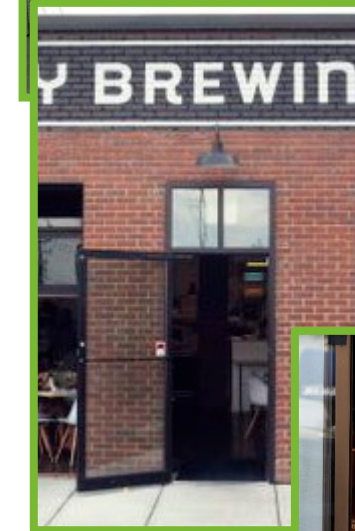


What To Expect From Restaurants When They Re-open

NEW DEFINITION OF HOSPITALITY

As restaurants dining rooms reopen, consumers will come back, but they will want some **reassurance**. **Sanitation** and social **distancing** are **key**, but don't just talk about it, demonstrate it. They need to see everything. Businesses will have to **prove** to customers that they are safe. Visible frequent cleaning will be a must – from common areas to menus. Assurance of social distance is also prerequisite. Restaurants that **go above and beyond** may be more attractive to diners as they ease back into “normal” eating habits.

Consumers won't be quick to abandon COVID learned behaviours like social distancing and extra sanitizing. Many will also avoid open and uncooked foods. When it comes to staying safe at restaurants, diners are appreciative of just about anything that keeps them away from others and minimizes exposure to the virus.



Many of these will vary by province and operator.

Dining in

- Partitions between tables.
- 50% capacity or limit on number of customers (based on size of facility).
- Sanitizer / wipes at every table to encourage guests to wash their hands or use hand sanitizer when entering and leaving.
- Surfaces sanitized after every meal.
- Controlling access to the dining area, by asking guests to wait to be seated.
- Common areas deep-cleaned daily.
- No shared condiment bottles on tables (ketchup, mustard, hot sauce, etc.) – single-use packets only. In Alberta, restaurants have been asked to remove table condiments and other frequently touched items (for example, salt and pepper shakers, ketchup, hot sauce).
- In the summer restaurants with patios will attract more customers. Makeshift patios?
- Controlled or no buffet or self-serve options.
- Mark floors to show physical distancing in areas where line-ups occur.
- Provide signage and guidance to guests regarding ordering and mobile orders.

Menus

- Reduced or adapted menus options.
- The physical menu might look different. From disposable to digital on your phone through a QR code.
- Reusable menus disinfected between every usage.

Off-Premise

- More offering delivery through third party .
- Tamper-proof safety seals on takeout.
- Curbside is here to stay.
- Will continue to offer family-size/bulk meal options.
- Will continue to offer take and bake options

Operations

- More ghost/commissary-kitchen restaurants.
- Some kitchens using face spit guards below the chin instead of face masks.
- Less staff.

Research

Diners are all right with a smaller menu.

For operators needing to pare back their menu offerings because of **product shortages**, fewer **available cooks** and **servers**, or having pivoted to what's best for delivery and carryout, there's some good news: Customers won't necessarily be upset if dining rooms open up with a limited menu at first. It's another opportunity for a restaurant to be transparent about why some quarantine-era changes persist. Consumers will likely appreciate the fact that their local operators are open in more ways than one.

HOW DO YOU FEEL ABOUT
RESTAURANTS OFFERING A
REDUCED MENU INITIALLY?

76%

I HAVE NO
PROBLEM WITH
THIS

Greater among
**BOOMERS (87%) &
CONSUMERS
UNWILLING TO
DINE OUT RIGHT
AWAY (84%)**

24%

I WOULD BE
DISAPPOINTED

Greater among
**GEN Z (43%),
SINGLES (30%), &
CONSUMERS WHO
WOULD DINE OUT
RIGHT AWAY (84%)**

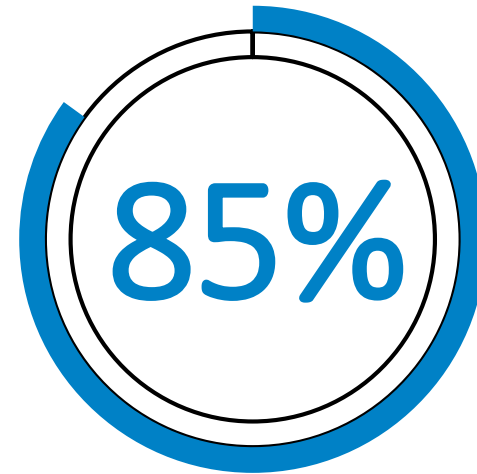


DELIVERY & TRUST

(Pre-Covid)

