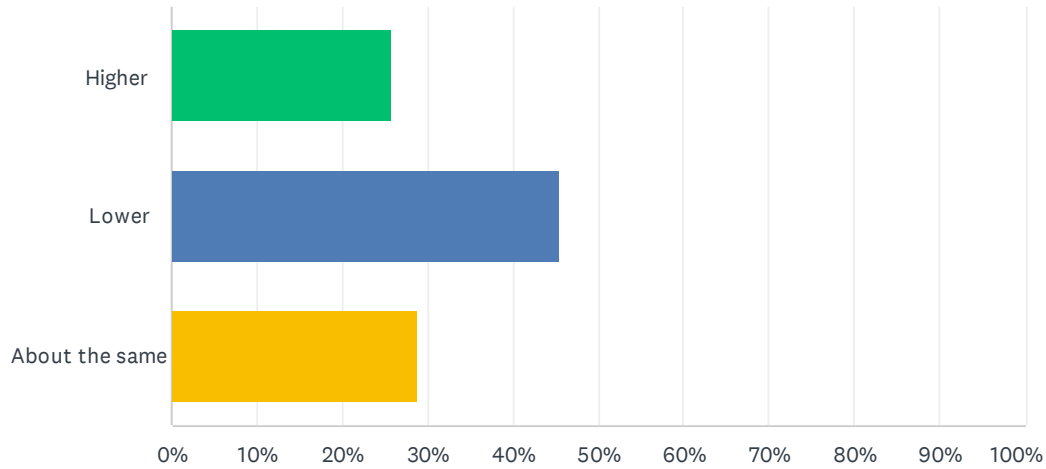


Q1 Over the past 12 months, how would you describe the change in your total dollar sales volume on a same-location basis?

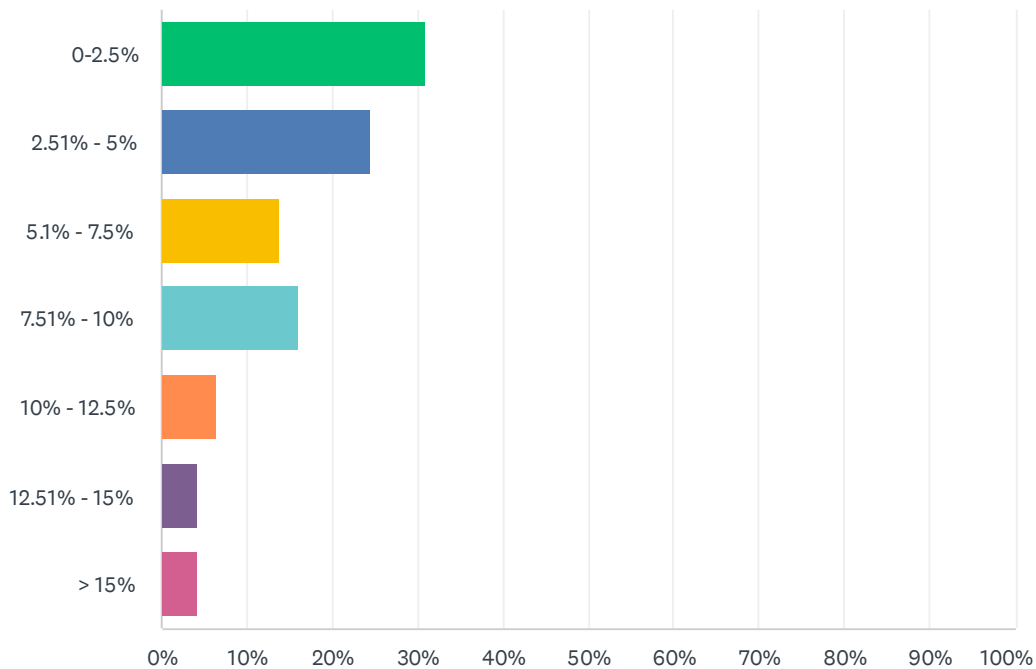
Answered: 209 Skipped: 0



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Higher | 25.84% | 54 |
| Lower | 45.45% | 95 |
| About the same | 28.71% | 60 |
| TOTAL | | 209 |

Q2 If your sales are higher, please provide the percentage increase in total dollar sales volume (on a same-store basis) over the past 12 months. If lower or the same, please skip to the next question.

