

ONE TABLE

operator insights and the path forward

A vertical, multi-colored braided rope is positioned on the left side of the image. The rope is composed of several strands in various colors including purple, red, grey, yellow, orange, and teal. The braiding is intricate, with the strands crossing each other in a complex pattern. The background is a solid, light blue color.

built through collaboration

Mitsui Foods	Wells	Bloomin Brands	Dr. Pepper	JUST	S&D Coffee & Tea	Community Coffee	Black Bear Diner	Firehouse Subs	Beaver Street Fisheries	Clemens Food Group	Ecolab	Gehl Foods	Avendra	Checkers / Rally's
Papa Johns	Dole International	Denny's	Continental Mills	Franke Coffee	Idahoan	Emmi Roth	JJ Snack Foods	Sigma Campofrio	Nespresso	Sugar Foods	Pulmuone	Unilever	Ventura	Hoffmaster
Harris Freeman Tea	Carl's Jr/Hardees	Keurig	Olam	Resers	Kerry	Lamb Weston	Subway	Luna Grill	Peanut Board	Michael Foods	Fudd's / Luby's	Welch's	Golden Corral	Coffee Bean and Tea Leaf
Mushroom Council	Morrison	AMC Theatres	Saputo	Bob Evans	DMA Delivers	Marzetti	Roy Rogers	Watermelon Board	Sheetz	Smithfield	SMWE	Jack in the box	Givaudan	Cavendish
Sandridge Foodservice	Graphic Packaging Int'l	GFG Mgmt	Weston Foods	PFG	TreeHouse Foods	Primanti Brothers	Nestle USA	Impossible Foods	Maple Leaf Farms	Genpak	Schreiber Foods	Dawn Foods	Sartori	Simplot
Duncan Family Farms	Carla's Pasta	Newly Weds Foods	Harbor Foodservice	Aquamar	Nestle Professional	Barilla	Kikkoman	Del Taco	Chobani	Zaxby's	Top Golf	Boston Market	Tillamook	T Hasegawa
Dunkin'	Illes Seasonings	Kum and Go	KraftHeinz	Ajinomoto	El Pollo Loco	Burger King	FGF Brands	Sonic	Ruth's Chris	Clorox	ASMI	Pilot	Taco John's	Avocados from Mexico
Little Caesars	A&W	Bama	Chili's	General Mills	Bongards	Perdue	Rotellas	Tyson	Fonterra	Conagra	OK Foods	Giraffe Foods	Royal Cup Coffee	Lentils.org
IFF	Moet Hennessy	Griffith Foods	Five Guys	Bimbo	McDonald's	Changing Tastes	Caulipower	Shake Shack	Home Market Foods	Mission Foods	Sysco	Rich Products	Labatt Foods	AAK
Chick-fil-A	FOCUS Brands	Farmers Daughter	Furmano Foods	Dinova	National Pork Board	Land O'Lakes	Custom Culinary	Unipro	Another Broken Egg	High Liner	Texas Roadhouse	Sage Hospitality	Supherb Farms	Sara Lee Frozen Bakery
Fogo	Dairy Queen	Red Robin	Hershey's	Melting Pot	Gordon Food Service	Fazoli's	Nyberg	Dress the Drink	IHOP	Schwan's	TGI Fridays	Sodexo	Cracker Barrel	Hard Rock Cafe
Bell Flavors & Frangrances	Moroch	Boar's Head	Ghirardelli	Stratas	King & Prince Seafood	Sargento	Orion	Starbucks	CH Guenther	Dessert Holdings	JBS/Pilgrims	Grande Cheese	Tofurky	McCain
Schuman Cheese	PDI	Panera	Del Monte	Sbarro	Forever Oceans	Creative Energy	Sweet Street	Lactalis	Procter & Gamble	Coca-Cola	Doehler	200+ Companies, One Table. Thank you all for coming together to help our entire industry recover!		
Barilla Restaurants	Basic American Foods	Cargill	Nordstrom's	Kettle Cuisine	Wawa	Red Bull	Damascus Bakery	Nando's Peri Peri	Corbion	Bojangles'	Bar Louie			

DATASSENTIAL ONE TABLE IS POWERED BY CUSTOM RESEARCH

ANSWER ANY QUESTION AROUND THE WORLD

Research without limitations. Access unmatched insights from the minds of consumers and operators across 130 countries with full language support.

Datassential's custom research capabilities provide unparalleled access to consumers and foodservice decision makers anywhere.



THIS STUDY

// fielded april.2019

METHOD

- ✓ Online survey of 502 operators from Datassential's OPERA panel
 - ✓ 253 Restaurant (Commercial) operators
 - ✓ 249 On-site operators
- ✓ Fielded April 30 - May 5, 2020
- ✓ Crosstabs available:
 - ✓ Channel
 - ✓ Segment
 - ✓ Chain Affiliation
 - ✓ Annual Food & Beverage Purchase
 - ✓ Staff Size
 - ✓ Job Title
 - ✓ Kitchen Complexity
 - ✓ Current Ordering
 - ✓ Region
 - ✓ Geotype
 - ✓ Open / Closed Status
 - ✓ Business Optimism
 - ✓ Enrolled in PPP

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what we learned

1

Foodservice operators were hit hard, but they are still fighting, and they are ready to get their doors open.

Once stay-at-home restrictions are lifted, most operators plan to open immediately or within 2-3 weeks. However, operators think the return to normal traffic will be slow, and don't expect to hit pre-COVID levels until September or later.

2

Ways manufacturers & distributors can help operators today:

- ✓ Sanitation solutions and training
- ✓ To-go packaging guidance
- ✓ Help forecasting demand
- ✓ Ideas and equipment to execute dine-in safely
- ✓ Lower purchase minimums (at least temporarily)
- ✓ Versatile or convenience-focused products

3

PPE and heavy safety accommodations are the new norm (at least for now).

Operators are willing and ready to institute what is needed to allow for a safe experience for customers and employees. This will include gloves, masks, socially-distant tables, and extra safety training for at least the next 2-3 months.

4

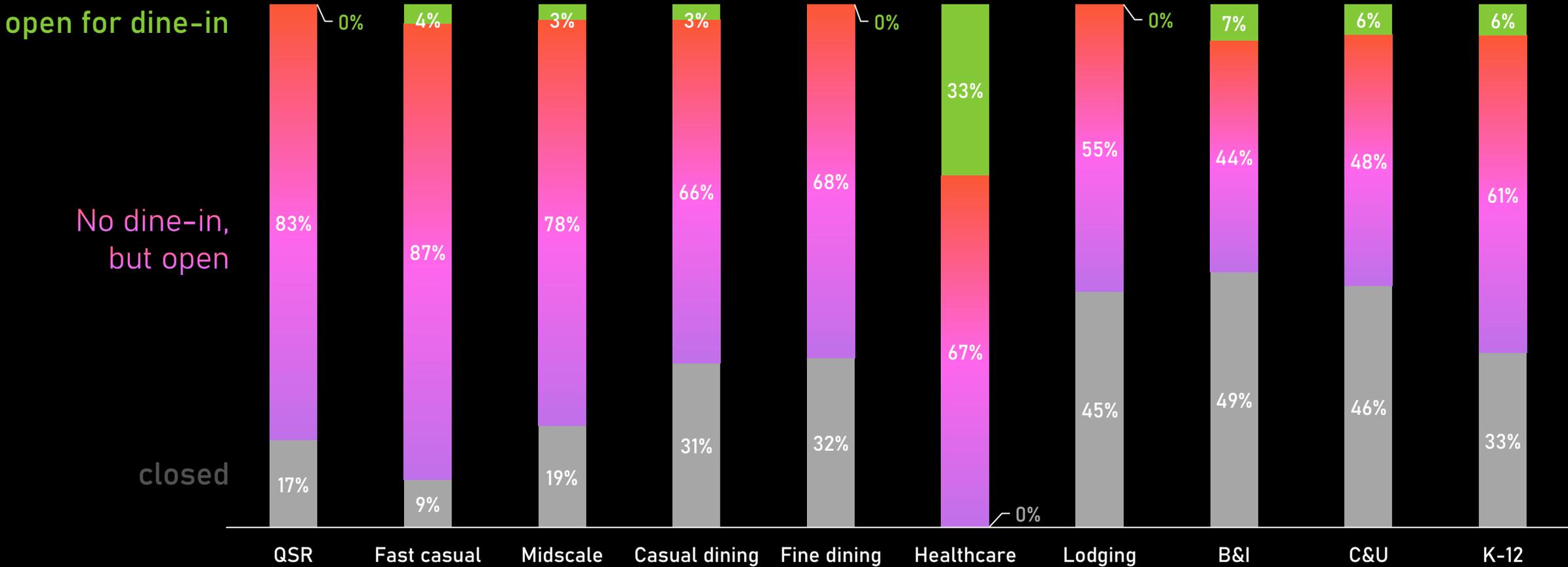
Keep up with operators who aren't slowing down on menu planning.

Operators aren't holding back on innovation and menu planning, and neither should manufacturers or distributors. Most operators are ready to talk about new products in the next 3 months, and they believe it is equally or more important to stay up on the latest trends.

CURRENT SITUATION

Healthcare is obviously staying operational, while Lodging, B&I, and C&U are more likely to have closed.

what is your operation's status in response to covid-19 / coronavirus?





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?

greater among K-12 (88%) and healthcare (77%) operators



37%

No staff cuts due to coronavirus so far

63% have laid off staff

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

greater among fine dining (51%) and C&U (54%) operators



29%

We let go of more than 75% of our staff

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

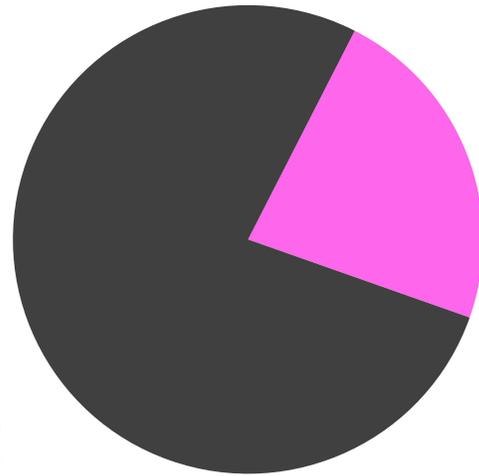
39% of limited-service restaurants

53% of full-service restaurants

20% of on-site operations

Hazard pay has been difficult for an industry facing so much turmoil.

Some operators have been able to increase wages for their employees during COVID-19 and a little over a third will maintain these increased wages once restrictions are lifted. With many temporary hotel and college closures, these operators are less able to enact hazard pay.



77%
We didn't / couldn't raise wages for staff working during COVID-19

greater among lodging (90%) and C&U (92%) operators

23%

We raised wages for staff working during COVID-19



do you plan to maintain these increased wages after covid-19 restrictions are lifted?

Yes 37%

No 63%

did you raise wages for any staff who are working during covid-19 / coronavirus restrictions or provide a "hazard pay" increase?

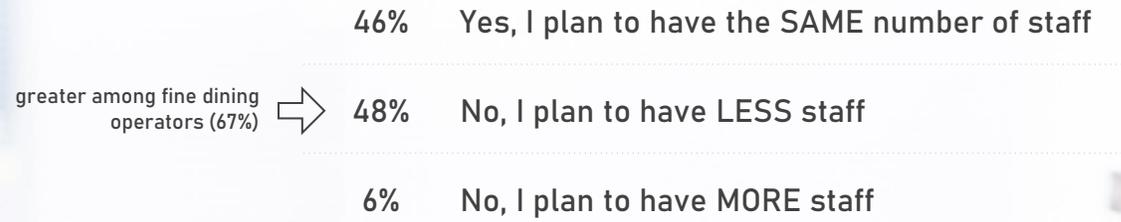




For operators who faced cuts, they may keep the reduced staffing.

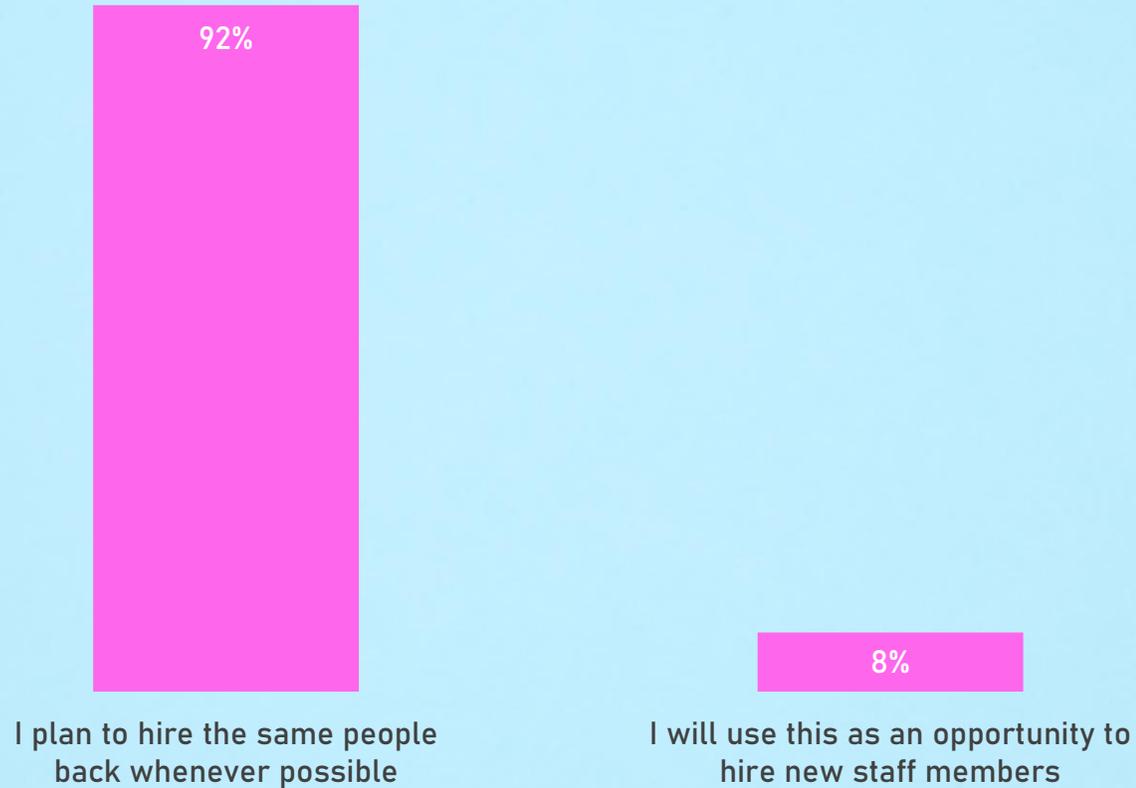
Though many would like to hire back the same number of staff, many may need to consider keeping some amount of reduction. Fine dining establishments are more likely to no longer need the same amount of staff as before COVID-19.

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



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.