1 in 4

drivers admit to eating food
from an order.²



of consumers said they'd
like restaurants to invest in
"tamper-evident labels".²

Source 1: Restaurant Directions – Technomic – Off-premise Packaging Study

Source 2: Today.com - US Foods - 1,518 consumers & 497 drivers



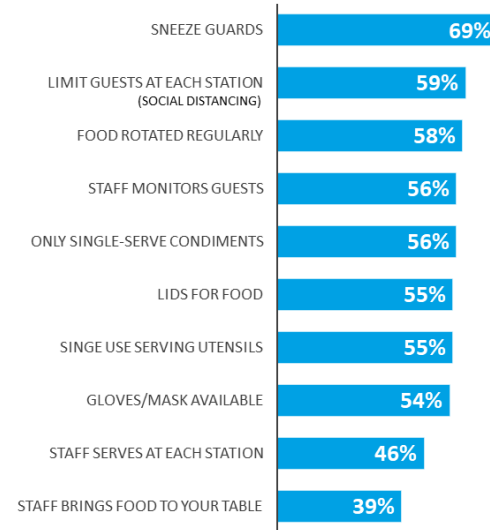
FOODSERVICE & COVID-19
INSIGHTS TO HELP OPERATORS GET THROUGH THIS DIFFICULT PERIOD

BUFFETS IN AN ERA OF COVID

WHICH OF THE FOLLOWING DO YOU FEEL TRULY
COMFORTABLE/SAFE DOING?¹



WHAT CONSUMERS ABSOLUTELY REQUIRE TO
CONSIDER A BUFFET²



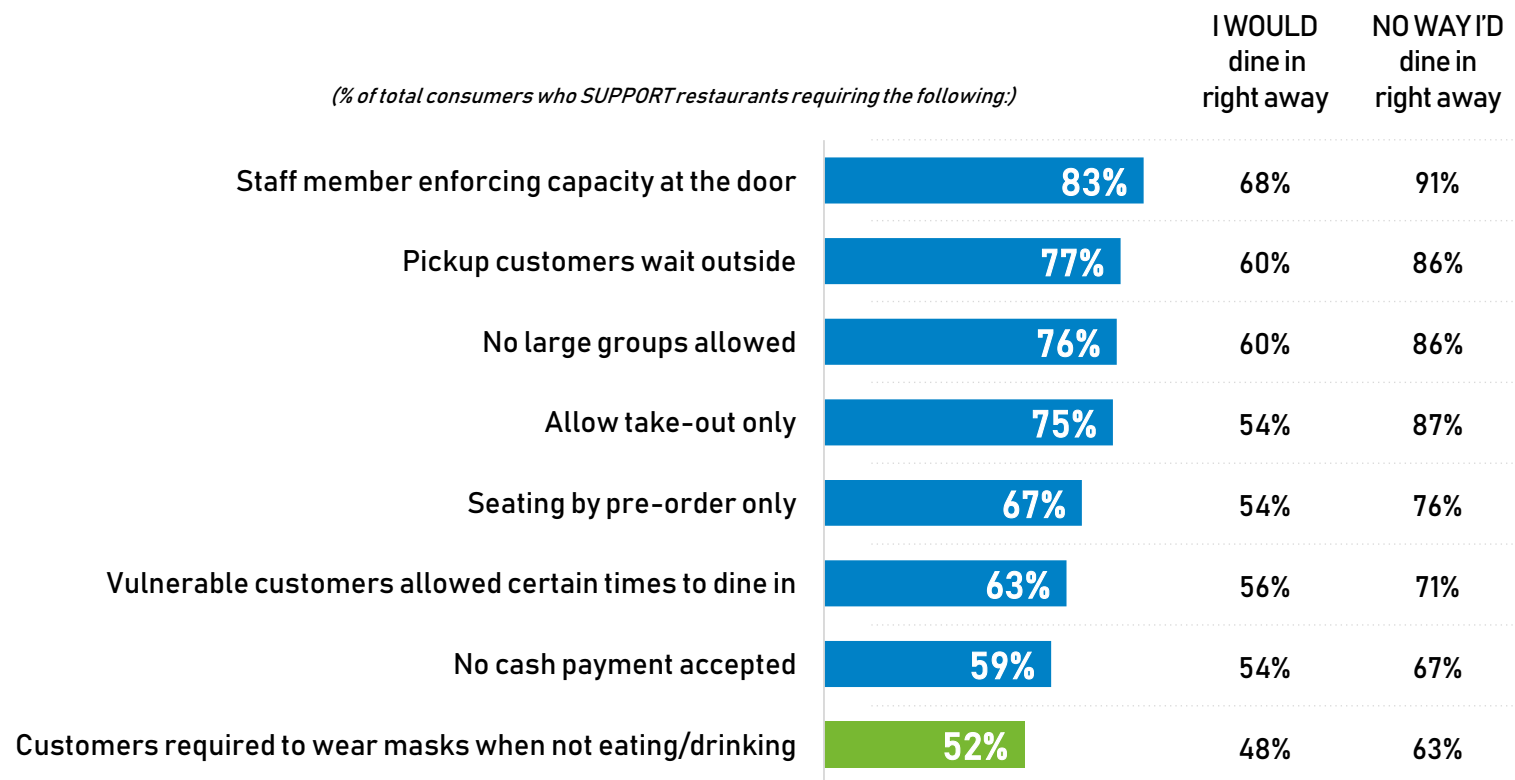
Consumers view buffets as one of the highest risk environments with food away from home. At least in the short term, buffets are going to need to make changes and reinvent themselves. What can buffets do to provide a safe experience that goes beyond the absolute basic requirements?

