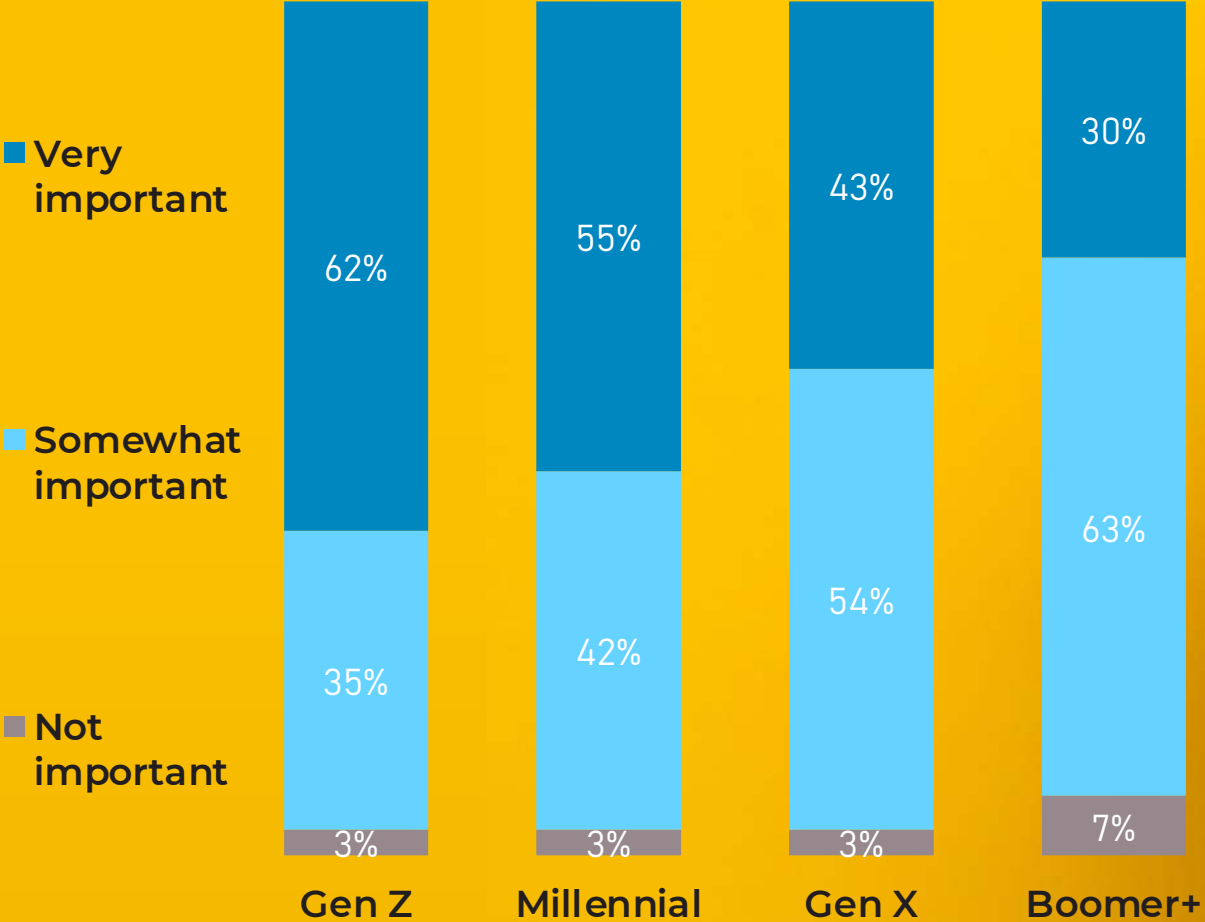




# PERSONAL IMPORTANCE OF SUSTAINABILITY by GENERATION

The significance of sustainability lays more heavily on younger adults.

