After weeks of confinement and cocooning, the country is GRAPPLING with how to move toward a “new normal”

**Horizon 0**
Prevention & Preparation

- Feb-Mar 2020
- Rapid shift to fear and uncertainty about the seriousness of the virus and how to prepare for “shelter-in-place”

**Horizon 1**
Confinement & Cocooning

- Mar-Jun 2020 (est.)
- Going through stages of adapting to a new, stressful lifestyle and restless for a return to normalcy

**Horizon 2**
Restricted Recovery

- Jun-Dec 2020 (est.)
- Cautiously optimistic and taking cues from others on how to balance our responses

**Horizon 3**
New Normal

- 2021+
- New behaviors form if finances, desire, and/or opportunity dictate; old behaviors return otherwise

Possible return to restricted living if COVID-19 cases spike

Varies by market based on COVID-19 impact, government actions and human response
Some states are pulling back on reopening plans as covid-19 cases surge to record levels

- Number of confirmed COVID-19 cases rising by at least 5% in 45 states

U.S. TOPS 3 MILLION CONFIRMED CASES AND CONTINUES TO REPORT RECORD DAILY CASE COUNTS

20 STATES HAVE PRESSED PAUSE OR REVERSED THEIR REOPENINGS

Source: NPR Coronavirus Map, NYT Interactive Map
Around the country...

**...JULY 4TH TRAVEL VARIED**

July 4th travel busier than expected
- July 3rd busiest day for road trips so far this year
- U.S. air travel up 90% vs. last month, but still down 70% vs. YA

States’ COVID-19 rates impacted the amount of travel happening
- States currently seeing surges of infections saw travel rates 10% below national avg.
- States with low or decreasing Covid-19 cases nearly doubled rates of travel

**...AS CASES CONTINUE TO RISE, STATES ARE RESPONDING**

- Texas ordered re-closure of bars & restaurant capacity reduction to 50%
- Restaurants in Miami-Dade County in ordered to shutter dine-in services
- Governor of NJ signed executive order mandating face coverings outdoors
- Arizona orders gyms, bars/nightclubs and entertainment venues including cinemas & waterparks to reclose

**...AS FALL 2020 COMES INTO VIEW, SCHOOLS ARE LEFT IN LIMBO**

Schools are lacking a clear consensus of what the Fall 2020 school year will look like sparking major debates:
- Some states have announced re-openings plans, but vary widely
- The administration threatens to cut federal funding to schools that do not open in the fall
- Strong backlash to new policies affecting International students, Harvard & MIT suing Trump administration
HOW WILL THESE CHANGES CONTINUE TO IMPACT OUR FOODSERVICE CHANNELS?

Today’s Focus:

**WORK**
- B&I
- Education

**DINE**
- Restaurants

**PLAY**
- Recreation/Gyms
- Entertainment/Cinema
- Stadiums

**TRAVEL**
- US Travel
- Airlines
- Hotels
Let’s take a look at Workplace & Education

- B&I
- Education
As consumers get more used to WFH, some say ‘pros’ outweigh ‘cons’

1 in 5 consumers are working more since COVID-19 started

“Video chats mean we need to work harder to process non-verbal cues like facial expressions, the tone and pitch of the voice, and body language; paying more attention to these consumes a lot of energy... You cannot relax into the conversation naturally.”

BBC Interview with Professor Gianpiero Petriglieri

Of those who can work from home, most report being MORE effective

50% of those who can work from home, have had a mostly positive experience

65% agree they’re satisfied with their work-life balance

Source: Kantar US Monitor COVID-19 Survey June 8-14, 2020, Google Trends
Offices are starting to reopen…but is it worth it?

As of mid-June, only 15% of consumers report they’ve gone back to the office.

Employees and employers are getting more comfortable with longer-term flexible schedules.

Only 19% of consumers are ready to go back to their office immediately after shelter-at-home.

Blue collar workers have returned with distancing & PPE, white collar offices starting to slowly open.

Locations that are open must practice social distancing, extra hygiene, including:

- Mask requirements
- Temperature checks
- Limited occupancy

48% think their employer will allow it or already are working from home.

75% want to work from home at least some of the time.

76% of those employed have potential to work from home.