#FOODIESUNITE

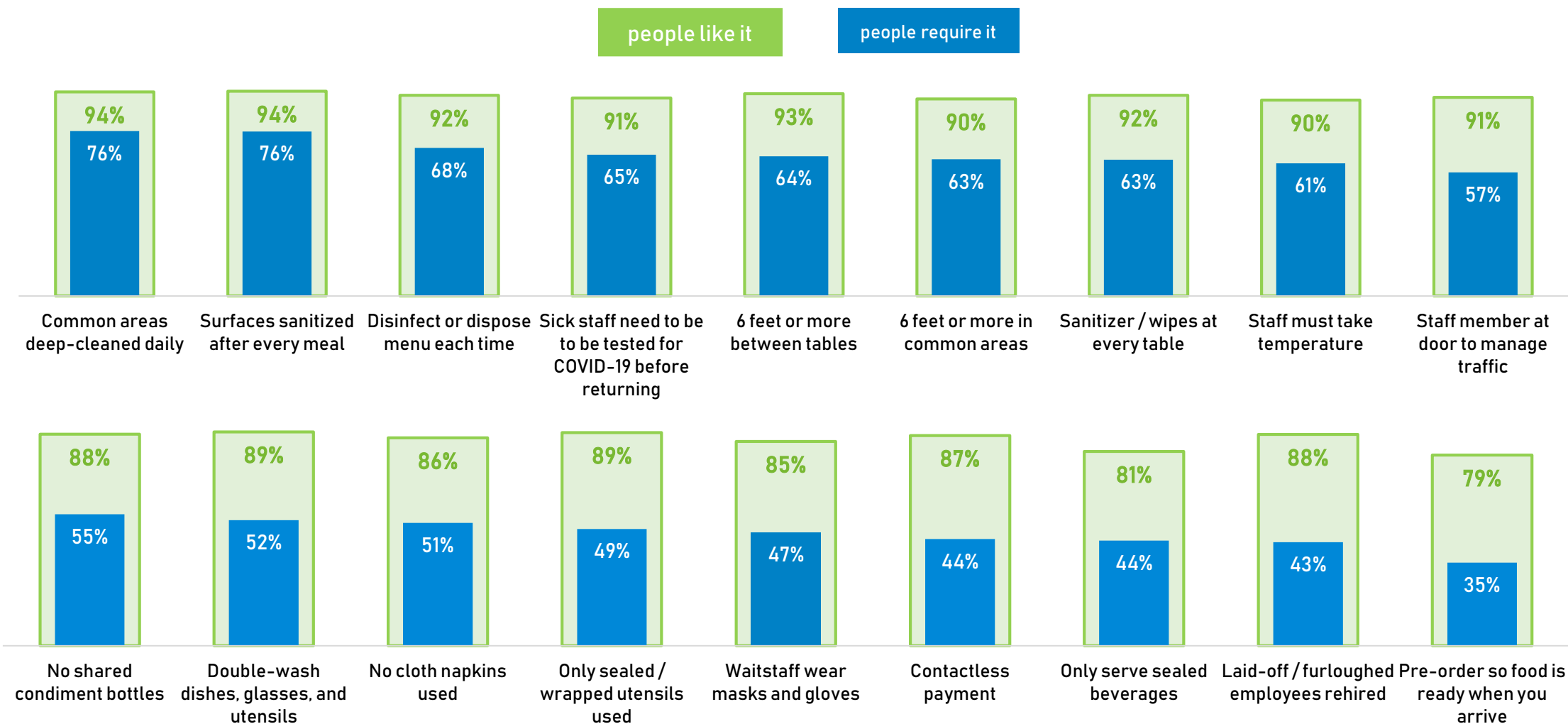
Source 1: Datassential: COVID-19 Report 17 - 5/8/2020
Source 2: Datassential: COVID-19 Webinar 7 - 5/13/2020

