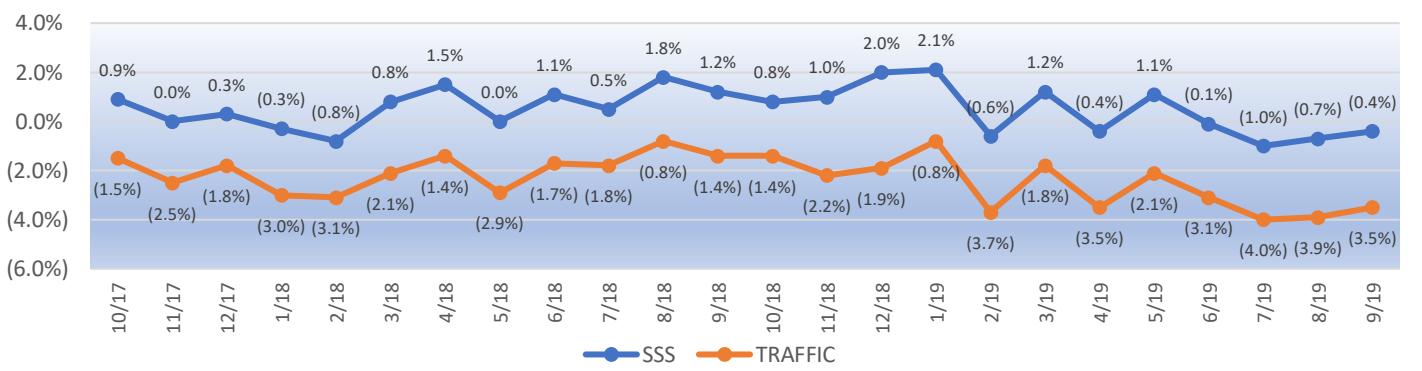


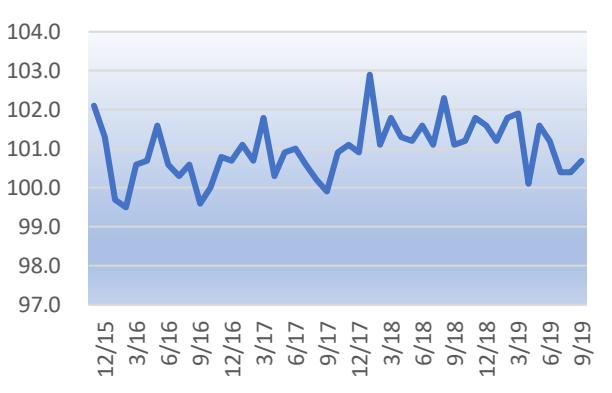
SAME STORE SALES & TRAFFIC



Source: Compass RCR and TDn2K

RESTAURANT PERFORMANCE INDEX

100.7 +0.3%



Source: National Restaurant Association and Compass RCR

Current Situation Index:

100.3 (0.4)%

	Same Store Sales:	48%	Reported increase over August 2018
	Customer Traffic:	33%	Reported increase over August 2018
	Capital spending:	62%	Capital expenditures increased in last 3 months

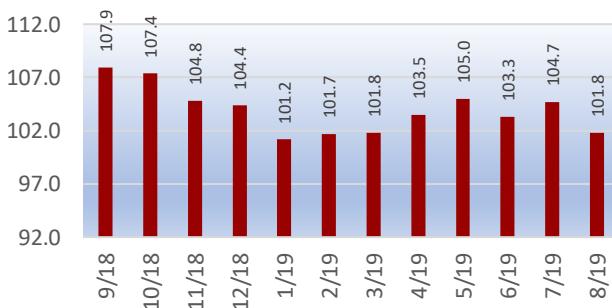
Expectations Index:

101.2 1.1%

	Sales outlook:	32%	Expect higher sales in next 6 months
	Capital spending:	60%	Plan to make capital expenditures in next 6 months
	Economy:	21%	Expect economic conditions to improve during next 6 months

SMALL BUSINESS OPTIMISM INDEX

101.8 (2.9%)



Source: NFIB and Compass RCR

CONSUMER OPTIMISM:

Current Mo: 93.2

Last Mo: 89.8

Trailing 3 Mo. Avg: 93.8

TRENDS:

OFF-PREMISE: Restaurant delivery sales softened the last two months.

PLANT-BASED PRODUCTS: More concepts are exploring plant-based meat products.

TOP CONCERNS:

- Labor issues continue to dominate. Recruiting mentioned by 63% of contacts. Actual labor and related costs increasing 79%.
- Building traffic and sales – 62%.
- Staying relevant with shifting consumer demands – 72%.