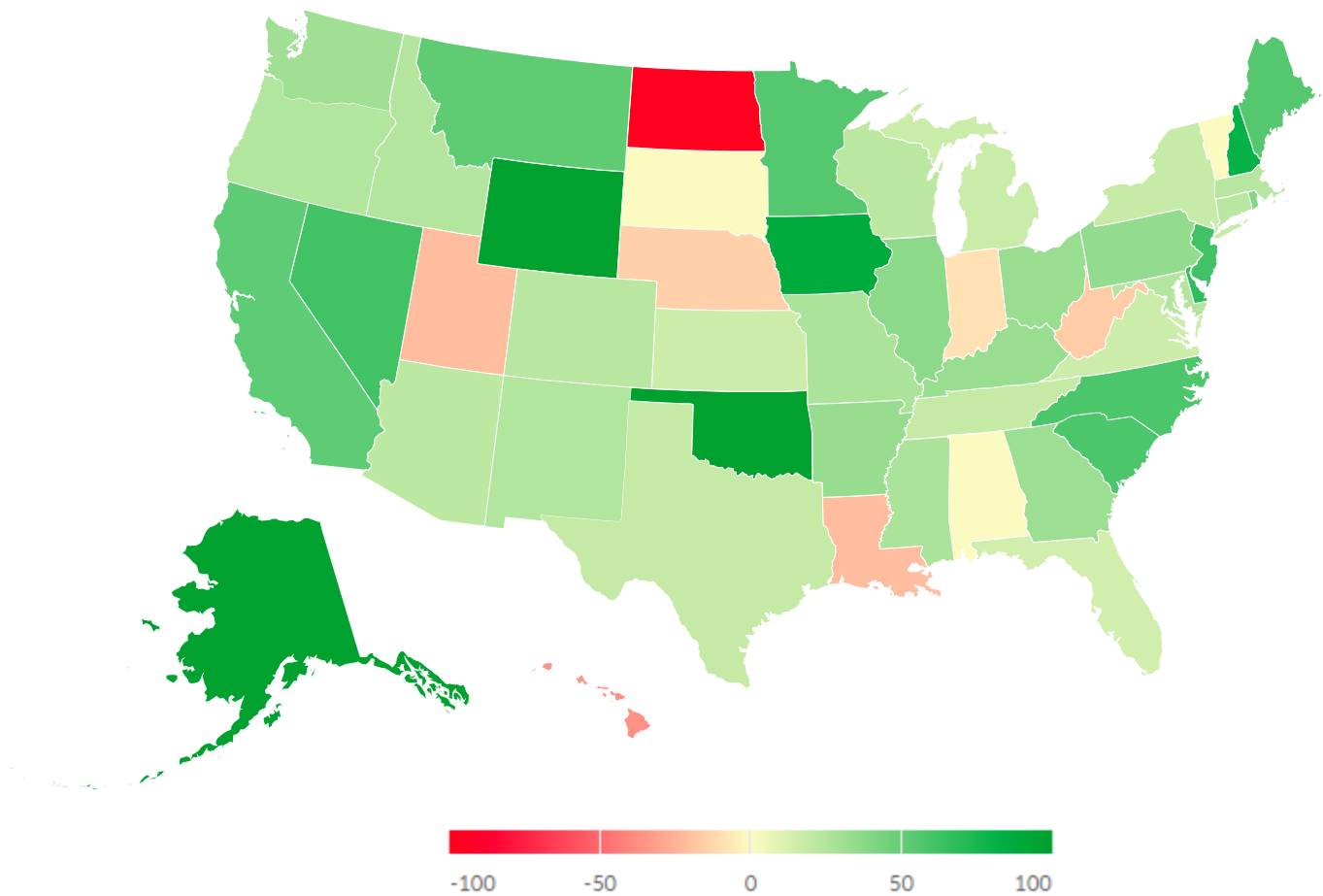
AND THE SENTIMENT OF CHAT BY STATE IS PRIMARILY POSITIVE

The majority of the states have positive indices, meaning posts are both positive and have strong positive emotions. Alaska, Wyoming and Oklahoma have the highest index scores while posts from those in North Dakota are by far the most negative.

