

**SIMPLY
SMARTER**



All panelists



✓ All panelists and attendees

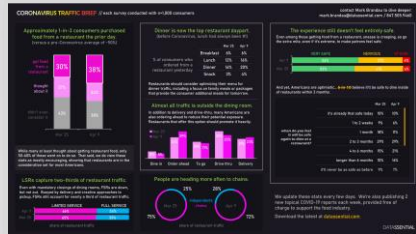
Alison Watson (Panelist)

To: All panelists and attendees ▼



Type message here...

datassential.com/coronavirus



What's up?!









NUMILK





The Food Network's Recipe for Popcorn Salad Is Branded a 'Monstrosity'

People Have Very Strong Opinions on Molly Yeh's Midwestern 'Popcorn Salad'

The now-viral recipe includes a mayo-based dressing, crunchy veggies, and of course, popcorn

'I'm calling the police': Viral 'popcorn salad' horrifies Twitter

The Internet Is Roasting The Hell Out Of This Woman's Soggy Popcorn Salad

Popcorn salad?! Haven't we suffered enough this year?!!!



Baseball Arena

Baseball Arena

Baseball Arena

















COMPETITION

🏆 MLB Food Tester – Get Paid \$500 to Eat Hot Dogs and Watch Baseball 🌭



by Fintan Costello on April 05, 2021



CHICAGO

37,332

TOTAL FOODSERVICE LOCATIONS

41% OF RESTAURANTS ARE CHAINS

[View Details](#)

HIGH INDEXING CUISINES

chinese
185

italian
185

korean
185

mexican
185

thai
185

steakhouse
185

ETHNIC POPULATION

White

Black

Hispanic

Asian

Other



NOTABLE RESTAURANTS

- Alex's Washington Gardens
- American Grill Place Cafe
- Baker Hill Pancake House
- Bokersfield
- Bangkok Belly



TOP TARGETS - AROUND ME

Address

Enter address

or

Territory

Enter territory, metro, city, zip

Select Prospect Type

Select # of Outlets

GO

Priority Targets

112

FOREST HILLS

New Item Targets

132

Regional Chain Targets

31

Search by operator, area, and more...

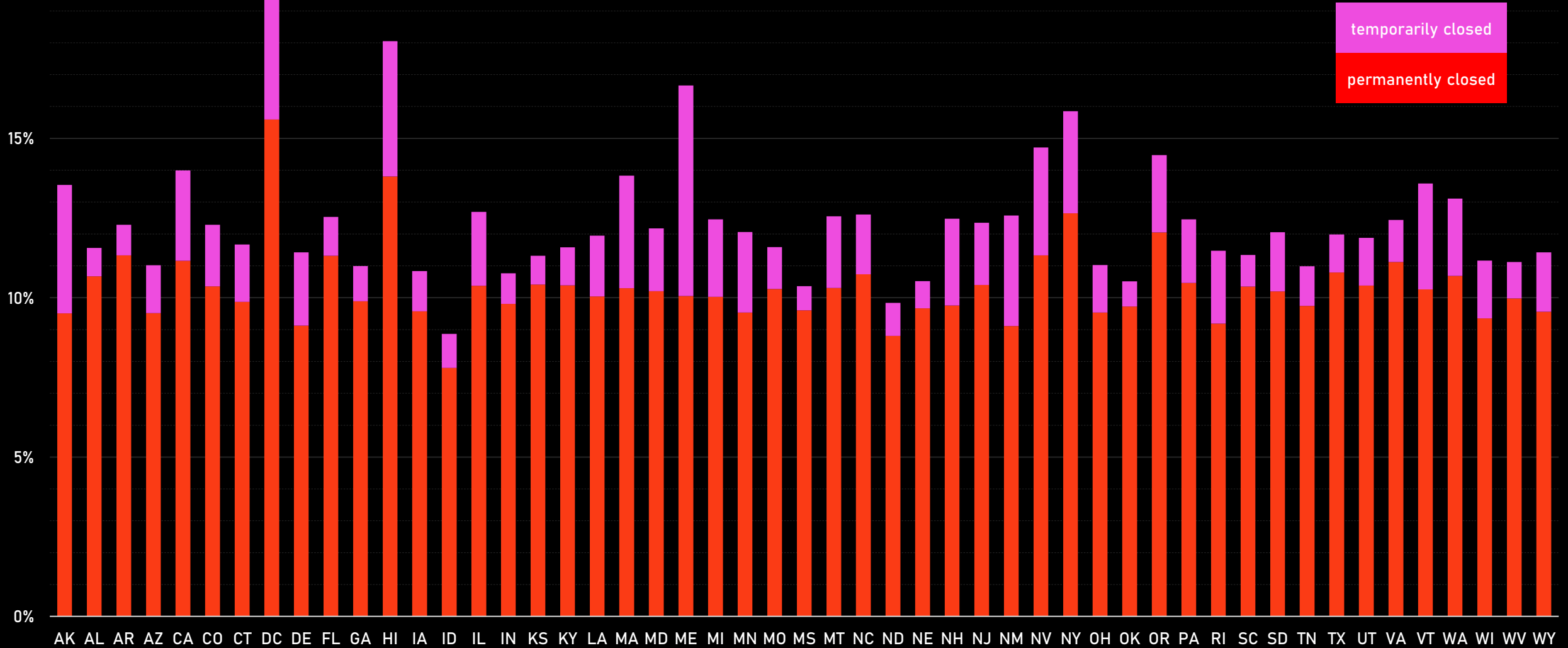


	Temporarily Closed	Permanently Closed	Total Closed
May 2020	8.2%	3.3%	11.5%
July 2020	3.1%	4.5%	7.6%
Sep 2020	2.9%	5.0%	8.0%
Dec 2020	2.5%	9.2%	11.6%
Apr 2021	2.0%	10.7%	12.7%



Covid Closures.

% of restaurants that have closed since March 2020 (as of April 2021)



	Total Restaurants	Permanently Closed
Miami	11,524	12.67%
Portland OR	10,492	12.60%
New York	58,455	12.28%
San Francisco	23,248	12.20%
Washington DC	16,425	11.62%
Orlando	10,484	11.26%
Los Angeles	49,586	11.20%
Seattle	15,292	10.96%
Houston	16,550	10.75%
Dallas	18,801	10.64%
Denver	12,389	10.57%
Philadelphia	19,656	10.55%
Chicago	23,388	10.52%
Detroit	10,715	10.45%
Boston	17,129	10.40%
Tampa	10,982	10.39%
Atlanta	16,228	10.24%
Sacramento	10,134	10.20%
Phoenix	12,533	9.70%
Minneapolis	10,029	9.54%