Sysco
At the heart of
food and service

WHICH WOULD YOU SUPPORT TO ENSURE YOUR SAFETY DINING IN AT A RESTAURANT?



HOW DO CONSUMERS FEEL ABOUT THE FOLLOWING SAFETY MEASURES?





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?

greater among fine dining operators (67%)

46% Yes, I plan to have the SAME number of staff

48% No, I plan to have LESS staff

6% No, I plan to have MORE staff




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.

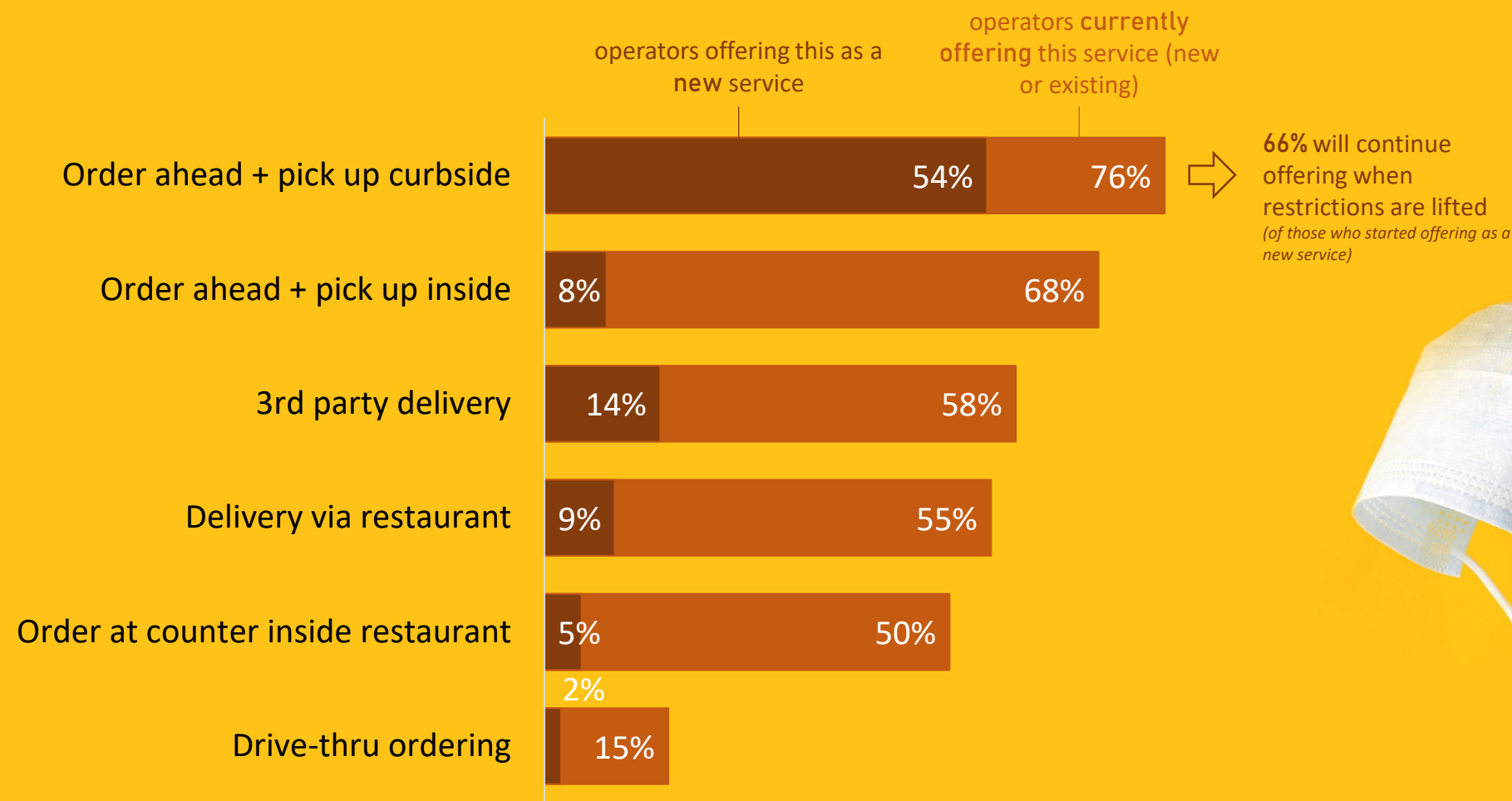
Operators are adapting to the new normal and are ready to make the changes necessary to keep employees and customers safe. Whether that's additional employee training or daily temperature checks, they are willing to do what is necessary to protect employees.