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

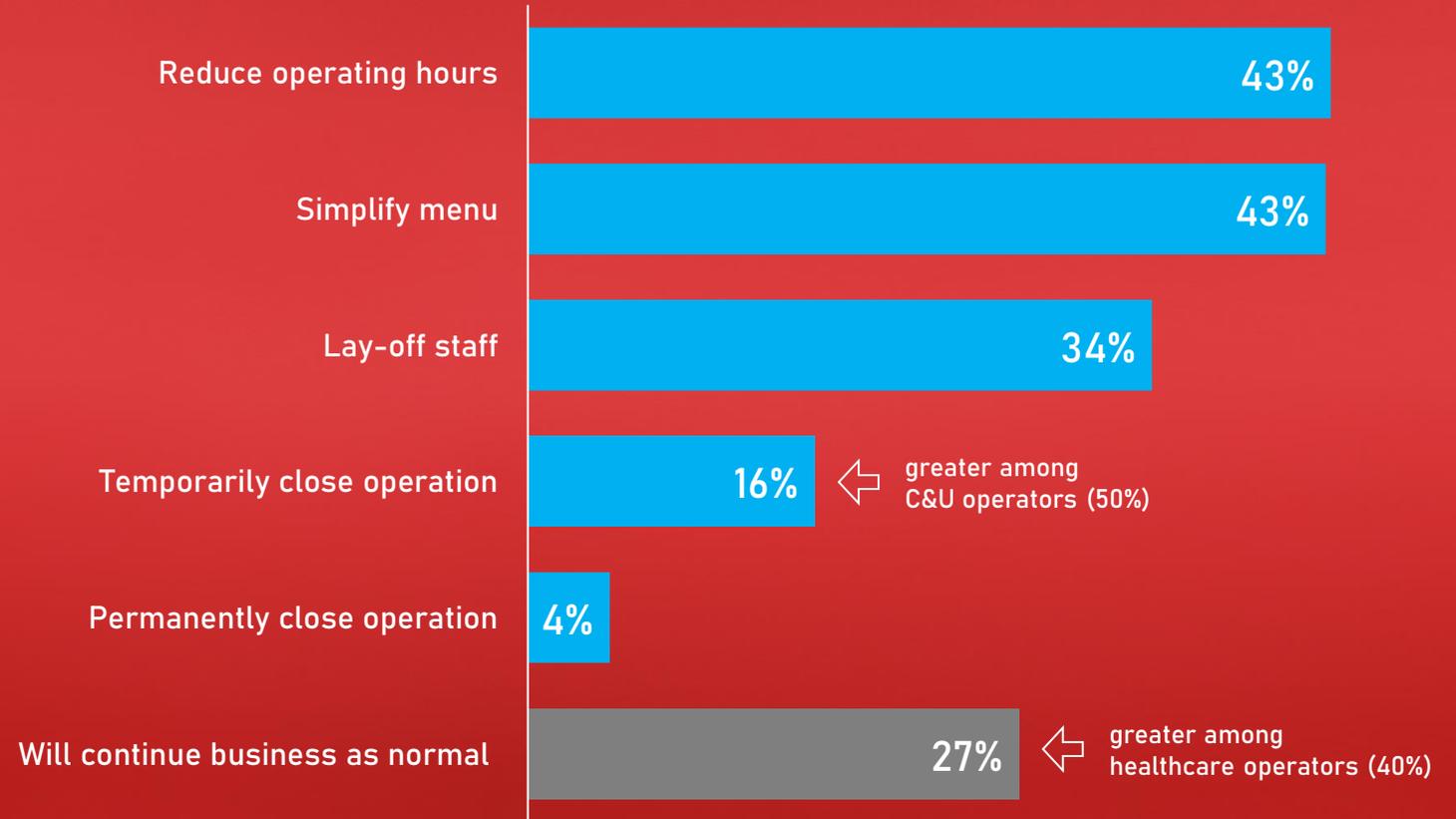


Operators are in the fight for the long haul.

Reducing hours or menu variety are the first things operators would do before laying off staff or temporarily closing their operations.



if the COVID-19 / coronavirus restrictions last longer than you expect, which of these options are you most likely to take?
among open operations





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 the 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

Implementing increased sanitation practices	53%
Creating separate pick-up area	51%
Maintaining social distancing between staff	36%
Setting up a system to create distance between customers	36%
Transitioning to online ordering	22%
Adding tamper-proof seals / measures	19%
Transitioning to using third-party apps for ordering	18%
Switching to new packaging that is easier to sanitize/safer and/or reheat	15%
Tools to make forecasting number and type of orders easier	10%



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

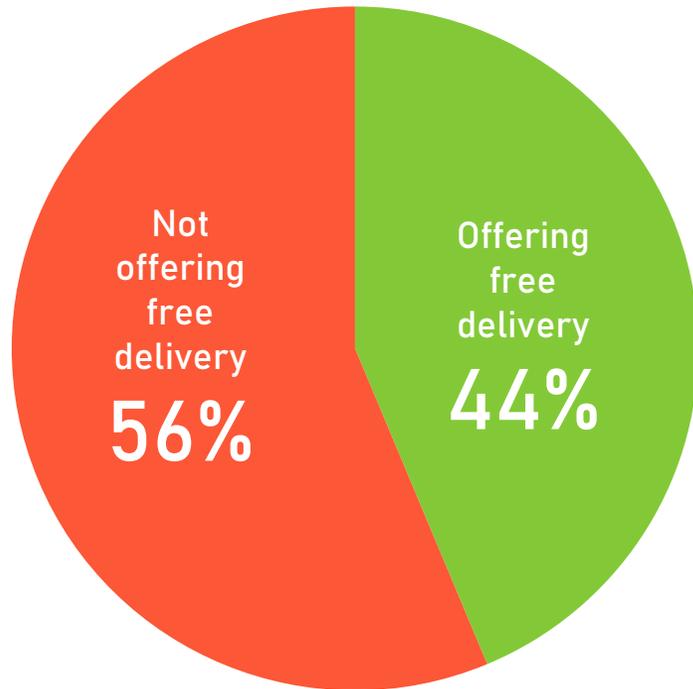
53% Instituting social distancing within the workspace

46% Daily employee temperature checks

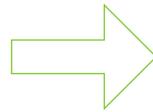
39% Installing clear coverings at registers to provide a barrier

While many restaurants are offering free delivery today, its long-term viability is in doubt.

This is especially true for full-service restaurants, many of whom didn't have a strong delivery presence in place before COVID-19.



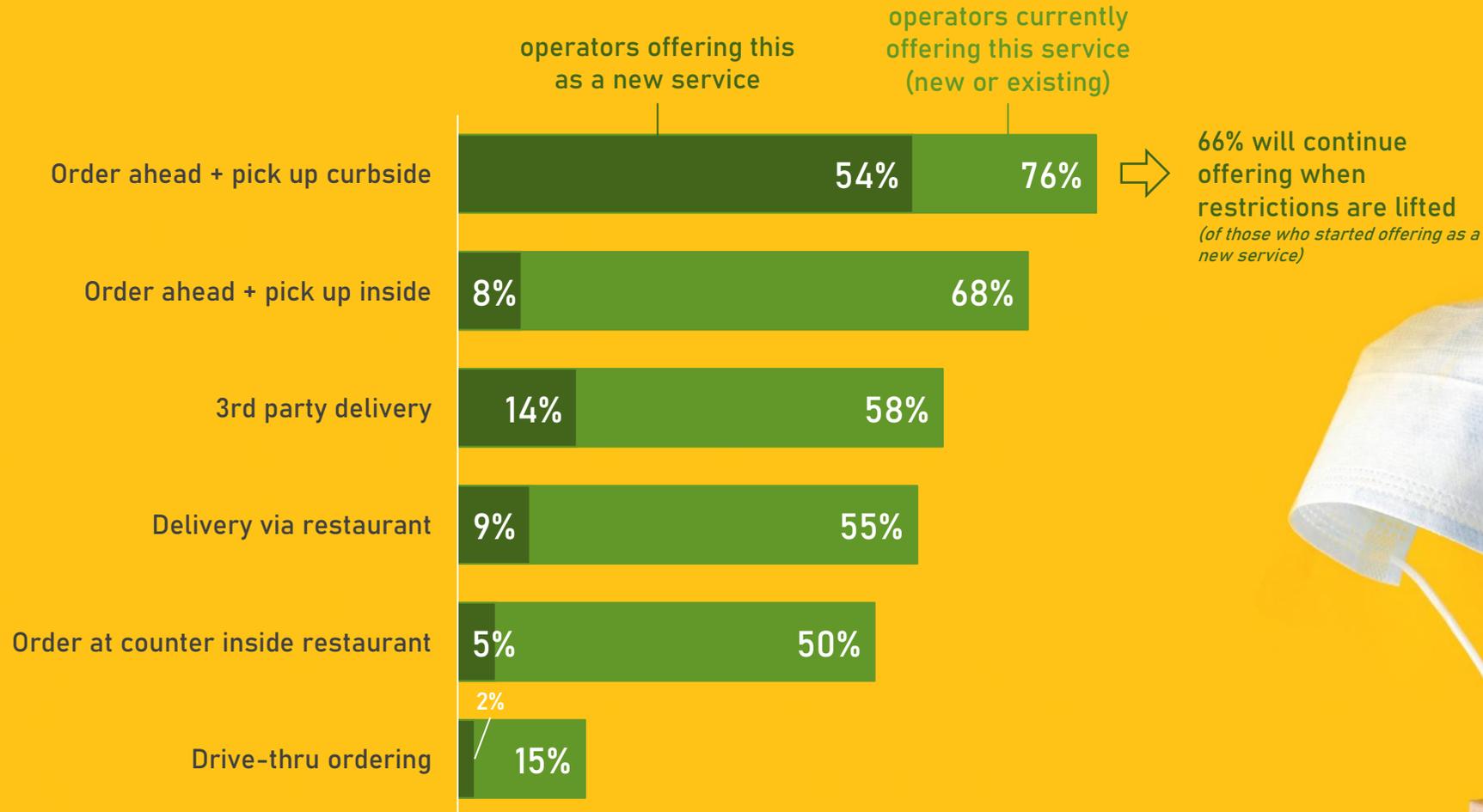
are you offering free delivery right now?
among open restaurant offering delivery



will it be sustainable to continue to after restrictions lift?
among those offering free delivery currently

Curbside is new, and it's here to stay.

Almost all operators had infrastructure for some kind of takeout, but curbside's safety benefits have made it the hot option for pick-up in the time of social distancing. Most operators who have added it plan to keep the option.

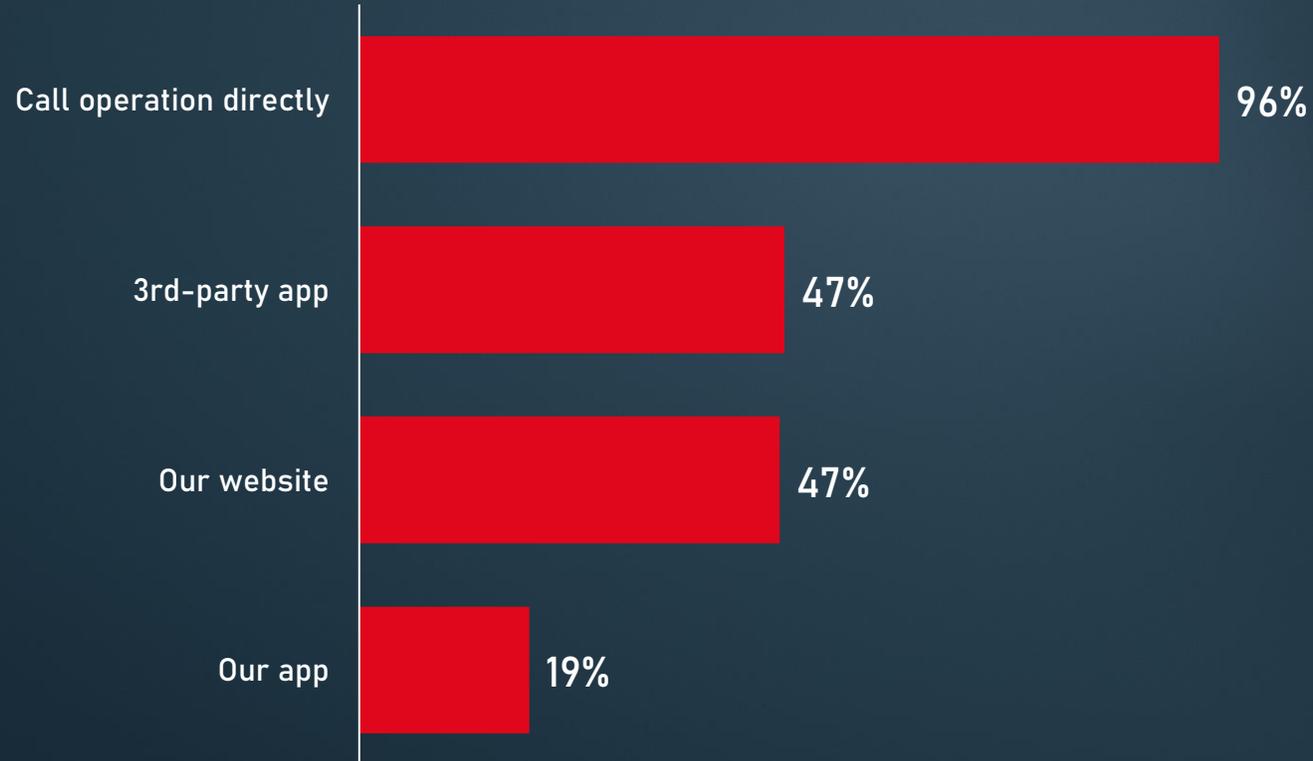


what services are you currently offering?
which of these are NEW services you didn't previously offer?
among open restaurants

Restaurants were ready for phone orders, but not all have the infrastructure for online.

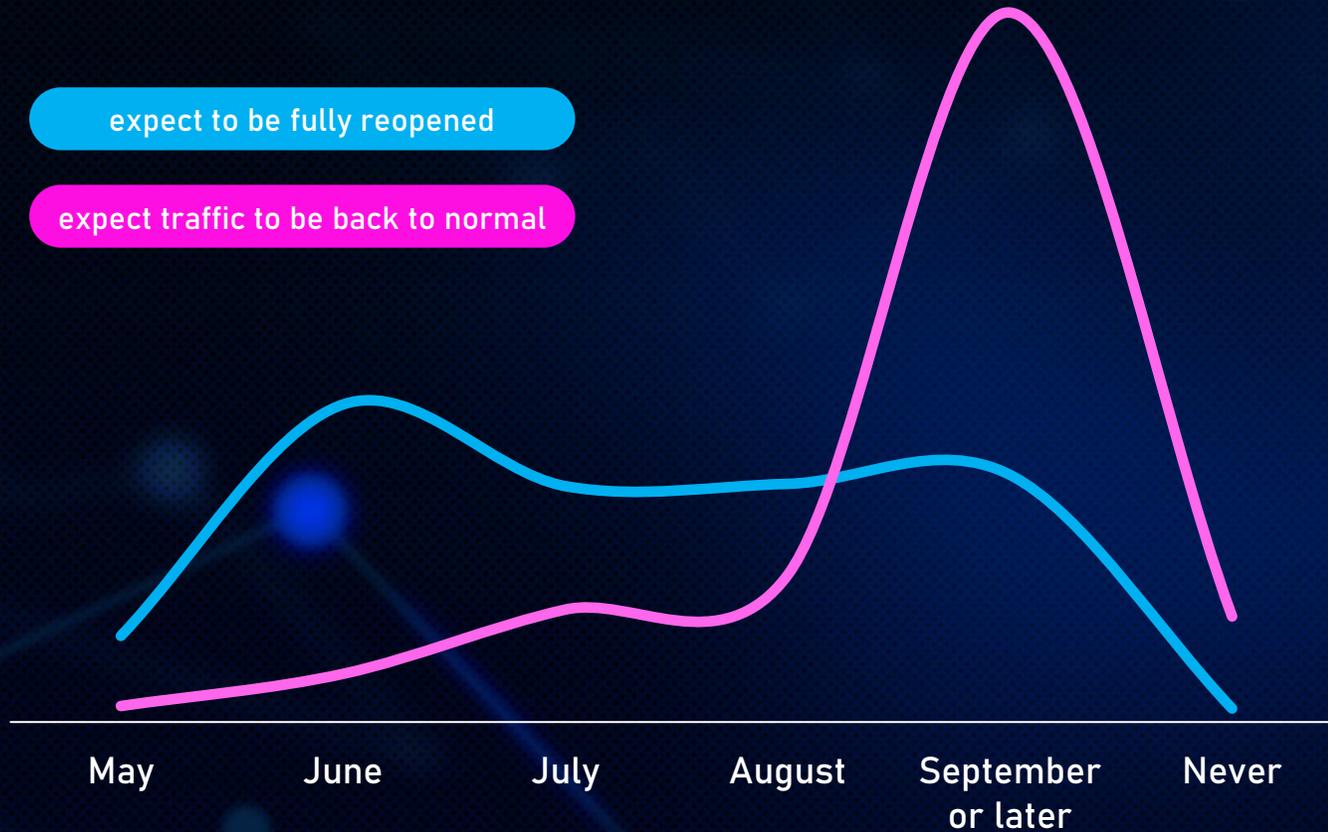
Surveying consumers on their last takeout or delivery order, an equal amount called a restaurant or used the restaurant's website or app—restaurants should focus on upping their online presence to align with consumer habits.

through which methods are consumers able to order ahead?
among restaurants w/order ahead



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.



