

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





NEED FOR COMFORT. **REASSURANCE &** 

**FEELING** 

DOING

Stockpiling Pantry Items,



Club & Ecom, fewer trips to C&G, Foodservice







CONFINEMENT & COCOONING

Mar-Jun (est)



CONTINUED NEED FOR COMFORT, & **REASSURANCE, AND BOREDOM RELIEF** 

**FEELING** 

Shift to

Working/Learning from Home



**DOING** 

Growth of Ecom & Delivery, most On-Premise closed



Shifts to Streaming & Gaming Decrease in podcasts





**RESTRICTED RECOVERY** 

Jun-Dec (est)



**TENTATIVE, CAUTIOUS** OPTIMISM, CONFUSION **ABOUT RULES** 





Continued Use of Ecom, Likely a short spike in Foodservice, incl. **Entertainment & Travel** 

Partial Return, Testing

to new Protocols

Out Situations, Adapting







Ecom & Delivery become

Adapting to Permanent



Likely a Return to Usual Media, with more





RELIEVED, DESIRE TO MAKE UP FOR LOST TIME BUT

**FEELING** 

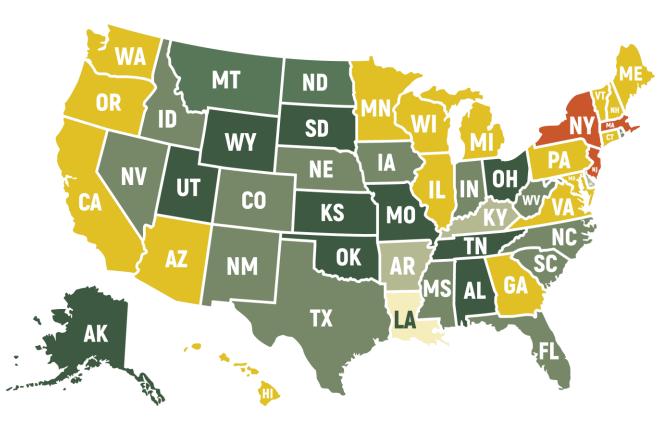








## Industry Update



**RESTAURANTS OPEN; NO** DIRECT CAPACITY LIMIT

**RESTAURANTS OPEN;** MISC. GUIDELINES

**RESTAURANTS OPEN;** MAX 75% CAPACITY

**RESTAURANTS OPEN;** 

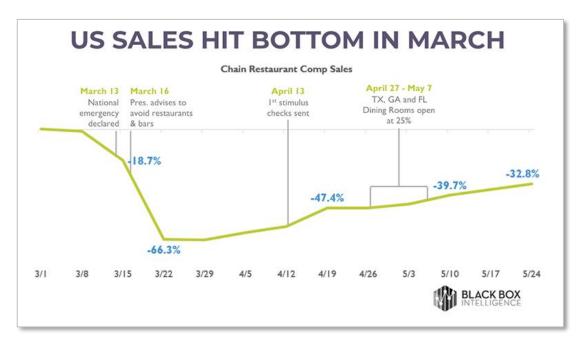
MAX 50% CAPACITY

MAX 33% CAPACITY

**RESTAURANTS OPEN; MAX 25% CAPACITY** 

**RESTAURANTS OPEN;** 

**RESTAURANTS** CLOSED







53% taking Employee temperature



61% removing some tables



76% requiring gloves for all staff



**63%** using plexi-glass shields



89% requiring masks for all staff

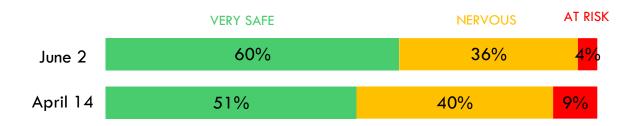


97% have hand sanitizer throughout



# **Industry Update**

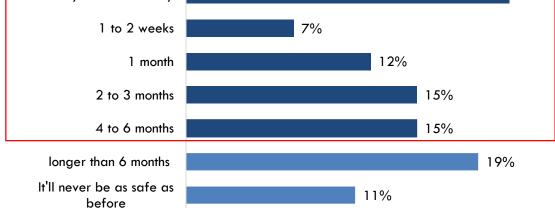
While concerns are easing, some consumers are still expressing reservations about the safety of dining out...



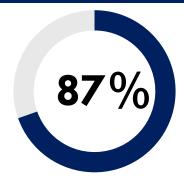
...But nearly three quarters of consumers are optimistic that dining out is already safe, or will be in the near term.

when do you feel it will be safe again to dine at a restaurant?





#### **Pent-Up Demand is Real**



% wanting to get back to restaurants



21%

# 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...



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



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



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 REPRESENTATIVE TO LEARN MORE



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.