TOP 20 METROS

BASED ON TOTAL SIZE

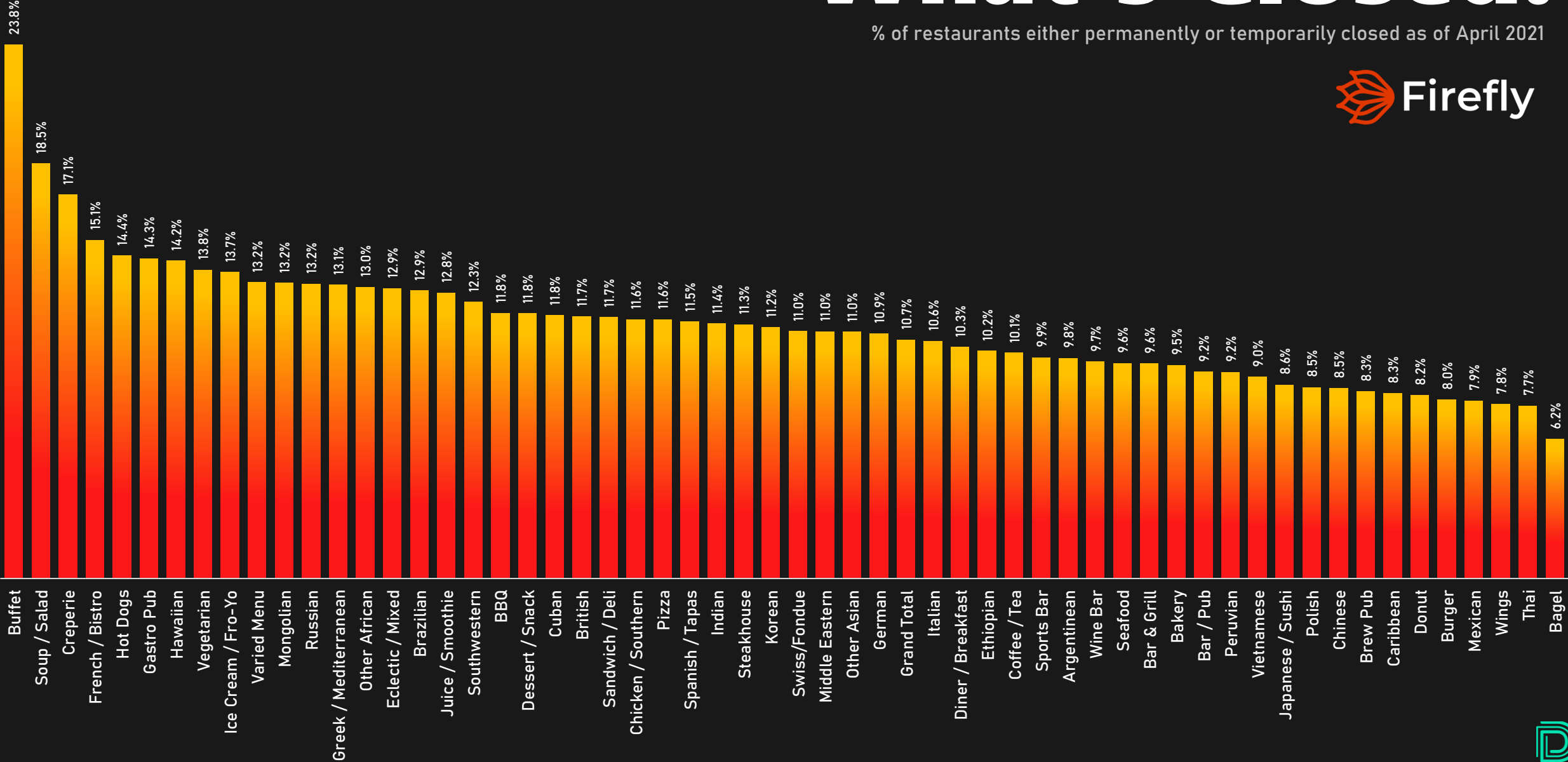
	Total Restaurants	Permanently Closed
QSR	343,080	10.69%
Fast Casual	88,465	10.22%
Midscale	125,973	10.09%
Casual Dining	202,459	10.28%
Fine Dining	8,497	10.93%
Food Truck	13,992	22.67%



SEGMENTS

What's Closed.

% of restaurants either permanently or temporarily closed as of April 2021



MAY 2020

	Temporarily Closed	Permanently Closed	Total Closed
Urban	11.2%	3.7%	15.0%
Suburban	3.4%	7.2%	10.6%
Rural	2.7%	4.7%	7.4%

APRIL 2021

	Temporarily Closed	Permanently Closed	Total Closed
Urban	2.6%	11.7%	14.3%
Suburban	1.4%	10.2%	11.6%
Rural	1.7%	9.5%	11.2%



There is tremendous disparity at the **local level**.



MOST CLOSED

(among zips with at least 100 restaurants)

Zip	Neighborhood	Temporarily Closed	Permanently Closed	Total Closed
94105	Central Embarcadero Piers (SF)	24.2%	23.7%	47.9%
94104	Financial District	25.0%	20.2%	45.2%
94111	San Francisco	20.4%	22.7%	43.1%
60603	Chicago Loop	20.2%	21.8%	42.0%
60606	Chicago Loop	18.2%	23.5%	41.7%
55402	Downtown Minneapolis	16.3%	24.4%	40.6%
97205	Goose Hollow (Portland)	9.6%	30.9%	40.4%
02210	West Broadway (South Boston)	15.2%	24.0%	39.2%
60601	Chicago Loop	21.0%	16.7%	37.6%
96815	Diamond Head (Honolulu)	15.3%	21.6%	36.9%
92802	Disney Area (Anaheim)	25.5%	11.3%	36.9%
97204	Downtown Portland	9.6%	26.4%	36.1%
20006	West End (DC)	13.3%	22.5%	35.8%
10017	Murray Hill / Manhattan (NYC)	13.5%	22.2%	35.7%
10010	Grammercy-Flatiron / Manhattan (NYC)	10.7%	24.0%	34.7%

MOST OPEN

(among zips with at least 100 restaurants)