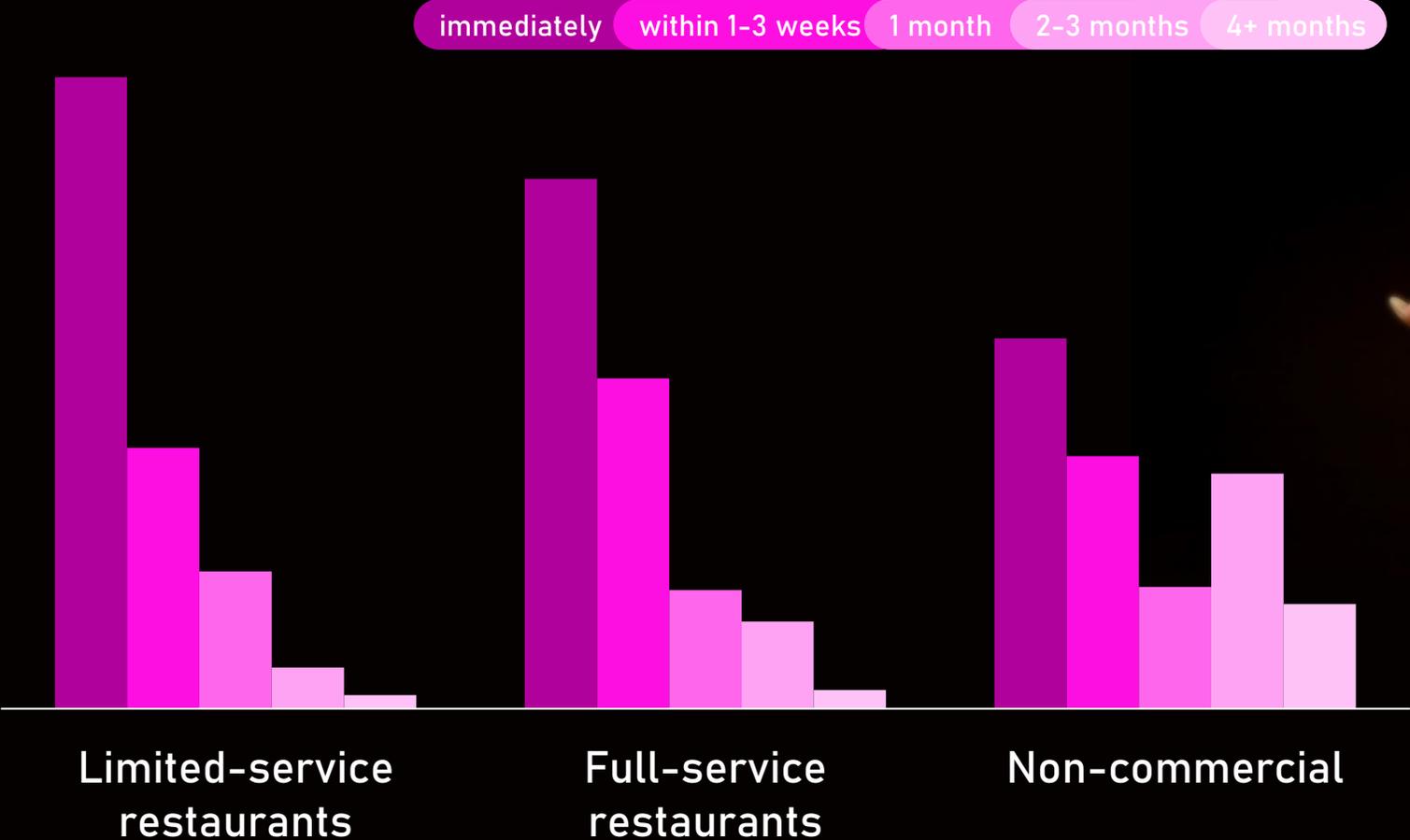
when do you think your business will be fully reopened with dine-in again?
when do you think your business will be back to normal (with similar traffic as you had before restrictions were put in place)?

RAMP UP

Restaurants are ready to open.

On-site segments are likely at the mercy of their larger industry (hospitals, hotels, schools, offices), which may be subject to later openings.

when the shelter-in-place restrictions are lifted, how soon do you plan to fully re-open your operation?
(as of May 5, 2020)



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

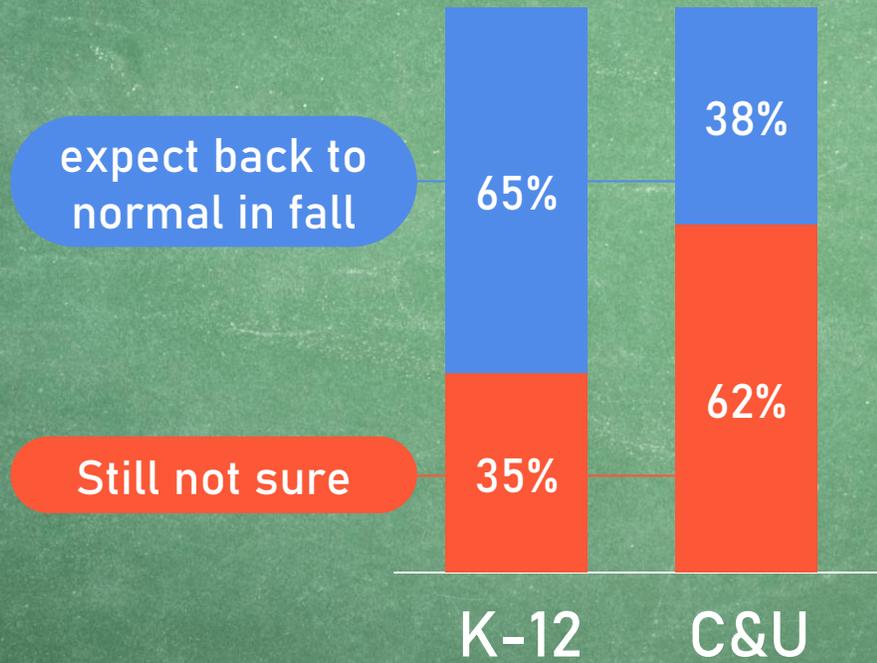
33% of limited-service restaurants

47% of full-service restaurants

32% of on-site operations

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?



Most operators will add additional marketing to help get capacity levels back up.

Consumers prefer to receive marketing communications via email and most think of promotions as a positive way to support restaurants and they do not think it's inappropriate to receive a promotion at this time. BOGO deals, free delivery, and loyalty points are among the most desired promotions.

21%

have already made a marketing plan for reopening

44%

will make a marketing plan for reopening

35%

don't plan to add additional marketing

do you have a plan for additional / new deals or promotions to help get customers back in your operation once stay-at-home restrictions are lifted? this excludes any deals or promotions you normally offer.

Major operational changes are not on the table yet.

While there will be heavy safety accommodations, operators aren't interested in fundamental changes like adding a drive-thru or switching to contract management just yet.

90% would not add a drive-thru

among qsr and fast casual operators

97% would not consider contract-management

among on-site operators

WHAT ARE YOUR TOP CONCERNS WHEN THINKING ABOUT REOPENING YOUR OPERATION?

“As previously mentioned, I worry about customers who won't take social distancing seriously. And they can't exactly wear masks when they're eating and drinking, so won't my restaurant potentially be swirling with virus??? What about my liability for people getting sick when I have so little control over it?”

- Casual Dining, Washington

“Where to start? Top concern is customer perception. I don't want our employees wearing masks if they are not effective (in food service, it's too hard to have your face covered all of the time) but customers will think they are necessary. Adhering to limits of customers in the store will be a challenge. We don't have the payroll to have a bouncer at a pizza place.”

- Fast Casual Minnesota

“Worried that we will have to be the enforcers of safety. I'm worried that people won't follow the rules and guidelines.”

- Fast Casual, California

“1. Public Health and Safety for staff and customers 2. Being able to follow all regulations 3. Increased staffing costs due to new regulations and having to monitor self-seating areas more often 4. Increased costs in chemicals, sanitizer, and to-go paper products”

- QSR, Indiana

“Concerned I won't have the staff to manage the operation. Some have been laid-off and others have found retail jobs..”

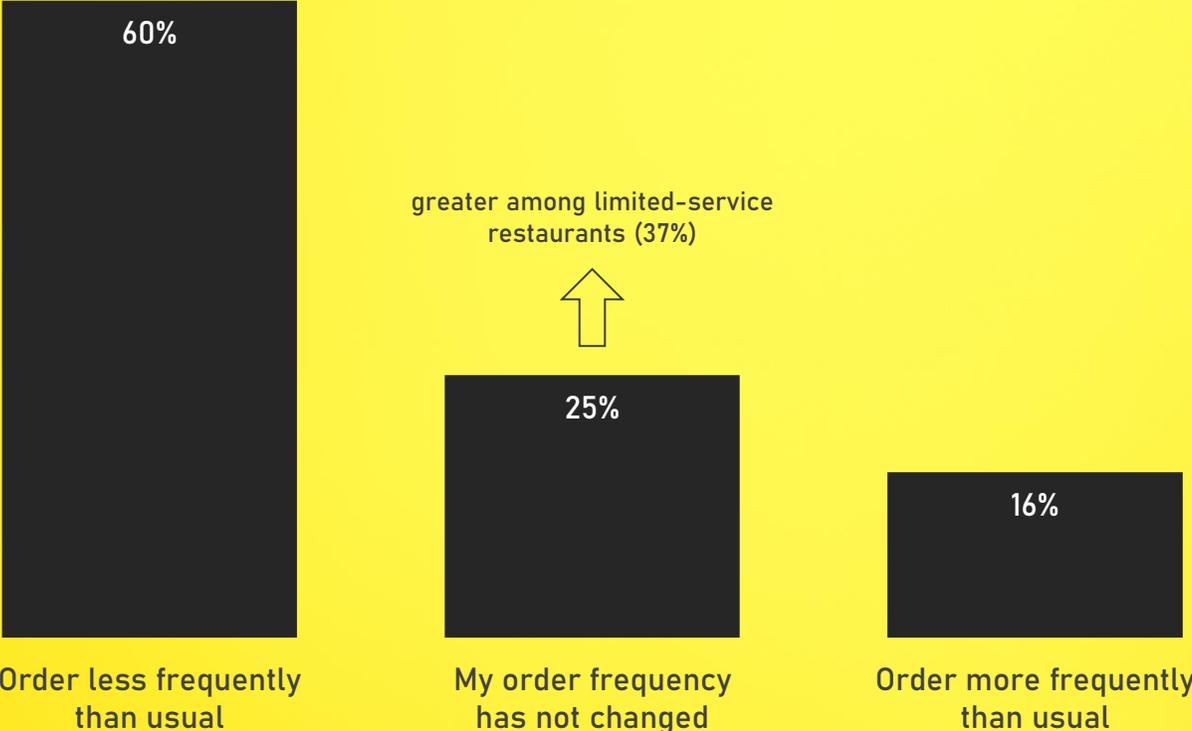
- Lodging, California



SOURCING

Lower demand means operators are ordering less frequently.

This means operators may need smaller order minimums. Limited service restaurants, who were best prepared for dine-in closures as their models are based on to go ordering, are less likely to have changed their ordering frequency than full-service restaurants or on-site operators.



to best manage your inventory during this time, which of the following are you doing?
among open operations

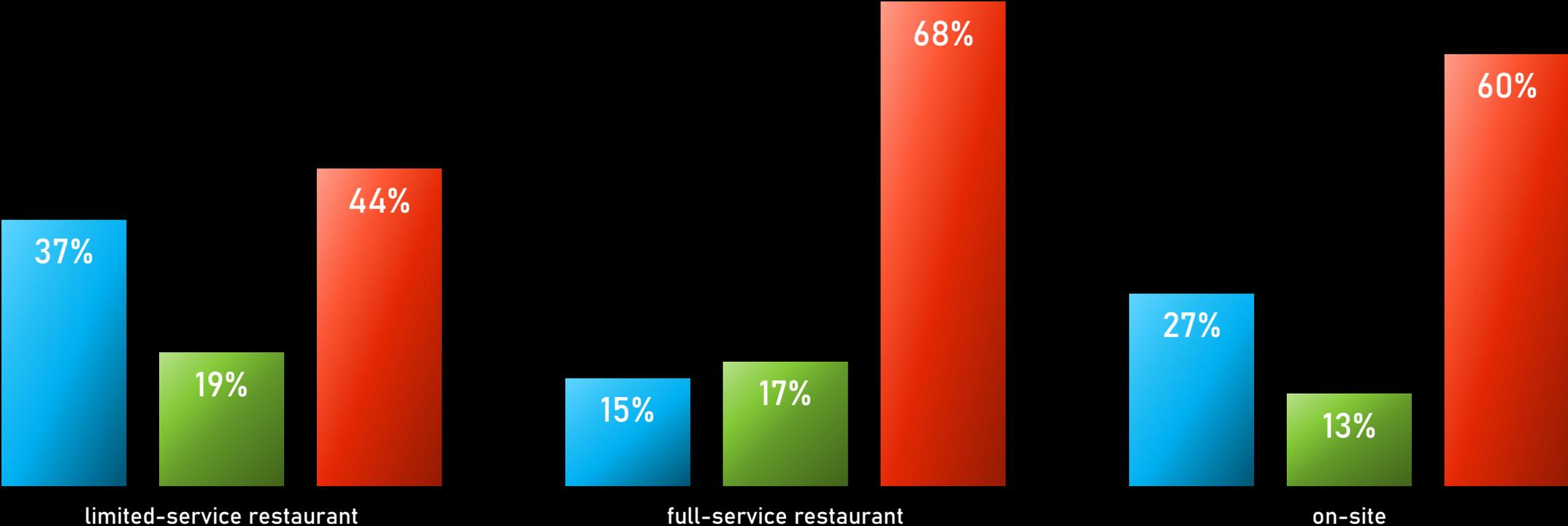


Full-service restaurants and on-sites particularly might benefit from smaller order minimums.

Order frequency has not changed

Order frequency increased

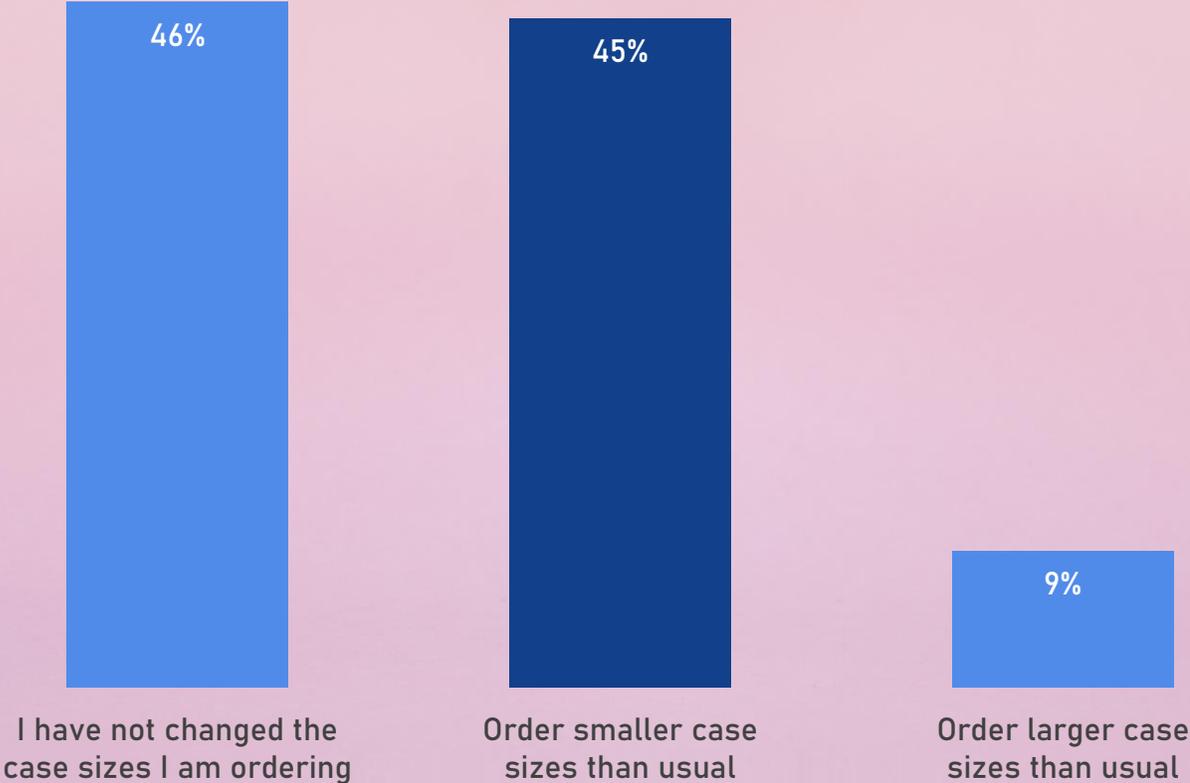
Order frequency decreased



to best manage your inventory during this time, which of the following are you doing?
among open operations

In addition to lower order frequency, operators are ordering smaller cases.