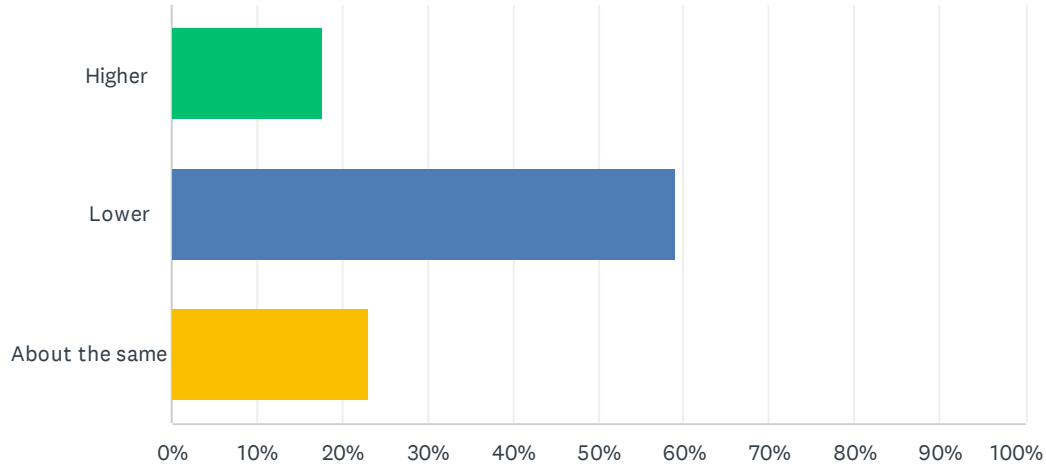
Answered: 94 Skipped: 115



| ANSWER CHOICES | RESPONSES |
|----------------|-----------|
| 0-2.5% | 30.85% 29 |
| 2.51% - 5% | 24.47% 23 |
| 5.1% - 7.5% | 13.83% 13 |
| 7.51% - 10% | 15.96% 15 |
| 10% - 12.5% | 6.38% 6 |
| 12.51% - 15% | 4.26% 4 |
| > 15% | 4.26% 4 |
| TOTAL | 94 |

Q3 Over the past 12 months, how would you describe the change, if any, to your customer traffic level in comparison to last year?

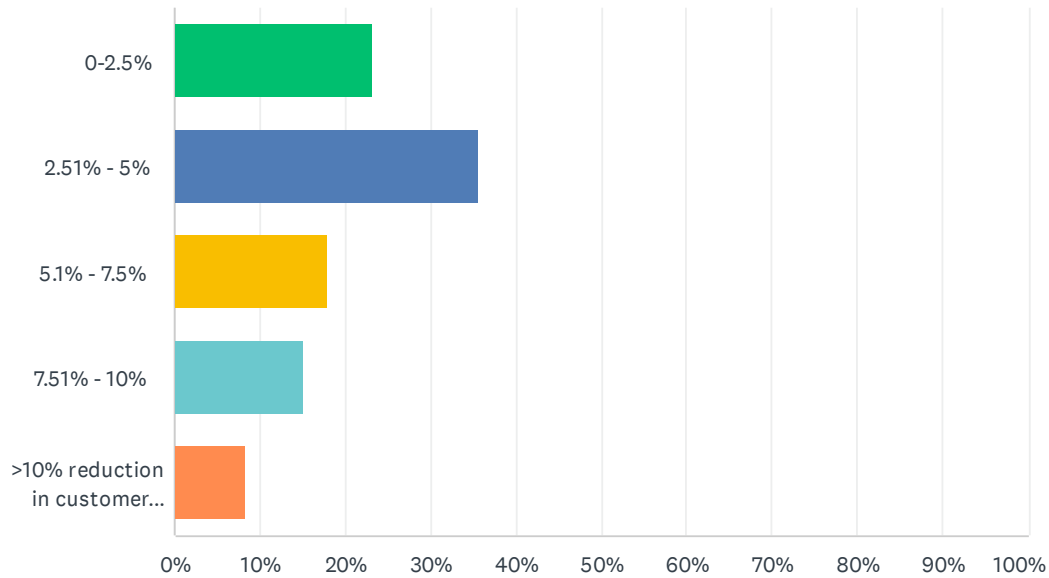
Answered: 208 Skipped: 1



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Higher | 17.79% | 37 |
| Lower | 59.13% | 123 |
| About the same | 23.08% | 48 |
| TOTAL | | 208 |

Q4 If your customer traffic was lower, please provide the percentage decrease over the last 12 months (if higher or the same, please skip to the next question).

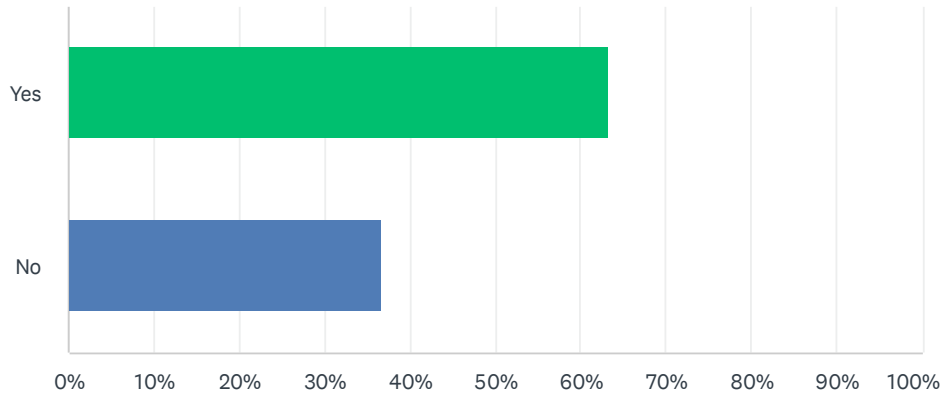
Answered: 146 Skipped: 63



| ANSWER CHOICES | RESPONSES | |
|--|-----------|------------|
| 0-2.5% | 23.29% | 34 |
| 2.51% - 5% | 35.62% | 52 |
| 5.1% - 7.5% | 17.81% | 26 |
| 7.51% - 10% | 15.07% | 22 |
| >10% reduction in customer traffic over the last 12 months | 8.22% | 12 |
| TOTAL | | 146 |

Q5 Is your food service business currently operating at a profit?