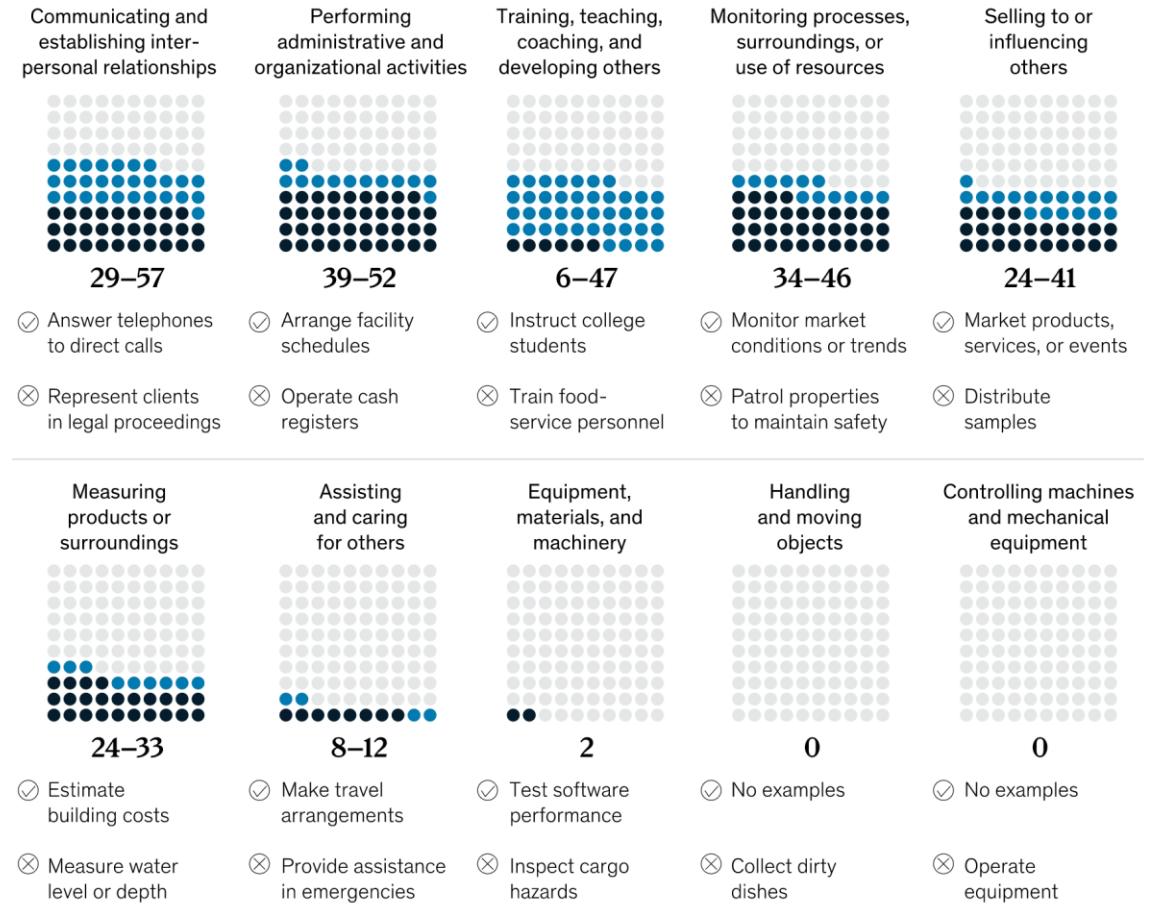
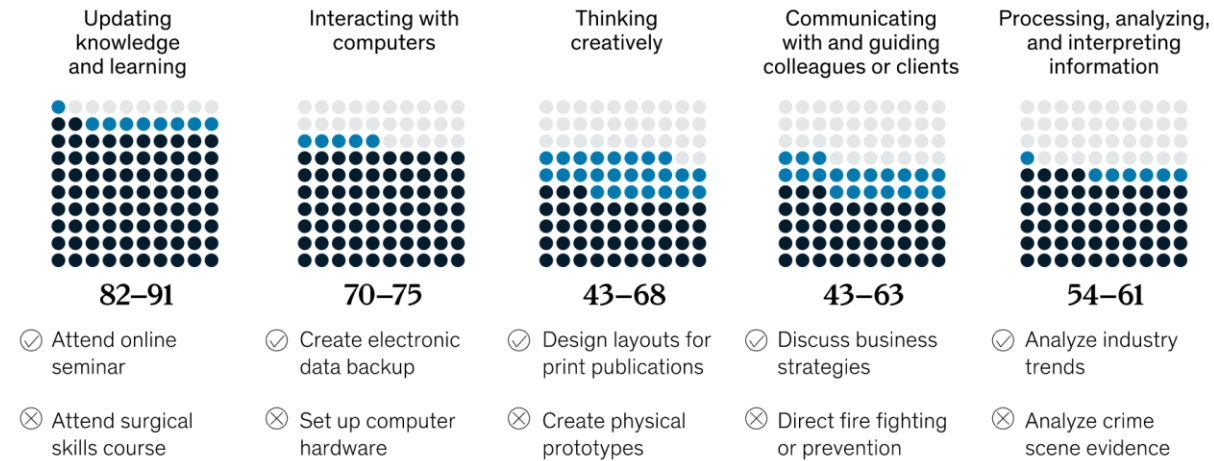
Zip	Neighborhood	Temporarily Closed	Permanently Closed	Total Closed
30120	Cartersville (GA)	0.0%	2.0%	2.0%
30281	Stockbridge (GA)	0.0%	3.3%	3.3%
32720	Deland (FL)	0.9%	2.6%	3.5%
19130	Fairmount District (Philadelphia)	0.9%	2.7%	3.5%
76028	Burleson (TX)	0.0%	4.0%	4.0%
46123	Avon (IN)	0.0%	4.0%	4.0%
45840	Findlay (OH)	0.0%	4.1%	4.1%
30041	Cumming (GA)	0.0%	4.3%	4.3%
91762	South Ontario (CA)	0.0%	4.4%	4.4%
43130	Lancaster (OH)	0.9%	3.5%	4.4%
23456	Virginia Beach (VA)	0.9%	3.5%	4.4%
17701	Williamsport (PA)	0.7%	3.7%	4.5%
97703	Old Bend (OR)	0.7%	3.7%	4.5%
73013	East Side (Oklahoma City)	0.0%	4.5%	4.5%
75149	Mesquite (TX)	0.9%	3.7%	4.7%



Activities with the highest potential for remote work include updating knowledge and interacting with computers.

Potential share of time spent working remotely for select activity categories in the United States, %

- Effective potential (no productivity loss)
- ⊙ Task that can be done remotely
- Theoretical maximum
- ⊗ Task that cannot be done remotely



Source: McKinsey & Co.



It's a poll!

how many days in the office?

$$\text{VARIABLE POPULATION RATIO} = \frac{\text{working population}}{\text{resident population}}$$

NATIONAL AVERAGE = 0.39



Zip	Neighborhood	Total Restaurants	Working Population	Resident Population	Variable Population Ratio	% Professional Services
90071	Grand Central Market (Downtown LA)	77	40,527	15	2,701.8	79%
32830	Lake Buena Vista (Orlando)	239	49,790	26	1,915.0	20%
11430	Jamaica / Queens (NYC)	80	25,504	53	481.2	2%
94104	Financial District (SF)	84	41,538	286	145.2	70%
55402	Downtown Minneapolis	121	58,826	429	137.1	66%
60603	Chicago Loop	93	44,334	480	92.4	62%
24011	Roanoke (VA)	56	8,198	119	68.9	77%
60606	Chicago Loop	143	115,313	2,123	54.3	71%
35233	Five Points South (Birmingham)	90	20,595	594	34.7	25%
78205	River Walk (San Antonio)	197	29,752	898	33.1	33%
60602	Chicago Loop	72	36,183	1151	31.4	57%
91210	Glendale Galleria (LA)	59	6,049	194	31.2	8%
02110	Financial District (Boston)	94	48,457	1,586	30.6	73%
98134	Industrial District (Seattle)	81	26,258	872	30.1	20%
95113	Downtown (San Jose)	142	20,192	713	28.3	48%
10018	Midtown West / Manhattan (NYC)	310	126,973	5,290	24.0	35%
15222	Troy Hill (Pittsburgh)	197	59,247	2,706	21.9	53%
92121	Sorrento Valley (San Diego)	129	95,937	4,398	21.8	53%
72201	Downtown (Little Rock)	81	22,103	1,021	21.6	60%
97204	Downtown (Portland)	152	29,195	1,538	19.0	56%



2021 EDITION

The 2020 chain restaurant landscape, after an unprecedented pandemic year

Key industry trends and consumer insights for the (hopeful) "new normal"

Firefly 500+



STANDOUT 2020 LTOS Standout limited-time releases from top US Mexican operators, courtesy of Datassential SCORES

01 CHIPTLE
Cilantro-Lime Cauliflower Rice
A plant-based option made with real, grilled cauliflower, seasoned with fresh-chopped cilantro, lime juice and salt, prepared fresh in restaurant every day.

99 SUPERSTAR

02 TACO BELL
Cantina Crispy Shell Beef Taco
Featuring a freshly fried white corn shell filled with melted nacho cheese sauce and three-cheese blend, seasoned beef, reduced-fat sour cream, lettuce, shredded cheddar cheese, and sliced tomatoes.

98 SUPERSTAR

03 QDOBA
Steak Fajita Quesadilla
Grilled steak, hand sliced sautéed fajita veggies, freshly made pico de gallo, salsa roja and shredded cheese, served with hand-smashed guac and sour cream.

99 SUPERSTAR

04 TACO JOHN'S
Sirloin Steak Taco Perfecto
A 9-inch taco shell stuffed with sirloin steak, shredded cheddar cheese, house salsa, shredded lettuce and diced tomato.

99 SUPERSTAR

01 INTRO-LIME CAULIFLOWER RICE
A grain-free way to lighten your day. 4 Net Carbs. Price \$2.50

02
Image of a taco

03
Image of a quesadilla

04
Image of a taco

59

5

Sports bars score surprising unit growth.