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

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

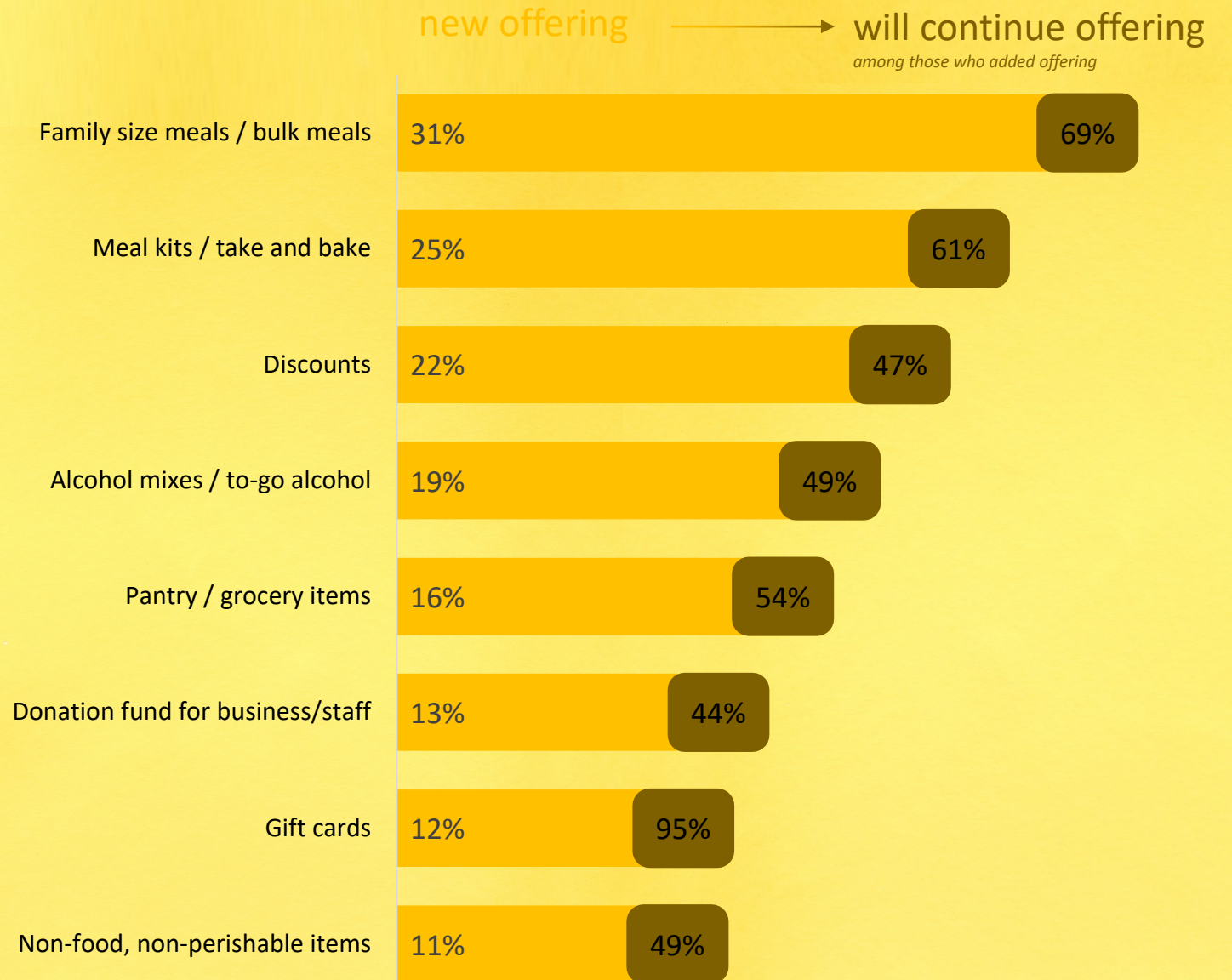
Almost all operators had infrastructure for some kind of takeout, but curbside's safety benefits have made it the hot option for pick-up in the time of social distancing. Most operators who have added it plan to keep the option.



