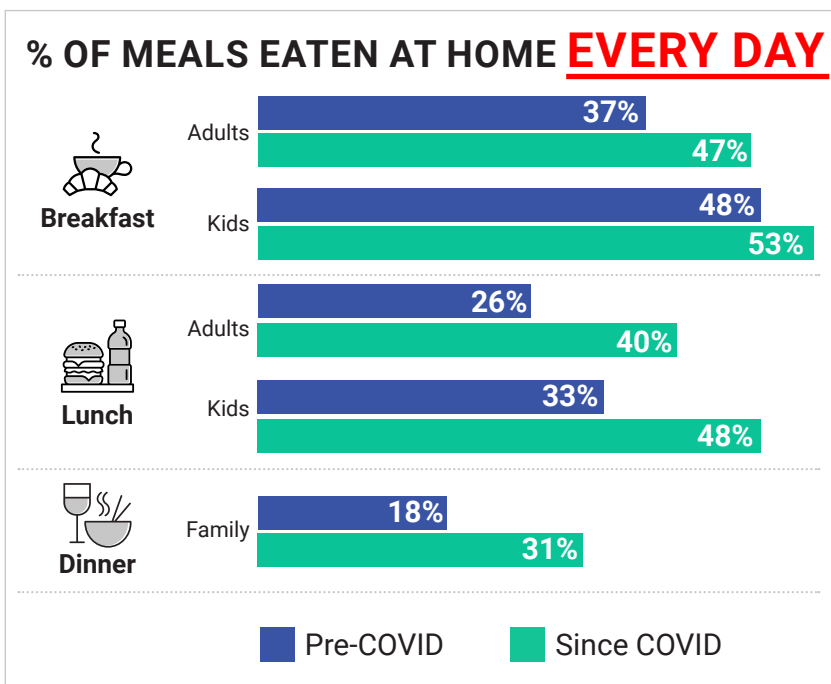
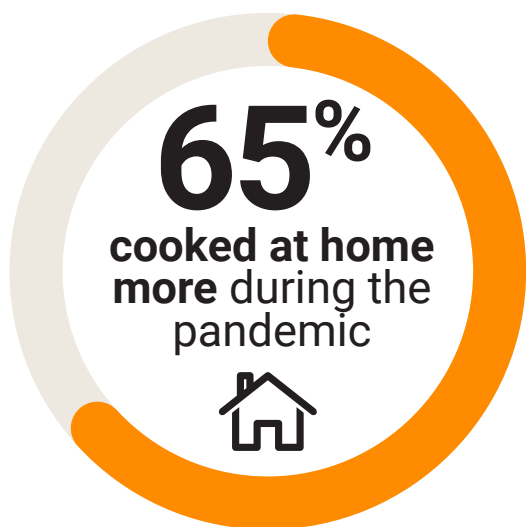


COVID Dining Journey:

Eating at Home and Away From Home

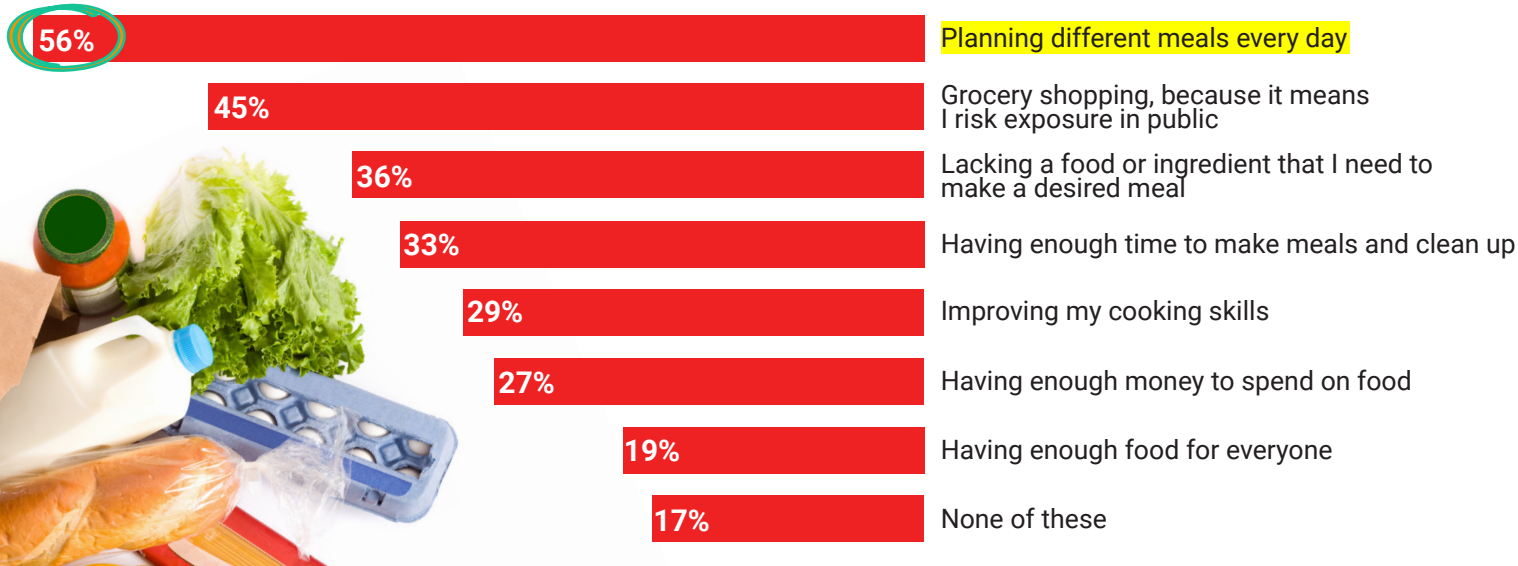


Nearly 2/3 of shoppers cooked at home more during the pandemic, eating far more meals at home all the time



Constant meal planning was a big challenge

BIGGEST MEAL PLANNING CHALLENGES DURING PANDEMIC





Shoppers' desire for healthy options led to big shifts toward plant-based food and organics

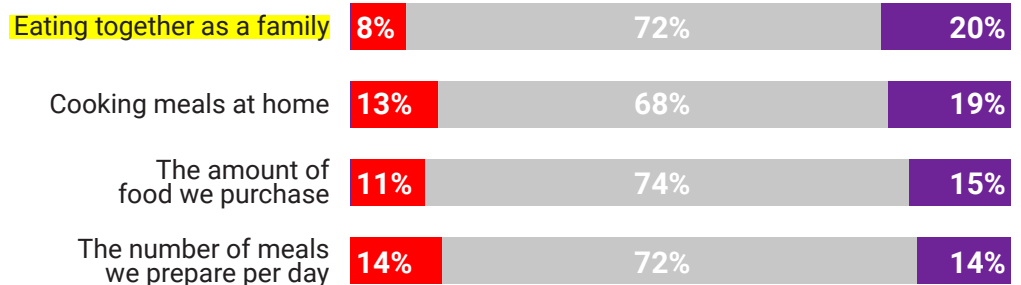
Plant-based food sales up 27% to \$7B in 2020

More than half of U.S. households buy these products

Source: The Good Food Institute and Plant Based Foods Association

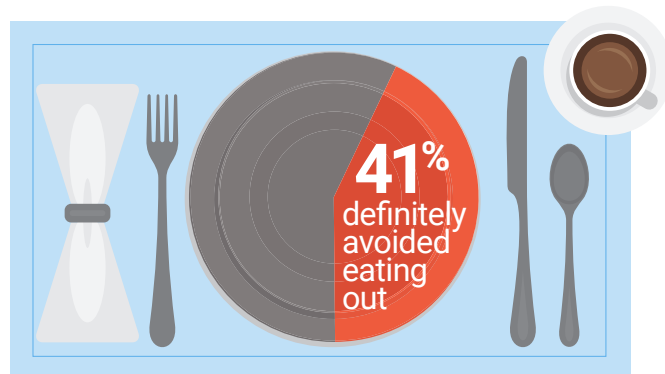
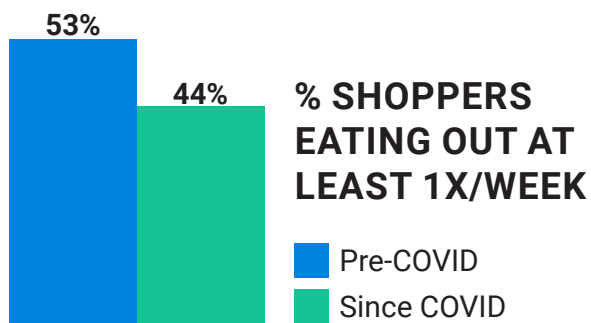