The FSR Sports Bar segment was an underdog story in the early innings of the pandemic. With live sports shut down, conventional wisdom held that sports bars might also shut down for lack of games to watch. Yet the 13 brands in this segment called the right plays — sports bars led all full-service segments in growth of adopting takeout and grew their delivery percentage more than any full-service sector except midscale — to produce a 3.2% gain in aggregate unit count. It also helped that sports bar chains index heavily to the suburbs and serve chicken wings, a menu item that worked well in delivery and carryout orders and proved popular during the pandemic.

The FSR Sports Bar segment's 9% decline in sales reflected the outside effect COVID had on entertainment brand Dave & Buster's. But the segment's newest member, **Wing On Sports** (Boston), contributed 12 restaurant openings and a 1.3% gain in annual sales to an estimated \$90.8 million in its rookie season in the Firefly 500.

94.3% of full-service sports bars offered takeout as of December 2020.

84.8% of full-service sports bars offered delivery as of December 2020.

21

At a Glance:

The Firefly 500+

Sales for the Firefly 500+ decreased by -4.3% compared to 2019, while unit counts decreased by -1.5%, shedding 3,616 total locations.

2020 SALES
\$305.18 billion

95% of total industry sales.

2020 UNITS
229,979 units

95% of total industry units.

6

At a Glance:

Sales

Sales for the Firefly 500+ decreased by -4.3% compared to 2019.

2019: \$319.0B

2020: \$305.2B

Sales for the Firefly 500+ decreased by -4.3% compared to 2019.

2020 Sales

Segment	2020 Sales	1-Year Change
FSR	\$246,889,155	+2.1%
Quick Service	\$161,221,670	+1.2%
Fast Casual	\$55,360,485	+4.1%
FSR	\$18,291,178	+4.1%
Midscale	\$14,528,344	+0.4%
Casual Dining	\$41,855,656	-1.0%
Fine Dining	\$2,557,278	-1.0%

FSR Segments:

Segment	Change
FSR Chicken	+2.7%
FSR Pizza	+2.7%
FSR Salad/Mealplan	+0.2%
FSR Mexican	-0.6%
FSR Burger	-0.6%
FSR Dessert Snack	-1.0%
FSR Other	-1.2%
FSR Sandwich	-1.8%
FSR Coffee	-1.3%
FSR Bakery/Cafe	-4.0%

FSR Segments:

Segment	Change
FSR Sports Bar	+9.0%
FSR Regional Ethnic	+6.4%
FSR Italian/Pizza	+4.1%
FSR Midscale	+3.1%
FSR Seafood/Steak	+0.7%
FSR American	-2.1%

Full-service chains' devastating sales losses came from severe downward pressure on average unit volumes, as the transition to self-service strategies like delivery was rocky across the board, especially for FSR American and FSR Seafood/Steak.

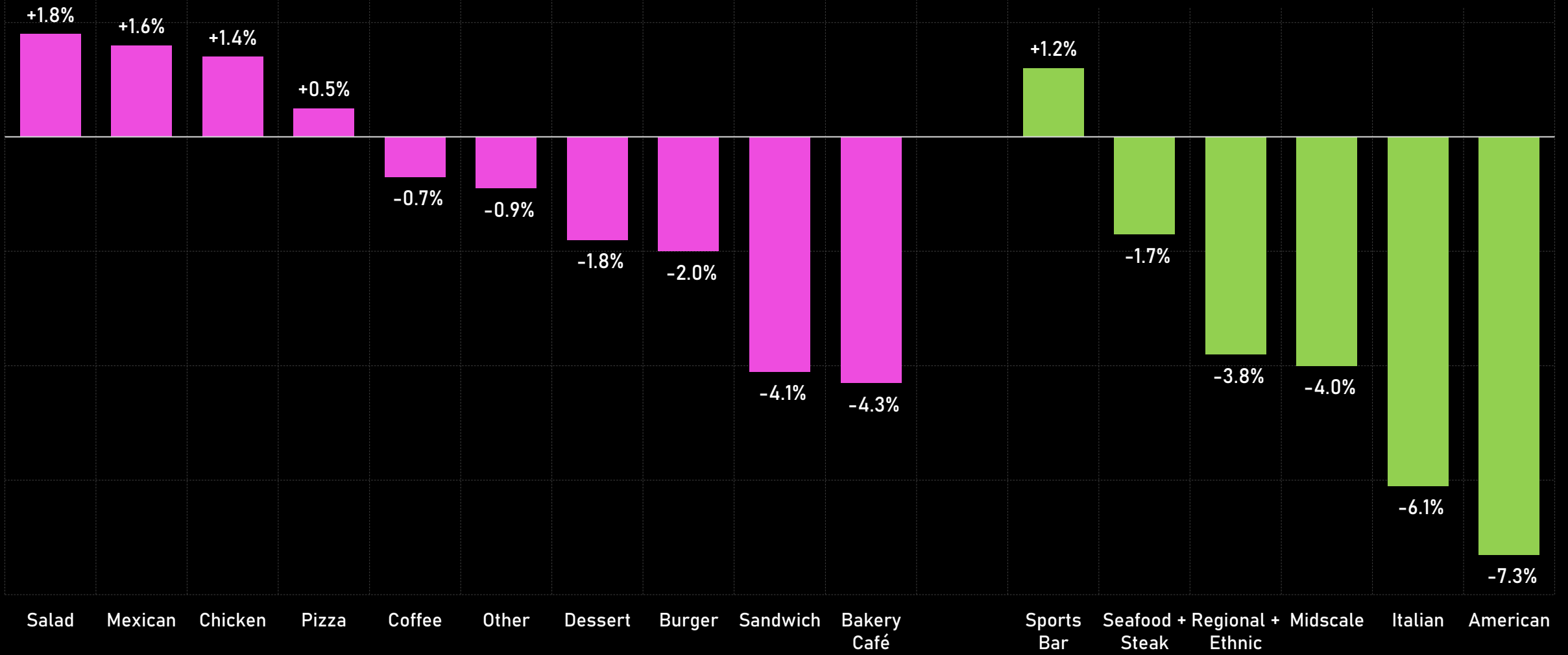
20

Firefly 500+

Unit Growth.