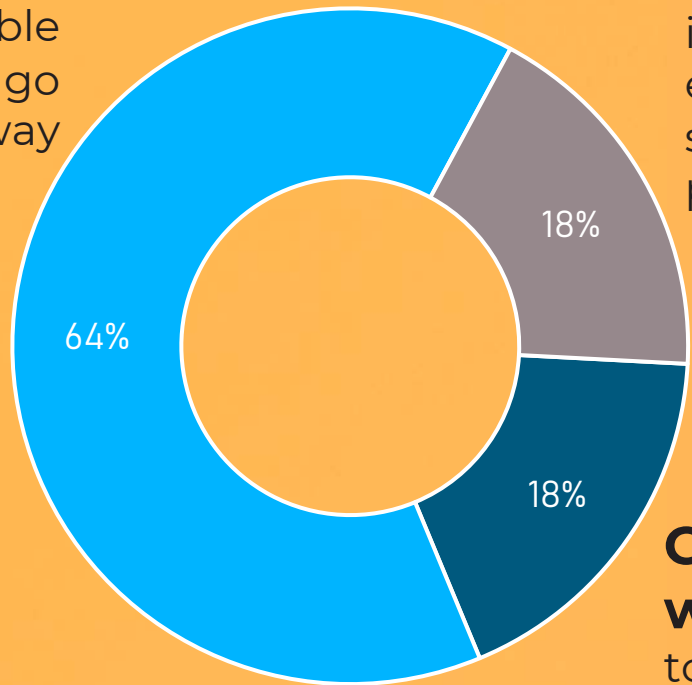


How important is sustainability to you personally? Among total consumer sample n=263 | 480 | 412 | 353



## Sustainability efforts have a positive halo effect.

**Like to eat at sustainable places** that support sustainable practices, but I won't go out of my way



**Don't care** if the places where I eat support sustainable practices

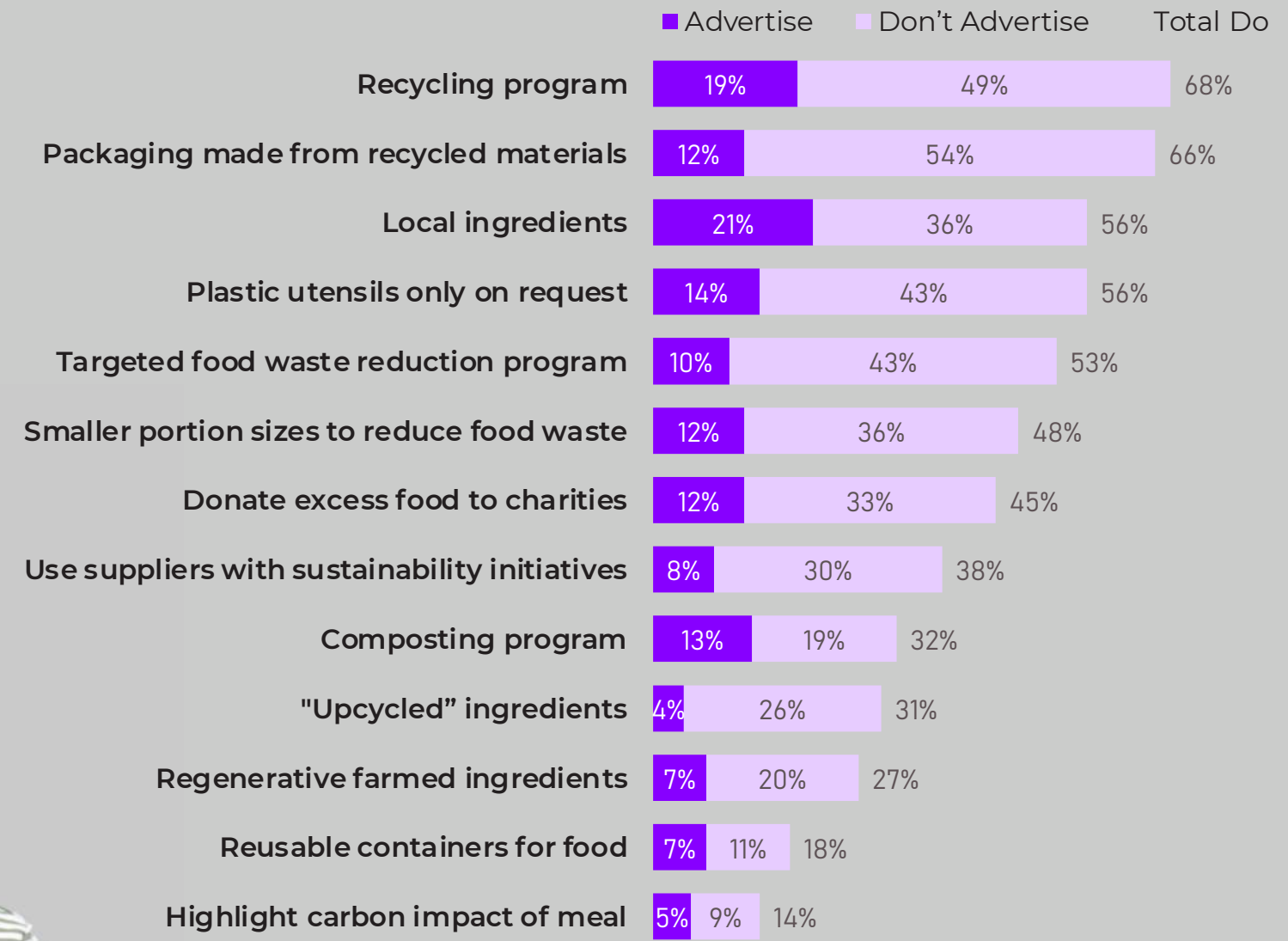
**Go out of my way** to eat at places that support sustainable practices





TOP SUSTAINABILITY INITIATIVES IMPLEMENTED & DEGREE ADVERTISED

Many types of sustainability initiatives are implemented but operators don't take advantage of the good press these offer.