Note: The darker green or red a state is shaded, the more positive or negative the brand passion index, respectively
Calculated by multiplying Passion Intensity and Net Sentiment

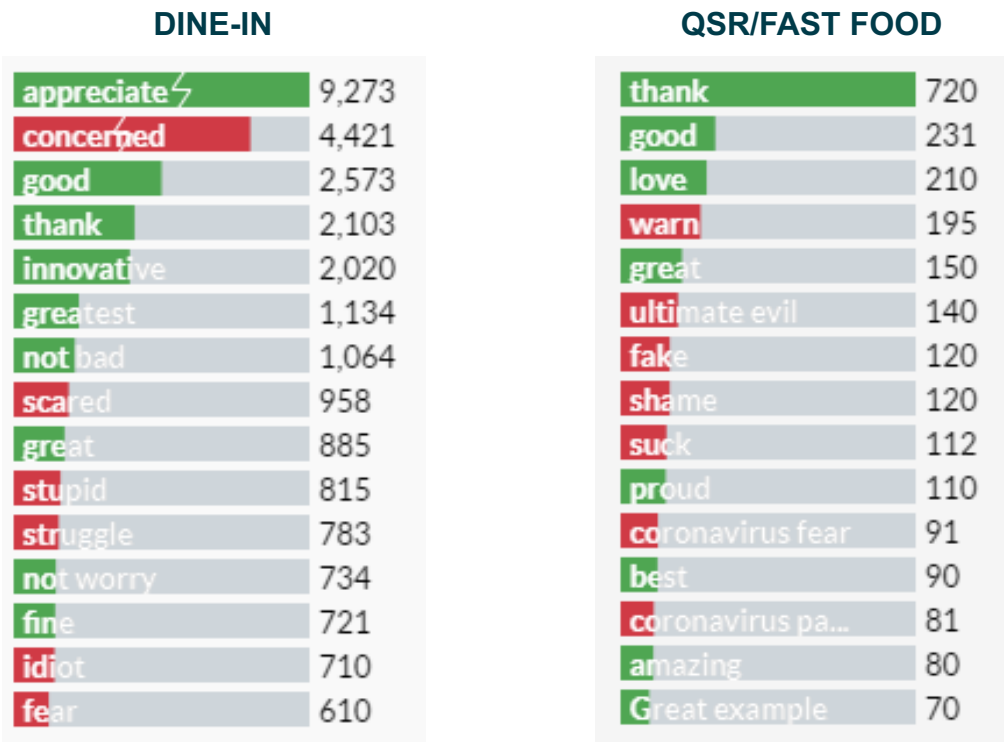
Source:
NetBase Social Media Software (captured for March 1, 2020 – March 31, 2020, looking at conversations related to both COVID-19 and restaurants in the U.S.)

STATE-LEVEL SENTIMENT / PASSION INDEX, MARCH 2020



FAST FOOD BRANDS ARE DOING A LOT TO HELP THEIR COMMUNITIES AND ARE REAPING PRAISE FOR THEIR EFFORTS

OF MENTIONS OF EACH WORD IN POSTS RELATED TO COVID-19



Note: lightening bolt symbol on bars indicates trending topic

Source: NetBase Social Media Software (captured for March 1, 2020 – March 31, 2020, looking at conversations related to both COVID-19 and restaurants in the U.S.)
QSR Web: [Is Your Restaurant Speaking the COVID-19 Era Customer's Language?](#)

“Nostalgia, reliability key to brand strategy now”
-QSR Web (S. A. Whitehead)

Customers' routines have been severely disrupted and they are craving comfort and nostalgia. Fast food can capitalize on this – many customers indicate they “miss,” “want” and “need” fast food; reassuring customers that they are safe and continuing to provide their favorite foods should assist in keeping customers coming back for now.

CONSUMERS NEED TO KNOW THE FOOD IS SAFE AND WHEN/WHERE IT IS AVAILABLE

GOOGLE TREND DATA ON TOP SEARCH TOPICS RELATED TO FOOD



Source:
Google Trends (captured for March 1, 2020 – March 31, 2020,, looking at searches related to both COVID-19 and restaurants in the U.S.)

MANY RESTAURANTS ARE STEPPING UP TO BE RELEVANT TO THE SITUATION

TRENDING SOCIAL MEDIA CHAT FOR SPECIFIC RESTAURANT BRANDS



"Burger King offers 2 free kids meals with adult meal purchase during COVID-19 pandemic." -Fox59 News (@Fox59), ???