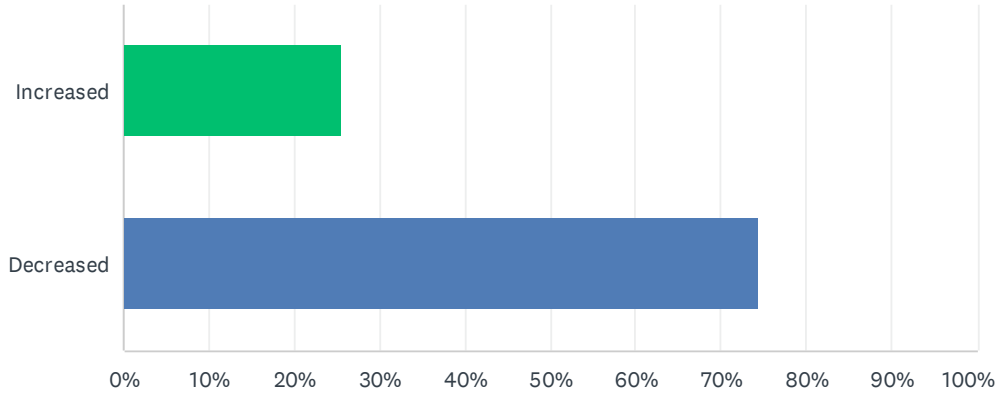
Answered: 207 Skipped: 2



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Yes | 63.29% | 131 |
| No | 36.71% | 76 |
| TOTAL | | 207 |

Q6 If you answered "yes" to the previous question, has profitability as a percent of gross sales increased or decreased over the past 12 months?

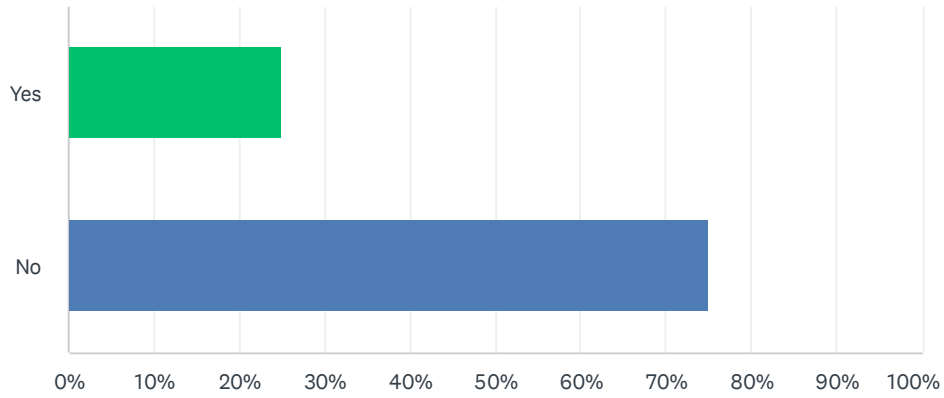
Answered: 156 Skipped: 53



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Increased | 25.64% | 40 |
| Decreased | 74.36% | 116 |
| TOTAL | | 156 |

Q7 If your foodservice business is not currently operating at a profit, is your business at risk of permanent closure in the next 12 months?

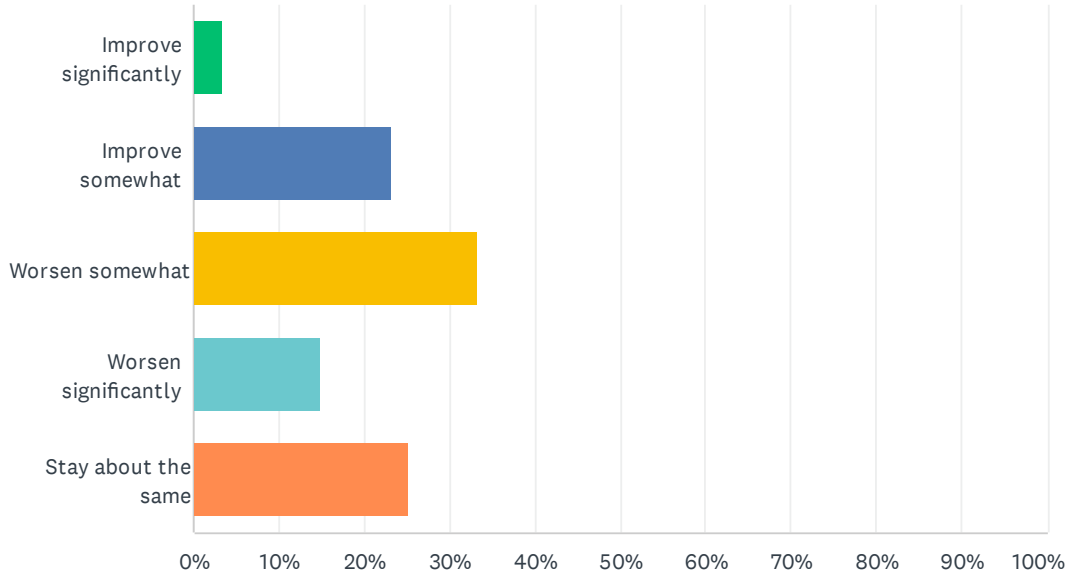
Answered: 165 Skipped: 44



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Yes | 24.85% | 41 |
| No | 75.15% | 124 |
| TOTAL | | 165 |

Q8 Over the next 12 months, do you believe the operating environment for your food service business will:

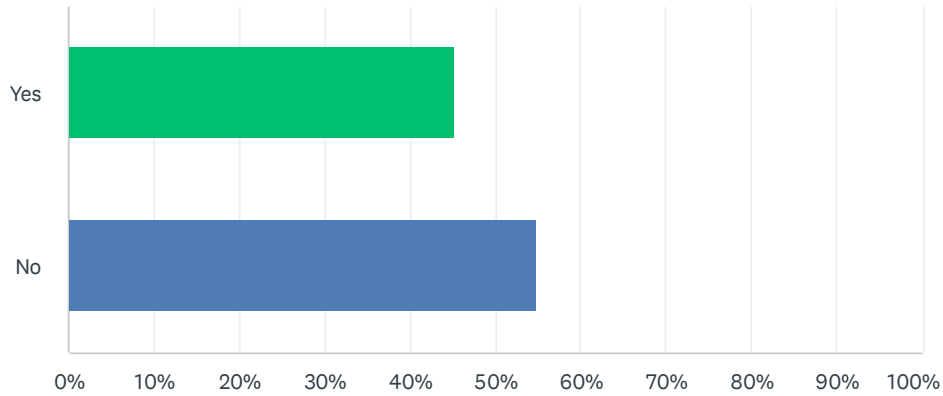
Answered: 207 Skipped: 2



| ANSWER CHOICES | RESPONSES | |
|-----------------------|-----------|------------|
| Improve significantly | 3.38% | 7 |
| Improve somewhat | 23.19% | 48 |
| Worsen somewhat | 33.33% | 69 |
| Worsen significantly | 14.98% | 31 |
| Stay about the same | 25.12% | 52 |
| TOTAL | | 207 |

Q9 Is your foodservice business currently operating with adequate staffing to meet customer demand?

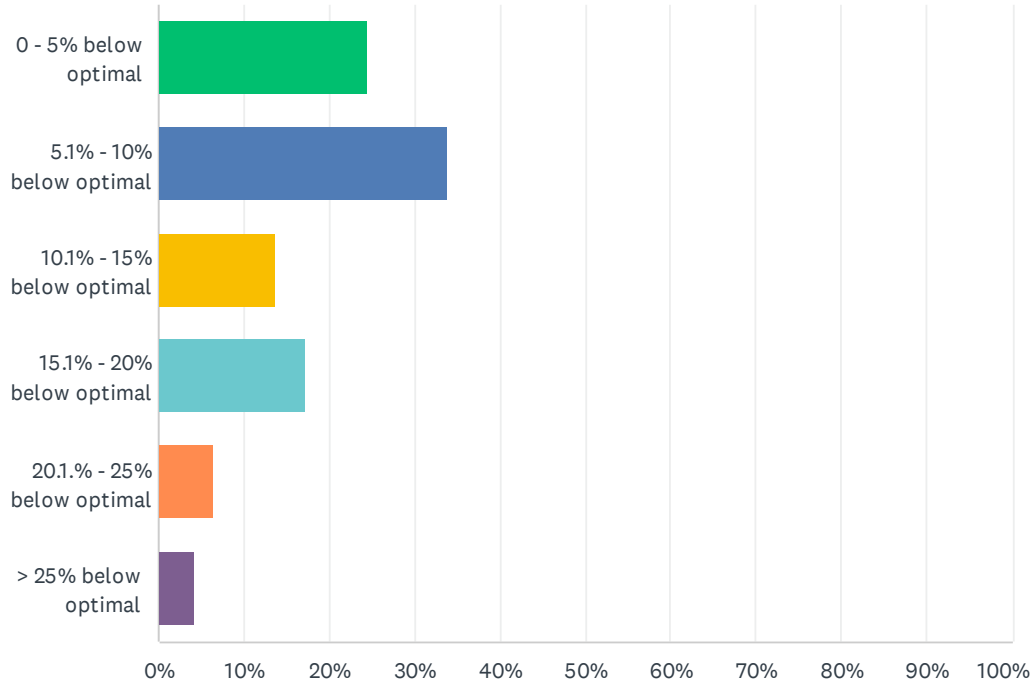
Answered: 208 Skipped: 1



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Yes | 45.19% | 94 |
| No | 54.81% | 114 |
| TOTAL | | 208 |

Q10 If not, how substantial is the staffing shortfall at your foodservice business?

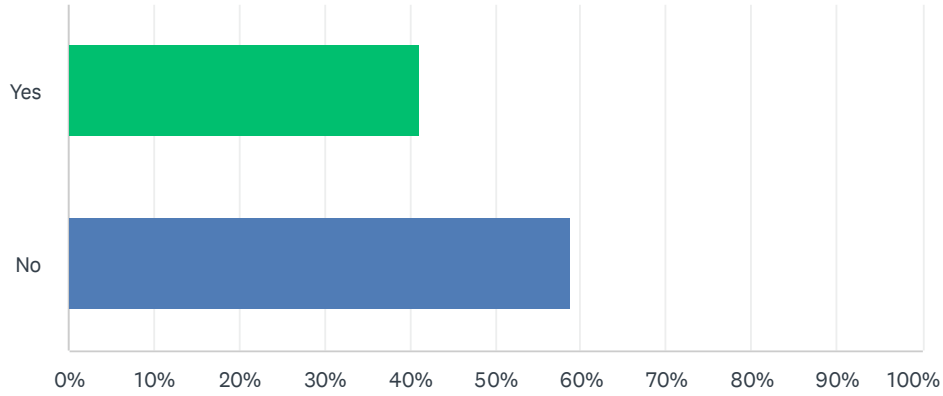
Answered: 139 Skipped: 70



| ANSWER CHOICES | RESPONSES | |
|---------------------------|-----------|------------|
| 0 - 5% below optimal | 24.46% | 34 |
| 5.1% - 10% below optimal | 33.81% | 47 |
| 10.1% - 15% below optimal | 13.67% | 19 |
| 15.1% - 20% below optimal | 17.27% | 24 |
| 20.1% - 25% below optimal | 6.47% | 9 |
| > 25% below optimal | 4.32% | 6 |
| TOTAL | | 139 |