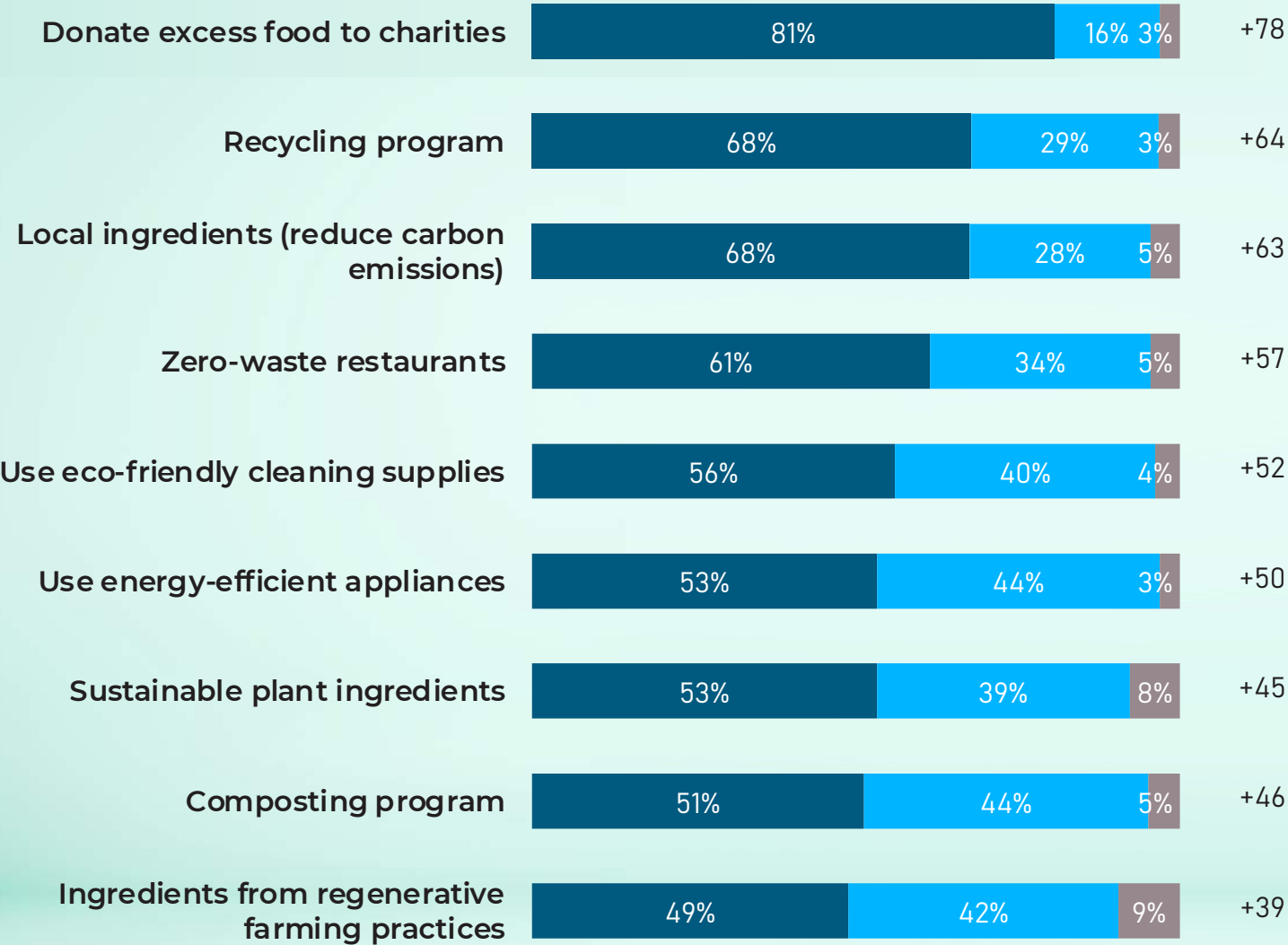
Does your operation currently implement any of the SUSTAINABILITY initiatives around operational PROCEDURES? | Does your operation currently offer your patrons any SUSTAINABLE PRODUCTS? | B4 - Does your operation's LOCATION incorporate any SUSTAINABLE features? | - Does your operation currently offer SUSTAINABILITY initiatives around the FOOD you serve? Among total operator sample n=402

SUSTAINABILITY EFFORTS MOST LIKELY TO DRIVE VISITS

Aside from food donations, a focus on recycling or local ingredients are best at driving traffic.