top 500 US restaurant chains from 2019 to 2020

FIREFLY 500



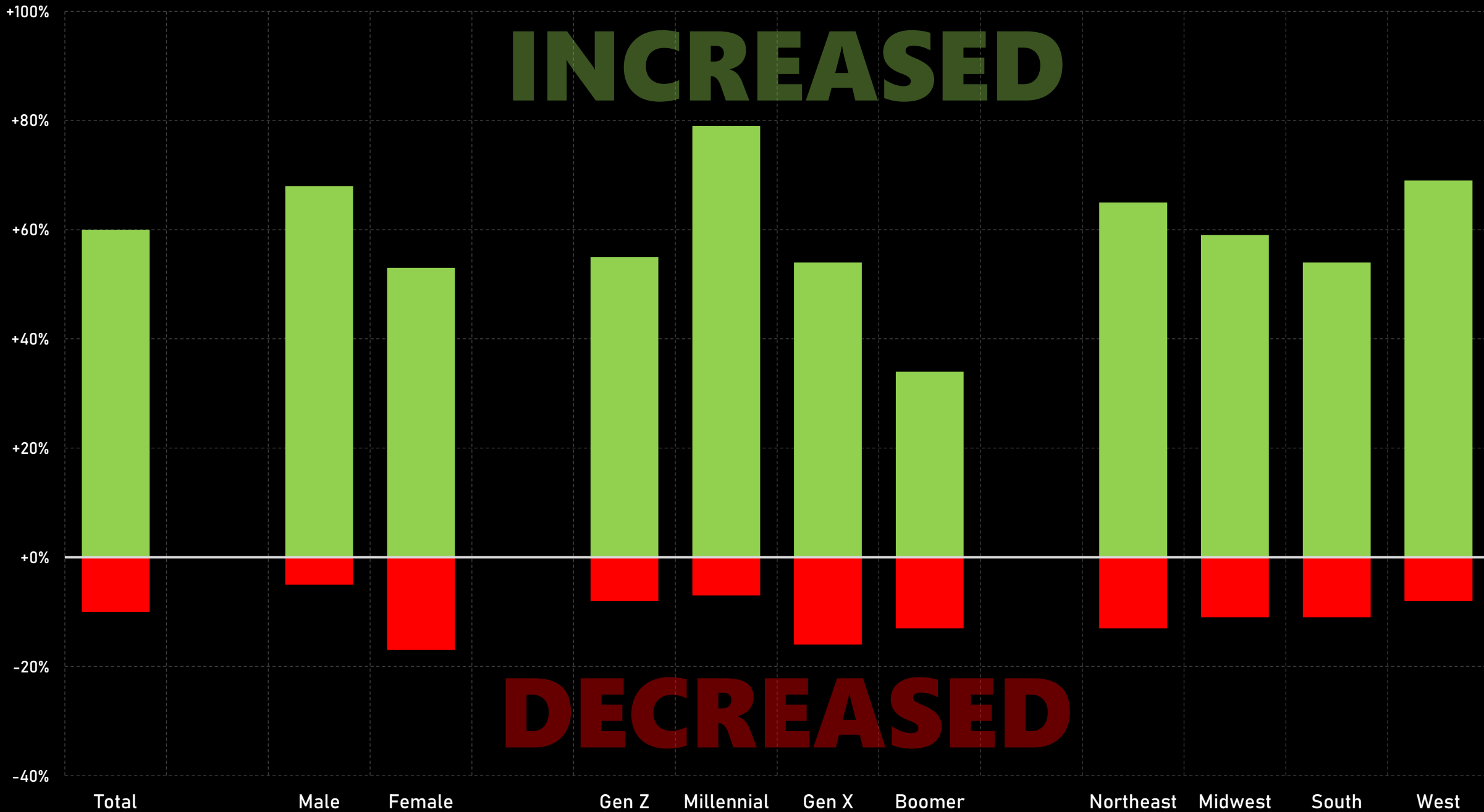
LIMITED SERVICE

FULL SERVICE



90% have changed their delivery behavior as a result of Covid.

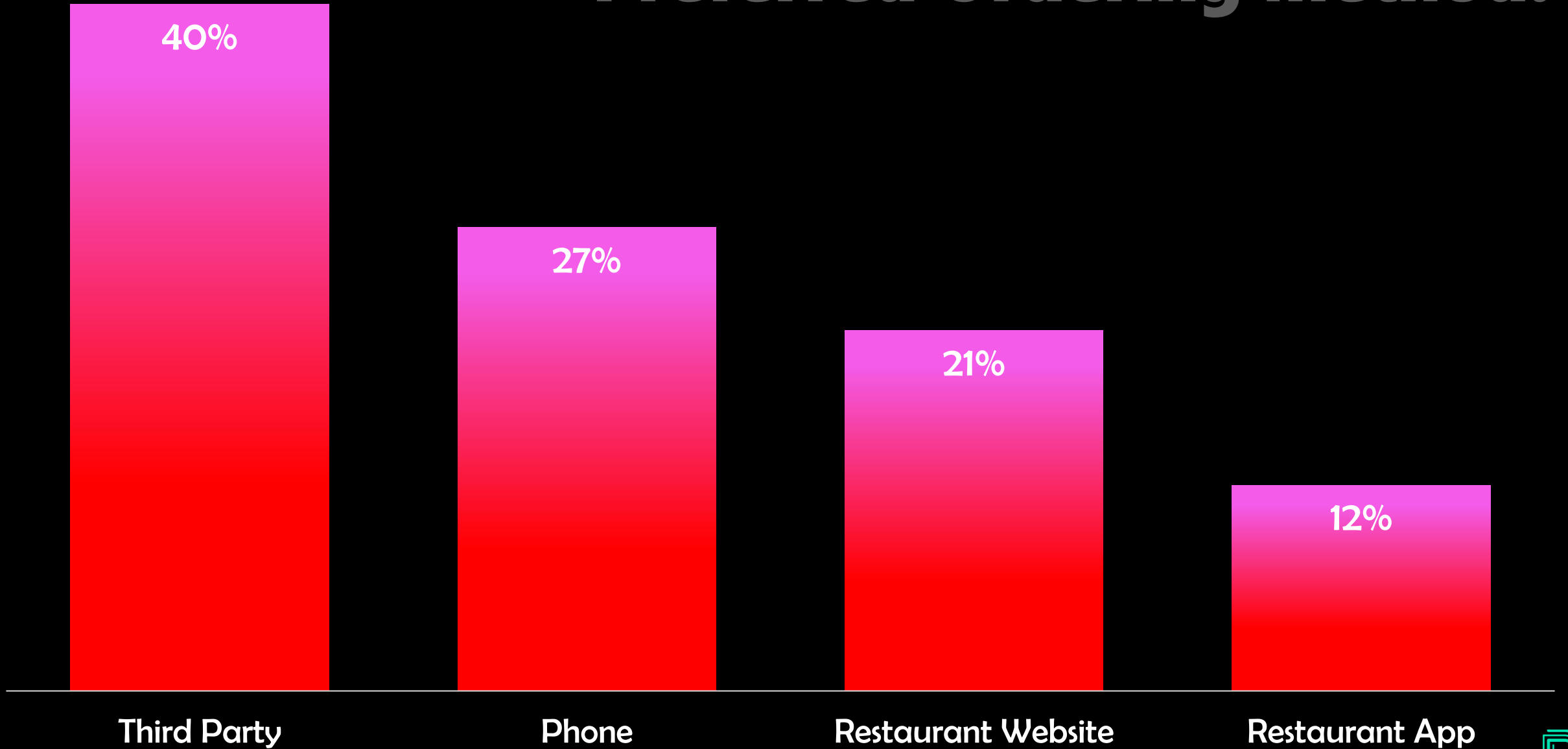






	June 2020	Dec 2020	% change
LSR Salad	32.7%	75.6%	+42.9%
LSR Dessert	25.8%	66.0%	+40.2%
LSR Sandwich	50.3%	78.3%	+28.0%
LSR Other	57.8%	84.5%	+26.7%
FSR Midscale	61.0%	84.9%	+23.9%
LSR Mexican	57.5%	80.9%	+23.4%
FSR Sports Bar	61.5%	84.8%	+23.3%
LSR Chicken	53.0%	73.0%	+20.1%
LSR Bakery Café	63.4%	83.0%	+19.6%
LSR Coffee	31.9%	50.8%	+18.9%
FSR American	66.1%	82.0%	+16.0%
LSR Burger	58.0%	73.5%	+15.5%
FSR Regional + Ethnic	69.7%	85.0%	+15.3%
LSR Pizza	65.3%	79.6%	+14.2%
FSR Seafood + Steak	60.3%	70.4%	+10.1%
FSR Italian	88.9%	92.4%	+3.6%

Preferred Ordering Method.