New: Yum! Brands CEO David Gibbs will forgo his 2020 base salary to provide \$1,000 bonuses to company-owned restaurant general managers and to help fund the Yum! Brands Foundation's Global Employee Medical Relief Fund.
[courier-journal.com/story/news/2020/...](https://courier-journal.com/story/news/2020/03/23/yum-brands-ceo-david-gibbs-forgoes-2020-base-salary-to-provide-1000-bonuses-to-company-owned-restaurant-general-managers-and-to-help-fund-the-yum-brands-foundation-s-global-employee-medical-relief-fund/51111110001)

[See Ben Tobin's Tweet](#)



Yum! Brands CEO to forgo 2020 salary to fund \$1k bonuses for managers, relief to employees

The Courier-Journal

Yum! Brands CEO David Gibbs officially became the head of the company starting in 2020.



"Texas Roadhouse CEO Gives Up Salary to Pay Front Line Workers During Covid-19 Outbreak"
-Matt Couch (@RealMattCouch), ???



"Olive Garden is offering free to-go meals amid coronavirus outbreak."
-Today (@TODAYshow), March 23



Wendy's giving away Jr. Frosties with drive-thru orders

The Daily Buzz

The people behind the Wendy's Twitter account took a short break from skewering rival fast-food chains to announce a bit of good news for anyone who could use a treat during the coronavirus pandemic. On Monday, Wendy's confirmed that it would be giving away a free Jr. Frosty — either chocolate or vanilla — with every drive-thru order, beginning that day at participating restaurants.



"McDonald's separates its golden arches in an act of coronavirus solidarity."
-Ad Age (@adage), March 26



Starbucks giving free coffee to first responders, healthcare workers dealing with coronavirus Mar 26

Kelly Tyko USA TODAY

Starbucks is serving up free coffee for first responders and healthcare workers dealing with the coronavirus pandemic. The coffee giant announced Wednesday that through May 3 "any customer who identifies as a first responder or frontline worker ([More...](#))"

Source:

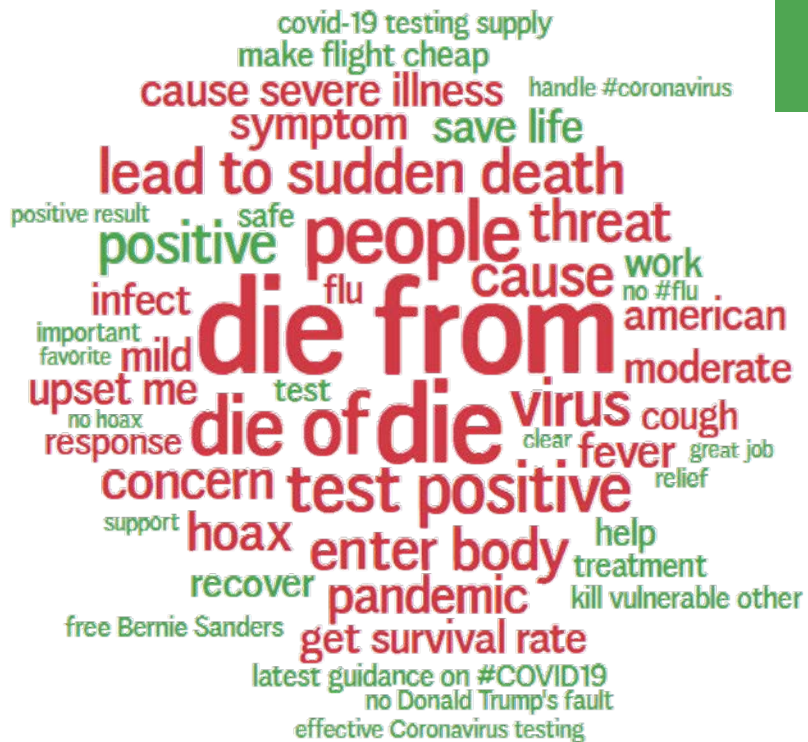
NetBase Social Media Software (captured for March 1, 2020 – March 31, 2020, looking at conversations related to both COVID-19 and restaurants in the U.S.)

RESTAURANT POSTS ABOUT COVID-19 ARE MORE POSITIVE THAN THOSE ABOUT COVID-19 ALONE

There are many comments supporting restaurants, which likely accounts for the greater positive sentiment.

