



Getting people back in the dining room

Toluna's Global Consumer COVID-19 Barometer provides insight into consumer sentiment, behaviors and predictions related to the "New Normal". Through subsequent conversations with consumers via our QuickCommunities solution, we explored these insights more qualitatively to more deeply understand their feelings about dining out.

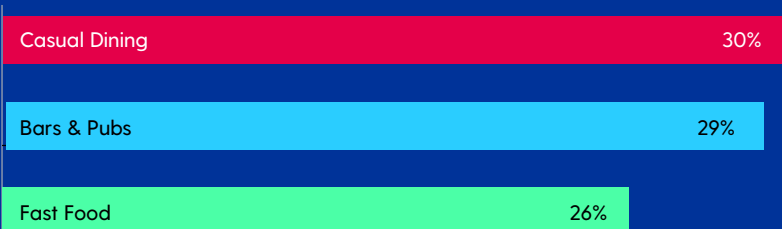


Here's what we've found.

The data reported here was collected at the end of May.

People are looking forward to business as usual.

When surveyed, many people within the USA plan to visit the following places immediately. Most within 30 days post quarantine.



People crave the social dynamic of the dining room

When we asked consumers what they miss most about sit down dining, they spoke primarily about a social aspects that just can't be replicated at home.

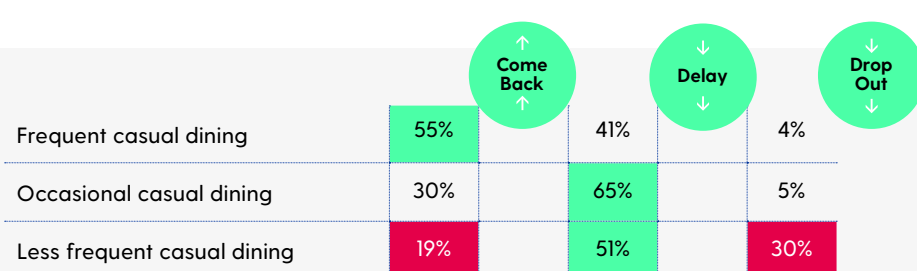
I like the fact I can go dine at my favorite locations and interact with owners and servers and meet with friends.

The social experience of it. Eating food at home isn't the same as sitting with a friend, eating some pasta, or chilling in a cafe!

I miss the experience of having a nice ambience to sit down in and have the opportunity to eat meals I might not wind up cooking at home.

People will dine out with the most loyal customers leading the way

Previously frequent consumers will be the first to come back to sit-down establishments. The occasional consumer will take more convincing and the less frequent indicate they would stop attending completely.



While there is a desire to return, diners need to feel safe so they can relax and enjoy themselves

Consumers are concerned not just about restaurant staff, but the risks from other customers.

I'm worried about getting the virus through the table tops, napkins, condiments, sitting to close to people, and I'm unsure how much the cooks and servers follow the rules to stay safe.

I am concerned that customers do not keep the corresponding social distance, especially children who are more restless in behaviors with complacent parents.

Other patrons have no concern for health or safety.

I'm worried about getting the virus through the table tops, napkins, condiments, sitting to close to people, and I'm unsure how much the cooks and servers follow the rules to stay safe.

Consumers are seeking reassurance that restaurants are taking the necessary steps to protect their customers

I would want social distancing between tables, limited number of patrons in the establishment at one time, the use of temperature screening to guests and employees.

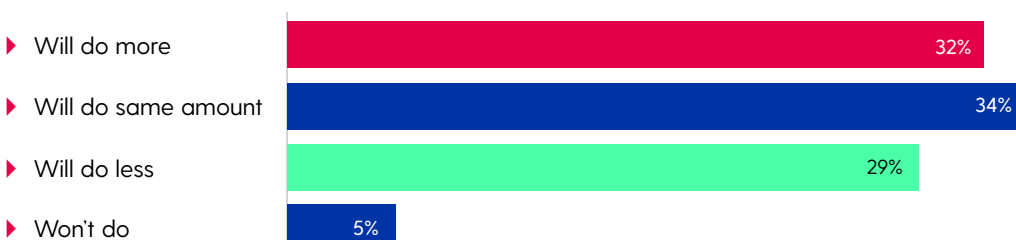
Increased sanitization after patrons leave and increased cleaning of the restaurant after closing for the day.

They need to make sure everyone is following the rules and their lives and their customer lives depend upon it.

Wiping everything down, using masks, gloves, and make sure there are plexiglass windows up all over the place.

People will order more food delivery than ever before

Even after the outbreak has been resolved, 2/3 of respondents claim they will order food for delivery or pick as often or more often than they are doing now.



What's on the menu: how to adapt your business to attract consumers emerging from quarantine?

- ▶ Although consumers will return to sit-down dining, it's the previous heavy dining room users that restaurants will need to rely on in the near term
- ▶ Unfortunately, lighter dining room users will take longer to return
- ▶ A focus on this smaller group of heavier users may help when prioritizing menu items in the nearer term
- ▶ Remind consumers about the unique joys of social connection that the dining room provides
- ▶ Acknowledge that potential dining room customers have valid concerns regarding health safety
- ▶ Reinforce your restaurant's commitment and dedication to its staff and customers