Q11 Is your foodservice business operating with fewer hours, dayparts or closing days altogether as a direct result of inadequate staffing?

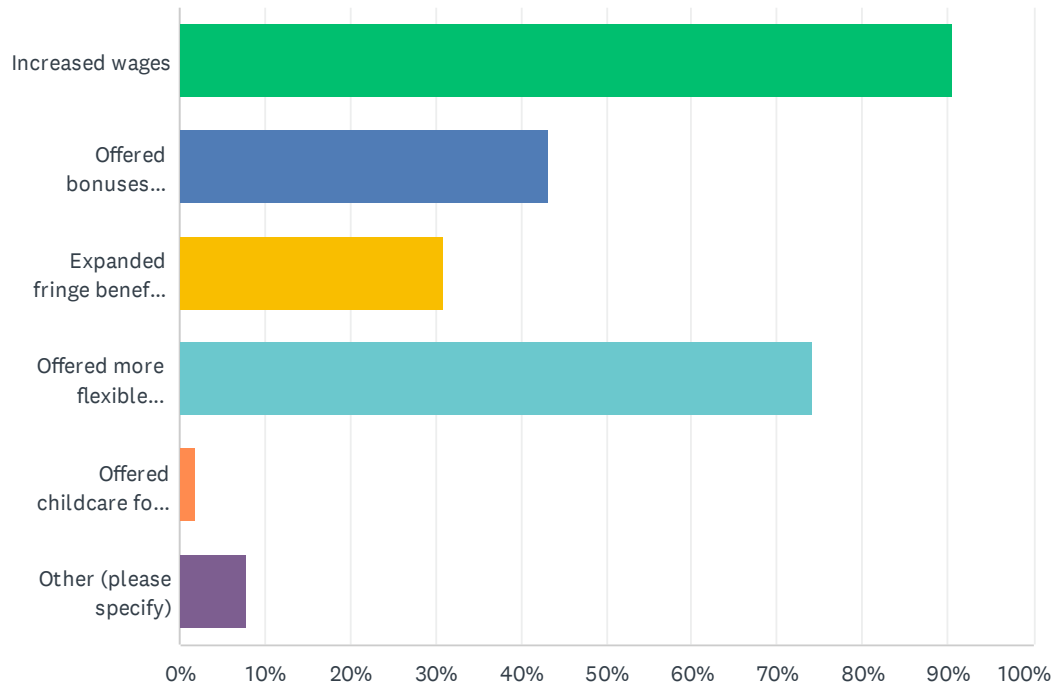
Answered: 207 Skipped: 2



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Yes | 41.06% | 85 |
| No | 58.94% | 122 |
| TOTAL | | 207 |

Q12 Over the past 12 months, what measures have you taken as an operator to address staffing shortages at your establishment? Please check all that apply

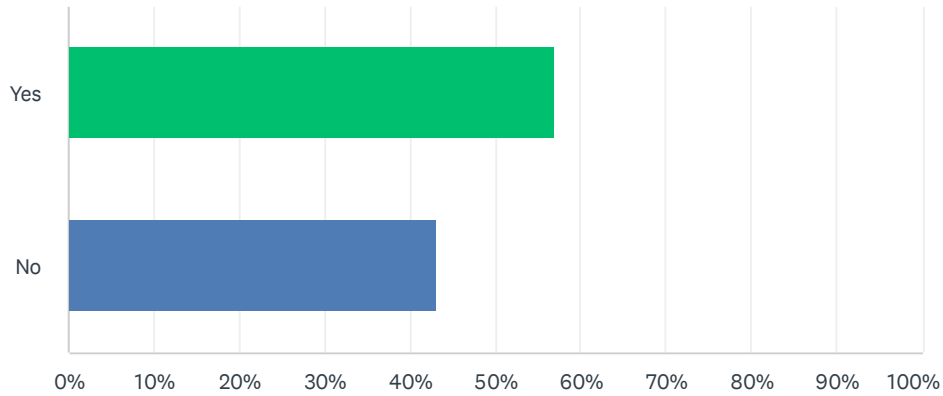
Answered: 201 Skipped: 8



| ANSWER CHOICES | RESPONSES | |
|--|-----------|-----|
| Increased wages | 90.55% | 182 |
| Offered bonuses (signing, retention or other) | 43.28% | 87 |
| Expanded fringe benefits (paid leave time, health care, 401k, etc) | 30.85% | 62 |
| Offered more flexible scheduling | 74.13% | 149 |
| Offered childcare for existing employees | 1.99% | 4 |
| Other (please specify) | 7.96% | 16 |
| Total Respondents: 201 | | |

Q13 Is your specific workforce challenged by inadequate affordable housing in your specific operating area(s)?