Source: Kantar US Monitor COVID-19 Survey June 8-14, 2020; Technomic, Inc. Planning Program 2020; Datassential Coronavirus Webinar 6-26
C&U operators are in the midst of planning for a variety of scenarios...

While most are planning to be in-person in the fall, some are proposing hybrid models

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**Recent announcements**

**Harvard University**
- 40% of undergrads on campus each semester
- Freshmen will get priority in the fall and seniors in the spring
- On campus students will live in single bedrooms
- There will be restrictions on access to dining halls and non-residential buildings.
- Students will be required to take a COVID-19 test every 3 days
- Tuition will not be discounted (despite all classes being taught remotely)

**Princeton University**
- 50% of undergrads on campus each semester
- First-year students and juniors will be on campus in the fall, sophomores and seniors return in the spring
- Breaks will be shortened to long weekends and students will leave campus before Thanksgiving, having reading periods and exams online
- In addition to regular testing and requirement of masks, social distancing will be the norm, including that “parties will be prohibited”
- Tuition will be discounted 10% and most instruction will be remote

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Ivy League schools announced the cancellation of all fall sports.

...but long-term headwinds exist for C&U

Students Staying Closer to Home

- 49% of the class of 2020 have changed their post-grad plans as a result of COVID-19
- Some state universities saw spikes in commitments from in-state residents compared to last year
- To save on costs, students and families are considering options such as commuting vs living on campus or starting out at a 2-year school

International Student Enrollment Expected to be Lower

- This week, it was announced that international students attending colleges & universities that will have 100% online learning will not be issued student visas. While active students can remain enrolled, they must return home or transfer to school offering in-person instruction.
- Colleges & Universities were already predicting worst-case scenarios when it comes to international student enrollment.

Dining Halls Changing Roles

- Greater emphasis will be put on to-go and Grab & Go options, as seating capacity will be reduced to accommodate distancing.
- Some Colleges & Universities have announced that dining halls will only serve on-campus residents and staff.
- 80% of students said they would be more likely to get food from an on-campus dining venue that offers digital ordering and payment options.

Source: Wakefield Research May 2020
K-12 school re-opening also on uncertain footing

SOME STATES HAVE REOPENED SUMMER CAMPS

Safety measures a potential indicator of what’s to come in the fall:

- Fewer campers allowed per session and those at camp are split into smaller groups they stay with for the session
- Social distancing through plexiglass barriers, marked off personal spaces, assigned seats, and eating meals in shifts
- Hand sanitizer widely available and required upon entry
- Daily temperature checks and health screenings upon drop-off
- Designated pick-up and drop-off spots to minimize the number of people coming in

OUTLOOK FOR FALL

Schools aren’t aligned on their decisions to re-open

- Some schools will limit in-person attendance to a few days/week, others will leave it up to parents to decide
- The CDC will provide more direction on school guidelines yet won’t change them despite Trump claims they’re too tough/expensive

Balancing safety with normalcy & peer interaction

- 1 in 5 teachers say they are unlikely to return to school if their classrooms reopen
- Engagement in proper activities, access to right resources, & fear of children falling behind academically are top concerns for continuing at-home learning in the fall.

Increased need for access to free or low-cost meals

- Parents of students experiencing higher rates of unemployment than ever before
- Lunch debt concerns

Lunch likely won’t take place in the cafeteria

- 69% of K-12 operators plan to have students eat in classroom or at desk only
- 37% are considering shortening school days and eliminating the lunch period for the near future

Source: Technomic, Inc. Planning Program 2020; Education Dive June 2020 Survey of 800 parents of K-12 children, USA Today – Back to School?
## Overall, consumers have concerns about the safety of Workplace foodservice

**CONSUMERS FEEL LESS SAFE RETURNING TO WORKPLACE FOODSERVICE...**

<table>
<thead>
<tr>
<th>Type</th>
<th>Percentage Feel Safe Going There After Shelter Restrictions Lifted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants with outdoor seating</td>
<td>63%</td>
</tr>
<tr>
<td>QSR</td>
<td>61%</td>
</tr>
<tr>
<td>C-Stores</td>
<td>54%</td>
</tr>
<tr>
<td>Hospital cafeterias</td>
<td>37%</td>
</tr>
<tr>
<td>Workplace cafeterias</td>
<td>36%</td>
</tr>
<tr>
<td>College &amp; University cafeterias</td>
<td>33%</td>
</tr>
<tr>
<td>K-12 school cafeterias</td>
<td>32%</td>
</tr>
</tbody>
</table>

**...HIGHLIGHTING A TRUST ISSUE**

33% of consumers **DO NOT TRUST** cafeterias (schools, offices, hospitals) to take the necessary precautions to keep them safe.

