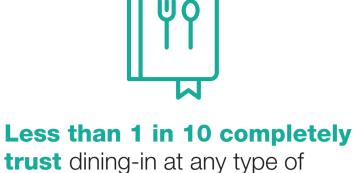
# Looking ahead at consumer dining perceptions

**Building consumer trust** 

An overview



be nearly 2x stronger for dining to-go than for dining-in—across all restaurant types.1



restaurant.1

**Making gains** 



the same. Although the economy is expected to recover, **not everyone** will experience the same sense of relief.



different mindsets.

## Update your Google profile with hours and availability for dine-in and delivery

Three quick tips for meeting diners in digital spaces

Upgrade your social posts and pivot to videos. Facebook users watch 100 million hours of video each day<sup>2</sup>

3 Consider paid digital advertising where you can very cost-effectively target niche audiences

Instagram is surging -



compared to 24% in 2018.3

78% of restaurants

had a profile in 2020

# Advance your digital convenience4

Three lasting lessons for the post-COVID world

Help your customers prioritize family time—offer simple, intuitive interactions every step of the way<sup>4</sup>

2020

75.6

78.8

Keep up safety and cleanliness protocols<sup>4</sup>

Where to grow from here

2021

85.9

86.8

2022

90.1

89.9

2023

93.1

92.6

2024

95.4

94.9

2025

97.6

97.2

## Restaurants & Bars 100

2019

100

**SEGMENT SALES INDEX** 

(2019=100)

Total Foodservice

	Industry Growth							
Noncommercial		100	77.0	93.3	97.8	99.3	100.6	101.9
Travel & Leisure		100	49.3	65.7	76.7	84.0	88.2	91.0
Retailers		100	81.5	90.6	94.3	96.9	99.2	101.4

Despite ongoing developments related to COVID-19, the industry will

Much of this growth will occur in 2021 as the industry digs out of its

grow by a real compounded annual growth rate for the next 5 years



## current predicament.5 Despite the aggressive growth over the next 5 years, the industry will

this 5-year time period.<sup>5</sup>

Retailers

so on an aggregate basis.5

through 2025.5

By the end of 2025, the industry will still be about 2.4% smaller than it was in 2019.5

Among the major segment areas, retailers (supermarket and c-store

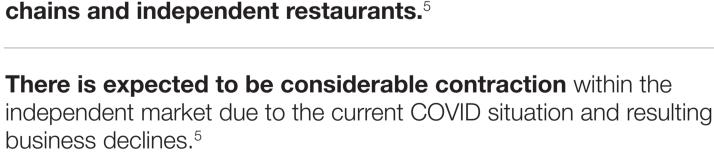
sales levels in 5 years. Other major segment areas are not expected to do

foodservice) and noncommercial will reach their pre-COVID real

not fully recover to its pre-COVID sales (on a constant dollar basis) during



a significant drop-off in 2020.5



**Small Chains &** Independent Restaurants

**Major Restaurant Chains** 

1.7% CAGR.5

In fact, this is a more aggressive growth rate than Top 100 chains have

experienced over the previous 5 years—even after taking into account

A paradigm shift is expected to occur within the restaurant industry over

the next 5 years, where large chain growth will outpace that of small

Over the next 5 years, Top 100 chains will fare better than any other restaurant category—growing at a

**Restaurants & Bars** Restaurants and bars are expected to lose over 125,000 net units



by year end 2021.5

**130,0** 

Segments which are the most vulnerable include: Full-service restaurants: capacity

Most of these losses will come from the independent

**More Vulnerable Segments** 

sector, primarily within full-service. However, the industry will only regain 30,000 of these units

Fast casual: greater demand for better quality off-premise meals will be a driver<sup>5</sup>

segments will see the most promising

prospects:

**Lodging:** severely impacted by consumer and business reluctance to start traveling again and at the same frequency<sup>5</sup>

Senior living: aging population will restraints and rapid movement toward continue to catapult this segment<sup>5</sup> off-premise are issues for this segment<sup>5</sup>

by 2025.<sup>5</sup>

Get more resources for your operation at

https://www.cargill.com/foodservice/insights-and-resources-around-covid-19

Trends in 2020" 4 "Navigating a Crisis with Consumers," US Consumer Insights Briefing, December 2020 5 Technomic 2020

1 "Restaurant Usage and Perceptions," COVID-19 Spotlight Research, August 2020 2 Bloom Intelligence 3 "The Top Restaurant Digital Marketing



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