While many have kept up with similar case sizes, many have looked to order smaller cases.

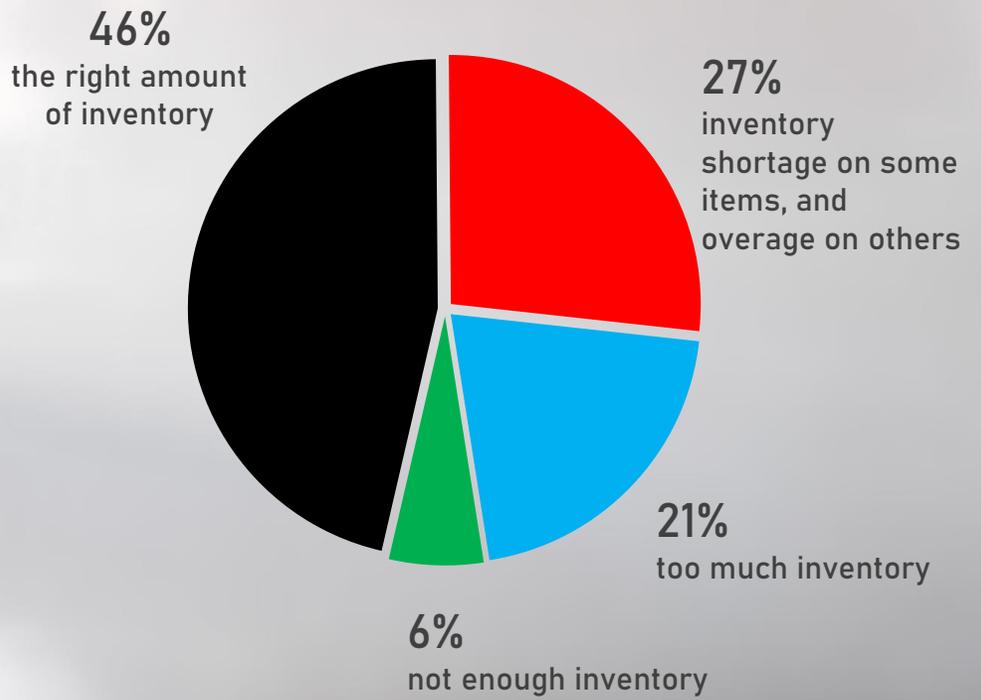


to best manage your inventory during this time, which of the following are you primarily doing?
among open operations



Many operators are struggling with inventory levels.

Unpredictable consumer demand along with food supply shortages have contributed to too much inventory or a mix, though most are not struggling overall to maintain the right amount of inventory.



overall, how would you describe the current inventory level at your operation?
among open operations

Operators, especially on-sites, are turning to longer-lasting and low-prep items.

Items that have a longer shelf-life have become more appealing to operators and can help them manage unnecessary food waste during this time.

ORDERING MORE OF...	Total	Limited-service restaurant	Full-service restaurant	On-site
Frozen items	25%	19%	24%	29%
Pre-packaged / grab-and-go ready items	25%	16%	8%	43%
Shelf-stable items	22%	11%	13%	34%
Dry goods	19%	13%	17%	24%
Ready-to-use / heat-and-serve items	17%	7%	9%	28%
Canned / bottled beverages	17%	13%	14%	21%
Canned goods	16%	7%	12%	22%
Pre-cut / pre-proportioned items	15%	10%	9%	22%
Fresh items	11%	17%	11%	9%
Speed-scratch items	7%	7%	8%	7%
Private-label / distributor-label brands	7%	7%	9%	5%
Name brands	2%	1%	4%	1%

significantly higher / lower than total at 95% CL

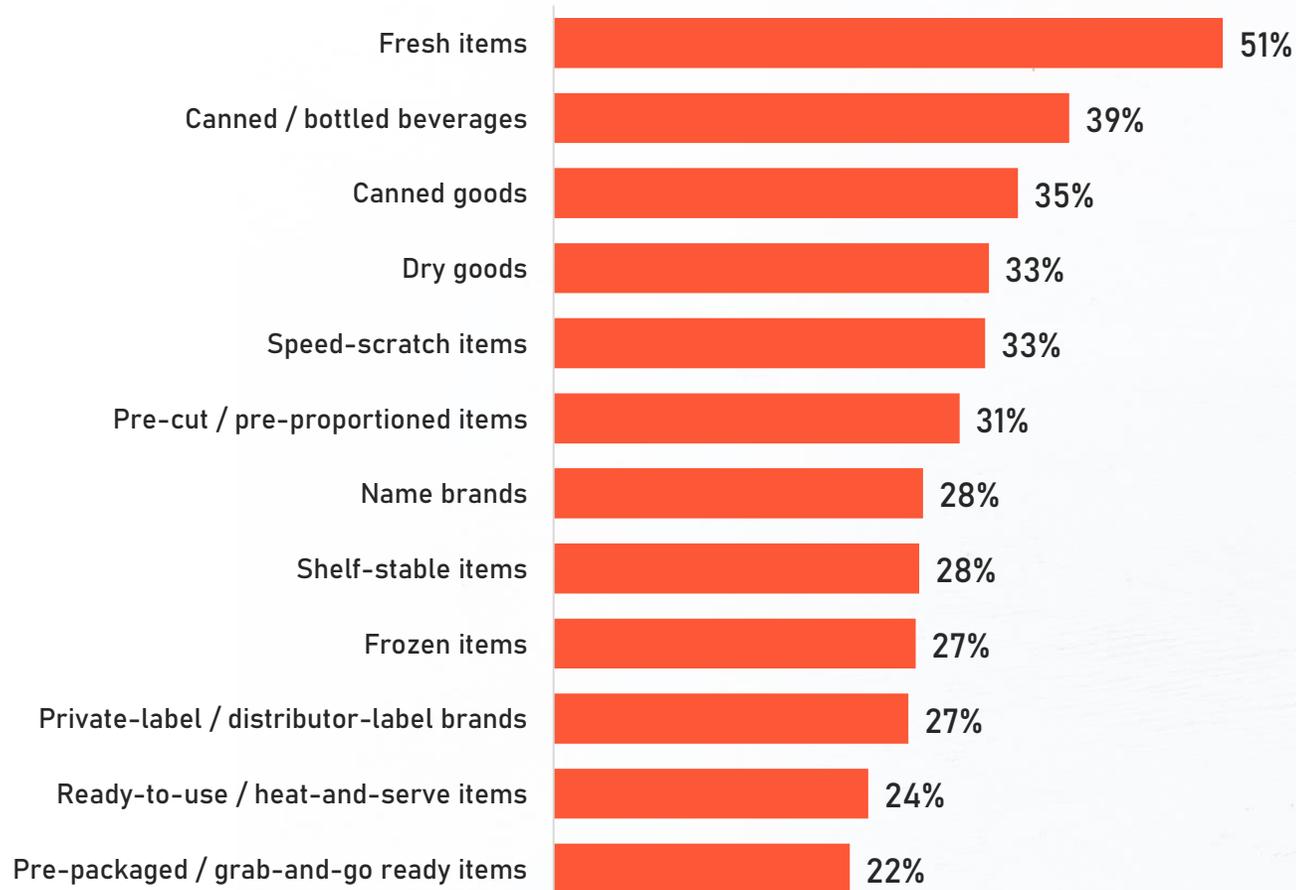


Currently, during the covid-19 / coronavirus restrictions, which of the following product formats are you buying MORE of?
among open operations

Operators are shying away from fresh items.

High purchase minimums could be forcing operators to order less frequently, which consequently is driving operators to purchase products with a longer shelf-life. The decline in canned and bottled beverages may be driven by the fact that consumers often do not purchase a beverage with to-go orders because they have beverages at home.

currently, during the covid-19 / coronavirus restrictions, which of the following product formats are you buying **LESS** of?
among open operations



Though operators are varying product types, they are not changing their sourcing channels.

Though initial research in March showed operators having to shift sourcing when shortages were more abundant, Operators now report that they are ordering from the same channels. Most will continue with the same suppliers they used prior to COVID-19 closures. If needed, operators are using grocery stores slightly more than usual during this time, but this is not a permanent shift.

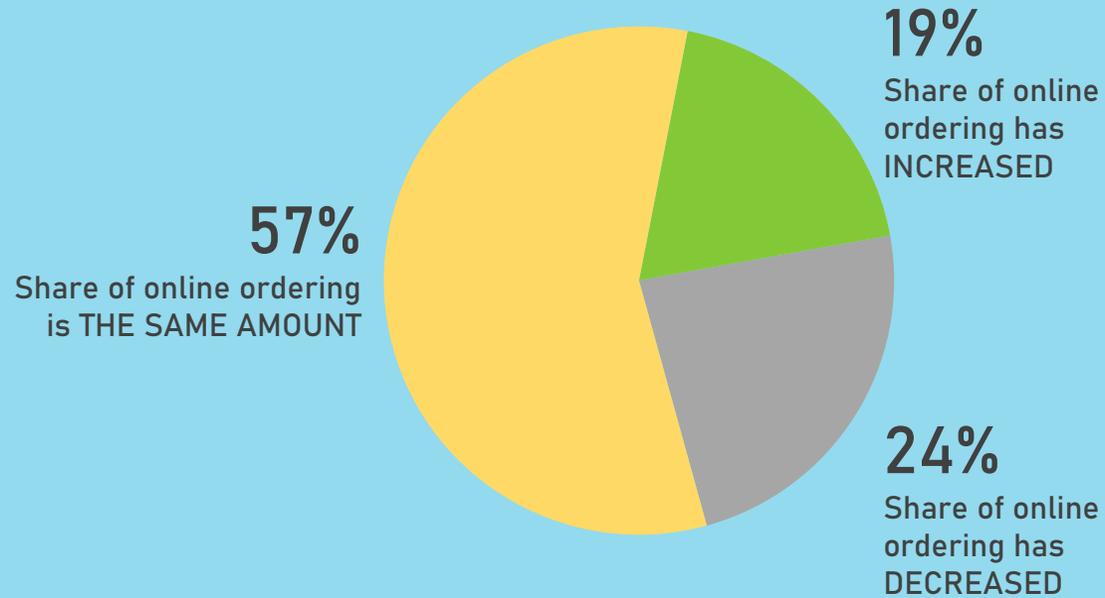
	BEFORE RESTRICITONS	CURRENTLY	AFTER RESTRICITONS ARE LIFTED
Broadline / main line distributors	67%	66%	67%
Specialty / ethnic / local distributors	9%	7%	8%
Cash & Carry stores	7%	8%	7%
Warehouse / club stores	4%	5%	5%
Supermarket / grocery stores	4%	6%	4%
Direct from manufacturers / direct-store-delivery	4%	3%	4%
Local farms / farmers markets	2%	2%	3%
Third party websites NOT from distributors	1%	1%	1%

what % of your overall purchases of food, beverages, and supplies (excluding alcohol and equipment) were from each of the following types of sources?



For the most part, operators are ordering online the same as they did before COVID-19 restrictions.

However, for those who have increased their share of orders made online, they are planning to continue using online ordering more often in the future. Operators that have decreased their share of orders made online are unsure whether this will last.



has the overall share of orders you place online changed as a result of the covid-19 / coronavirus outbreak?
among open operations



Those who have increased their share of orders made online are planning to continue using online ordering more often in the future.



19%

Increased their share of
online ordering

Do you plan to continue to rely more heavily on online ordering once restrictions are lifted?

among those who increased their share of online ordering

46% will rely more heavily on online ordering

13% will not rely more heavily on online ordering

41% say it is too soon to tell

Operators that have decreased their share of orders made online are unsure whether this will last.

Do you plan to continue to rely less on online ordering once restrictions are lifted?

among those who decreased their share of online ordering

24%

Decreased their share of
online ordering

25% will rely less heavily on online ordering

22% will not rely less heavily on online ordering

53% say it is too soon to tell





While price, product availability are still critical, operators have a newfound focus on food safety and out-of-stock alerts.

Operators want to know they are not only going to be getting the food they ordered but also getting it on-time. Communication and transparency with sales representatives about shortages and food safety is once again key when ordering food for their operation.



during this time of uncertainty, what are the top 5 most important factors to you when purchasing products for your operation?
among open operations

Be ready to talk about new takeout packaging.

Not all operators have had to make a packaging switch, but some establishments have made changes to increase safety and adapt to a to-go focused landscape.



41%

have made the switch to new packaging

59%

have continued using their original packaging

since covid-19 / coronavirus restrictions began, have you had to switch what types of packaging you are using for to-go/delivery orders?
among open operations

Sealed feels safe.

Operators who have made the switch to a new packaging have listened to consumer concern and have made the switch to individually sealed utensils, condiments, and containers to assure safety.

what types of packaging have you started using now that you were not using before?
among those who tried a new to-go packaging type

Utensils individually sealed in plastic	52%
Individual condiment packets instead of cups filled in-house	47%
Plastic containers with lids over Styrofoam	42%
Containers with tamper-proof seals	24%
Plastic bags over paper	23%
Double bagged containers	13%



WHAT ONE THING WOULD MAKE THE BIGGEST DIFFERENCE FOR YOUR OPERATION RIGHT NOW?

“Help with replacing items when [my distributor is] out of stock. Sometimes it’s just not sent, and we have to make last minute changes to menus on the days of delivery.”

- Healthcare, California

“Making sure our order is correct and delivered on time. Communicating about out of stock items and a plan to replace or substitute with a comparable product.”

- Midscale Dining, Texas

“Keep sanitation and safety products in stock. High level of communication about expected shortages. We need this for menu planning!”

- C&U, New Mexico

“Be flexible with deliveries when we open up. Once the stay at home is lifted, we will need product and that could become a problem depending on delivery days, order deadlines etc. So I'm hoping they will be flexible when we open back up.”

- B&I, Illinois

“Honestly, it would be smaller requirements on purchases. I understand it would be hard, but I believe it helps build the relationship if there is a justified "wiggle room" amount. And I mean that about the larger companies obviously.”