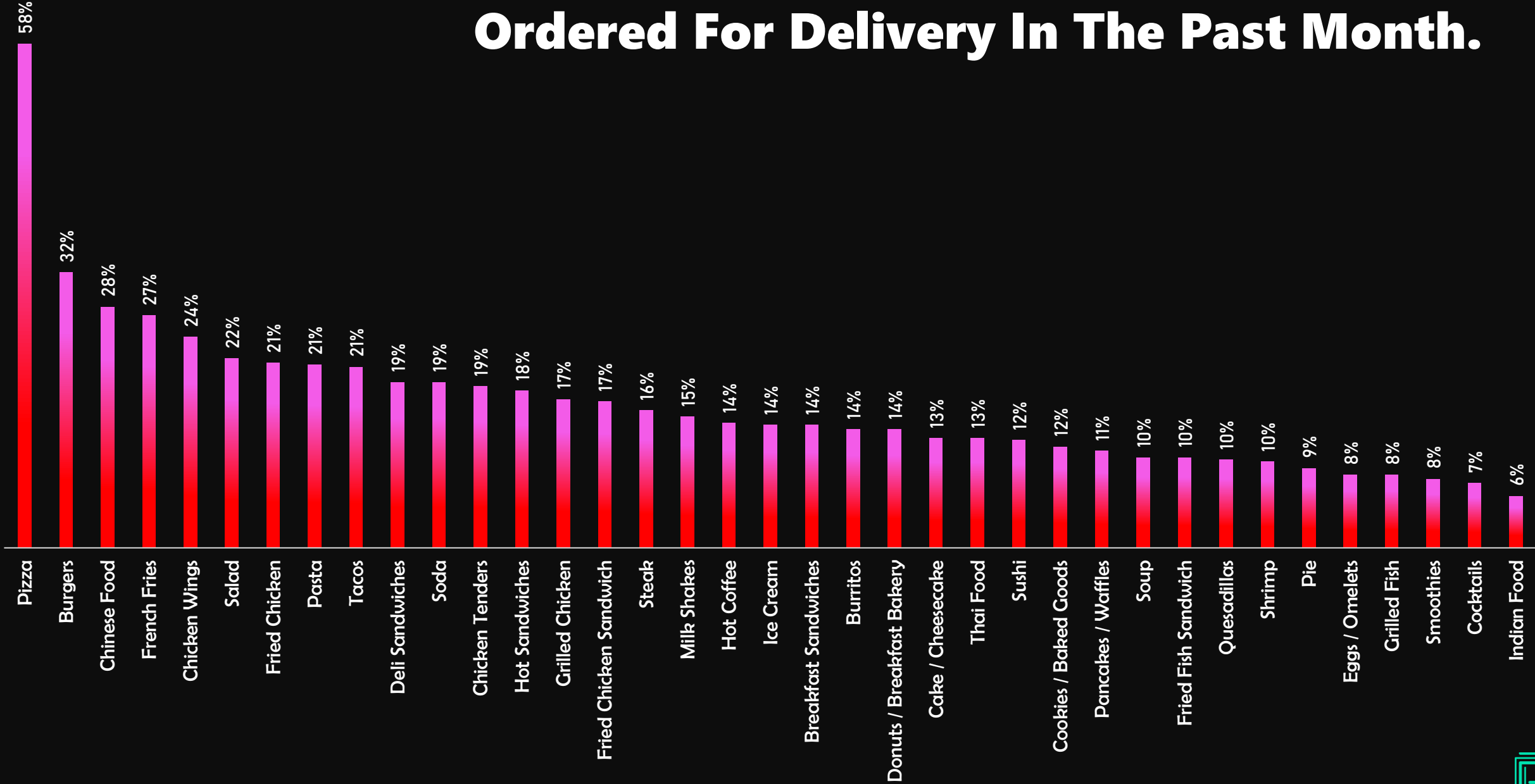


PREFER TO ORDER BY **PHONE**

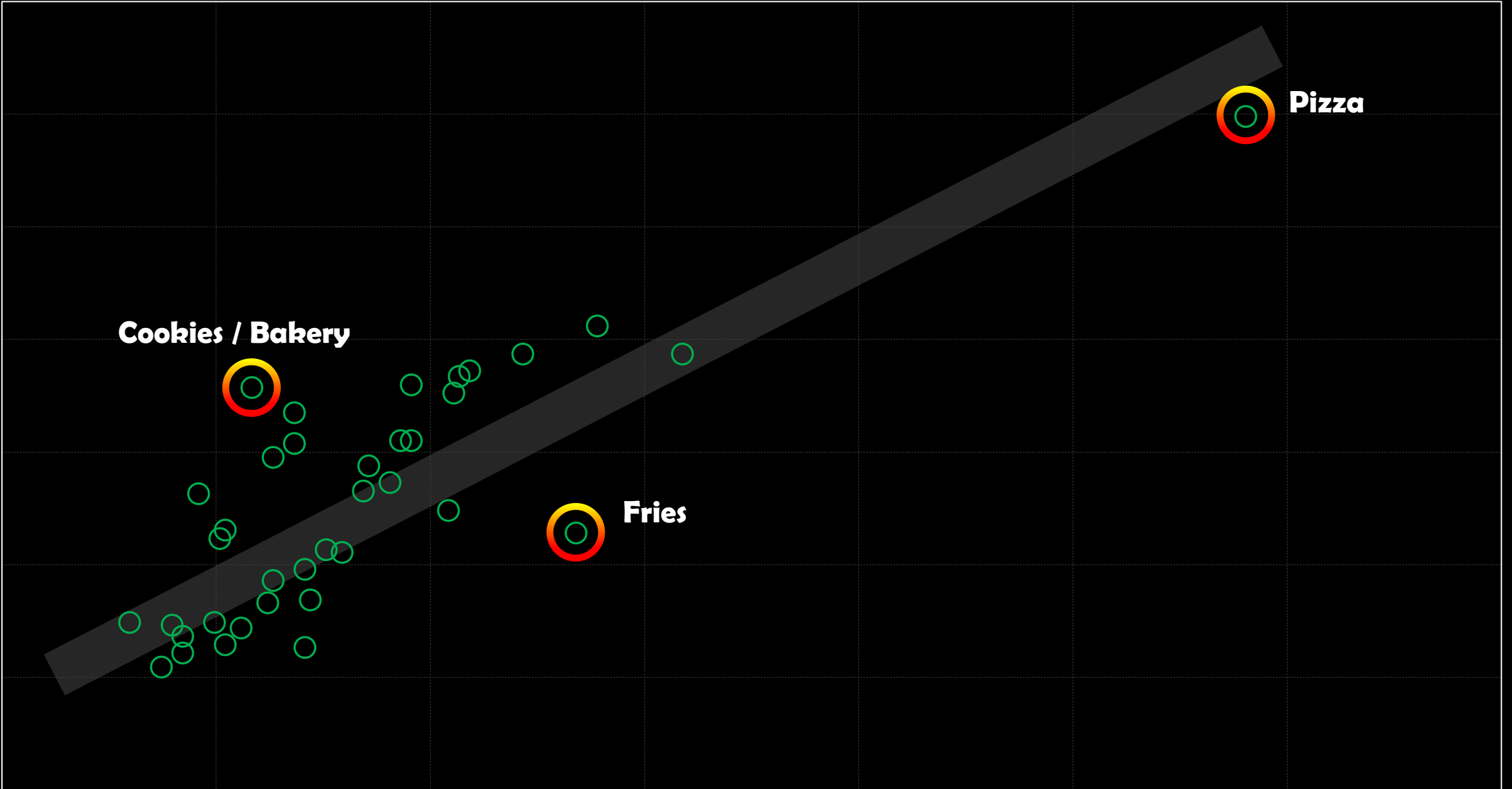
Gen Z	Gen Y	Gen X	Boomer+
18%	10%	30%	61%