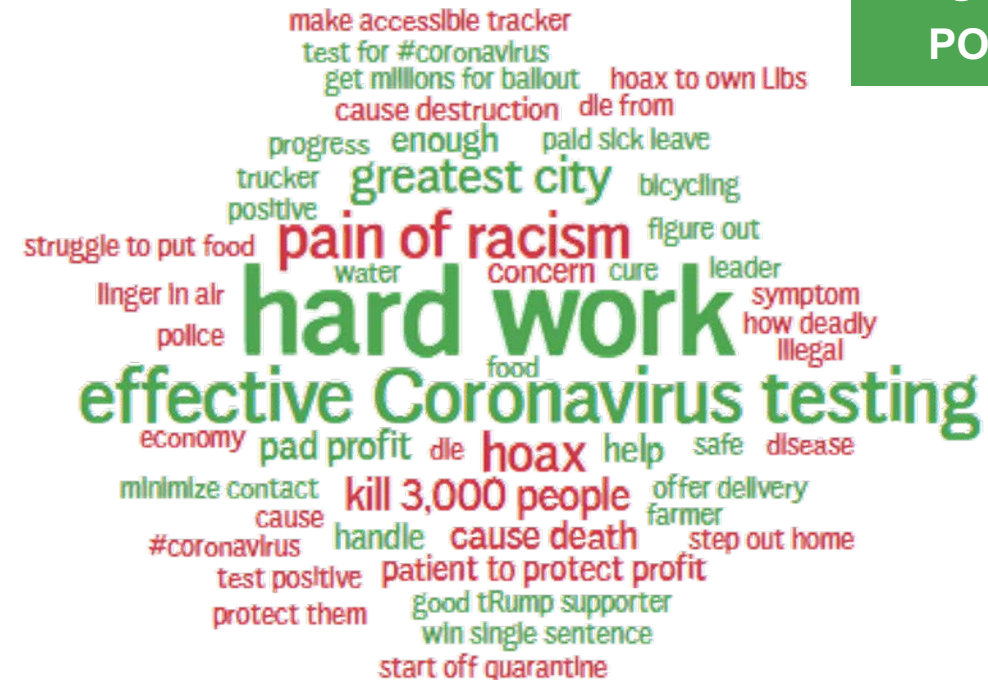
COVID-19 ATTRIBUTES

41%
POSITIVE



COVID-19 AND RESTAURANT ATTRIBUTES

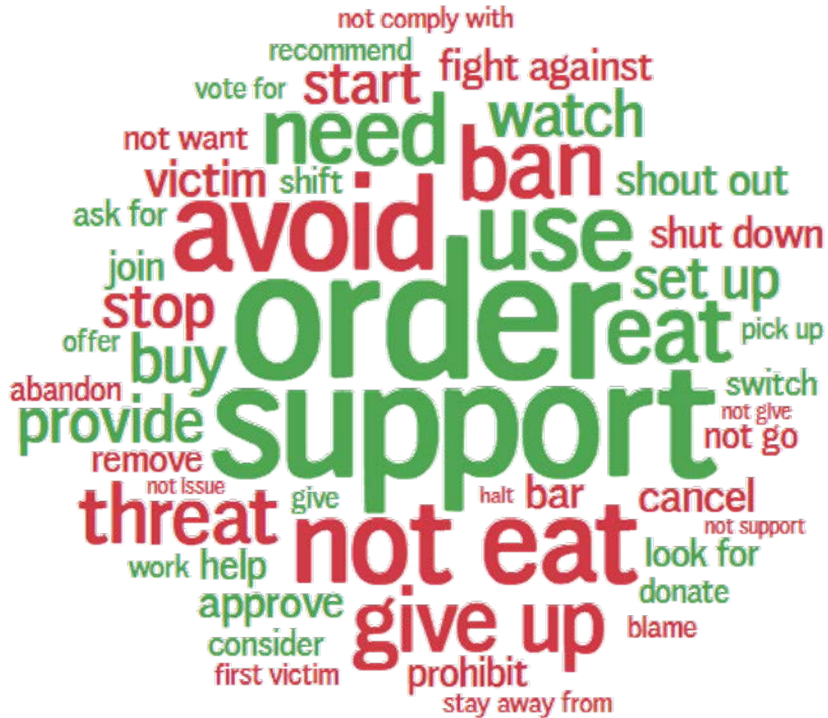
**50%
POSITIVE**



Source:
NetBase Social Media Software (captured for March 1, 2020 – March 31, 2020, looking at conversations related to both COVID-19 and restaurants in the U.S.)