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

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.



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

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.

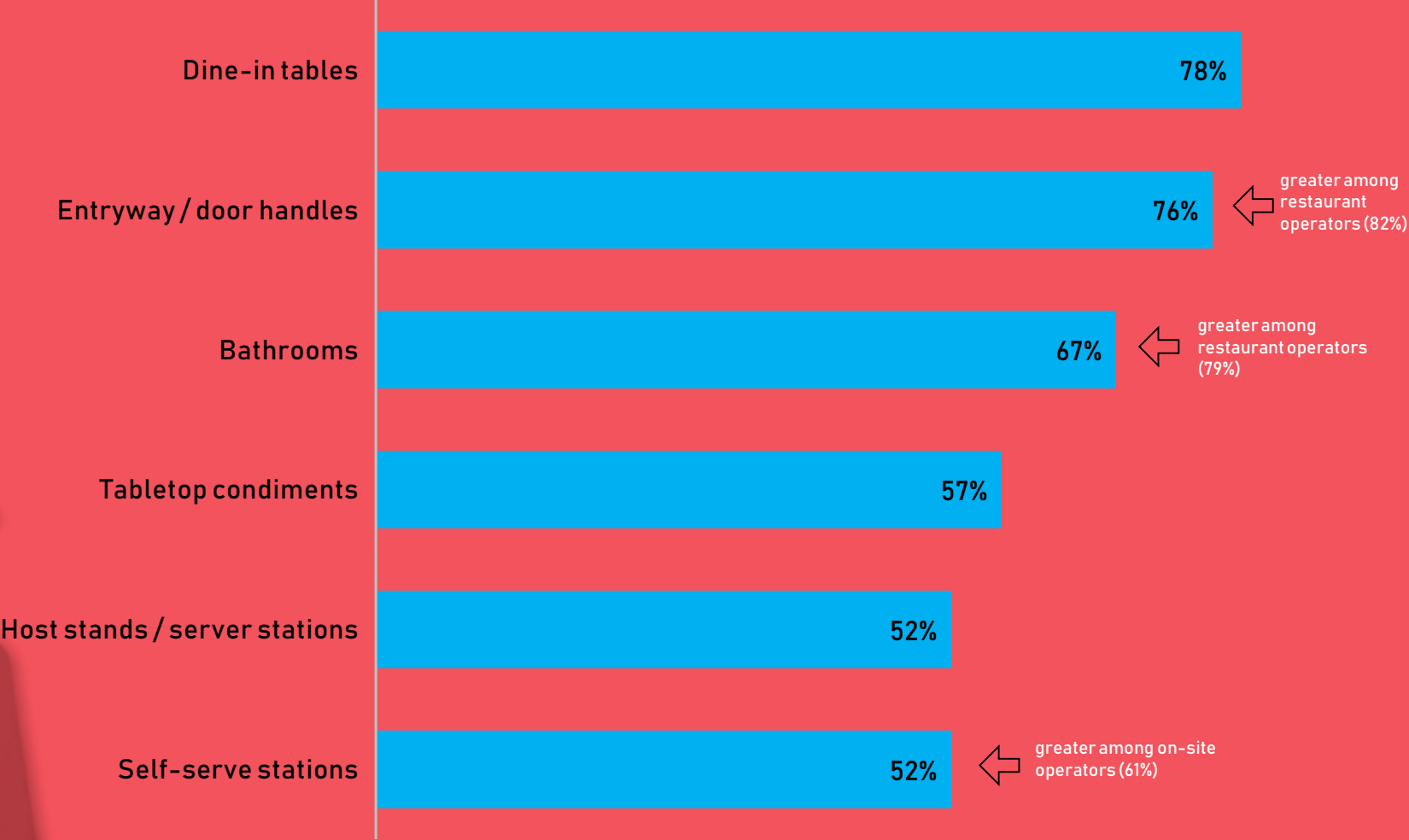
FRONT-OF-HOUSE CHANGES...	ALREADY DOING / PLANNING TO DO THIS	WOULD CONSIDER IT	UNLIKELY TO DO IT
Visibly wiping down and sanitizing tables, kiosks, menus, handles, etc.	85%	11%	4%
Providing and requiring employees to wear gloves	73%	17%	11%
Removing condiments bottles from tables	58%	27%	15%
Providing 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?



