



COVID Business Dining Client Survey Executive Summary

Final Results

May 15, 2020



INNOVATIVE
HOSPITALITY
SOLUTIONS



IHS would like to thank those that participated in our survey and interviews.

No one knows for sure what the “New Normal” will look like in the next few months and beyond. These survey results will help you understand how your peers have responded to the pandemic and what they may be planning for the short and long term future.

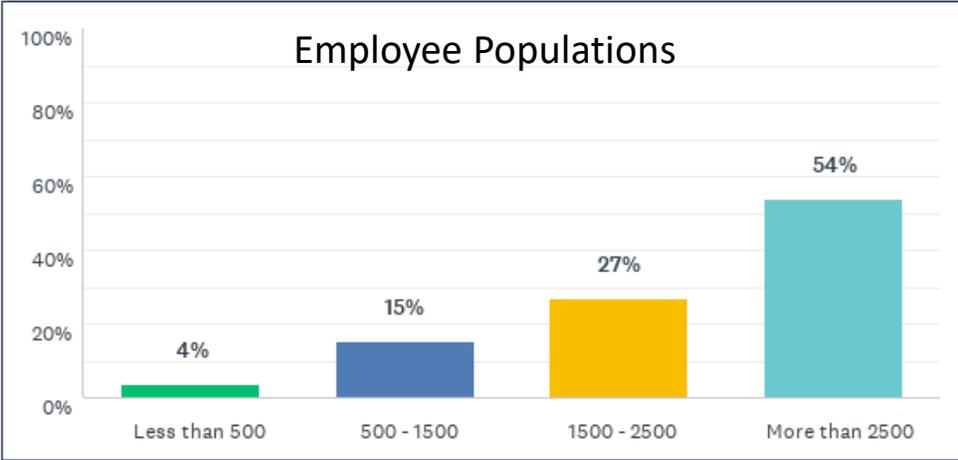
In addition to creating this survey/sharing these results, we are developing the following strategic initiatives to assist our clients with the new normal:

- **Reopening Checklist** – to prepare your foodservice venues as you ramp up for your employees return to site
- **COVID-19 CrossCheck Quality Assurance Test Areas** – to validate your operations’ compliance with these new standards
- **New Contract Language Templates** – to ensure your foodservice contract protects your liability in the event of future unforeseen disruptions
- **Station Modification Plans** – to recommend physical modifications to your venues
- **Service Modification Plans** – to recommend service procedure modifications to your venues
- If you believe that there are opportunities for us to help you:
 - Schedule a call – 302-231-2333 x 10
 - Schedule a meeting – matt.mundok@ihsimpact.com
 - Schedule a free consultation – www.ihsimpact.com

[Link to Full Survey Results](#)

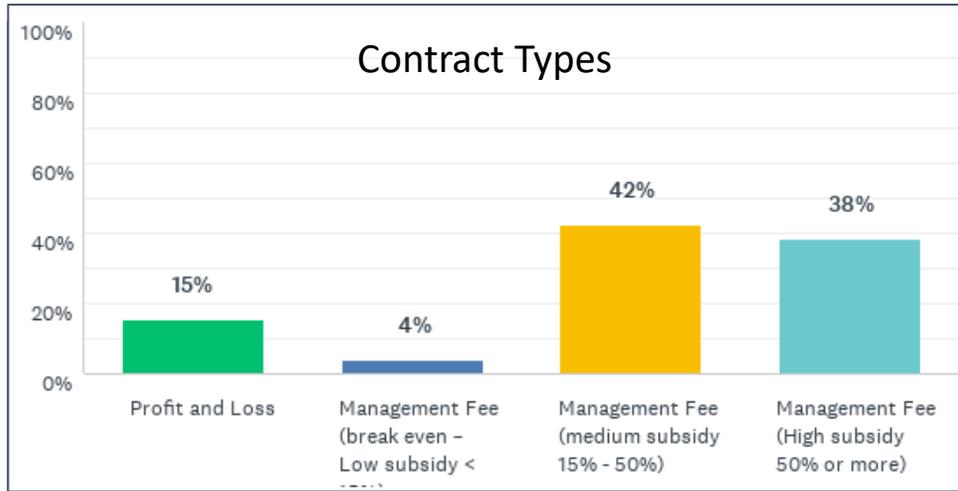
We surveyed 26 Business & Industry Clients:

- 4% had headquarters with less than 500 employees
- 15% had headquarters with 500-1500 employees
- 27% had headquarters with 1500-2000 employees
- 54% had headquarters with more than 2500 employees



Of those respondents, food service contract types included:

- 16% Profit and Loss (P&L)
- 5% Break Even/Low Subsidy Management Fee <15%
- 42% Medium Subsidy Management Fee 15-50%
- 37% High Subsidy Management Fee 50-100%



Current State Operations

The logo for IHS (Industrial Hygiene Solutions) features the lowercase letters 'ihs' in a bold, black, sans-serif font. A small teal circle is positioned above the 'i'.