What would need to happen for you to feel safe dining in again?

- ✓ Spaced out tables 40%
- ✓ Employees wearing masks 39%
- ✓ All common areas are visibly wiped down regularly 39%
- ✓ Restrooms are extremely clean 39%
- ✓ Employees wearing gloves 38%
- ✓ Sanitizing products provided to customers 38%
- ✓ Smaller capacity 36%
- ✓ No self-serve buffets 25%

That leaves Workplace foodservice in new territory

<table>
<thead>
<tr>
<th>GRAB &amp; GO IS A TOP MENU PRIORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Grab &amp; Go</td>
</tr>
<tr>
<td>Healthy, Ready-to-Heat Kits</td>
</tr>
<tr>
<td>Healthy, Good Supply, Kits</td>
</tr>
</tbody>
</table>

Nearly 9 in 10 will continue meal kits

2/3 will continue to-go family meals

2/3 will continue pantry

Source: Technomic, Inc. Planning Program 2020

*Boston College* plans to streamline menus to focus on its most popular menu items, “comfort foods that intersect with ethnic preferences.”

*Aramark* opened pop-up convenience stores for healthcare workers across the country to serve as one-stop shops for groceries and other necessities.
1. As consumers start to return to Work channels for potentially the first time in months, consumers will have a strong need to have safety concerns addressed.

2. Operators should consider revisiting the footprint of cafeteria spaces to accommodate for social distancing, desire for grab & go, and growing need for solutions that allow for contactless experiences (i.e., digital order ahead for pick-up and delivery).

3. New product offerings like family meal kits and meals for the next WFH day are potential tactics for revenue.
Getting deeper into restaurants...
Consumers desire to support local businesses, especially restaurants during the time of COVID-19

66% of consumers say they try to buy from local companies when possible

Independent restaurants are more transparent than chain restaurants

48% 60% 51% 42%

I trust independent restaurants more than chain restaurants

48% 53% 57% 41%

Source: Mintel – 1The Impact of COVID-19 on Foodservice; 2Datassential COVID 19 Report “Resilience” 6/19/20 3 Technomic Ignite consumer brand metrics data

...AND ALL CONSUMERS WANT HELP THEIR COMMUNITIES THROUGH LOCAL RESTAURANTS 2

62% of consumers
Feel “Eating at restaurants allows me to do my part in helping my community”

54% of consumers
Feel “Eating at restaurants makes me feel connected to the community again”

31% of consumers
Say “Seeing my local community support local restaurants” is one of the most positive food-related outcomes of COVID-19

15% of consumers
Say “Knowing I support employees in my community” encourages them to visit/order food from restaurants 3
Interest in independent restaurants is reflected in a recent uptick in traffic share but some barriers exist

**INDEPENDENT RESTAURANTS ARE SEEING AN INCREASE IN RESTAURANT TRAFFIC SHARE SINCE THE BEGINNING OF COVID...**

- **75%** in March 25
- **67%** in June 8
- **33%**

**BUT LACK OF ACCESS CAN KEEP CONSUMERS FROM ENGAGING**

What issues have you had with ordering from independent restaurants during shelter-in-place restrictions?

- Don’t offer delivery: 19%
- Independent restaurants in my area have closed: 17%
- Unsure of safety/sanitation practices in place: 14%
- Their hours have been cut: 14%
- Not sure if they offer delivery: 13%
- Difficulty finding if they are open: 12%
- Worried about a crowded pick-up area: 11%
- Worried they aren’t taking safety precautions: 10%
- Couldn’t reach them on the phone: 9%
- They don’t have a website / not on social media: 9%
- They have a reduced menu: 9%
- Can’t get delivery via 3rd Party: 8%

30% of consumers have no barriers to ordering from independents

Source: 1 Datassential Coronavirus Traffic Brief 6/8/20 ; Datassential – One Table Consumer Report
Restaurant operators face many re-opening challenges

**SPACE & OPERATIONS**
- Physical changes like: Re-spacing seating, plexiglass barriers, contactless fixtures, air purifiers, removed tabletop items...much more
- New processes: reservations-only, virtual queues, ordering process changes, digital menus, etc.