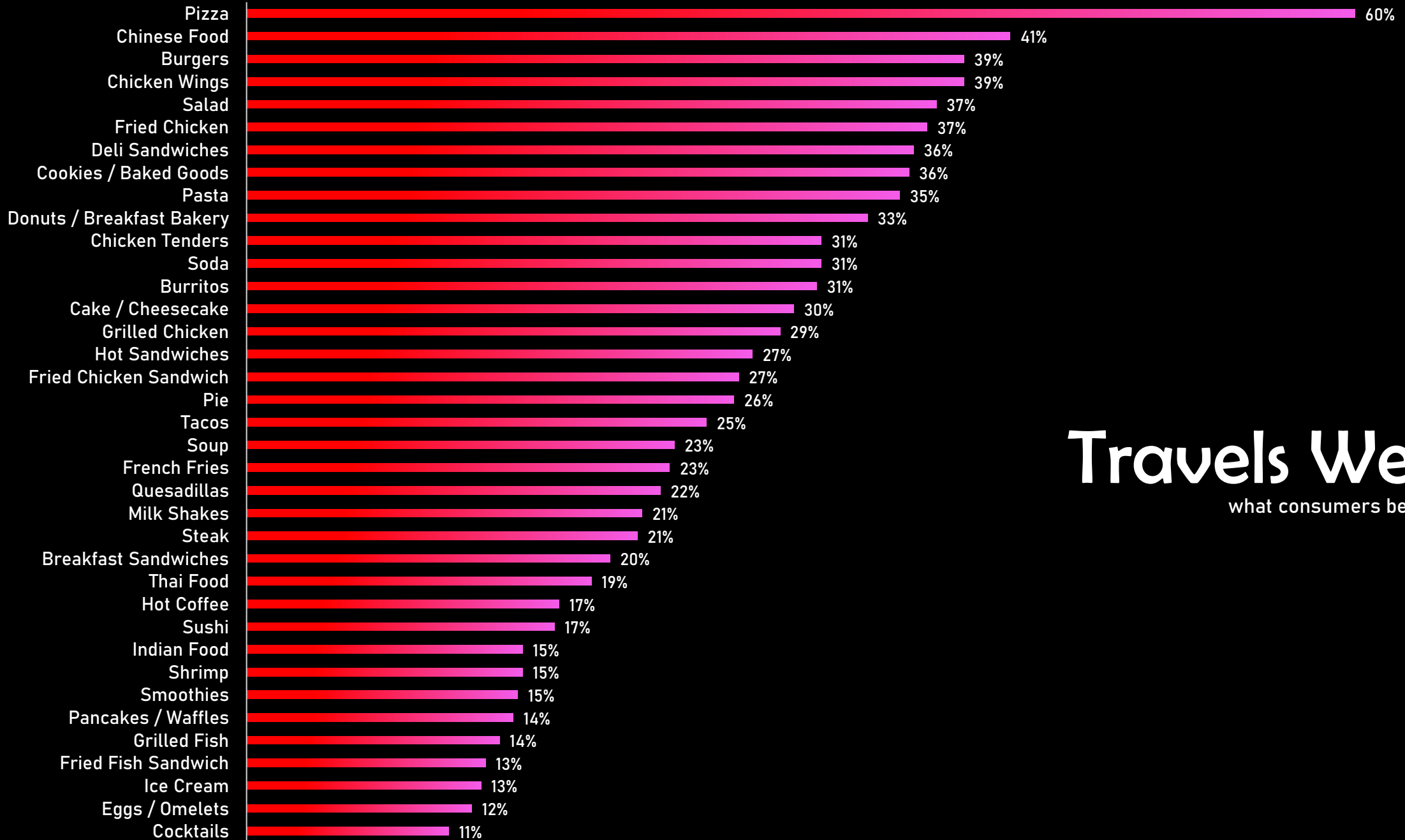
Ordered For Delivery In The Past Month.



Travels Well



Ordered For Delivery



Travels Well
 what consumers believe



DINE-IN**DELIVERY**

EXPECTED

33 minutes or less

ANNOYED

47 minutes or more





GHOST KITCHEN

a space with no physical storefront that's used to prepare and send delivery food





VIRTUAL BRAND

a delivery-only brand where food is prepared in an existing kitchen



VIRTUAL BRAND AWARENESS

OCTOBER 2020

35%

MARCH 2021

50%

HAVE ORDERED FROM A VIRTUAL BRAND

OCTOBER 2020

23%

MARCH 2021

34%



92%

want virtual brands properly identified on delivery apps



73% want to know which restaurant / kitchen is preparing the food

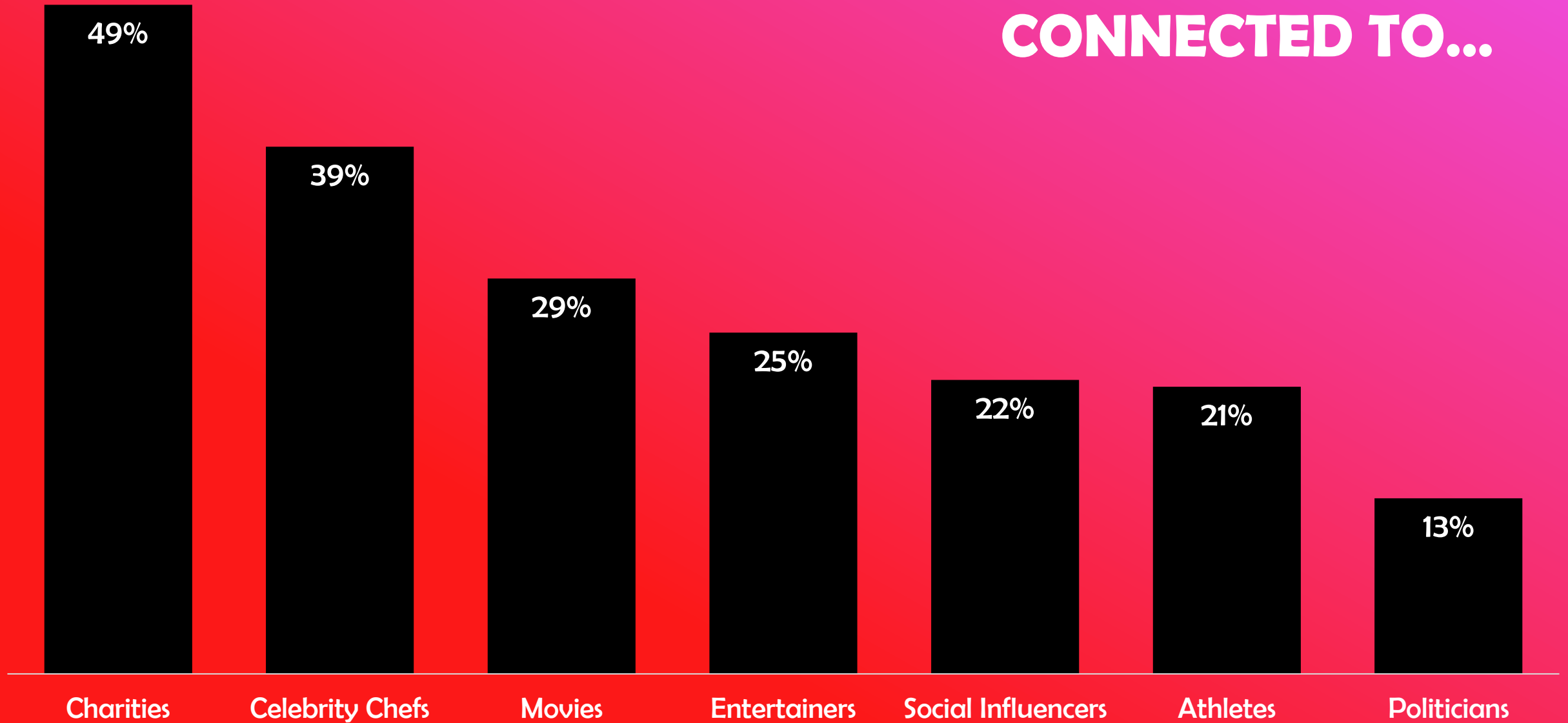


MOSTLY THE SAME?