COVID-19 Client Survey Results

[For access to the full data set
click here](#)

96%

of respondents had less than 25% of their normal **work force** onsite.

88%

of respondents indicated that **essential workers** made up less than 15% of their total work force.

2 out of 5

organizations were **offering amenities like foodservice** to those employees still reporting to site during the crisis.

90%

of respondents had reduced their **open foodservice venues** by more than half.

67%

of respondents had reduced their **foodservice venue offerings** by more than 75%.

Nearly 50%

of respondents indicated that **Micro Markets and Vending Machines** remained operational and were being restocked.

Only 24%

of respondents indicated that their **Café** venue remained operational.

One

organization continued to utilize their Cafe to serve varieties of **pre-made boxed lunches** to their onsite employees.

67%

of respondents with opened venues had provided foodservice to onsite employees at a **reduced cost** (free meals, meal stipend, etc.).

Only 7

organizations had modified their **receiving protocols** as a result of the crisis. 59% of respondents indicated that they have not modified or not considered modifying their receiving protocol.

Multiple

organizations have already implemented the following modifications to their foodservice venues:

- Eliminating **self-service** stations.
 - Offering **take-out only**.
- Modifying/closing **dining areas**.
- **Limiting customers** entering venues.
- Replacing **reusable wares** with disposables.

Financial & Contractual



COVID-19 Client Survey Results

[For access to the full data set
click here](#)

60%

of respondents indicated that their foodservice operators had **requested compensation** for their impacted workers.

Less than 15%

of foodservice operators had requested implementation of **Force Majeure** or changes to their **contract terms** in response to the crisis.

38%

of respondents indicated that their foodservice employees were being redeployed for other duties outside of foodservice.

70%

of those redeployed workers were **cleaning/sanitizing** foodservice areas or **assisting healthcare** verticals.

82%

of respondent organizations have agreed to **support hourly and salaried foodservice workers** with compensation.

- Over **60%** have covered 100% of hourly wages.
- Over **70%** have covered 100% of salaried wages.

One

organization's subsidized foodservice contract allowed them to **retain one (1) salaried position per venue**.

One

organization offered foodservice employees:

- 85% compensation for **those staying home**.
- 115% compensation for **those reporting onsite**.

33%

of respondents indicated that their **foodservice operators are compensating** 75% or more of their employees.

78%

of respondents indicated that **less than half** of their foodservice employees were **being furloughed**, while retaining benefits.

86%

of respondents indicated that **less than 25%** of their foodservice employees were **being laid off**, either temporarily or permanently.

41%

of respondents indicated that **more than half** of their **salaried managers were still working** during the crisis.

Future State Operations



COVID-19 Client Survey Results

[For access to the full data set
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78%

of respondents have begun **collaborative conversations** with their foodservice operators to discuss plans to reopen foodservice venues.

100%

of organizations have discussed **reopening foodservice venues in stages** when employees return to site.

73%

have discussed modifying their **Catering operations** to eliminate self-service models.

64%

have discussed reintroducing **self-service stations** to their Café venues in phases.

41%

have discussed the implementation of **disposable service wares** upon reopening.

55%

have discussed the implementation of service delivery models including **mobile ordering and kiosks**.

Multiple

organizations have discussed the following modifications to their foodservice venues:

- **Eliminating self-service** stations altogether, including salad bars.
- **Modifying their dining areas** to maintain social distancing.
- Considering **sustainability** when purchasing disposable service wares.
- Increasing the regularity of **their cleaning and sanitation** programs.

64%

of organizations believe that **physical modifications** will be made to their foodservice venues within the next 6-9 months as a result of the crisis.

94%

of organizations that previously utilized **guest restaurants** believe that outside restaurants will be limited upon reopening.

Multiple

organizations have discussed the following plans to direct social distancing in their foodservice venues:

- Using **signs, floor markers and stanchions** to direct customers.
 - **Staggering mealtimes** and extending hours to decrease meal rushes.
- Allowing **reservations or assigning mealtimes** to decrease meal rushes.
- Accepting **mobile orders** for take-out.
- Introducing **meal delivery** within the buildings.



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