- Fine Dining, Pennsylvania



MENU CHANGES

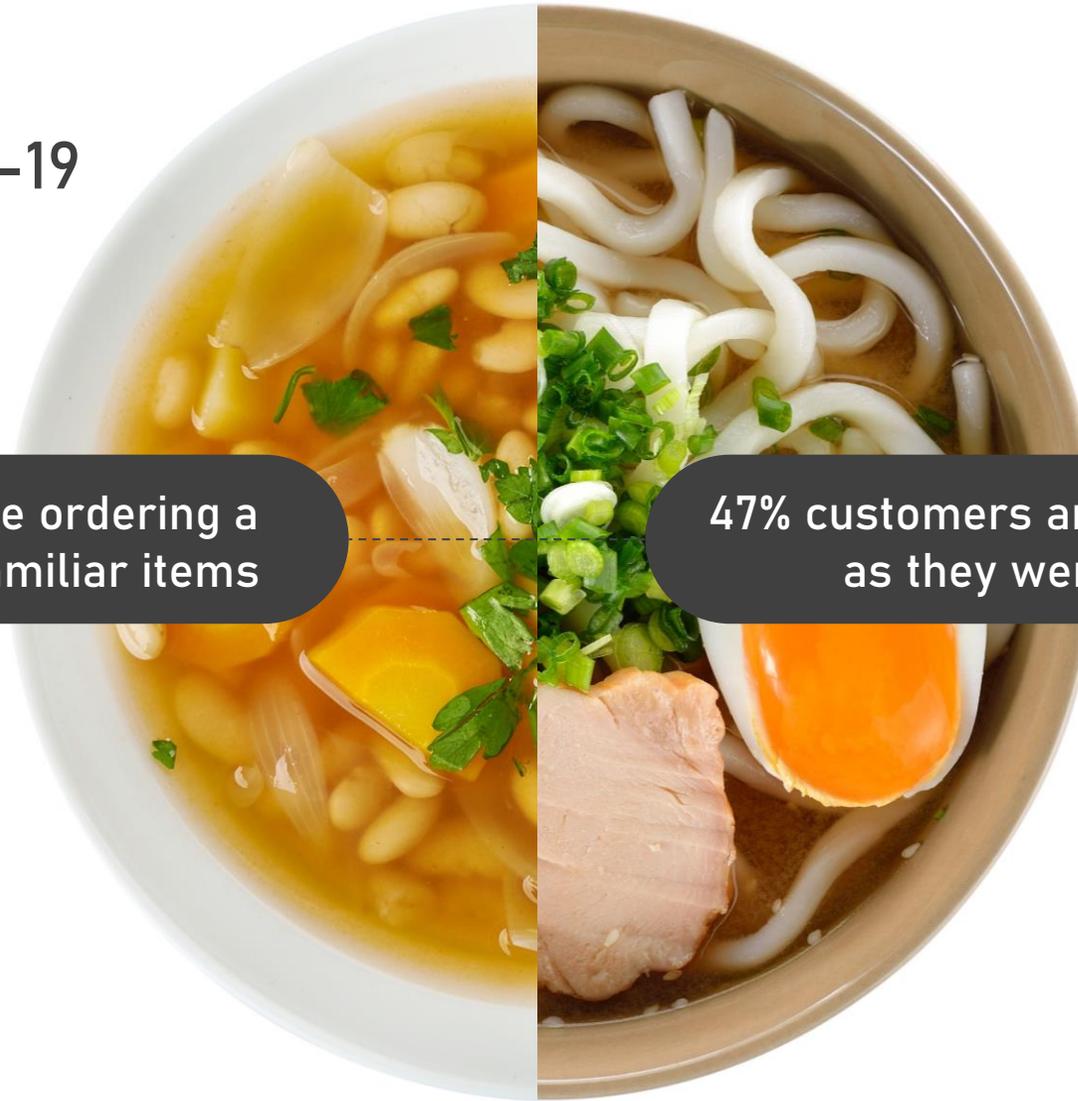
Many operators report that customers have shifted to ordering more comfortable menu staples during COVID-19 restrictions.

53% customers are ordering a narrower set of familiar items

47% customers are ordering just as they were before



QSR and fast casual operators report customers are more likely to still be trying the full menu, which may be driven by their naturally slimmer menus.

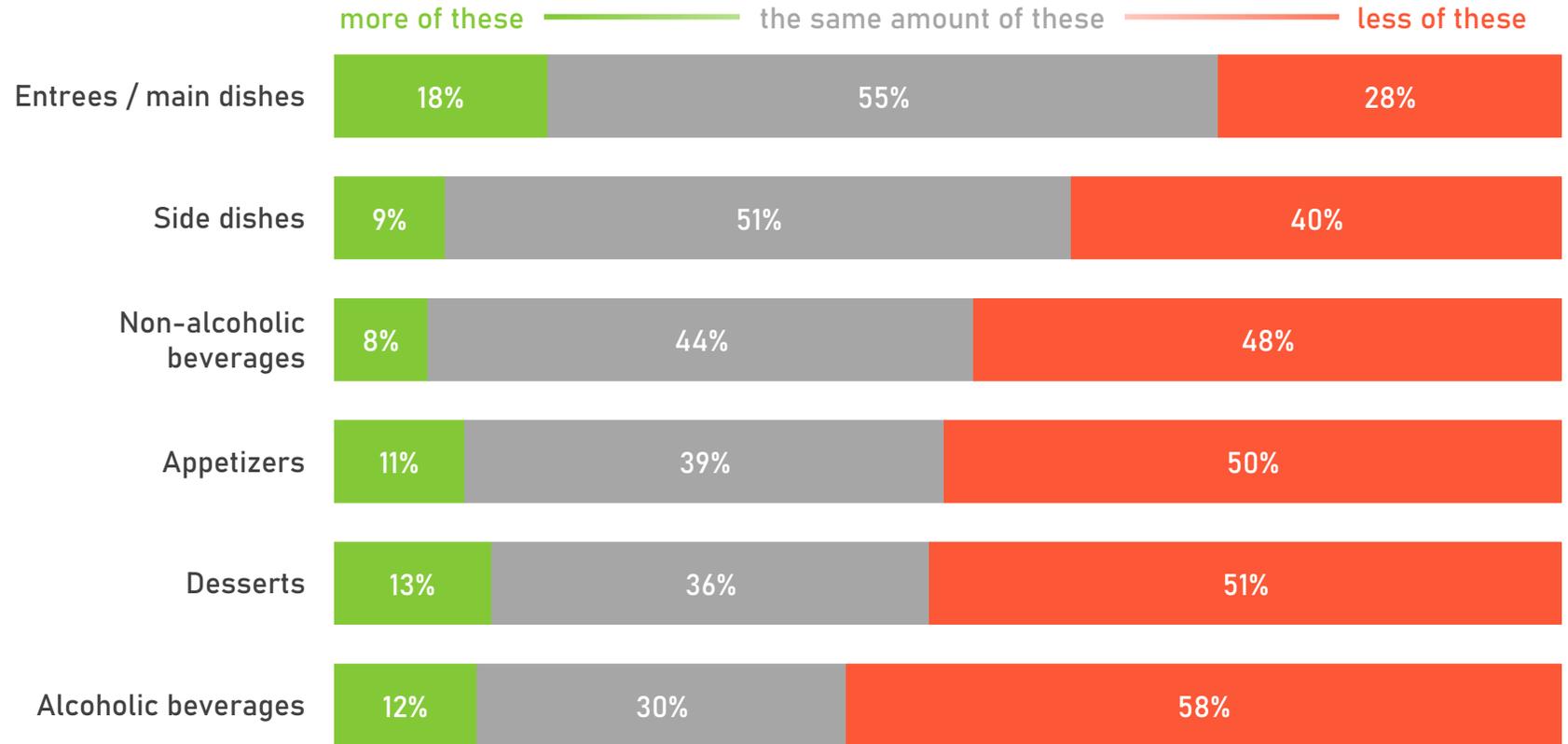


Entrees and sides haven't seen nearly the hit that upsells have.

Beverages, appetizers, and desserts are less commonly ordered to-go by consumers, and operators are feeling the strain on the decrease in these higher-profit menu items.



during the covid-19 / coronavirus restrictions, do you feel like customers are ordering more, less, or the same amount of the following types of items?





However, operators are still planning and adapting their menus.

While many have had to turn from their menus to deal with staff and safety concerns, most operators are still steaming ahead with menu planning, either continuing to innovate as usual or reframing to accommodate COVID-19 challenges. Looking back to 2008, operators who use this time to adapt and innovate will have the strongest chance of emerging strongly.

18% using COVID-19 as an opportunity to try new things

38% reframing planning around changes caused by COVID-19

44% paused menu planning to focus on other things

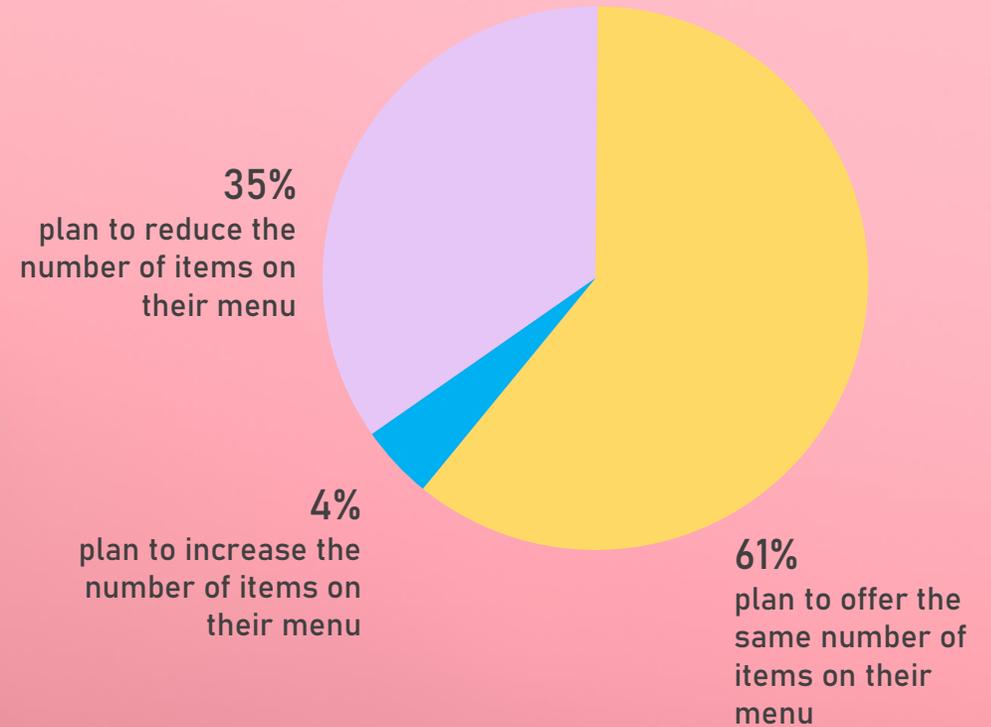
New COVID-19 offerings have staying power.

For many of these new offerings, more than half of operators who added them will continue to offer after restrictions lift. Family meals and meal kits especially may become a standard offering.



Operators plan to maintain or reduce their menus.

Virtually no operator is increasing menu size. With menu sizes staying somewhat consistent to pre-COVID-19, distributors and manufacturers may see reduced orders start to pick back up. For those considering reducing menu size, it can help operators manage cost and staff requirements while traffic returns to normal.



do you plan to increase or decrease your menu size at all after covid-19 / coronavirus and stay-at-home restrictions are lifted?

Fine dining, lodging, and business operators are most likely to see a menu reduction.

These operators have been hit hard during this time; menu reduction may be beneficial to their businesses for the time being.

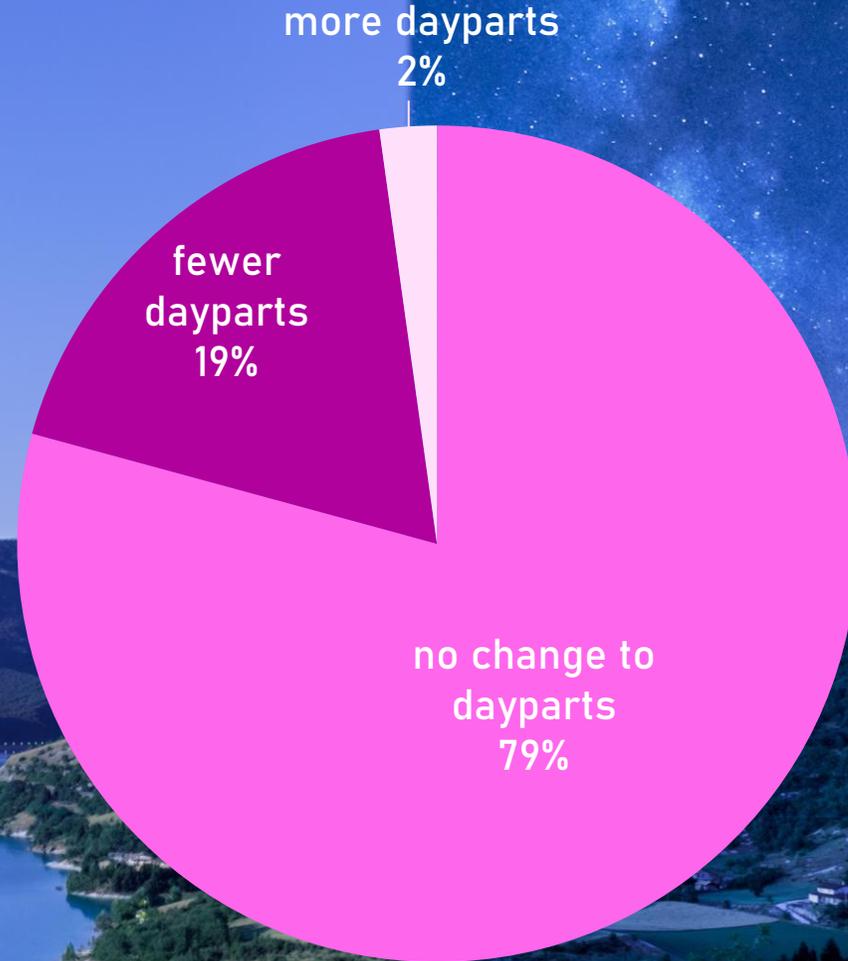
	QSR	Fast casual	Midscale	Casual dining	Fine dining	Healthcare	Lodging	B&I	C&U	K-12
plan to reduce the number of items on their menu	21%	9%	37%	39%	54%	15%	49%	56%	48%	22%
plan to offer the same number of items on their menu	71%	87%	61%	56%	46%	73%	47%	42%	50%	73%
plan to increase the number of items on their menu	8%	4%	1%	6%	0%	12%	4%	2%	2%	6%

do you plan to increase or decrease your menu size at all after covid-19 / coronavirus and stay-at-home restrictions are lifted?

significantly higher / lower than total at 95% CL

However, operators aren't reducing daypart offerings.

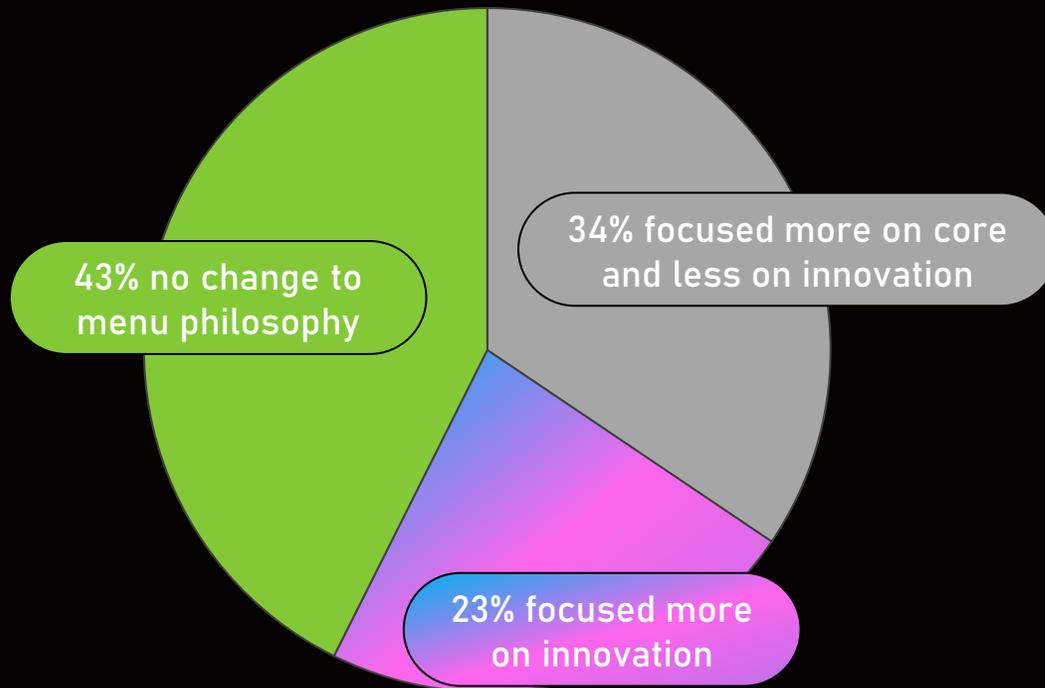
While operators may shave off an hour here or there, they aren't making drastic changes (like cutting breakfast). This will give operators more flexibility operationally as the market returns to normal.