**LABOR ISSUES**
- Labor pool widened but challenges remain in finding skilled, long-term labor
- Retraining employees with new processes and training new COVID-related positions
- Creation of a new work culture post-COVID-19

**SUPPLY CHAIN**
- Restaurants must stabilize supply chain in the short term, look to reorganize operations & supply chain to match new realities
- Supply issues persist as distributors recover from the drop in Foodservice demand & food supply disruptions continue

**SHIFTING OPENINGS**
- Initial closures caused restaurants to pivot quickly to off-premise-only operations
- Re-opening starting with outdoor dining, required further adaption
- Re-closures now looming may require restaurants to pivot operations again
What does dine-in actually look like in re-opened states?

As the country began to peel back stay-at-home orders and restrictions, operators excitedly re-opened their doors to welcome back guests. What did guests find in their return?

- Seating Blocked Off
- Social Distancing Signs
- Masks on Team Members & Guests
- Paper Menus

Reservations required
Fewer Customers
Limits on Party Sizes
No Indoor Waiting Areas
Individually Packaged Silverware
Noticeable Cleaning & Hygiene
No Salt & Pepper, Nothing on Tabletops
Contactless Payment

“While everything looked the same at the surface, there were precautions and reminders everywhere that we’re still in the middle of a pandemic.”

Source: Business Insider
Restaurants are implementing & optimizing outdoor dining

Outdoor dining has been the first step in reopening around the country.

Many operators did not have an existing or large enough outdoor dining space, causing restaurants to create in-regulation spaces & operationalize very quickly, maximizing the space for revenue & guest comfort.

There are many forms based on restaurant locations and layouts:

- Existing Patio Seating
- Sidewalk/Parking Lot Seating
- Open Streets Seating (closed off street areas)
- Pedestrian Plaza Seating (urban areas)

Examples of outdoor dining done properly include safety measures for social distancing & crowd reduction and mask-wearing

Boston, MA

Issues arise when outdoor dining leads to crowding/no distancing or mask-wearing; There are questions surrounding who polices guidelines & varies by location

Columbus, OH
In Recovery, operators will balance simplified menus & innovation

**Percent of Operators Reducing the Number of Menu Items**
- Not considering implementing: 30%
- Already implemented: 23%
- Considering implementing: 25%
- Will implement: 23%

**Operator Considerations**
- Restaurants are currently implementing streamlined menus for ops efficiency & service speed, reduced costs/complexity
- In Mar/Apr, Technomic reported fewer product LTOs than normal due to fewer resources for product innovation; Most LTO’s were value-based
- Value LTO’s, Family Meals, and Comfort Food will continue into recovery as restaurants try to entice consumers back
- But innovation pipelines remain important, as trends re-emerge post-COVID and consumers seek variety

**Menu Impacts Across the Stages**

<table>
<thead>
<tr>
<th>Menu Actions</th>
<th>Confinement</th>
<th>Initial Recovery</th>
<th>Recovery</th>
<th>New Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Rationalization</td>
<td>Menus shrink, with items tailored to off-premise</td>
<td>Craveable, value-driven items prevail</td>
<td>Low-cost, high-profit-margin items that drive check averages</td>
<td>More advanced culinary innovation</td>
</tr>
<tr>
<td>Menu Revitalization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Menu Optimization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Menu Reinvention</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sources:
- Technomic Foodservice Impact Monitor w/e 5/8/20
- Technomic Talks Menu Solutions Jun 20
- Datassential One Table Operators
- Technomic Menu Solutions Jun 20
Guests will accept short term menu changes, but still want variety from restaurants

Many consumers are **empathetic** to current operator challenges and will accept some change in the short term

What would you think if your favorite restaurant did any of the following during this period of shelter-in-place restrictions? immediately after?¹

