

Snapback Insights & Trends

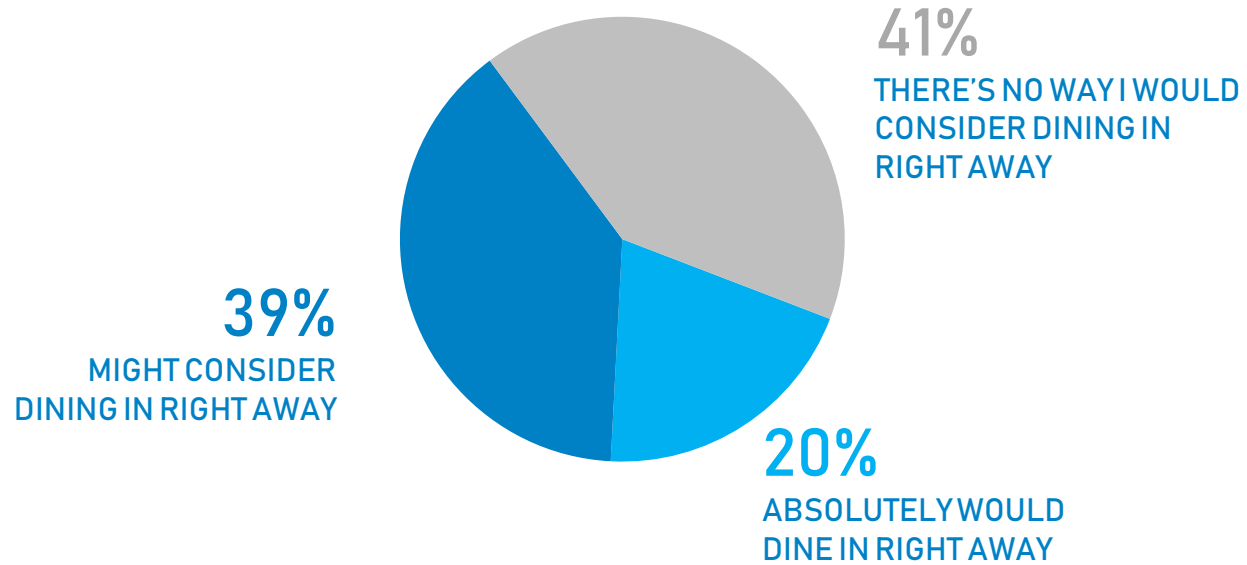
FOODIES
UNITE

OVERVIEW OF RESEARCH

1. When restaurants reopen, what % of consumers will consider dining in?
2. How long do consumers anticipate the Coronavirus will impact their restaurant dining out behaviour?
3. How do consumers feel about restaurants offering a reduced menu initially?
4. What considerations do consumers have when selecting a restaurant?
5. When choosing restaurants, how important are certain factors in a consumers decision?
6. How much confidence do consumers have, that the food will be kept safe from the Coronavirus from certain operators?
7. What are consumers ordering takeout food from restaurants are most worried about? And, what would they want to know that the restaurant was doing to handle their food safely?
8. Insights on delivery and perceived safety.
9. What measures would consumers support to ensure their safety while dining in a restaurant?
10. How do consumers feel about the certain safety measures? Which are a must and which are nice to have?