POST-COVID MEALS AT HOME



Decrease Stay the same Increase

Between quarantines and restaurant shutdowns, people ate out far less during the pandemic



Source: DATAESSENTIAL

**Restaurant Industry
\$240B below forecast**
~110,000 restaurants closed

Source: National Restaurant Association

FOODSERVICE VS. RETAIL DOLLAR SALES



Source: Technomic/McMillanDoolittle LLP

Shoppers did their best to support restaurants when indoor dining was not an option



Hit positive sales growth in 2020, greatly aided by their drive-thru ops



Achieved one of the strongest years in its history, with 21% \$ growth

Source: Technomic.com

63%

got restaurant food via **drive-thru** in the past 3 months

49%

got restaurant food via **store or curbside pickup** in the past 3 months

80%

of fine dining, family dining and casual operators **added curbside** during the pandemic

68%

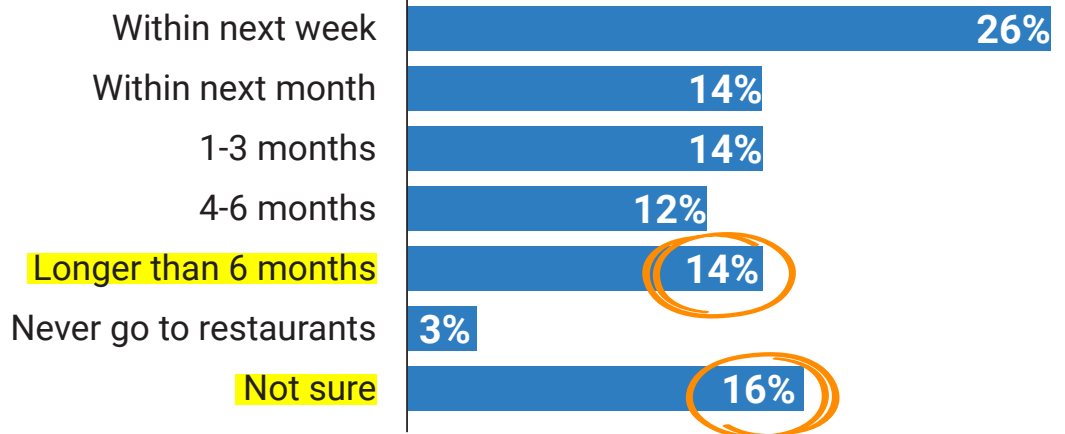
of adults say they're **more likely to purchase takeout** food from a restaurant than they were pre-COVID

Source: National Restaurant Association

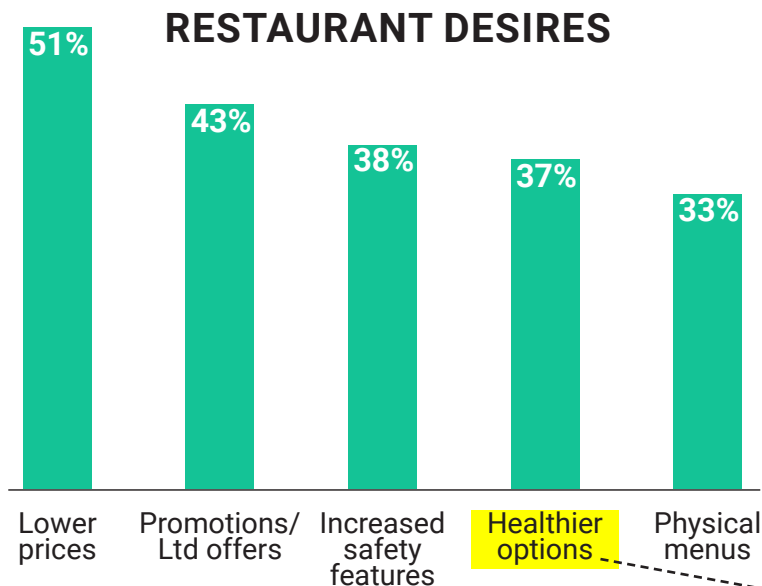
Nearly 1/3 are not sure or think it will be a while before they eat inside a restaurant



WHEN WILL YOU DINE INSIDE A RESTAURANT?



Diners will be looking for lower prices, special deals, healthy options and more



HEALTHY DESIRES

- 48% High protein
- 43% Low sugar/sugar-free
- 41% Low calorie
- 41% Locally grown
- 40% Low sodium
- 39% Organic