<table>
<thead>
<tr>
<th>Change Description</th>
<th>Acceptable Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adds many new menu items</td>
<td>84%</td>
</tr>
<tr>
<td>Shortens menu to only most popular items</td>
<td>69%</td>
</tr>
<tr>
<td>Reduces options / flexibility for customization</td>
<td>63%</td>
</tr>
<tr>
<td>Increases menu prices slightly</td>
<td>52%</td>
</tr>
<tr>
<td>Offers / sells lower quality alcohol</td>
<td>49%</td>
</tr>
</tbody>
</table>

**BUT...** Not all consumers feel this way, as some note they would be upset with reduced menu sizes **AND...** Consumers will desire variety as we move back into the New Normal

It would be upsetting to visit a restaurant to then find out that their menu has reduced in size²

<table>
<thead>
<tr>
<th>Demographic Range</th>
<th>Overall</th>
<th>18-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65 and over</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>41%</td>
<td>40%</td>
<td>47%</td>
<td>51%</td>
<td>42%</td>
<td>35%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Sources: ¹Datassential One Table Consumer Report; ²Technomic Foodservice Impact Monitor w/e 6/5/20
Catering is shifting to smaller events with individual items

FROM: LARGE GATHERINGS  TO: FAMILY/INTIMATE GATHERINGS

• A majority of catering programs saw significant decreases during COVID-19 due to the cancellation of large group events and workplace shutdowns

• Focus is now on new customers (e.g. families, essential businesses) with a higher number of deliveries with smaller event sizes and lower ticket averages

• Shift from sandwich platters, family-size salads, shared party trays to individually wrapped sandwiches, boxed lunches, individually portioned entrees/sides/dessert to prevent contact and potential contamination at group gatherings; **Strong opportunity to provide individual-size chips as a side for this occasion as they travel & pair well.**

• These shifts require operations & logistics changes, as well as incremental costs such as labor, packaging, and delivery that must be considered

• Potential Future State – Catering “virtual events” is an idea being explored by Panera Bread; creating a singular, private menu that participants can order from at any Panera around the country and have that product delivered at a specific time

Source: NRN.com
The growth in the delivery space is leading to change for both restaurants & 3rd Party Delivery

**NOTABLE MERGERS/AQUISITIONS**
GrubHub to merge with European food delivery company Just Eat Takeaway in $7.3B deal

Uber to buy Postmates for $2.65B, combining US networks of restaurants & delivery people; separate apps will remain active

**DELIVERY CONSOLIDATION**

**DELIVERY NEWS**
Brinker launched national delivery-only chain “It’s Just Wings,” delivers through DoorDash; Orders fulfilled via Chili’s & Maggiano’s kitchens

WingStop opened 1st US Ghost Kitchen in Dallas, TX; future goal of digitizing 100% of transactions

**REGULATION**
NYC, LA, Portland join list of large US cities capping 3rd party delivery fees to help restaurants

**IMPLICATIONS**
Speculation on long term impact of delivery consolidation - Commission fees a big question. Potential for more choices for consumers, more work for delivery drivers. Consumer loyalty to one app/company may increase.

Delivery-Only businesses will continue to grow near term as restaurants fight for survival; Offers flexibility for new & established brands to bring in revenue at a crucial time.
Opportunity in the future of alcohol to-go

Many states relaxed liquor laws as a temporary COVID-19 relief measure, allowing restaurants & bars to sell alcohol to-go, increasing off-premise revenue in recovery & beyond while consumers safely enjoy their alcoholic beverages at home. Now, some are making the changes permanent.

**A FIGHT A’ BREWIN’**

**IOWA** governor signed a bill into law permanently allowing cocktails to go on menus, **MICHIGAN** extended through 2025.

States currently considering making temporary cocktails to-go policies permanent: **FLORIDA, OHIO, OKLAHOMA, TEXAS, DC**

**BUT…** There is potential legislation opposition from alcohol retailers, as well as groups concerned with upholding alcohol safe-serving policies.

**OPPORTUNITY:** Retention of the new adopters of alcohol to-go is an opportunity area for restaurants (if permanent). And early indicators show it is incremental to off-premise beverage sales. Innovation and menu planning for this offering could be a differentiator.

63%  
13%  

Consumers who ordered alcoholic beverages from a restaurant for pick-up / delivery

- Tried for the first time
- Will continue post-COVID (among 1st time triers)

**OPPORTUNITY:** Retention of the new adopters of alcohol to-go is an opportunity area for restaurants (if permanent). And early indicators show it is incremental to off-premise beverage sales. Innovation and menu planning for this offering could be a differentiator.

