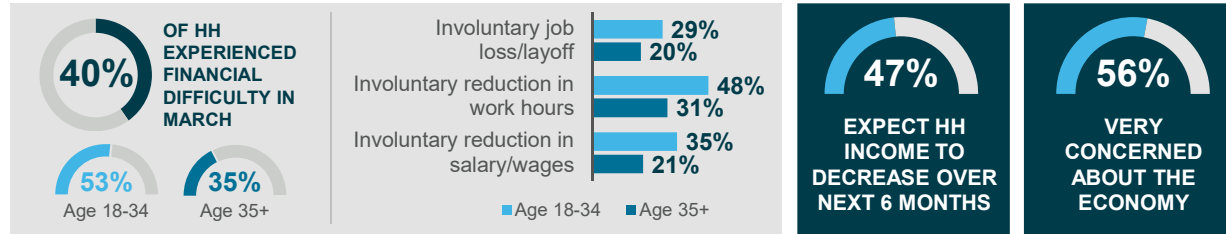


POST-SHUTDOWN RECOVERY FOR THE RESTAURANT INDUSTRY WILL LIKELY BE SLOWED BY FINANCIAL EXPECTATIONS AND LINGERING HEALTH CONCERNS

A Burke-conducted survey from April 1-April 5, 2020 captures an early snapshot of behaviors and concerns among US Adults and Restaurant Visitors

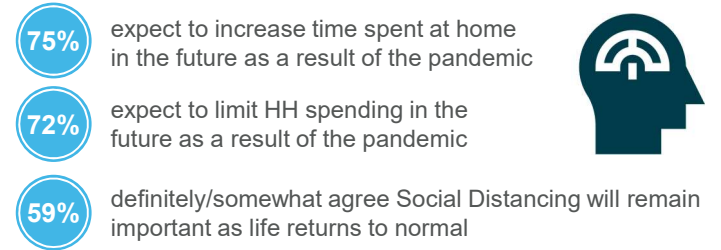
AMERICANS ARE BEING HARD HIT FINANCIALLY DURING THE PANDEMIC, AND THEIR CURRENT EXPECTATIONS FOR THE ECONOMY ARE FAIRLY PESSIMISTIC

The impact of job loss and wage reductions hit especially hard among those <35, who are heavy fast food users.



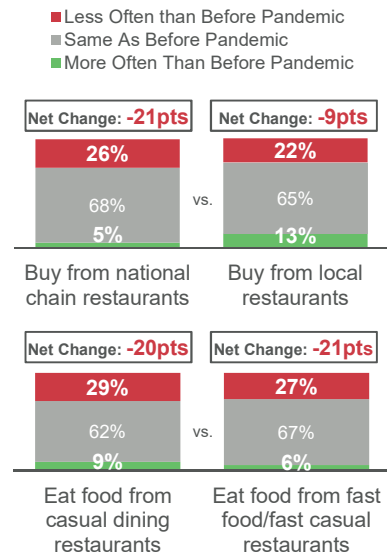
SOME PANDEMIC-BASED BEHAVIORS WILL LIKELY STICK AFTER “STAY AT HOME” IS LIFTED

Among restaurant visitors:



RESTAURANT VISITORS WILL CONTINUE TO DINE OUT LESS OFTEN THAN BEFORE, EVEN AFTER THE PANDEMIC SUBSIDES

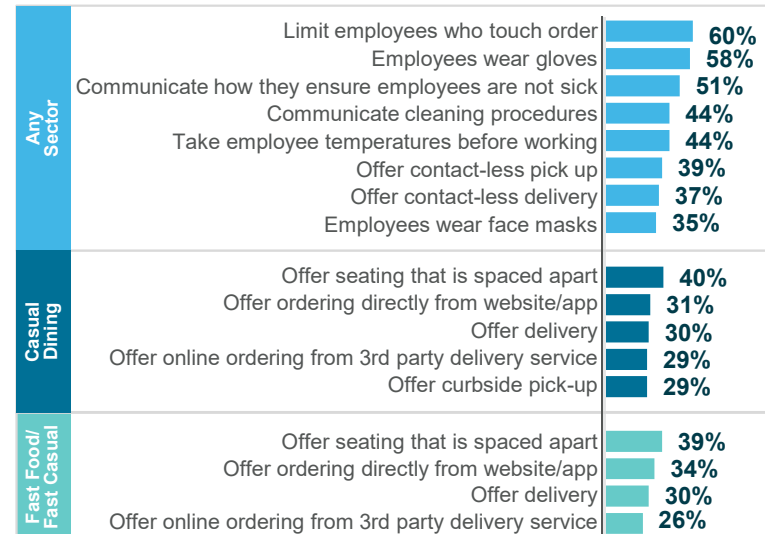
Q: Once the pandemic subsides and restaurants re-open for normal business, how often will you...



	Net Change (% Saying More Often – % Saying Less Often)	
Any Sector	Order food using third-party delivery	-25pts
	Order food for delivery directly from a restaurant's website or app	-20pts
	Buy food from a restaurant to eat at home	-10pts
Casual Dining	Dine in at casual dining restaurants	-23pts
	Order food in person at casual dining for carry-out	-23pts
	Order food ahead of time from casual dining for pickup inside	-22pts
	Order food ahead of time from casual dining for curbside pickup	-19pts
Fast Food/Fast Casual	Dine in at fast food/fast casual restaurants	-28pts
	Order food ahead of time from fast food/fast casual for curbside pickup	-21pts
	Order food in person at fast food/fast casual restaurants for carry-out	-21pts
	Order food ahead of time from fast food/fast casual for pickup inside	-20pts
	Pick up food via drive-thrus	-16pts

AND LINGERING HEALTH CONCERNS WILL LIKELY REQUIRE SOME ADJUSTMENTS TO MEET CUSTOMER EXPECTATIONS

Restaurant Visitors Saying Will Be “Extremely/Very Important” When Restaurants Re-Open



Local Restaurants fare a bit better in retaining future visits. This is in line with general sentiments: 46% of Restaurant Visitors say it is very/somewhat important to buy from a local restaurant instead of a national chain.