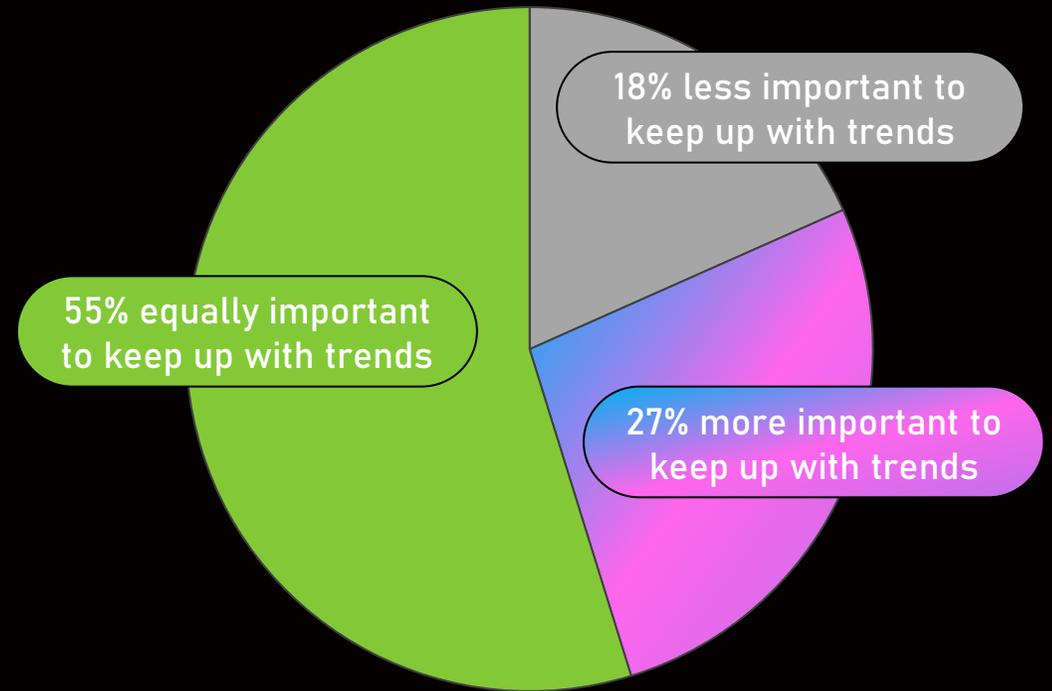
do you plan to offer the same number of dayparts (breakfast, lunch, dinner, etc.) you offered before covid-19 restrictions?

Operators are not slowing down on trend watching.

While some operators are planning to take a step back and focus on the core, most plan to keep hold their course or even turn up their innovation pipelines. They believe that consumers will bounce back from COVID-19 changes.



menu philosophy post covid-19



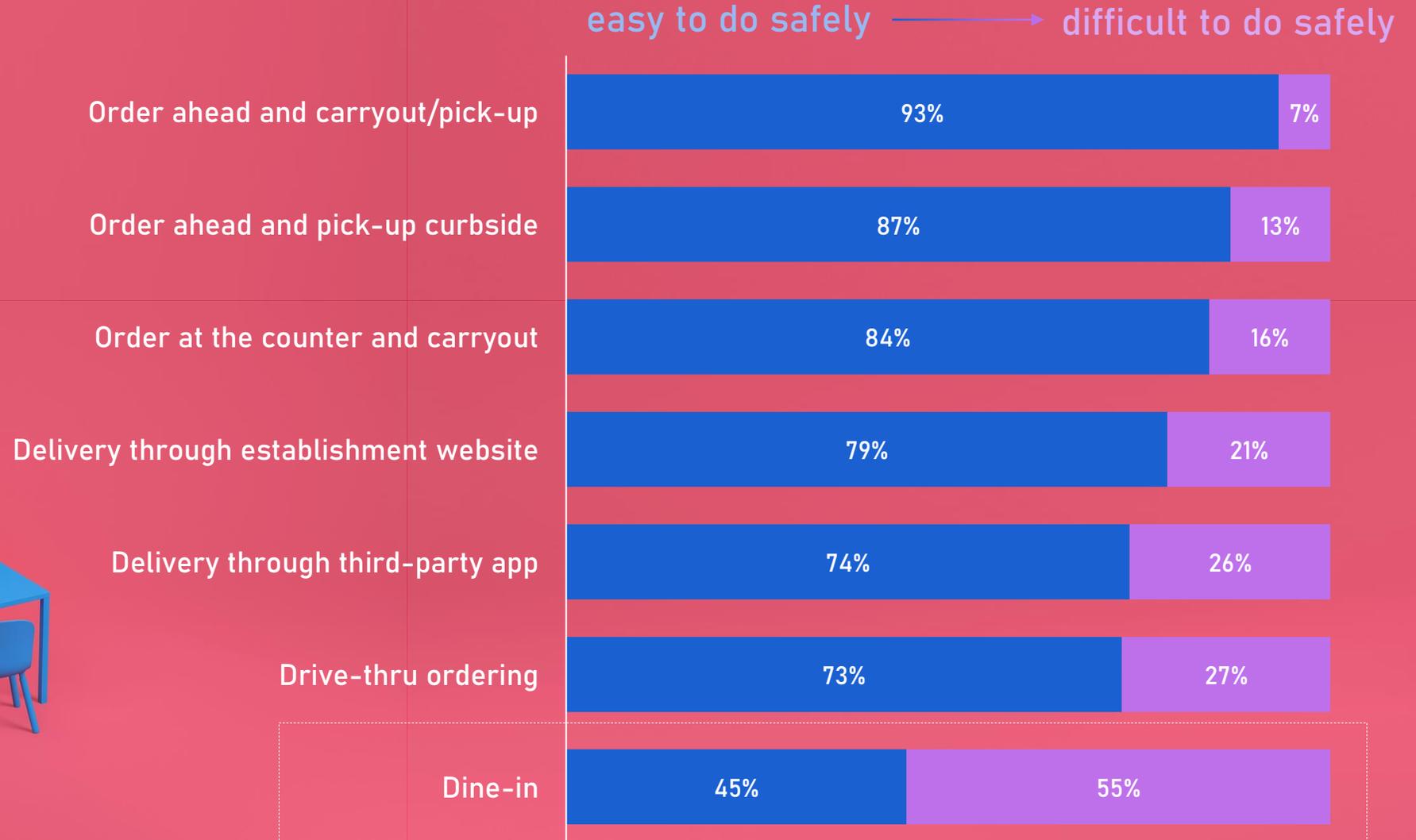
importance of trends post covid-19

FUTURE OF

FRONT-OF-HOUSE

Help operators navigate dine-in safely.

At this point, operators have adapted to safely navigate delivery and pick-up, but many are still very concerned about their ability to offer a safe dine-in experience.



Wipe it down and wear gloves.

It is no surprise that operators are planning on changing their sanitation protocols by wiping down surfaces, providing masks for staff, and removing items with many touch points. Operators will likely be looking for help with sanitation solutions and PPE. However, they are less likely to go as far as requiring customers to order ahead or make reservations prior to dining in.

FRONT-OF-HOUSE CHANGES....	ALREADY DOING / PLANNING TO DO THIS	WOULD CONSIDER IT	UNLIKELY TO DO IT
Visibly wiping down and sanitizing tables, kiosks, menus, handles, etc.	85%	11%	4%
Providing and requiring employees to wear gloves	73%	17%	11%
Removing condiments bottles from tables	58%	27%	15%
Providing disinfectant wipes or sanitizer for customers	55%	31%	14%
Adding signage / communication that explains sanitation methods	54%	31%	15%
Providing and requiring employees to wear masks	51%	31%	18%
Switching to individually wrapped or portioned silverware, condiments, etc.	41%	31%	28%
Offering contactless payment	35%	32%	32%
Disposable menus	29%	24%	47%
Sanitizing customers' credit cards after handling them	19%	32%	49%
Requiring reservations to manage crowd	19%	22%	59%
Disposable table linens / coverings	17%	20%	64%
Require order ahead (contactless ordering)	16%	23%	62%
Providing sink for customer use outside the bathroom	7%	16%	77%

for each of the front-of-house changes listed below, after covid-19 stay-at-home restrictions are lifted would you say you are?



Tables will be removed to remain 6 feet apart.

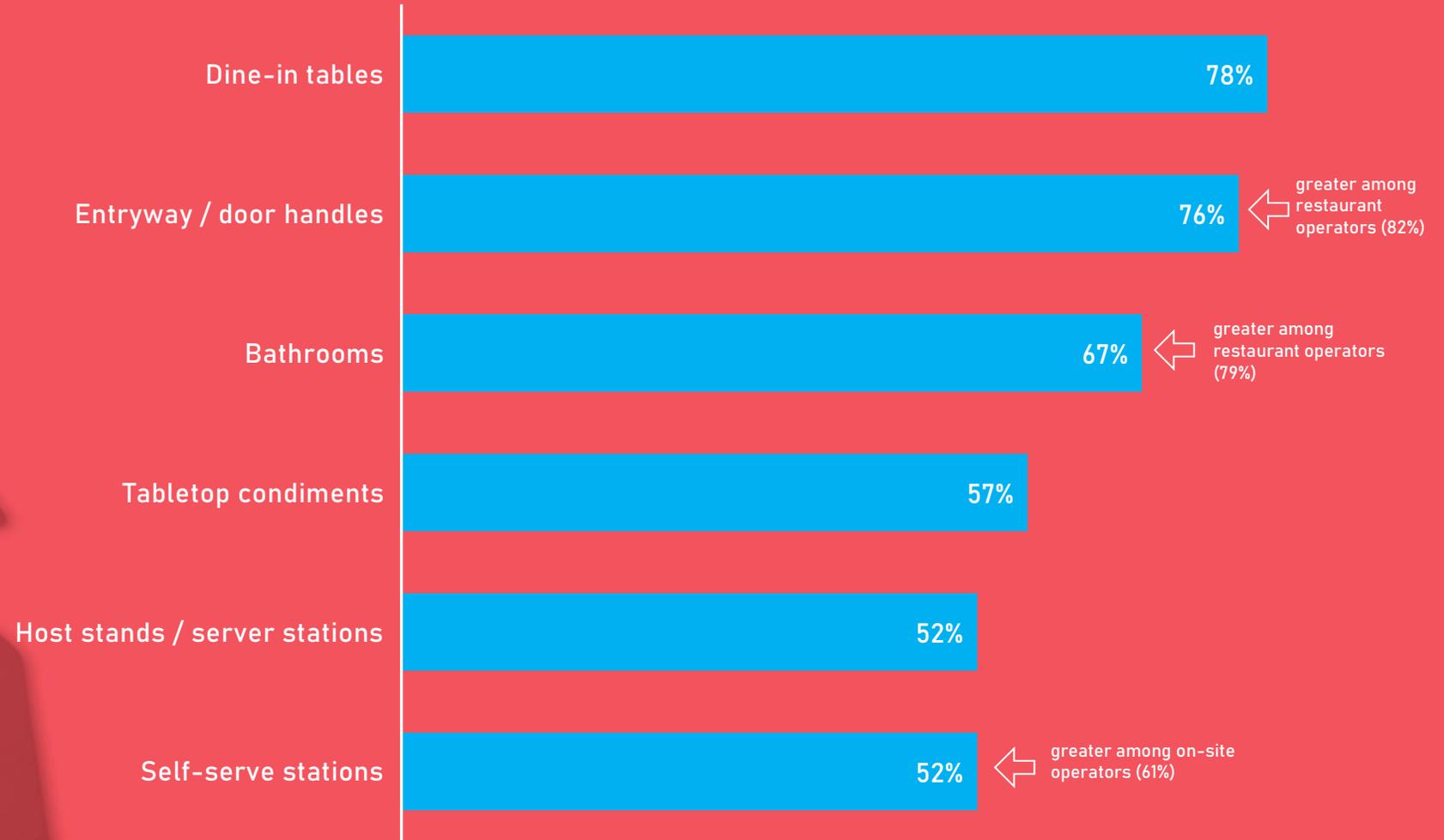
Operators are on board with capacity regulations and will remove tables in order to meet them. This is especially true of full-service restaurants whose patrons dine together for longer amounts of time.

	TOTAL	LSR	FSR	ON-SITE
Will have the same number of tables	36%	42%	28%	40%
Will remove tables <i>(to maintain a 6-foot distance between tables)</i>	61%	51%	71%	57%
Not planning to offer dine-in options at all	4%	8%	2%	4%

are you planning on having the same number of tables for dine-in customers?

Everything will be sanitized more.

Areas such as dine-in tables, door handles, and bathrooms with many different touch points will be cleaned more frequently. Restaurant operators, who focus on customers sitting and eating, will plan to be more diligent in their sanitizing protocols.



will you sanitize any of the following areas in the front-of-house more thoroughly or more frequently?

Operators are considering reworking self-serve areas.

Similarly, condiments may come only on request as operators look to manage safety and limit the amount of surfaces a customer interacts with. Manufacturers may want to highlight individually portioned options for condiments, creamers, etc. instead of bulk. Operators aren't overwhelmingly in favor of raising menu prices either, which is a smart move with customers facing a problematic economy.

	ALREADY DOING / PLANNING TO DO THIS	WOULD CONSIDER DOING THIS	UNLIKELY TO DO THIS
Stop offering self-serve areas	41%	26%	33%
Offer condiments by request only	36%	38%	25%
Focus on menu items with greater profit	28%	41%	30%
Add menu items optimized for delivery / takeout	25%	39%	36%
Increase menu prices slightly	19%	33%	48%
Shorten menu to only most popular items	18%	40%	42%
Add family-sized / multi-meal options	16%	29%	55%
Eliminate option for customization	11%	33%	56%
Add many new menu items	8%	27%	64%



for each of the menu changes listed, after covid-19 restrictions are lifted would you say you are?

Salad and hot bars may be the first to go.

Consumers find salad and hot bars to be less sanitary and operators are aware of this. While these stations may be a thing of the past, but you may still see beverage dispensers and fountains with more upkeep than usual.

<i>(among those who offer)</i>	WILL DISCONTINUE SELF-SERVE	WILL CONTINUE SELF-SERVE
Salad bar	66%	34%
Hot bar	56%	44%
Condiment station	53%	47%
Beverage station	33%	67%
Coffee / tea dispensers	30%	70%
Soda fountain	26%	74%

after covid-19 / coronavirus restrictions end, will you continue to offer the following SELF-SERVE areas in your operation (where the customers can serve themselves)?



FUTURE OF
BACK-OF-HOUSE

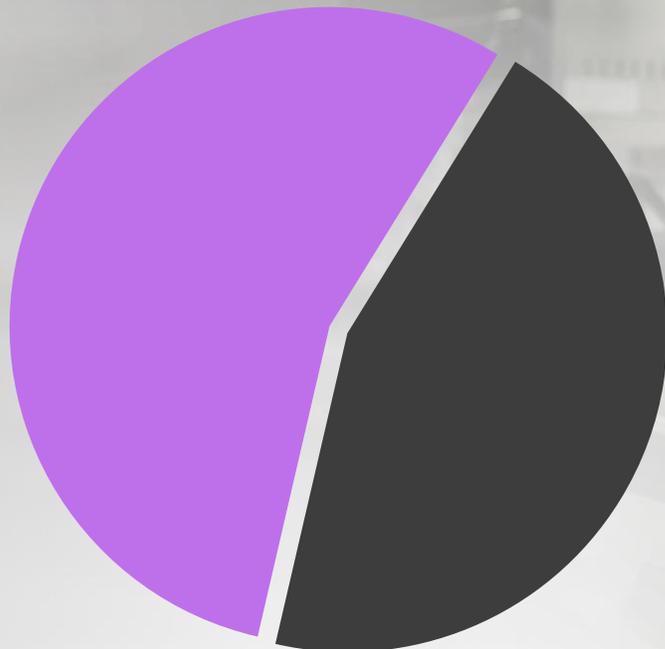
Operators are updating sanitation back of house.

Midscale, who were among the hardest hit by restrictions, are more likely to implement new safety protocols. Meanwhile, fast casual, who have already had to adapt to counter-order and prep format are less likely to need a sanitation update. Additionally, K-12 may feel its sanitation standards are already strict enough.

