



PepsiCo Foodservice Insights

COVID-19 INSIGHTS

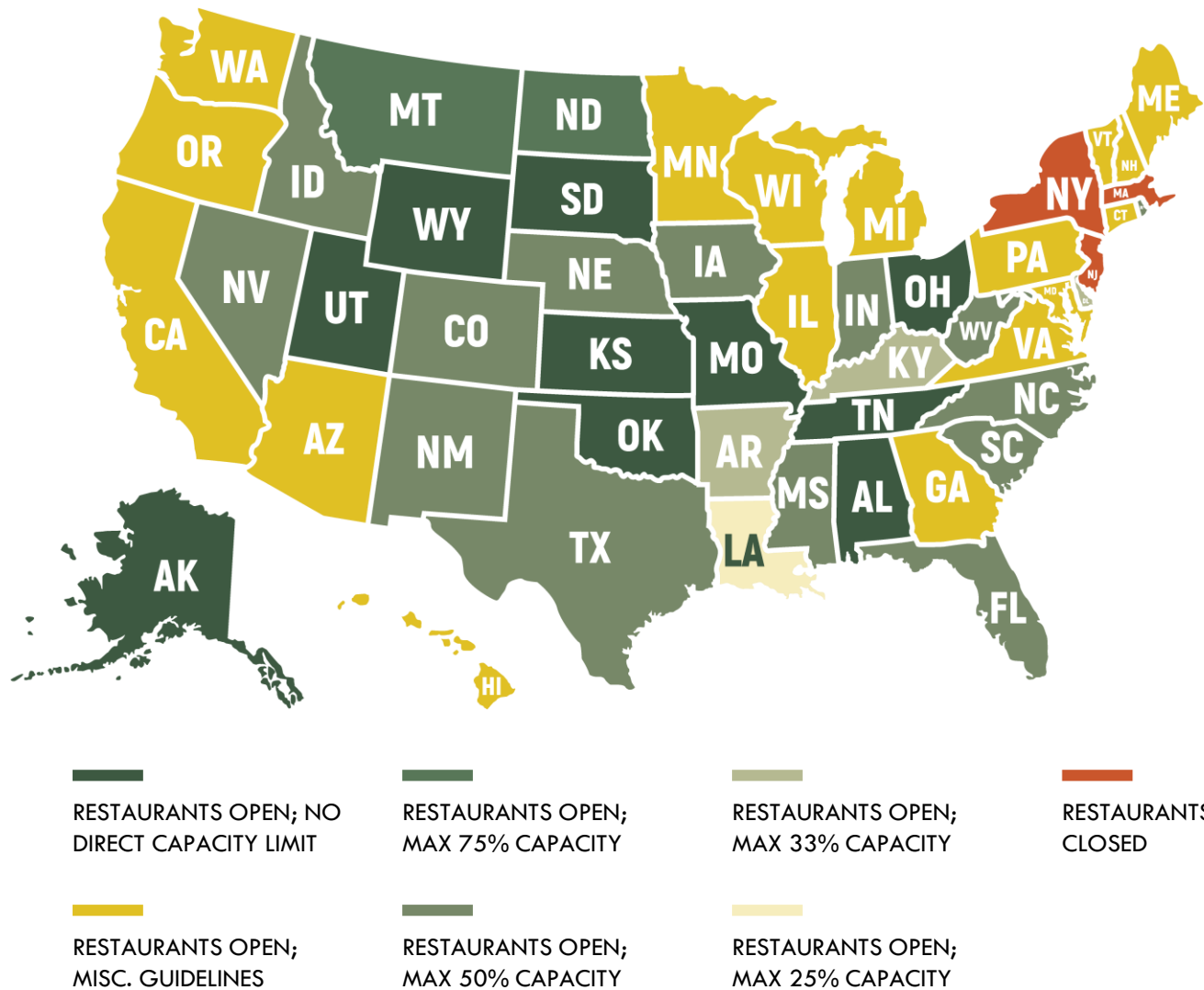
JUNE 5, 2020

We continue to look at the impact COVID-19 across 4 stages:

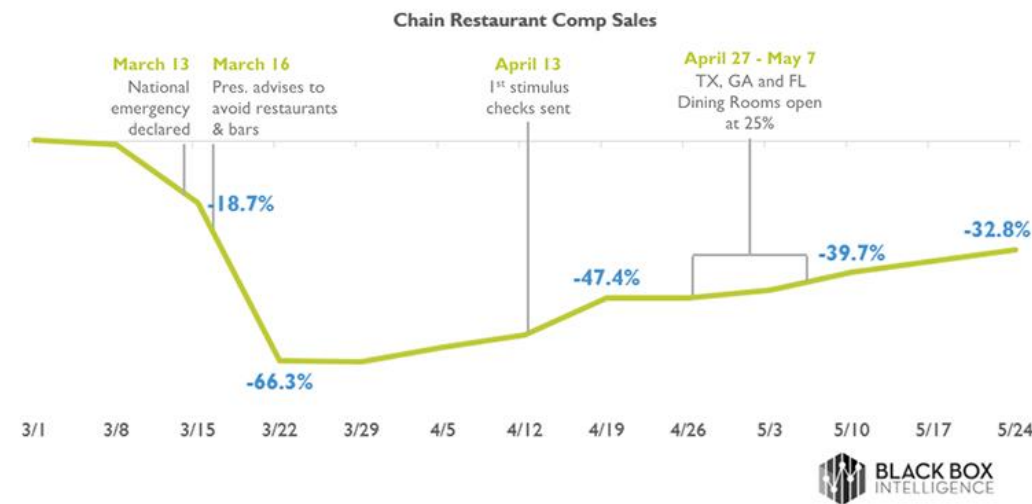


Most states are currently in this stage

Industry Update



US SALES HIT BOTTOM IN MARCH

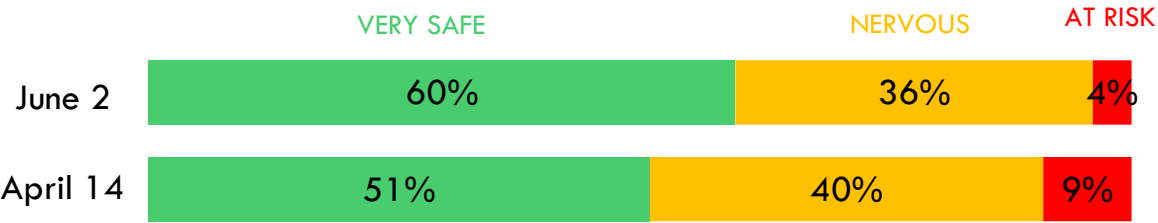


RESTAURANT SAFETY MEASURES

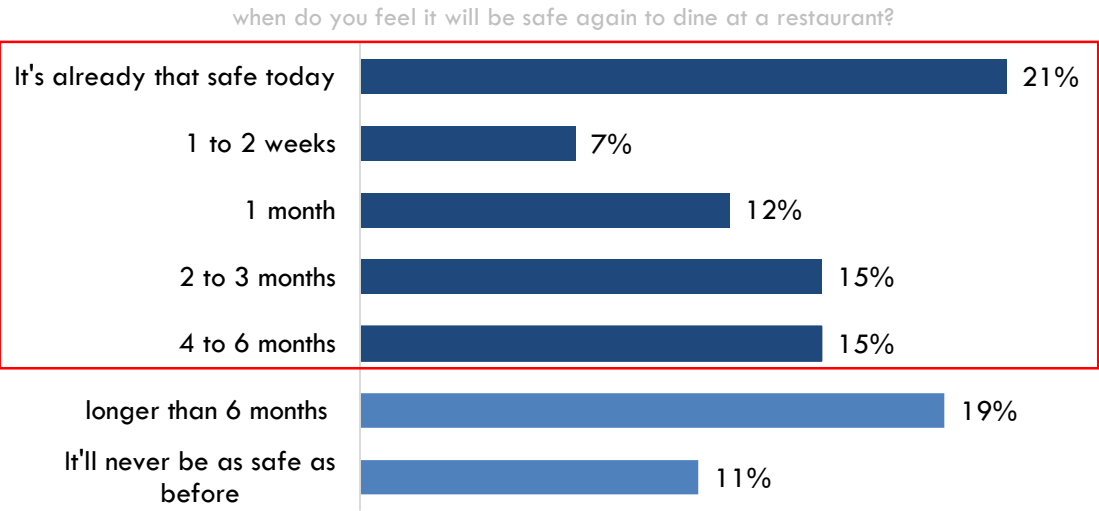


Industry Update

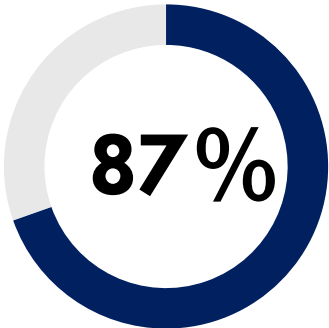
While concerns are easing, some consumers are still expressing reservations about the safety of dining out...



...But nearly three quarters of consumers are optimistic that dining out is already safe, or will be in the near term.



Pent-Up Demand is Real



% wanting to get back to restaurants



Operators Around The Globe Are Finding Creative Ways To Adhere To Social Distancing

With safety still a concern, some operators are having fun with social distancing, turning it into more of an experience than an intimidating chore...



N E W Z E A L A N D

Cyclista Espresso Bar in New Zealand is delivering coffee via a custom fashioned delivery train, creating a socially distant, contactless experience.



M A R Y L A N D , U S A

Fish Tales Bar & Grill in Maryland created bumper tables which allow guests to enjoy a drink while remaining in their own socially distanced space.



G E R M A N Y

Select Burger Kings in Germany recently debuted these social distancing crowns, encouraging guests to keep their distance while enjoying their Whoppers.

We've Been Tracking the Macro Consumer Shifts and Signals

**CONTACT YOUR PEPSICO
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PepsiCo Foodservice Insights

We are in a time of unprecedented change and disruption as a result of the COVID-19 pandemic. While there are more questions than answers right now, we are committed to delivering best-in-class insights and perspectives that will provide a more informed approach as we jointly build plans that can succeed on the other side of this challenge.

Due to the dynamic nature of the situation, this document will evolve as new information refines our hypotheses.

Special thanks for this edition go to Karen King, Ashley Dodge, Kimberly Sugden and Amy Edler.