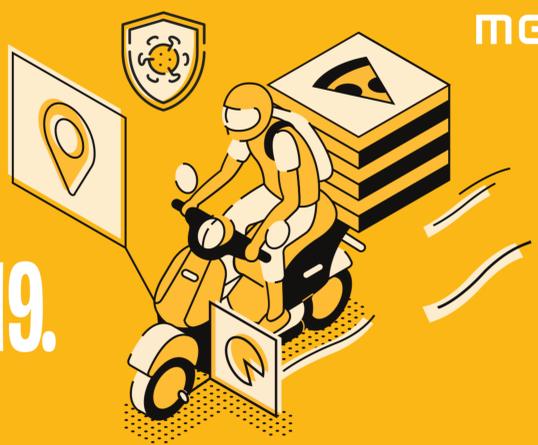


DINER BEHAVIOR HAS CHANGED AS A RESULT OF COVID-19.



THE BAD NEWS:

Nearly 50% of diners have cut back on ordering from restaurants.

Lunch has been hit hardest. Some 33% are ordering the midday meal less than once a month, while 21% are ordering dinner less than once a month.



DINERS WHO ORDERED LUNCH SEVERAL TIMES PER WEEK



DINERS WHO ORDERED LUNCH LESS THAN ONCE A MONTH



■ PRE-COVID ■ POST-COVID

The reasons for these shifts in ordering behavior vary:



28%

are concerned about the health risks of ordering food



28%

have enjoyed cooking more with or for family



21%

haven't had the discretionary income



20%

haven't had as many restaurant options available



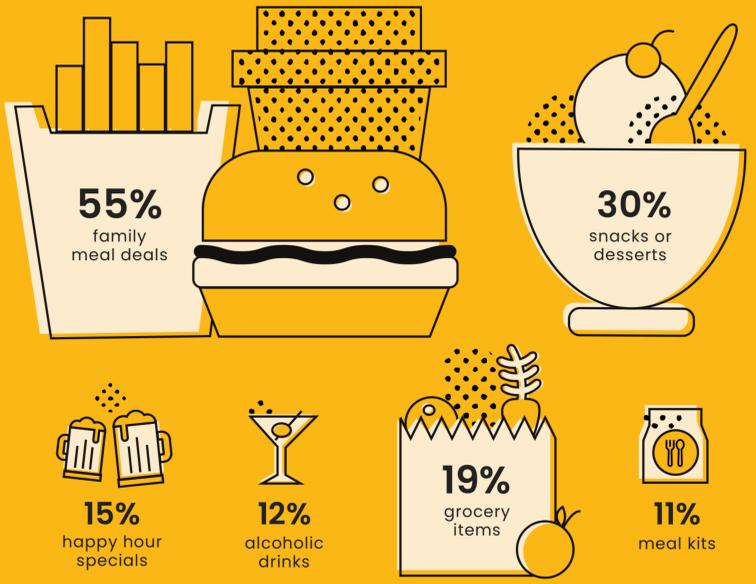
5%

are not sure how to order food from restaurants at this time

THE GOOD NEWS:

Creative marketing and shifts in menus are helping to attract customers.

A full 55% of those surveyed have ordered a family meal deal, 19% have ordered grocery items, and 12% have ordered alcoholic beverages to go.



Habits of diners have changed in other ways:



37%

have tried a dish or menu item they hadn't tried before



28%

have used delivery services more often than before



22%

are actively looking for new restaurants in the past 3 months



40%

are eating more meals together with their family than before



55%

have ordered from a restaurant to support local businesses in their area

WHAT'S TO COME:

Once restaurants reopen, many diners are open to eating at them again.

Of those surveyed, 40% said they've already dined at a reopened restaurant. Another 28% say they plan to in the near future.



FOR THOSE LIVING WHERE RESTAURANTS HAVE REOPENED



FOR THOSE LIVING WHERE RESTAURANTS ARE NOT YET OPEN



Survey conducted by



Modern Marketing for Restaurants
www.mghus.com

Results are based on an online survey of 917 U.S. adults using the SurveyMonkey Audience Panel and conducted by MGH - a full-service marketing agency serving the restaurant industry and beyond. The survey results have a 3.2% margin of error at the 95% confidence level.