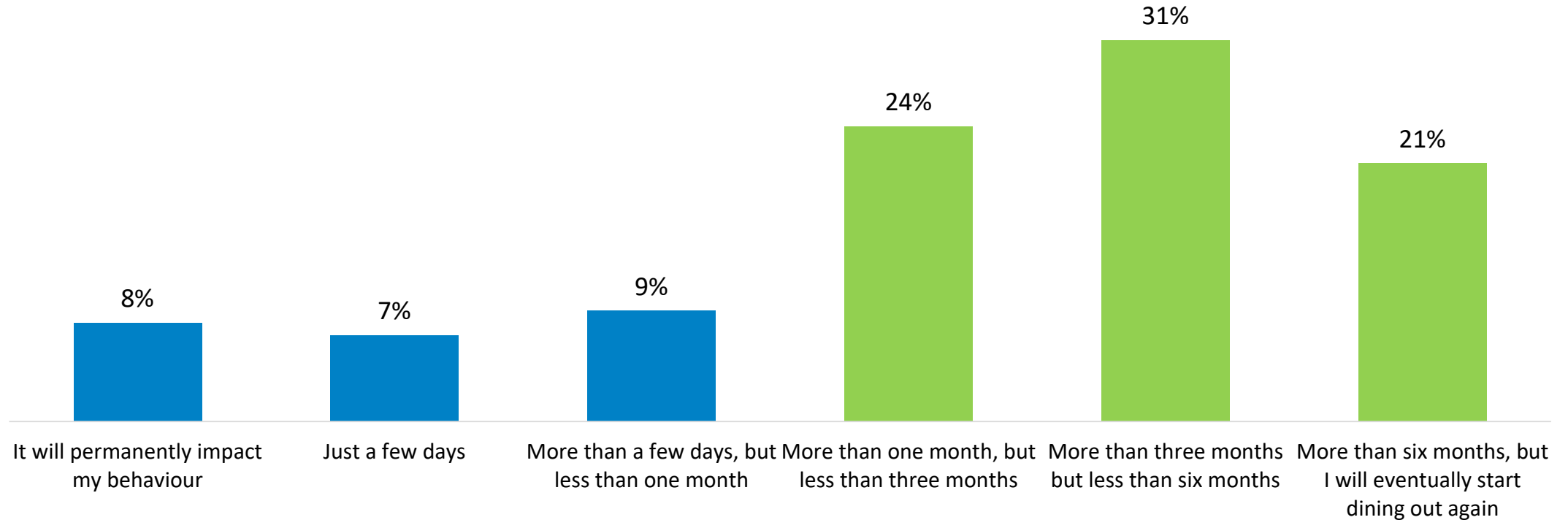
WHEN RESTAURANTS REOPEN, CONSUMERS WILL CONSIDER DINING IN.

More than half of diners would at least consider dining in at a restaurant right away after it reopens. Males, Millennials and households with kids are more likely to be ready as soon as they open.



	Gen Z	Millennials	Gen X	Boomers
Absolutely	25%	31%	18%	10%
Might	46%	35%	37%	42%
No way	30%	34%	44%	48%

HOW LONG DO YOU ANTICIPATE THE CORONAVIRUS WILL IMPACT YOUR RESTAURANT DINING OUT BEHAVIOUR?



Most consumers believe that it will take between **2 to 5 months** for them to return to **previous dining-out behaviours**. This reluctance to envision revisiting restaurants anytime soon is likely due to Canada still being in the middle of the country's coronavirus battle.

Diners are all right with a right-sized 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%