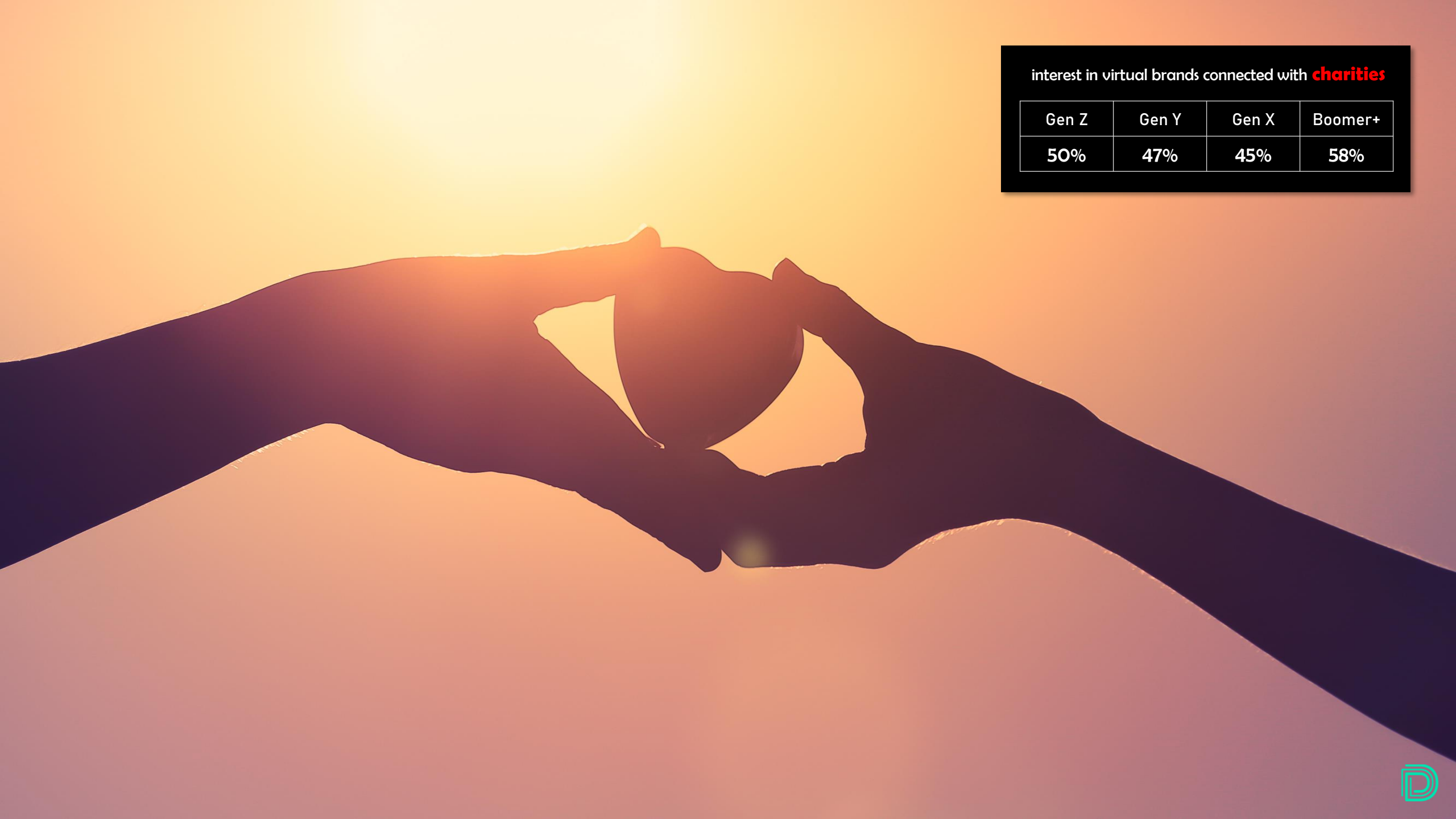
INTEREST IN VIRTUAL BRANDS CONNECTED TO...



interest in virtual brands connected with **movies**

Gen Z	Gen Y	Gen X	Boomer+
40%	41%	24%	7%





interest in virtual brands connected with **charities**

Gen Z	Gen Y	Gen X	Boomer+
50%	47%	45%	58%



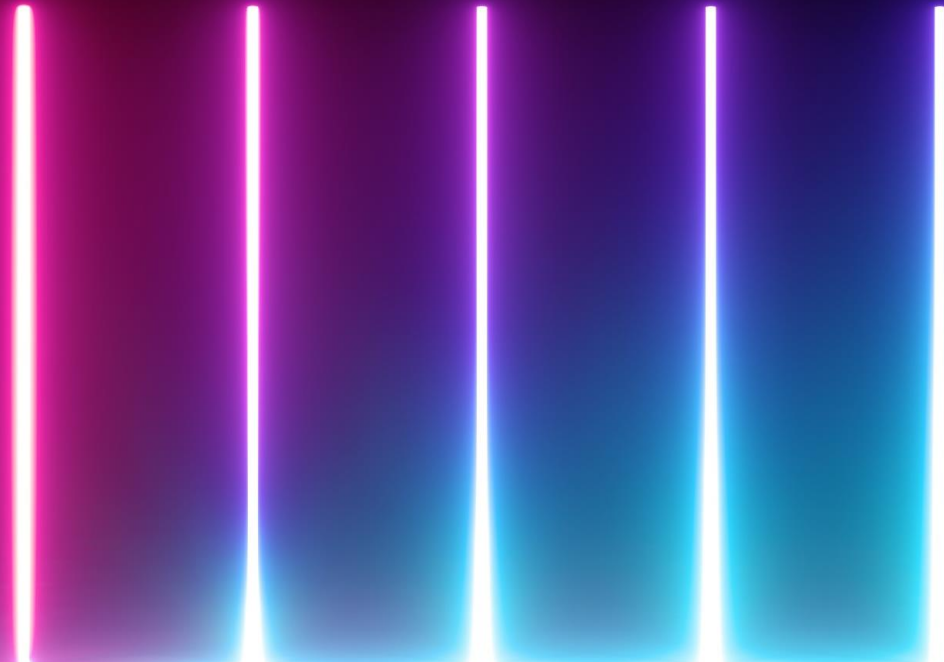


interest in virtual brands connected with **celebrity chefs**

Gen Z	Gen Y	Gen X	Boomer+
35%	38%	41%	38%



virtual brands can help **target audiences** with laser-like precision







April 29

EVERY OTHER THURSDAY @ 12pm CST



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- Bangkok Belly



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Enter address

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Enter territory, metro, city, zip

Select Prospect Type

GO

Priority Targets

112

FOREST HILLS

New Item Targets

132

Select # of Outlets

31

Regional Chain Targets

Search by operator, area, and more...



GET STARTED

hello@datassential.com