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Sources: ¹Datassential COVID-19 Report 19 5/20; ²Technomic Foodservice Impact Monitor w/e 5/8/20, 488 operators/157 operators offering adult beverage for takeout or delivery
**POST-COVID, CONSUMERS WANT TO RETURN TO SELF-SERVE AT C-STORES**

**CONSUMERS ARE MORE INCLINED TO RETURN TO SELF-SERVE BEVERAGE OPTIONS, BUT OPERATORS WILL STILL NEED TO REASSURE & DRAW THEM IN**

<table>
<thead>
<tr>
<th>Item</th>
<th>Likely</th>
<th>Neutral or unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-dispensed coffee</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>Self-dispensed soft drinks</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>Self-dispensed frozen drinks</td>
<td>74%</td>
<td>26%</td>
</tr>
<tr>
<td>Self-serve fresh bakery case items</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Self-serve roller grill items</td>
<td>72%</td>
<td>28%</td>
</tr>
<tr>
<td>Condiments bar for food</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Condiments bar for beverages</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Soup/chili</td>
<td>66%</td>
<td>34%</td>
</tr>
</tbody>
</table>

After closing them in March, **Wawa** has reopened self-serve areas in 60 locations with added safety measures including tissue paper to cover handles & wrapped stirrers.

As a welcome back to customers, **7-Eleven** is offering seven free any size hot coffee and/or any size fountain drinks for 7Rewards loyalty members per day via the 7-Eleven mobile app.

Source: Technomic C-store Monitor Q2 2020
TECH ENABLED SOLUTIONS ALLOW OPERATORS TO STAY ENGAGED WITH THEIR CONSUMERS

**Country Garden**
- **Country Garden**, a developer in China, has opened up a restaurant completely operated by robots, eliminating most human-to-human contact.
- The space is 20,000+ sq. ft., can handle 600 diners at once, and has 200 menu items available within 20 secs of ordering.

**Domino’s**
- **Domino’s** has unveiled the “Domino’s Rain Check Registry” targeting couples who have had to postpone their weddings due to COVID-19.
- Friends & family can send gift card packages to couples who register on the website.

**Chipotle**
- **Chipotle** has created an online platform connecting farm suppliers directly to consumers.
- The platform allows consumers to buy items directly from farmers, and was created with the intention of generating a new revenue stream for farmers amid COVID-19.
INNOVATION IS BACK ON THE MENU

• **The Capital Grille** introduced “The Capital Butcher,” offering consumers a way to enjoy their signature steaks at home.
  
  • Consumers can choose from 4 Steak Grille Boxes which include 4 steaks cut daily by the in-house butcher and include a Signature Steak Sauce.

• **Blaze Pizza** introduced a new menu innovation, the Mango White Claw Pizza which was available for one day only.
  
  • Blaze Pizza’s executive chef infused the crust of the pizza using Mango White Claws to replace filtered water in the dough.

• **Curry Up Now** is hopping on the chicken sandwich bandwagon, launching the Tandoori Fried Chicken Sandwich
  
  • This permanent menu addition features a crisp-fried tandoori-marinated chicken topped with Bombay-dust aioli, pickled onions and a chutney made with curry leaves, pineapple and jalapeno on a brioche bun.
DINE IMPLICATIONS

1. Especially in Independent Restaurants, evaluate any guest pain points and remove barriers to visitation as much as possible to capitalize on positive consumer sentiment.

2. Take care if/when simplifying menus to ensure retention of key guest-satisfying and value-focused items, while filling the innovation pipeline for the New Normal.

3. Focus on off-premise beverage menus, with a mix of non-alcoholic beverage and alcohol to-go (where legal) to maximize revenue opportunities.
PepsiCo Foodservice Insights

We are in a time of unprecedented change and disruption as a result of the COVID-19 pandemic. While there are more questions than answers right now, we are committed to delivering best-in-class insights and perspectives that will provide a more informed approach as we jointly build plans that can succeed on the other side of this challenge.

Due to the dynamic nature of the situation, this document will evolve as new information refines our hypotheses.

Special thanks for this edition go to Nina Guest, Ashley Dodge, and Amy Edler.