55%

I plan to change sanitation protocols in back-of-house

greater among midscale restaurants (69%)



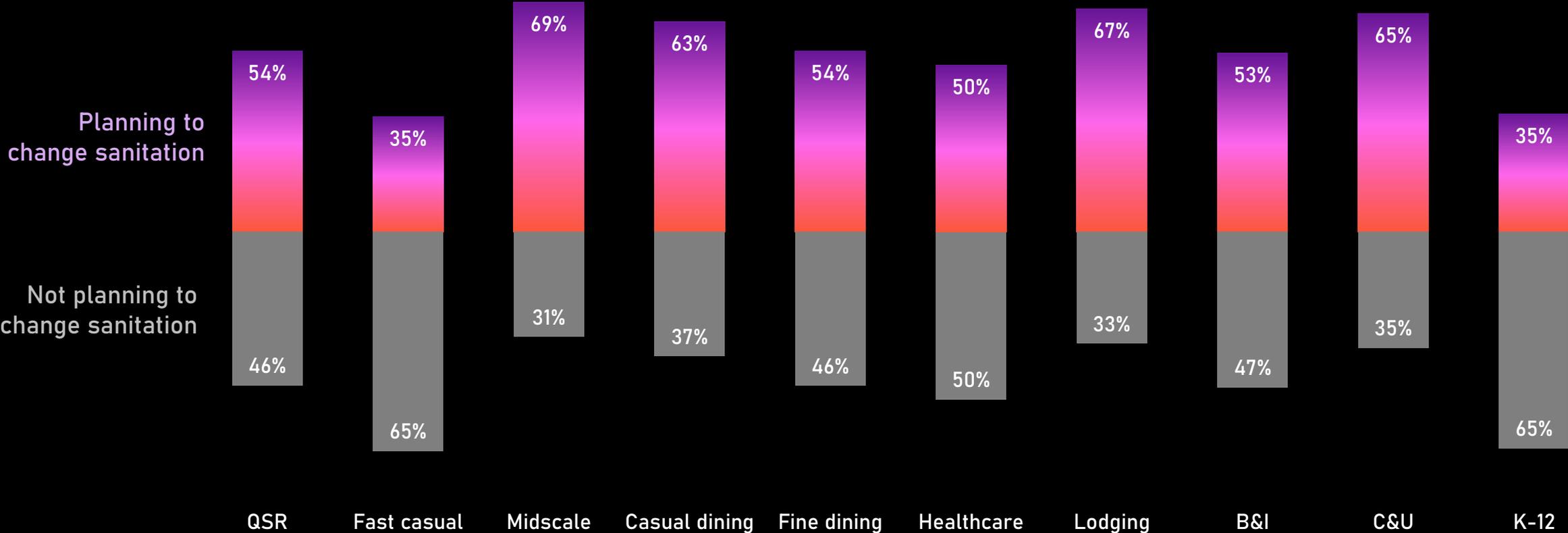
45%

I do not plan to change sanitation protocols in back-of-house

greater among K-12 (65%) and fast casual (65%)

do you plan on changing any of your sanitation protocols in the back-of-house?

Midscale, lodging, C&U, and casual dining operators are most likely to make the back of house sanitation changes.



do you plan on changing any of your sanitation protocols in the back-of-house?

Convenience-focused products are more attractive to many operators.

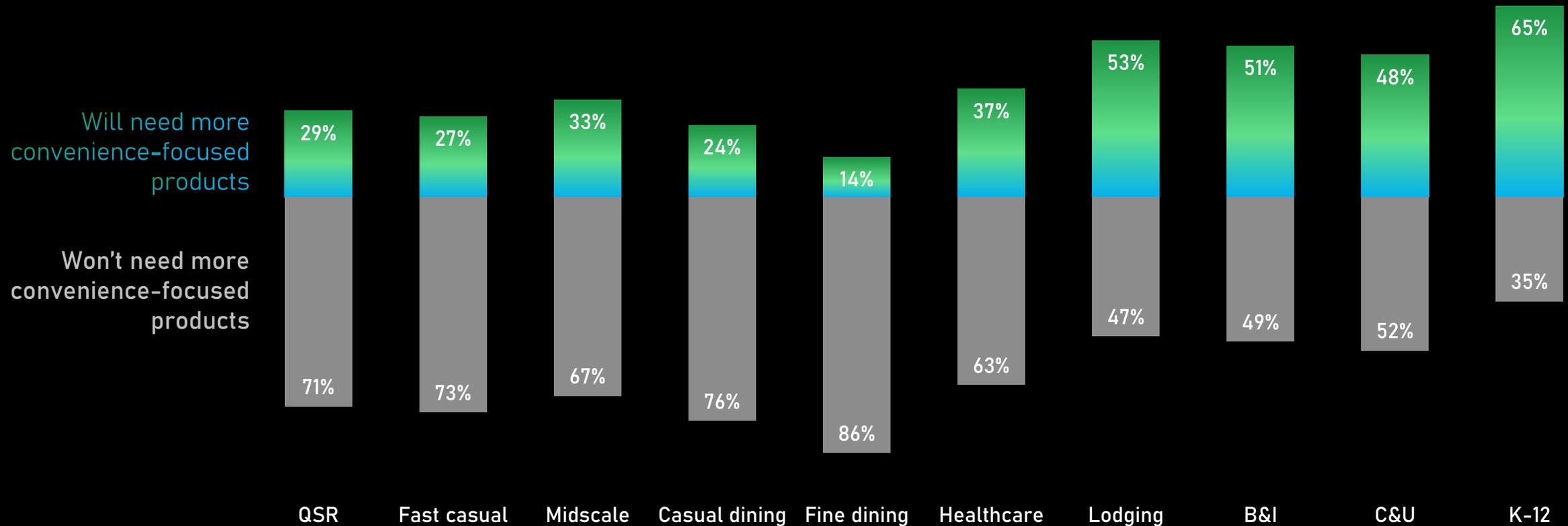
Many operators may make the switch to convenience-based products, especially casual and fine dining establishments, nearly half of commercial operators are interested in products that can help simplify prep or accommodate reduced labor.



after covid-19 restrictions are lifted, do you think you'll need more convenience-focused products to help simplify prep or accommodate reduced labor?



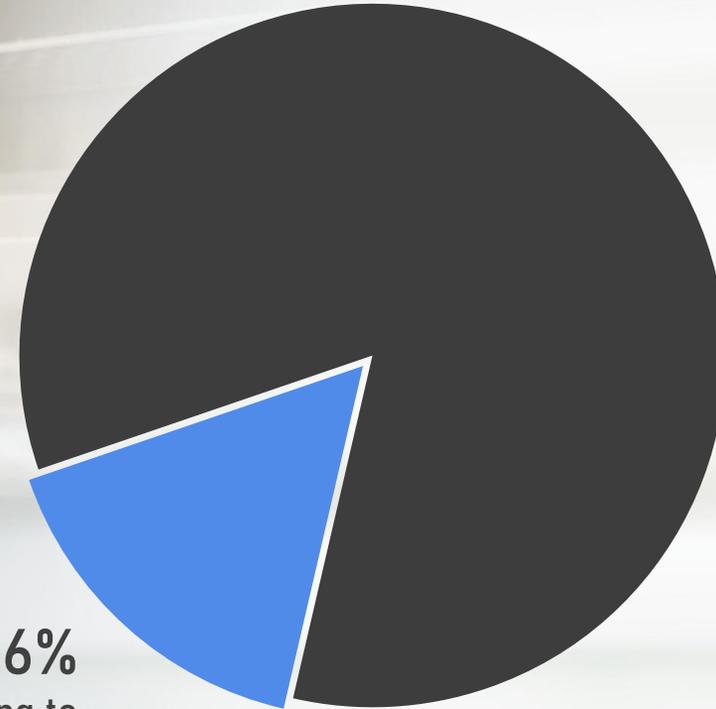
K-12, Lodging, and B&I all may be facing labor concerns, which may drive them to more convenience-focused products.



are you considering switching any bulk items you purchase to single serve for efficiency or reduced employee contact with ingredients?

Commissary kitchens may get some traction.

While most plan to keep restaurants open and running as normal, a few operators considering a shared kitchen space.



84%

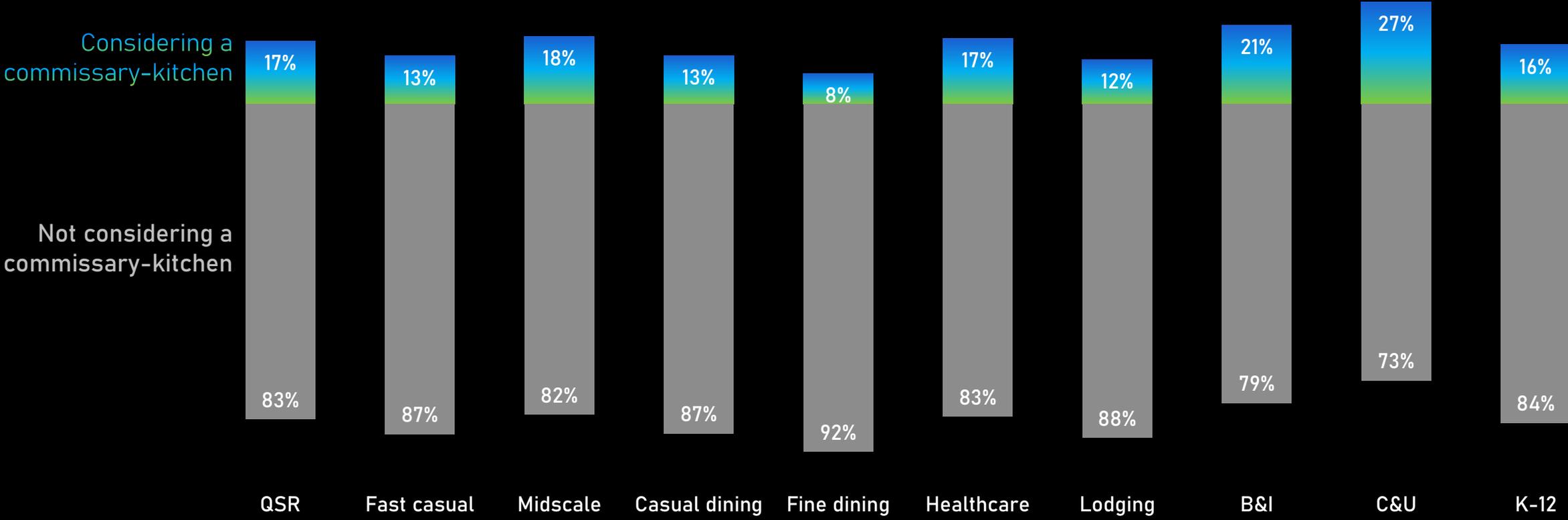
I have not considered switching to a commissary-kitchen model

16%

I have considered switching to a commissary-kitchen model

have you considered switching to a commissary-kitchen model to lighten operations on-site at your operation after covid-19 restrictions are lifted?

B&I and C&U operators are most heavily considering a commissary-kitchen model.



have you considered switching to a commissary-kitchen model to lighten operations on-site at your operation after covid-19 restrictions are lifted?

Demand for single-serve may spike.

Many are considering making the switch due to safety concerns. Restaurants are less likely to turn to single-serve; however, on-site operators may switch out to single serve due to their higher levels of grab and go offerings.

37%
I have considered switching
some bulk items to single-serve

greater among on-site
operators (47%)

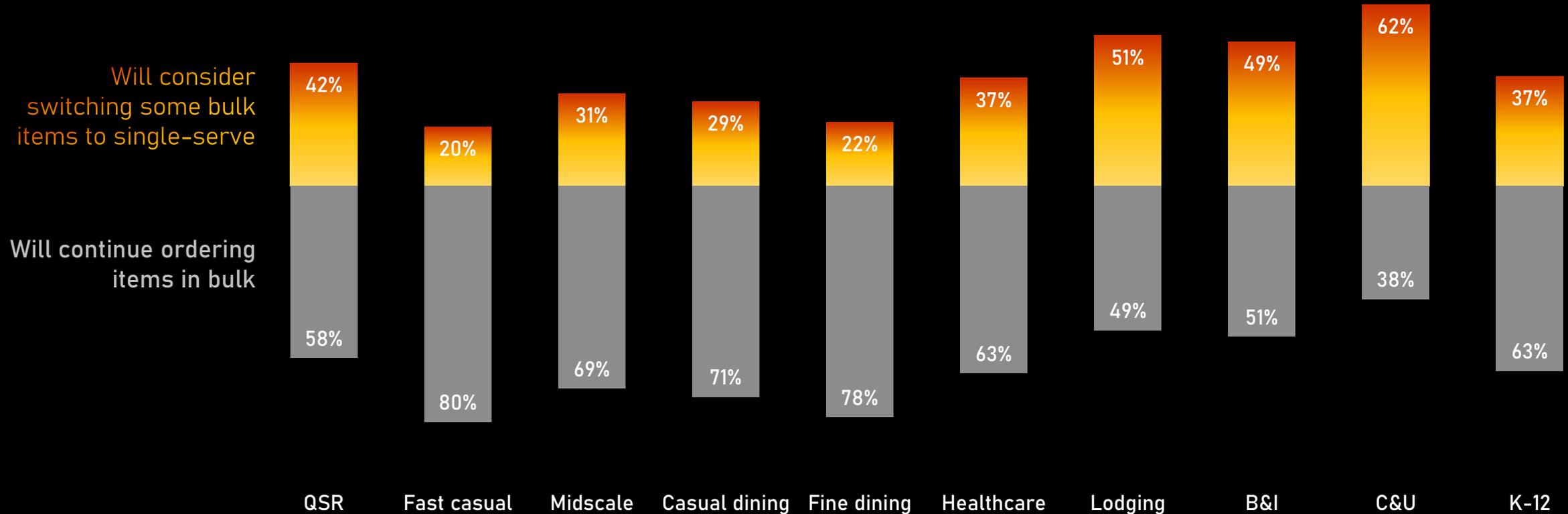


63%
I will continue ordering
items in bulk

greater among restaurant
operators (72%)



On-site operators, including lodging, business, and college, are most likely to make the switch to single-serve.



are you considering switching any bulk items you purchase to single serve for efficiency or reduced employee contact with ingredients?

HOW DO YOU PLAN ON CHANGING YOUR SANITATION PROTOCOLS IN THE BACK-OF HOUSE?

“Temperature testing... Must wear mask... Must wear gloves... Stricter uniform cleanliness... Stricter personal hygiene... New chemicals for dish scullery... New hand-washing logs... New, timed cutting board sanitizing... Bleach soak for cutting boards & clean up...”

- Healthcare, Idaho

“We will sanitize all high touch areas every two hours, run utensils through the dishwasher every two hours, wear disposable aprons that can be changed when changing jobs (such as prepping mise en place items prior to service hours and then switching to line work). We will take temperatures of all staff when they first arrive for each shift as well as ask if anyone has symptoms or been around someone who has.”

- Casual dining, Michigan

“More frequent cleaning of surfaces . Having supplies and sanitation supplies easier to access and busy times. Have a person dedicated to this duty.”

- Midscale dining, California

“Hospital - hosts are cleaning transport carts after each delivery run to nursing units. Prep cooks are sanitizing stations more frequently. Cooks are wearing masks. Food deliveries are kept out of our kitchen stocking area for a period of time and sanitized prior to bringing in, breaking down and stocked. Stockers are washing hands after breaking down boxes prior to putting foods away in kitchen.”

- Healthcare, Wisconsin

“Shortening cleaning intervals on checklists, putting lead cook in charge of enforcing tighter sanitation procedures. “

- Casual dining, Illinois



MANUFACTURER ROLE

Low purchase minimums and sanitation solutions are most helpful.

Operators are feeling the strain of decreased traffic—when possible, lower purchase minimums could help relieve financial pressure. Solutions in sanitizing and safety are also a welcome relief for operators navigating the new COVID landscape.



what help would you like from manufacturers & distributors?



WHAT EXPERIENCES WITH YOUR SUPPLIERS HAVE STOOD OUT TO YOU SINCE COVID-19 RESTRICTIONS HAVE BEEN PUT IN PLACE?

Communication and transparency are key.

“GFS has been sending out updates as to supply chain issues, specials on their inventory items, tons of information regarding state and federal guidelines. US Foods has had some amazing webinars available, such as re-opening your business, cash flow calculators, as well as making consultants and chefs available to help those businesses that stayed open to pivot from in store dining to carry out and delivery.”

- Casual Dining, Michigan

“My rep has made a point to send out emails to let us know of items that are low in stock. He has also shown what could be used as a substitute for those items that are low in stock. He has personally been on the phone with me to let me know what is available and in what quantities.”

- Healthcare, Missouri

“The sales staff have all gone extra steps to address shortages and offer alternatives. Brutal honesty has been the best policy to allow future planning and I have appreciated this a lot. Shortages and restrictions have and continue to impact negatively.”