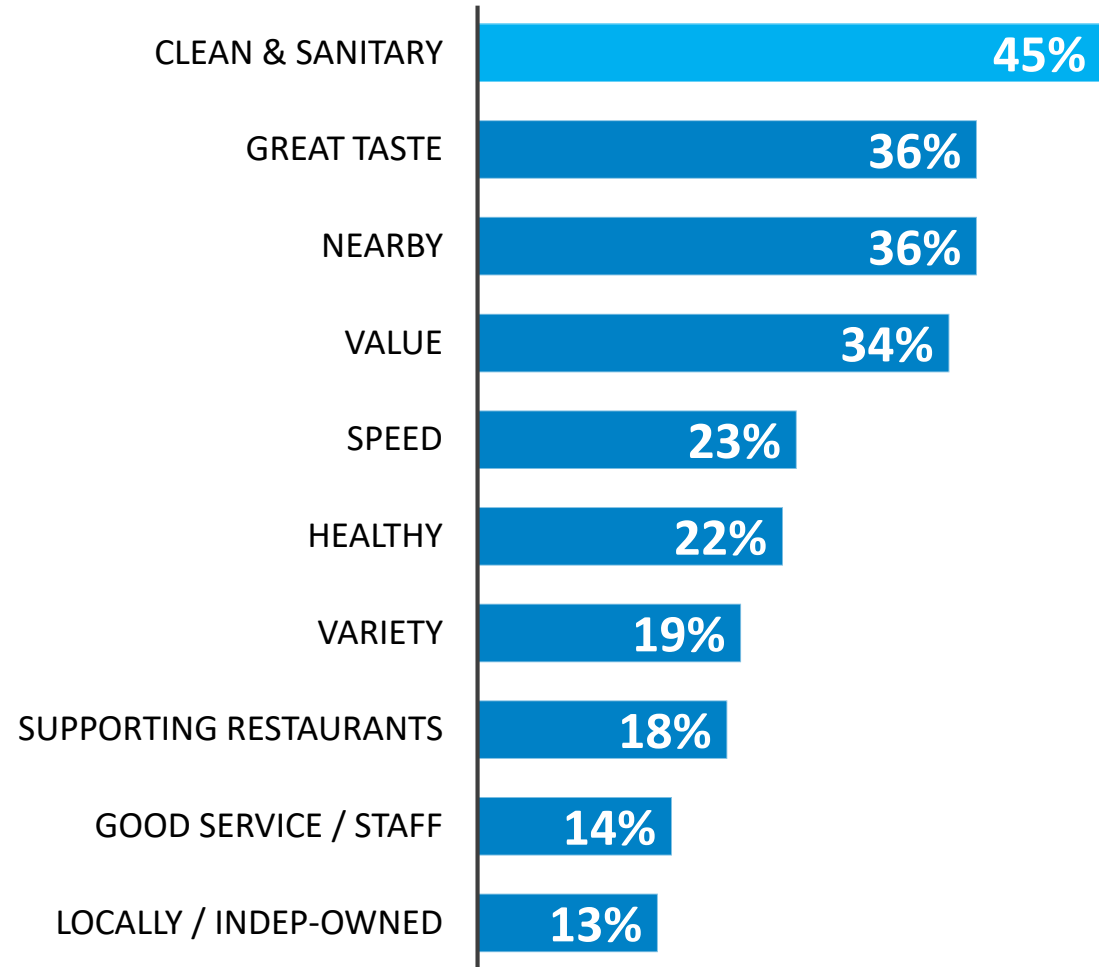
I WOULD BE DISAPPOINTED

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

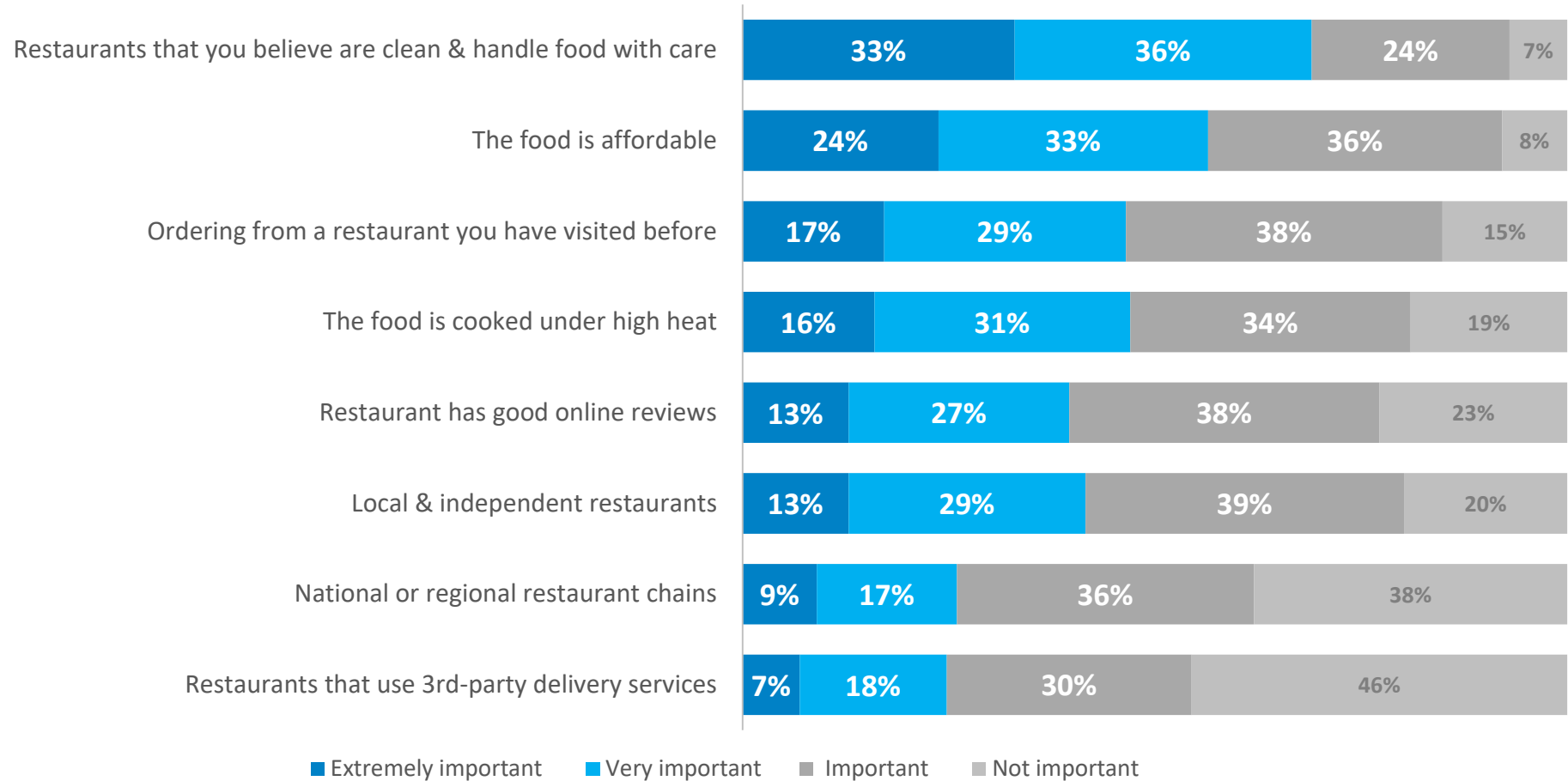
CLEANLINESS BEATS TASTE

In regular times, “great taste” is the primary attribute consumers care about when selecting a restaurant. But these aren’t normal times. With the Covid-19 pandemic, what are consumers looking for?