■ MORE LIKELY to visit ■ NO IMPACT ■ LESS LIKELY to visit PPT Gain\*



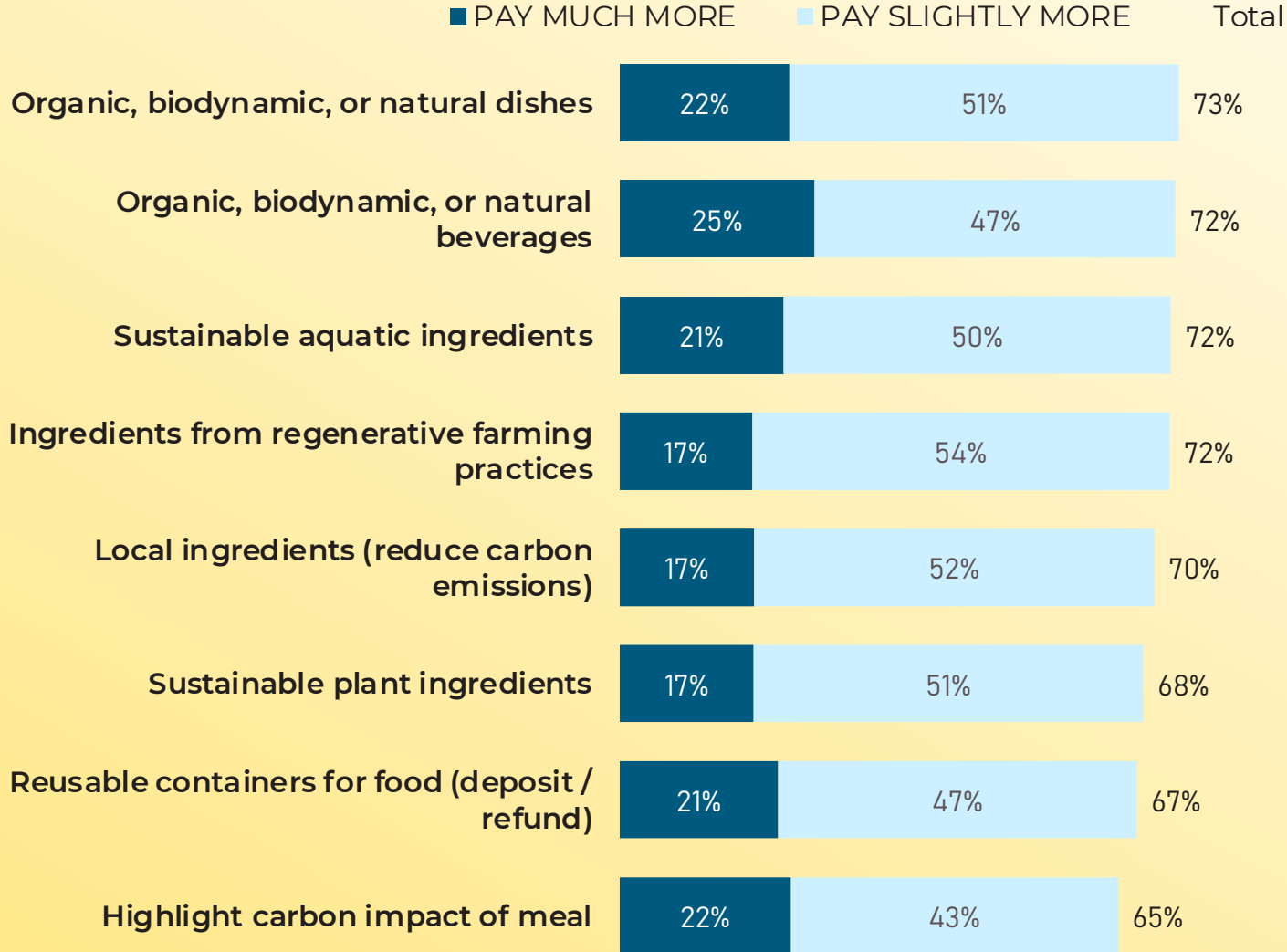
\*Less likely to visit subtracted from more likely to visit