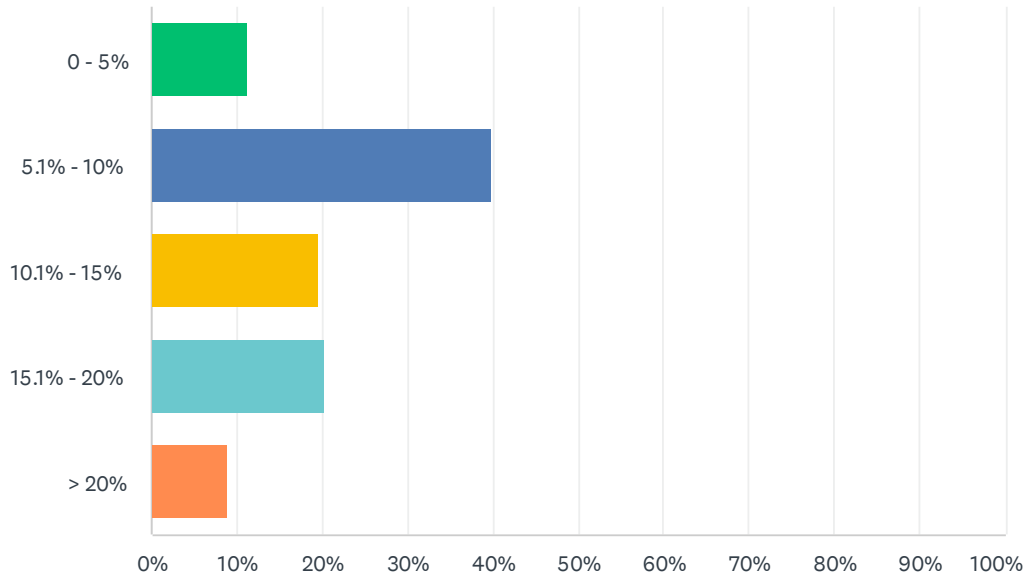
Answered: 207 Skipped: 2



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Yes | 57.00% | 118 |
| No | 43.00% | 89 |
| TOTAL | | 207 |

Q16 Over just the past 12 months, how much commodity inflation have you experienced at your food service business(es)?

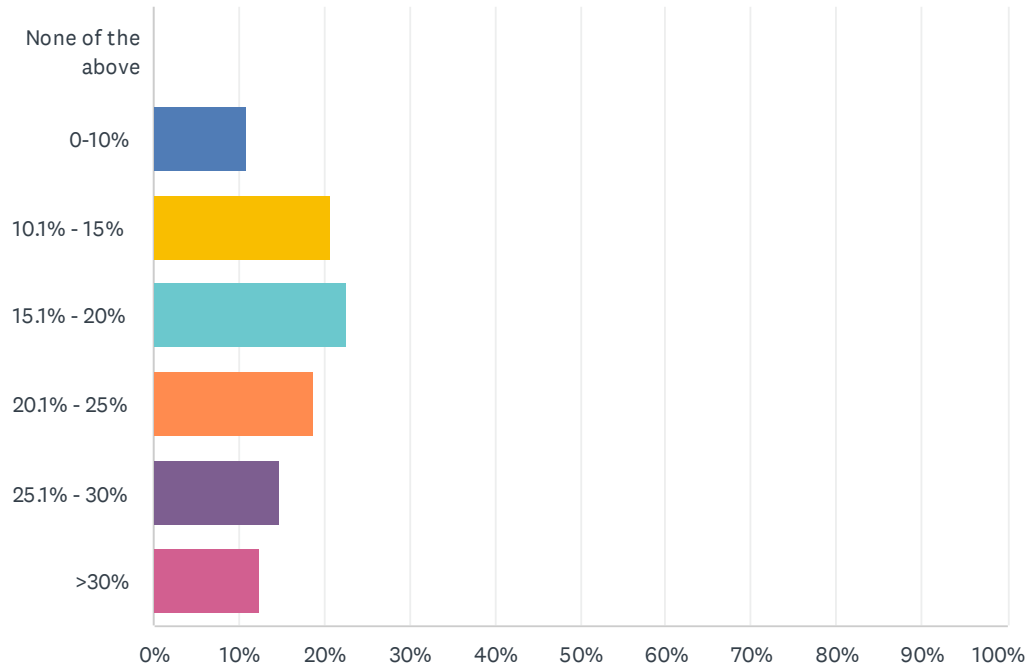
Answered: 203 Skipped: 6



| ANSWER CHOICES | RESPONSES |
|----------------|------------|
| 0 - 5% | 11.33% 23 |
| 5.1% - 10% | 39.90% 81 |
| 10.1% - 15% | 19.70% 40 |
| 15.1% - 20% | 20.20% 41 |
| > 20% | 8.87% 18 |
| TOTAL | 203 |

Q17 Over the past 3 years, how much commodity inflation have you experienced at your food service business(es)?