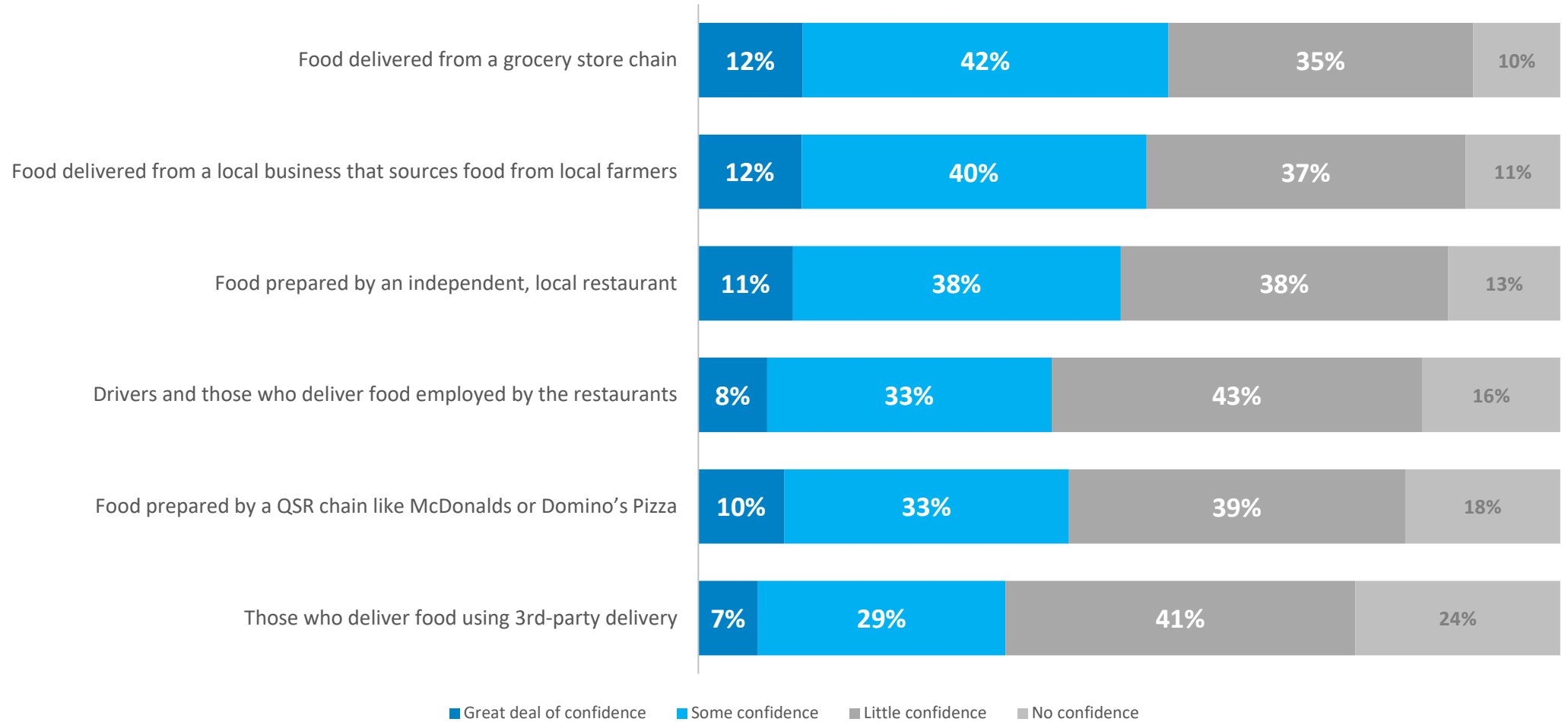
CONSIDERATIONS WHEN SELECTING A RESTAURANT



WHEN CHOOSING RESTAURANTS, HOW IMPORTANT ARE THE FOLLOWING FACTORS IN YOUR DECISION?

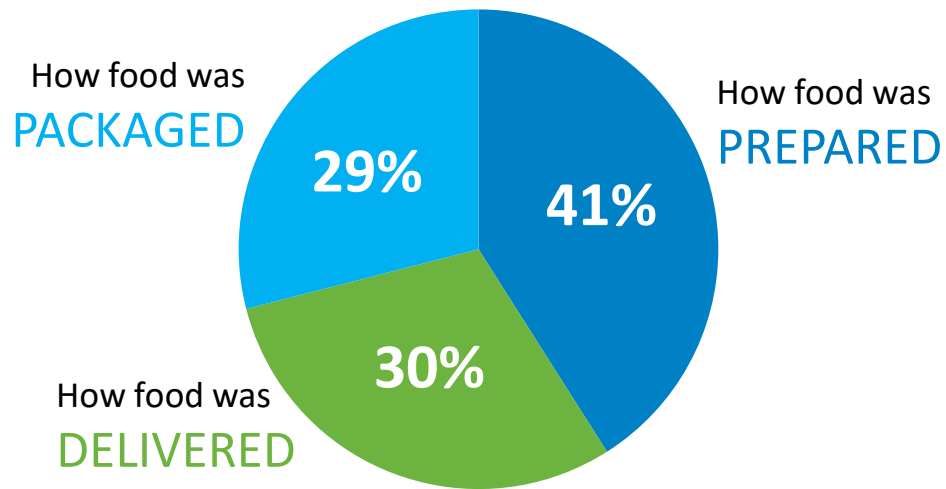


HOW MUCH CONFIDENCE DO YOU HAVE, THAT THE FOOD WILL BE KEPT SAFE FROM THE COVID FOR THE FOLLOWING?





CONSUMERS ORDERING FROM RESTAURANTS ARE MOST WORRIED ABOUT



IF ORDERING DELIVERY/TAKEOUT, WHAT WOULD YOU WANT TO KNOW THE RESTAURANT WAS DOING TO HANDLE YOUR FOOD SAFELY?

