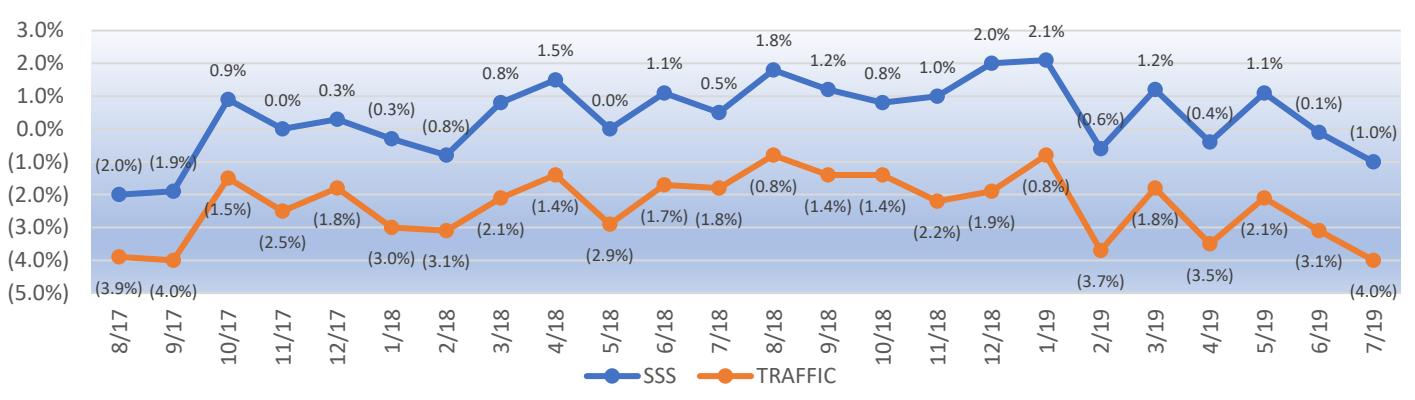


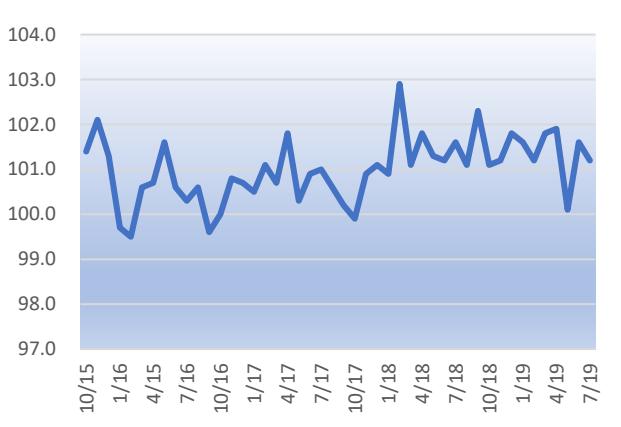
SAME STORE SALES & TRAFFIC



Source: Compass RCR and TDn2K

RESTAURANT PERFORMANCE INDEX

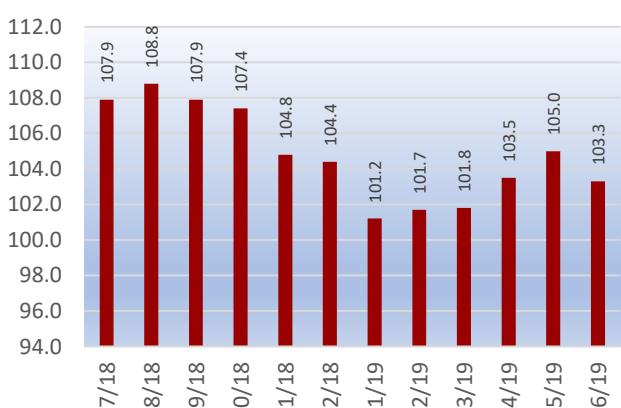
101.2 (0.4%)



Source: National Restaurant Association and Compass RCR

SMALL BUSINESS OPTIMISM INDEX

103.3 (1.7%)



Source: NFIB and Compass RCR

Current Situation Index: 101.1 (0.4%)

	Same Store Sales:	57%	Reported increase over July 2018
	Customer Traffic:	44%	Reported increase over July 2018
	Capital spending:	55%	Capital expenditures increased in last 3 months

Expectations Index: 101.2 (0.4%)

	Sales outlook:	51%	Expect higher sales in next 6 months
	Capital spending:	54%	Plan to make capital expenditures in next 6 months
	Economy:	13%	Expect economic conditions to improve during next 6 months

TOP CONCERNS:

- Labor issues continue to dominate operators' top concerns as reported by 85% (increase)
  - Recruiting & retaining quality people – this problem will continue to grow due to over 45% of operators planning to increase staff amounts
  - Forced to work varying shifts understaffed or reduce hours of operations – 47% (increase)
- Improving sales & traffic as reported by – 58% (increase)
- Controlling expenses – as reported by 73% (increase)
- Adapting/choosing new technology – as reported by 41% (increase)