What IMPACT, if any, would the following SUSTAINABILITY INITIATIVES have on your likelihood to visit a restaurant or other foodservice location? Among total consumer sample n=1,508



SUSTAINABILITY INITIATIVES MOST WILLING TO PAY MORE FOR

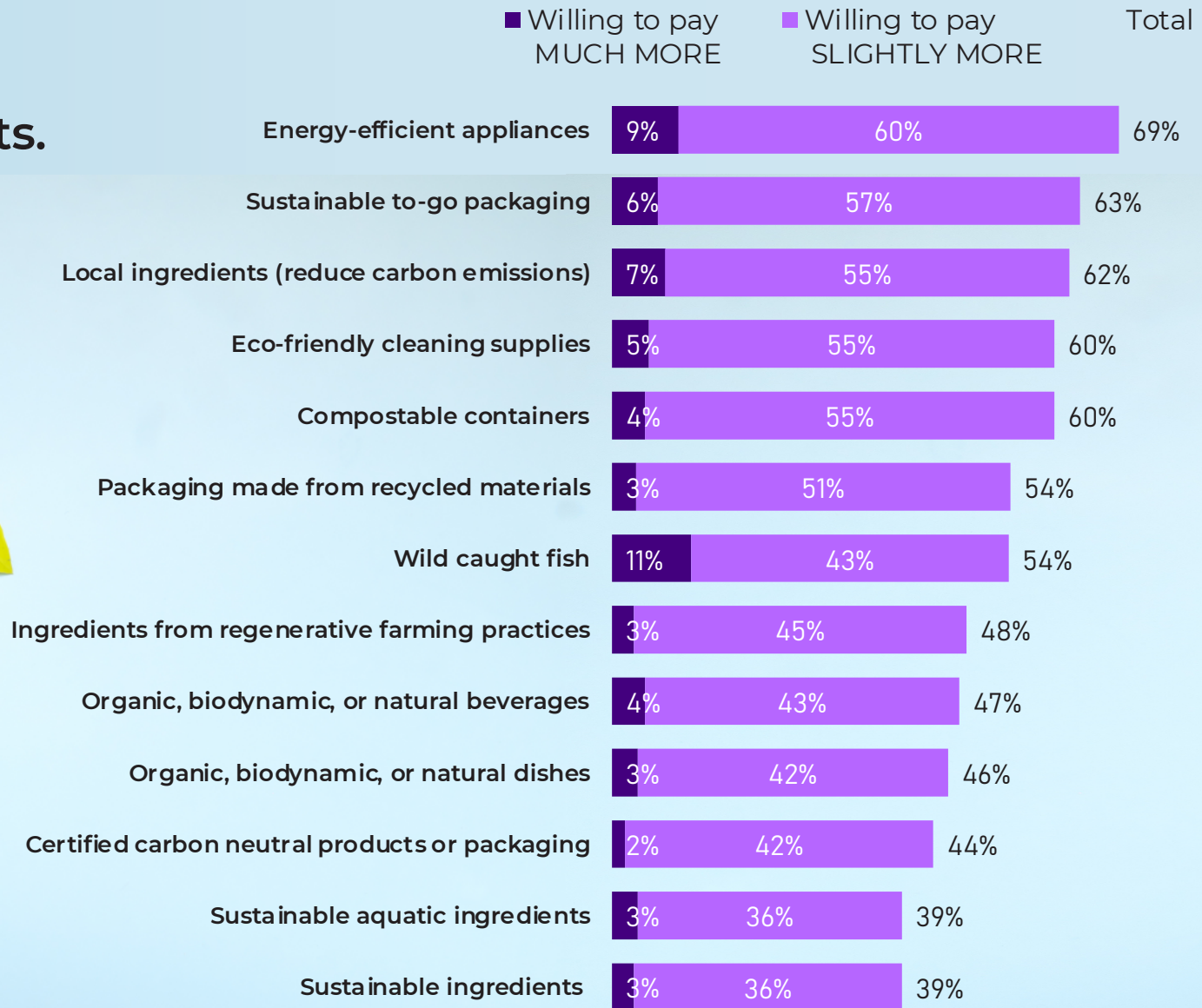
Consumers understand the need to pay more, to a degree, for organic and ingredients from other sustainable practices.



Would you be WILLING TO PAY MORE for any sustainability initiatives at a restaurant or other foodservice location? Among consumers more likely to visit n=varies from 404-1,216



# Operators begrudgingly understand the need to pay for some sustainable products.



And if each of the following sustainable products did cost more, would you be...? Among total operator sample n=402