- 62% Sending sick staff home
- 61% Requiring kitchen staff to wear protective equipment
- 54% Requiring delivery & food packing staff to wear protective equipment
- 46% Tamper-proof seals on food packages
- 44% Contactless food delivery
- 43% Fewer staff in kitchen
- 40% Signage about sanitation/food safety procedures
- 39% Pack food in wipeable/cleanable containers
- 37% Include disinfectant wipes with each order
- 31% Individually-wrapping each part of my order



DELIVERY & TRUST

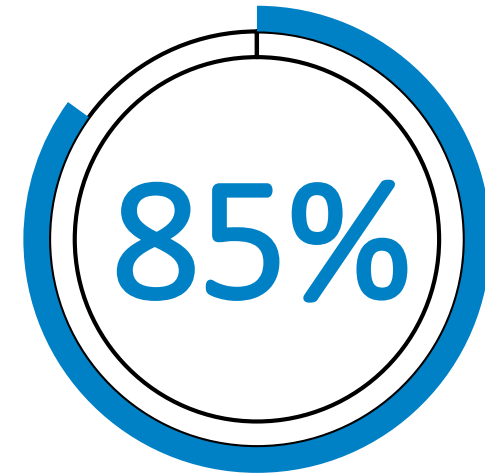
(Pre-Covid)