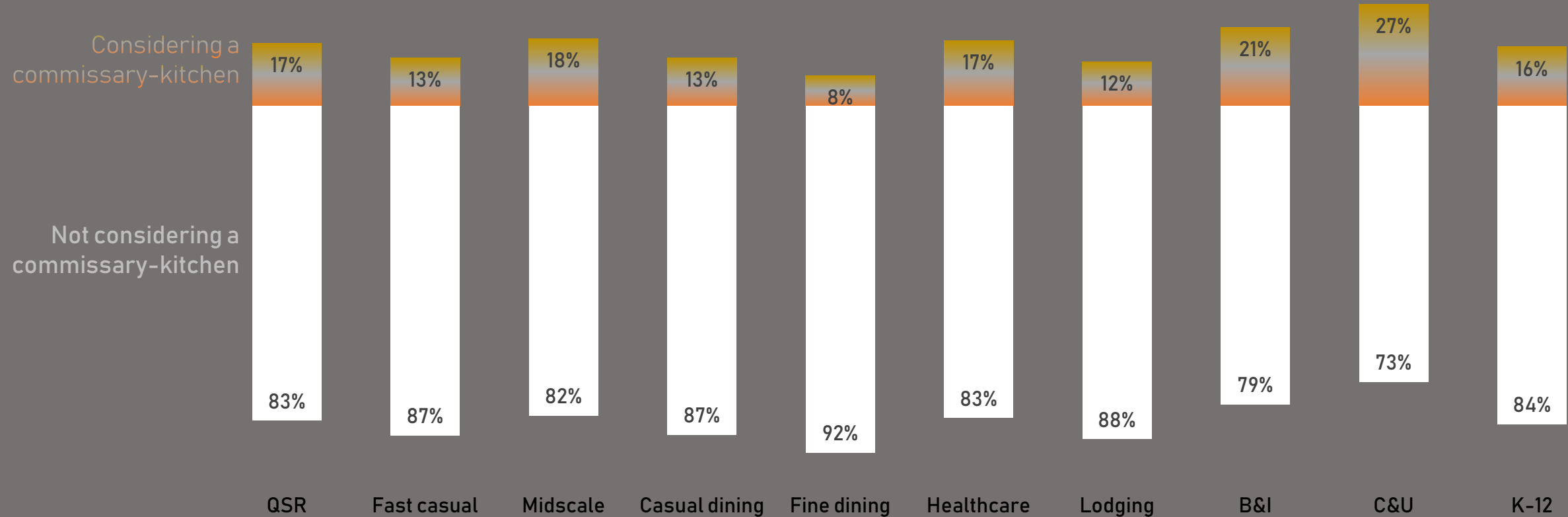
Everything will be sanitized more.

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?

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?