- Midscale Dining, Georgia

“Our primary vendor does not show what items are 'out of stock' when looking for items. I have to place my order and then receive an order confirmation which lists 'out of stock' items. Then I have to try and find substitutes that will work in my setting. Finally, I have to call customer service to see if the substitutes are 'in stock'. It has become a much more time-consuming process to finalize my order. Why can't they set up an item list to indicate items not available at this time?”

- K-12, Massachusetts

“They are running out of more products that they never did before. There are less people in their offices to communicate with us about changes in orders and their inventory or lack there of.”

- Fine Dining, California



help is noticed and appreciated.

“

I think [manufacturers and distributors] have done wonderfully considering there was no precedent for how to handle this.

”

”

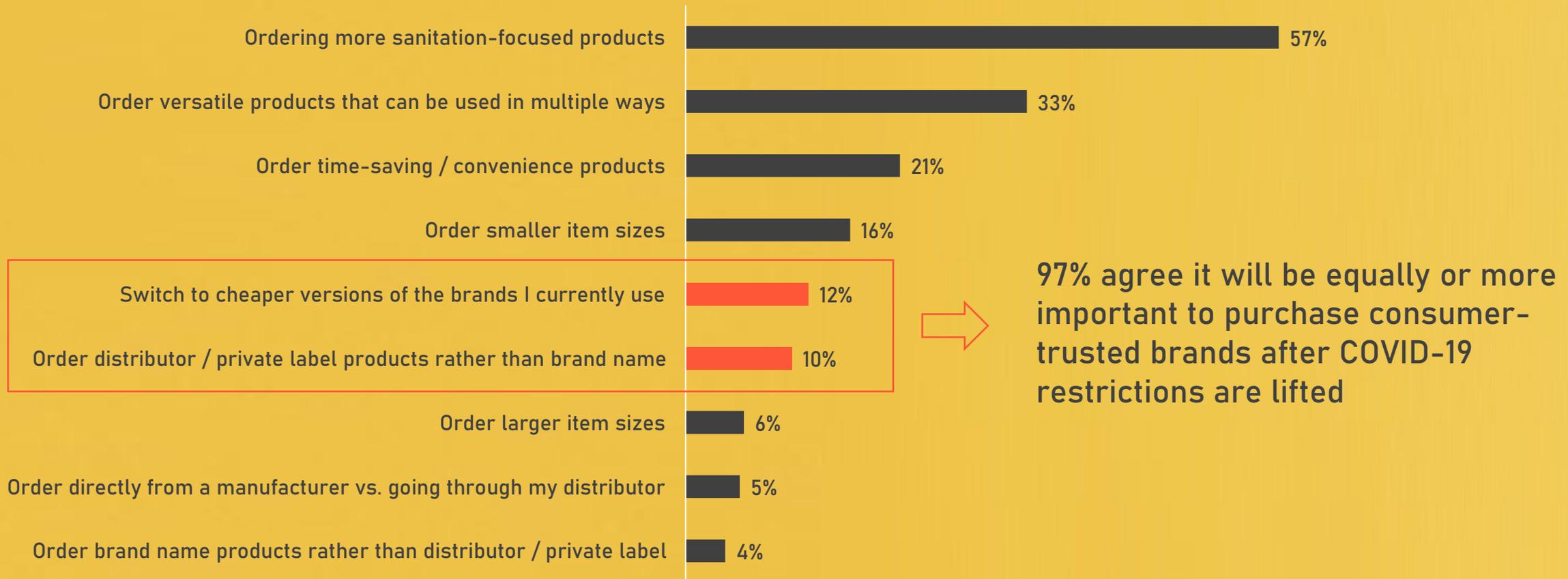
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Name brands aren't going anywhere, and versatile products will have an edge.

Operators are dedicated to maintaining their pre-COVID quality standards and few would consider switching to cheaper brands or distributor brands. However, versatility or time-saving features may be a differentiator, along with safety or sanitation focused products. Manufacturers should highlight all the ways their products can be used.



what things are you more likely to do for your operation going forward as a result of the covid-19 restrictions?



Operators need help forecasting demand.

Figuring out order frequency and the appropriate staff levels are difficult for operators as consumers' away from home eating habits have shifted. There are also concerns around the cost of to-go packaging and 3rd party delivery fees. Additionally, operators need help upselling and maintaining product quality during delivery.

during the COVID-19 restrictions, what challenges are you having with takeout and delivery?
among restaurants offering takeout or delivery

I never know how many orders will come in and when, hard to prep for the day	55%
It is hard to figure out how much staff I need to keep up with demand	54%
Cost of to-go packaging / materials	43%
Delivery app commissions are too expensive	35%
Reliability of third-party delivery drivers	35%
Upselling (getting customers to add drinks, desserts, appetizers, etc.)	32%
Ensuring product quality / integrity when consumer receives product	30%
Maintaining distance between customers	29%
Figuring out how to maintain social distancing between staff	28%
Issues continually sanitizing work and customer spaces	27%
Creating a menu that's suitable for takeout / delivery (e.g., foods that travel well)	27%
Figuring out how to maintain social distancing between staff and customers	26%
Finding packaging that is easier to sanitize / safer	20%
Third-party delivery apps are difficult to use	12%
Difficulties setting up online ordering capabilities	11%





You still have time to defend (or capitalize) on an operator's product shifts.

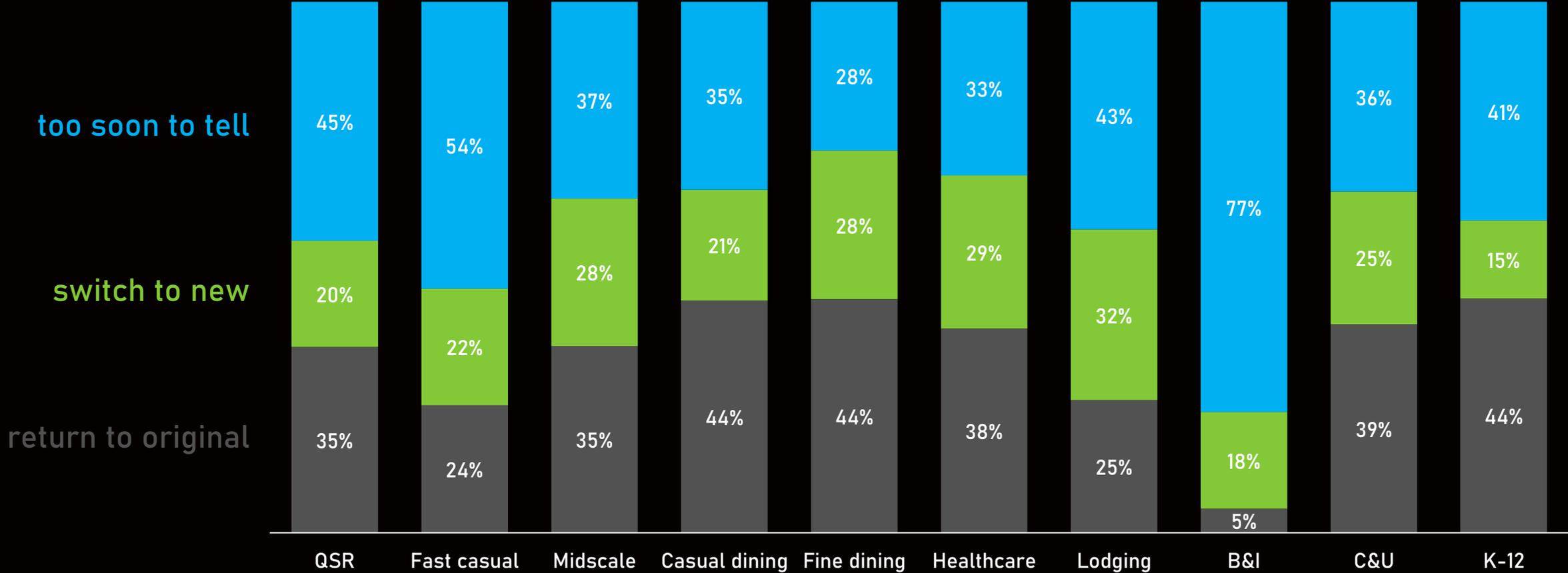
Operators are in an extreme state of flux. Only a third are sure they'll return to using their legacy products. Since operators are still in the midst of planning the return to 100% capacity, there is still time to sway operators if they had to switch products during COVID-19.

once stay-at-home orders are lifted and business starts to return to normal, will you return to using all your original product, or continue using some of the new products you've needed to use?

Return to using all your original products	34%
Continue using some of the new products you've needed to use	24%
Too soon to tell	42%

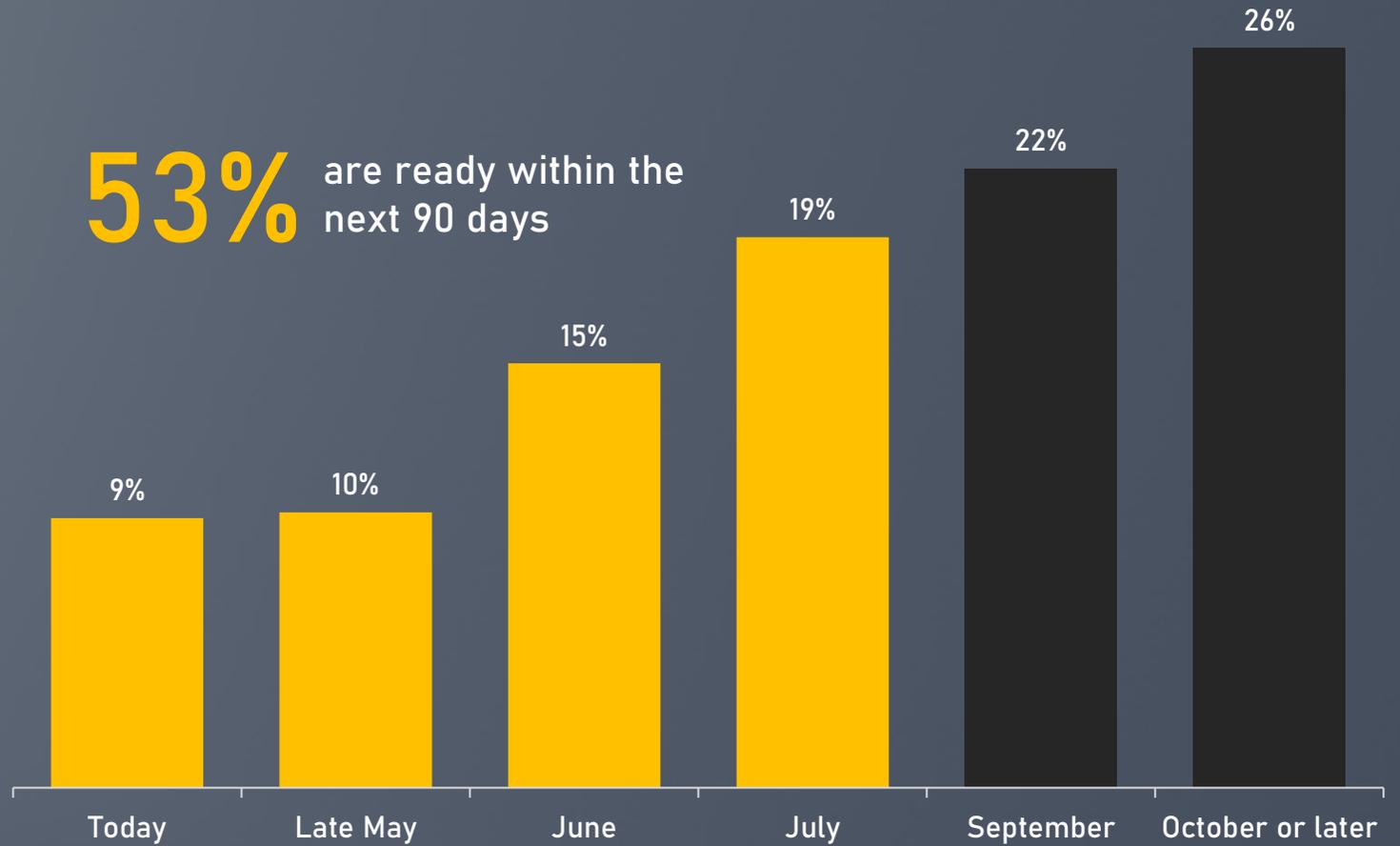
Fast casual and B&I operators are most undecided about product switching.

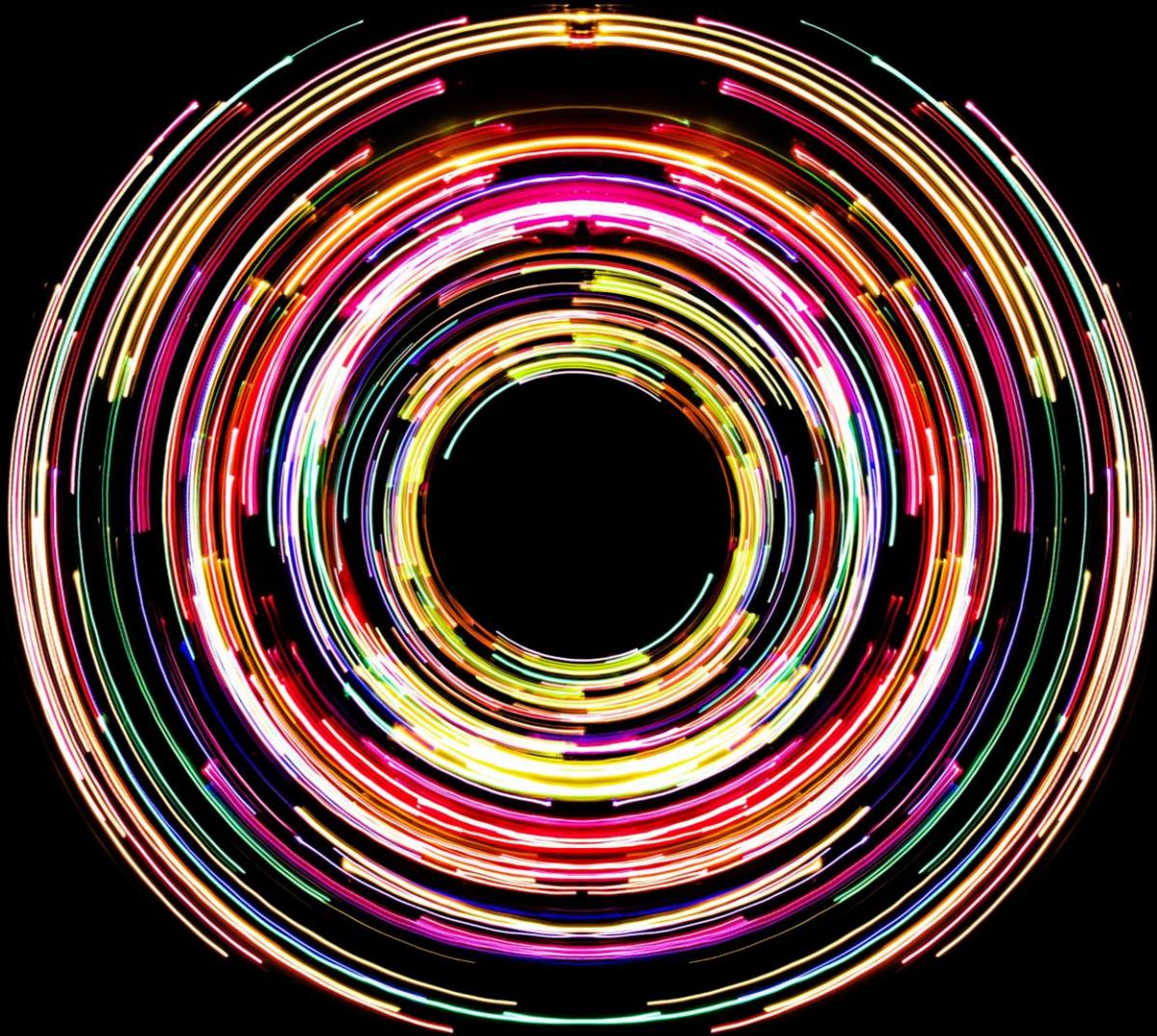
once stay-at-home orders are lifted and business starts to return to normal, will you return to using all your original product, or continue using some of the new products you've needed to use?



— when will you be ready to talk to foodservice manufacturers about new products & innovation?

53% are ready within the next 90 days





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questions? want to learn more?
email onetable@datassential.com