1 in 4

drivers admit to eating food
from an order.²

1 in 3

consumers would like to see
labels that indicate time
their food was prepared.¹

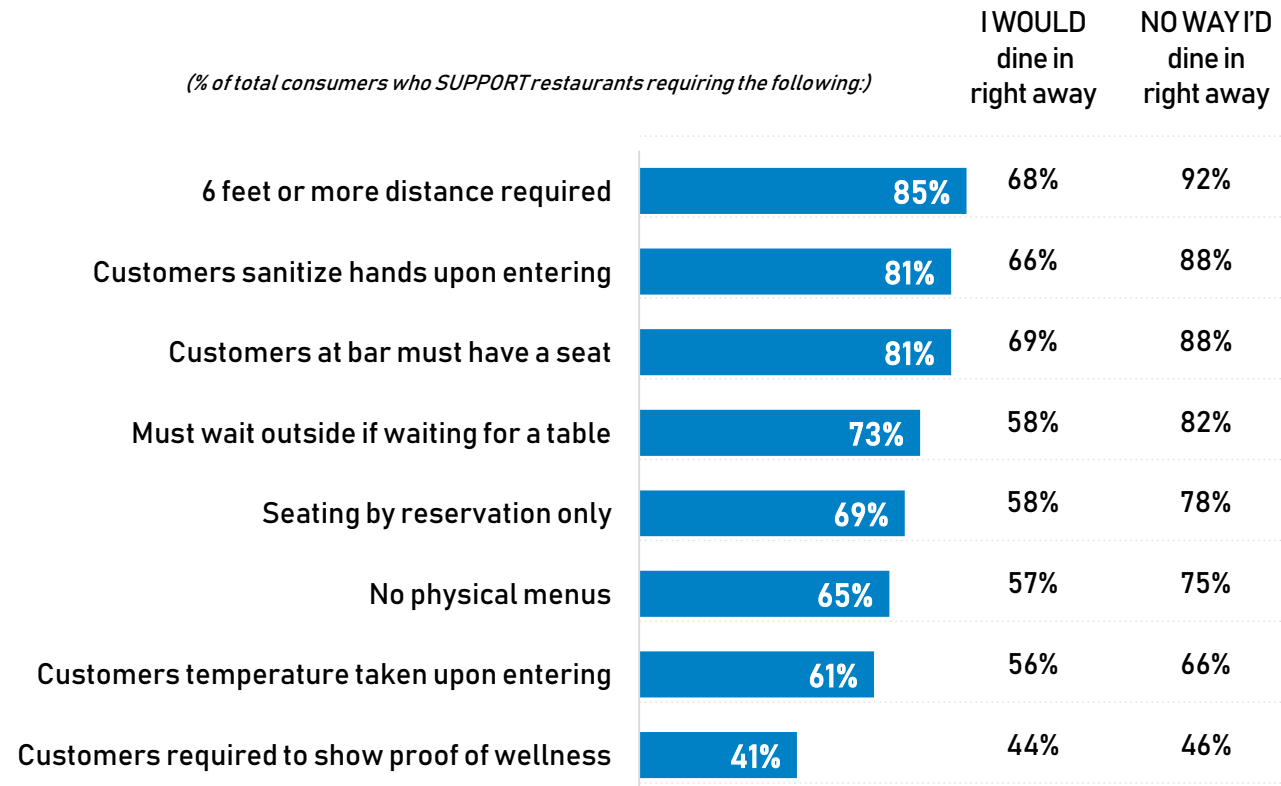


of consumers said they'd
like restaurants to invest in
"tamper-evident labels".²

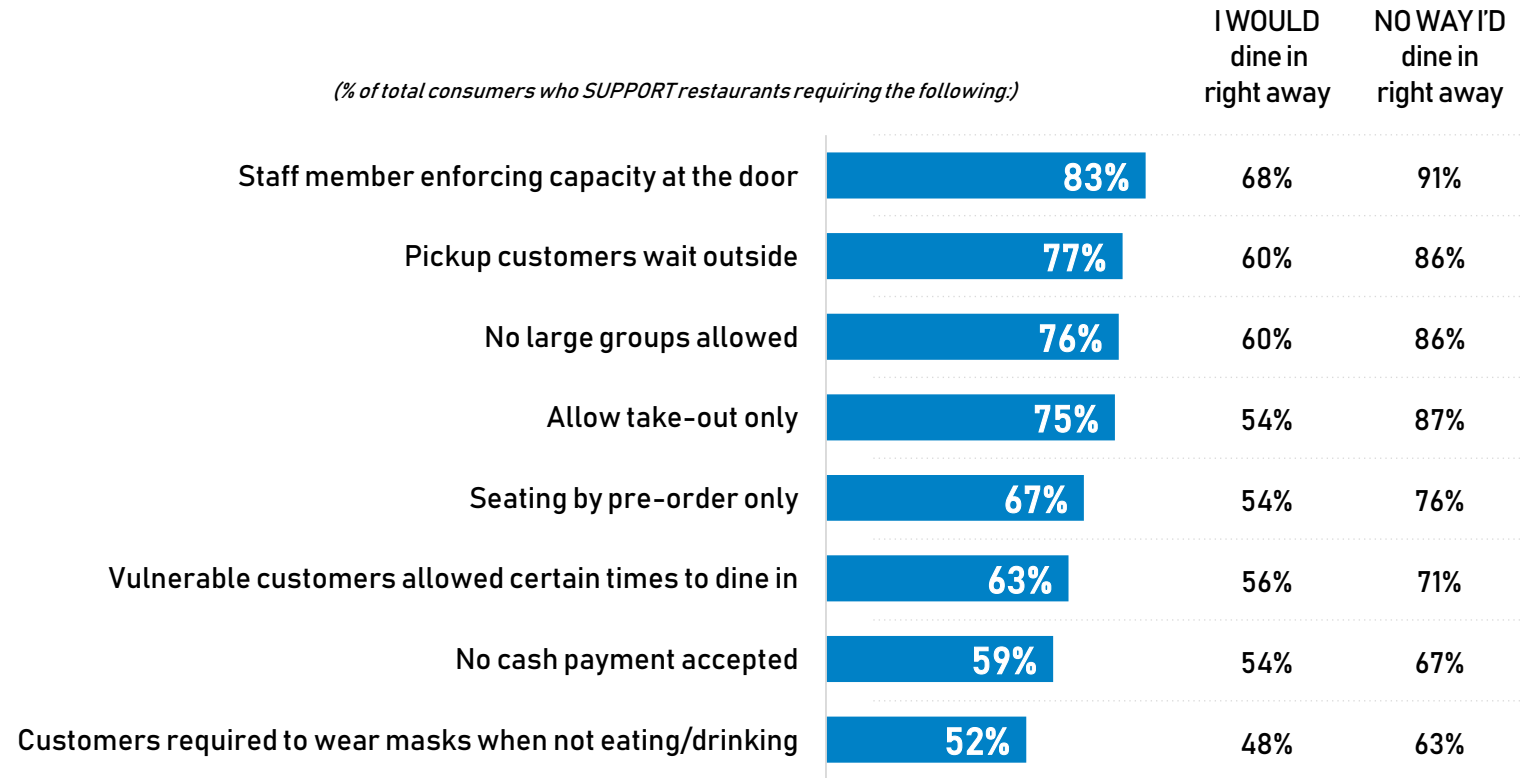
Source 1: Restaurant Directions – Technomic – Off-premise Packaging Study