FINALLY, CONVERSATION OVERWHELMINGLY SUPPORTS LOCAL RESTAURANTS, DESPITE GENERAL RESTAURANT SAFETY CONCERNS

SMALL RESTAURANT BEHAVIORS



“...[P]lease help your favorite restaurant and its staff through these hard times. If you're fortunate, please share a little of your good fortune with others trying to make it through. Please tip generously.”
—Ken Foreman (@LatheOfDreams), March 21



"Virtual Bay Area Tip Jar #bayareatipjar support your restaurant workers!"
-Rob (@RLeyvaCA), March 24



“Proud to see Utah’s tech entrepreneurs stepping up to help our small businesses during the #COVID19 crisis. Utahns – if you’re able to, I hope you consider supporting our local economy by ordering takeout or delivery to continue supporting local restaurants.”
-Senator Mitt Romney (@SenatorRomney), March 21



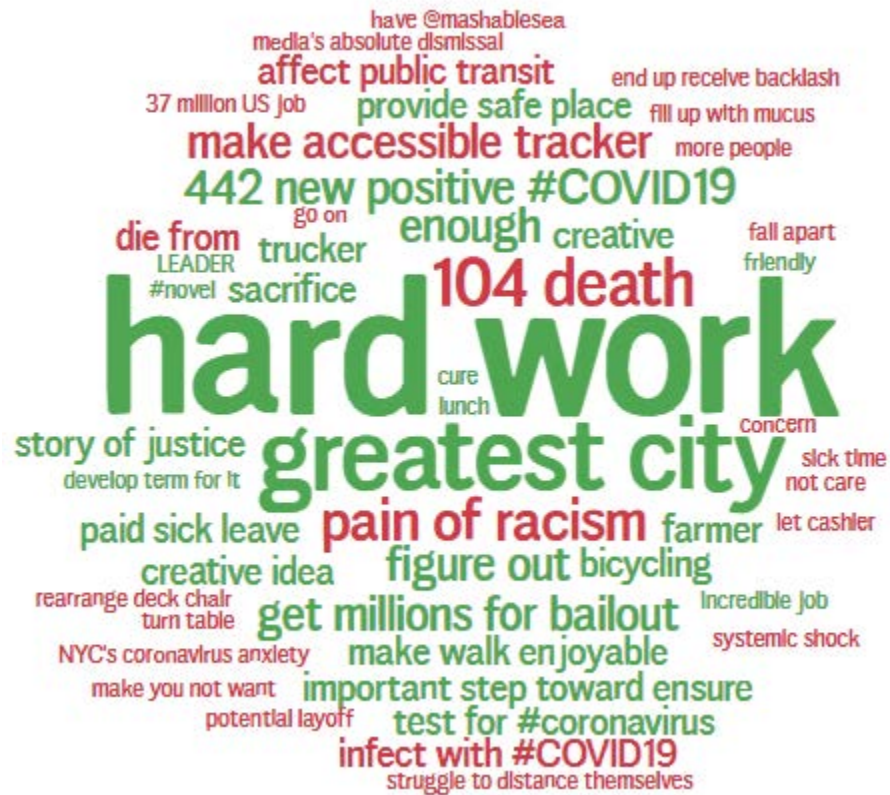
“A great way to support local restaurants during #COVID19 is to buy gift cards. That’s why we’re launching the #SupportLocalRestaurants Challenge & encouraging others to join us. If you’re tagged, let us know if you’re game, choose a restaurant to support & challenge 3 other firms.”
-Edelson PC (@edelsonpc), March 23

Source:
NetBase Social Media Software (captured for March 1, 2020 – March 31, 2020, looking at conversations related to both COVID-19 and restaurants in the U.S.)

NEW YORKERS SHOW RESILIENCY AND REMAIN POSITIVE TOWARDS RESTAURANTS, DESPITE BEING IN THE EPICENTER

NEW YORK-SPECIFIC SENTIMENT WORD CLOUDS

ATTRIBUTES



EMOTIONS



Source:
NetBase Social Media Software (captured for March 1, 2020 – March 31, 2020, looking at conversations related to COVID-19 and restaurants, filtered on posts from New York)

FOR MORE INFORMATION,
CONTACT:

John Thomas

HEAD OF CLIENT SERVICES

513.564.8390

JOHN.THOMAS@BURKE.COM