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

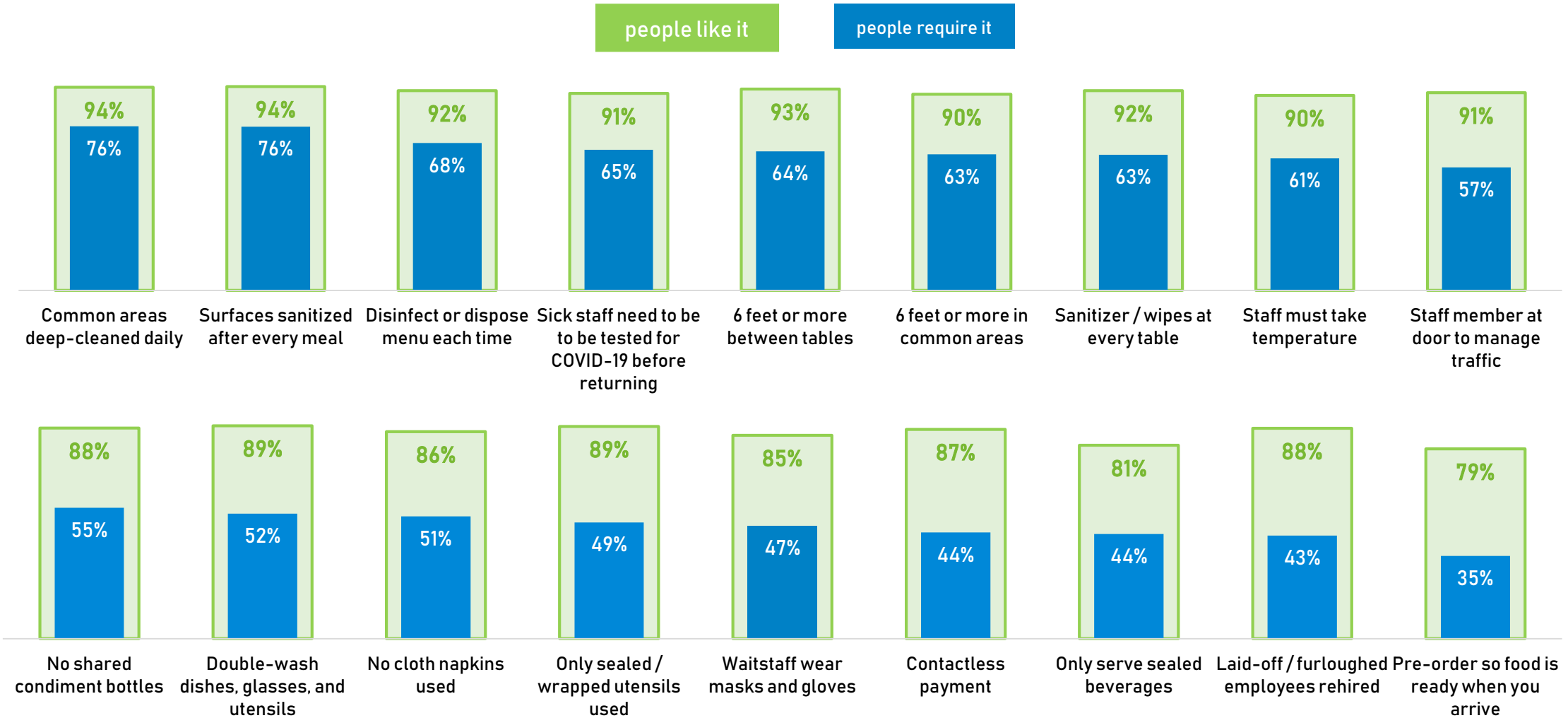
WHICH WOULD YOU SUPPORT TO ENSURE YOUR SAFETY DINING IN AT A RESTAURANT?



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HOW DO CONSUMERS FEEL ABOUT THE FOLLOWING SAFETY MEASURES?



Source: Datassential: COVID-19 Report 15 - Ready or Not – 4/23/2020 – U.S. Consumers

CLEANLINESS BEATS TASTE

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. 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.



What can your restaurant do to help ease concerns and reassure customers that their meal was handled with caution?