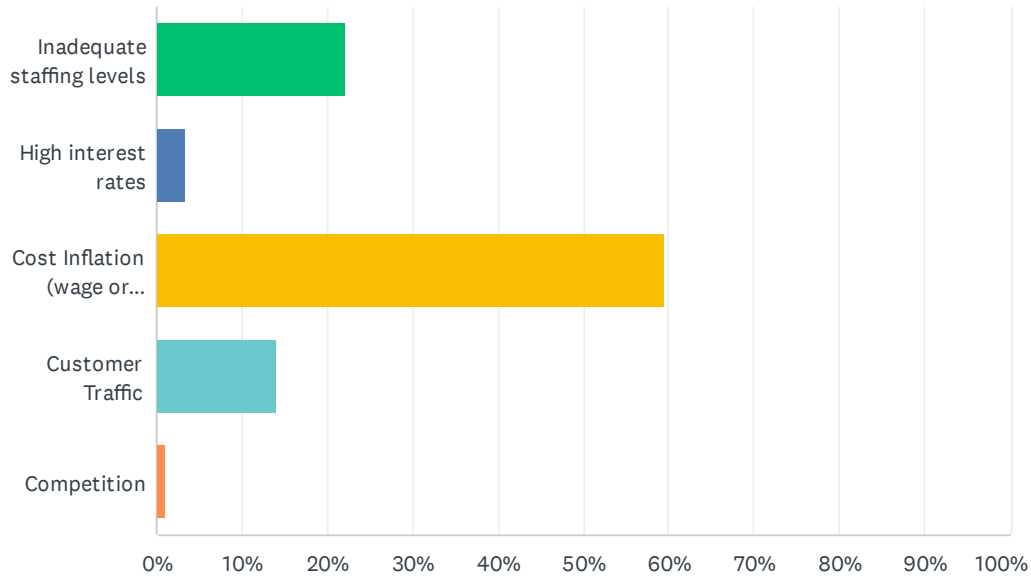
Answered: 203 Skipped: 6



| ANSWER CHOICES | RESPONSES | |
|-------------------|-----------|------------|
| None of the above | 0.00% | 0 |
| 0-10% | 10.84% | 22 |
| 10.1% - 15% | 20.69% | 42 |
| 15.1% - 20% | 22.66% | 46 |
| 20.1% - 25% | 18.72% | 38 |
| 25.1% - 30% | 14.78% | 30 |
| >30% | 12.32% | 25 |
| TOTAL | | 203 |

Q18 What is the MOST significant challenge to operating your business at the moment?

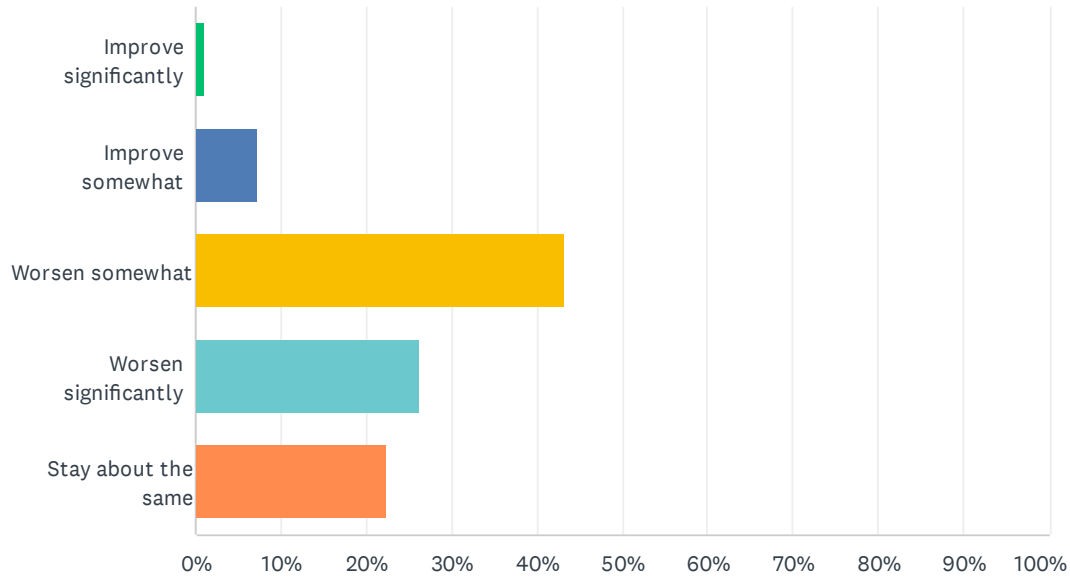
Answered: 207 Skipped: 2



| ANSWER CHOICES | RESPONSES |
|------------------------------------|------------|
| Inadequate staffing levels | 22.22% 46 |
| High interest rates | 3.38% 7 |
| Cost Inflation (wage or commodity) | 59.42% 123 |
| Customer Traffic | 14.01% 29 |
| Competition | 0.97% 2 |
| TOTAL | 207 |

Q19 Over the next 12 months, do you believe the operating environment for food service operators in Michigan will:

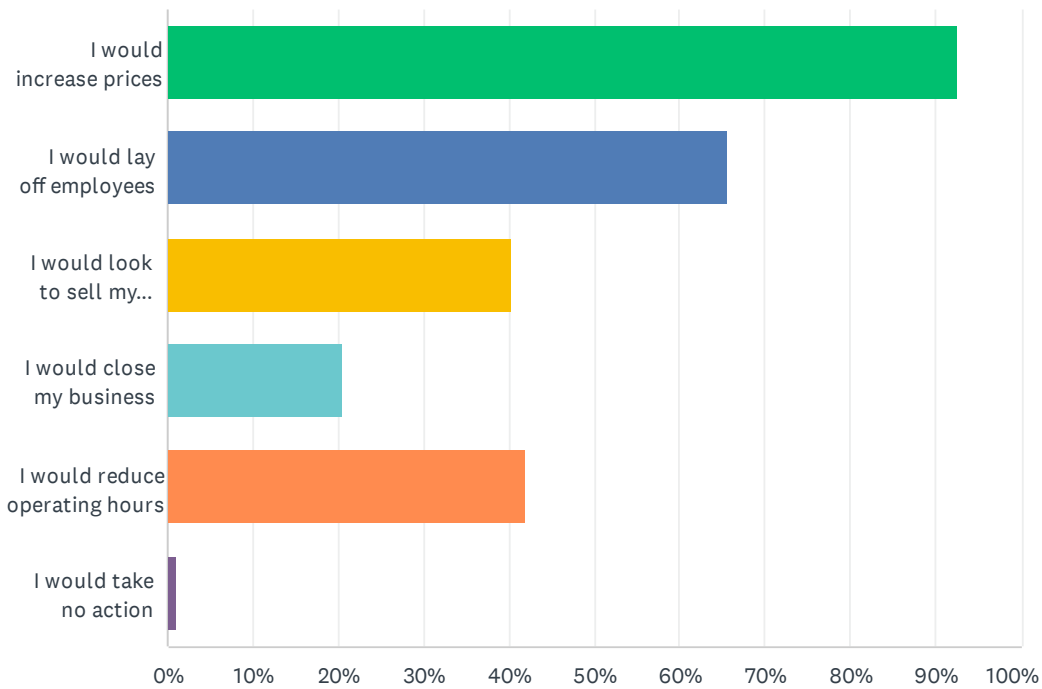
Answered: 206 Skipped: 3



| ANSWER CHOICES | RESPONSES |
|-----------------------|-----------|
| Improve significantly | 0.97% 2 |
| Improve somewhat | 7.28% 15 |
| Worsen somewhat | 43.20% 89 |
| Worsen significantly | 26.21% 54 |
| Stay about the same | 22.33% 46 |
| TOTAL | 206 |

Q20 If the Michigan Supreme Court rules against the Michigan legislature, triggering the chance to the state's minimum wage and paid sick leave laws as summarized above, what steps would you take as an operator to accommodate for the increased cost of operating your business (approximately: \$14 minimum wage, \$14 tipped minimum wage, 72 hours of paid sick leave)? Please select all that apply.

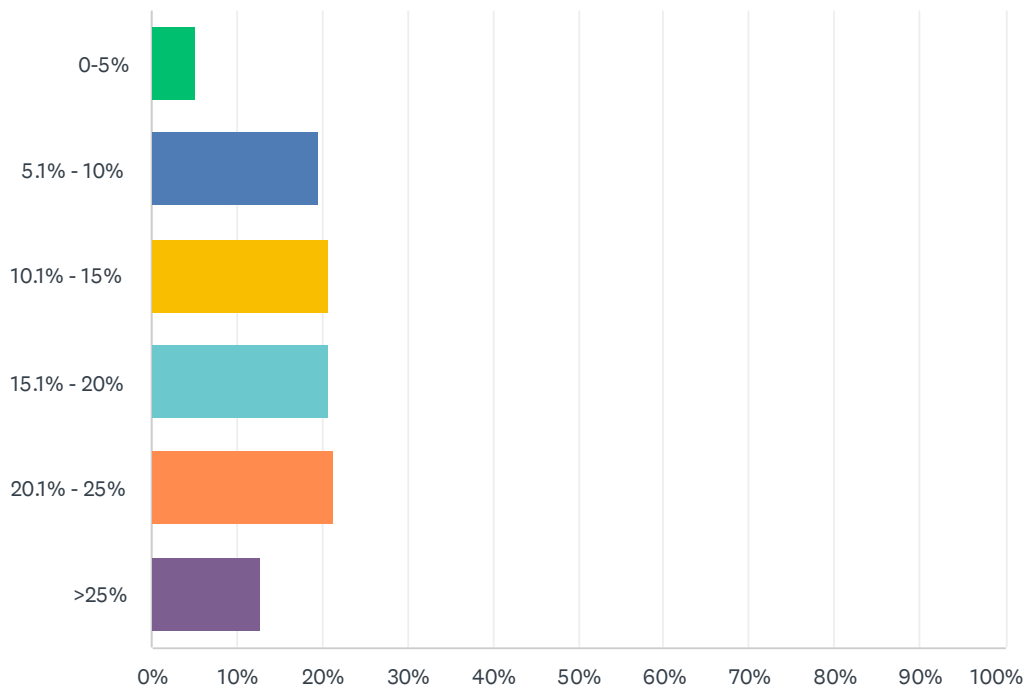
Answered: 186 Skipped: 23



| ANSWER CHOICES | RESPONSES |
|----------------------------------|------------|
| I would increase prices | 92.47% 172 |
| I would lay off employees | 65.59% 122 |
| I would look to sell my business | 40.32% 75 |
| I would close my business | 20.43% 38 |
| I would reduce operating hours | 41.94% 78 |
| I would take no action | 1.08% 2 |
| Total Respondents: 186 | |

Q21 If you indicated that you would increase menu prices, what would you anticipate the rate of increase would be on January 1, 2025, to accommodate for the increased cost of operating your business (approximately \$14 minimum wage, \$14 tipped minimum wage, 72 hours of paid sick leave)?

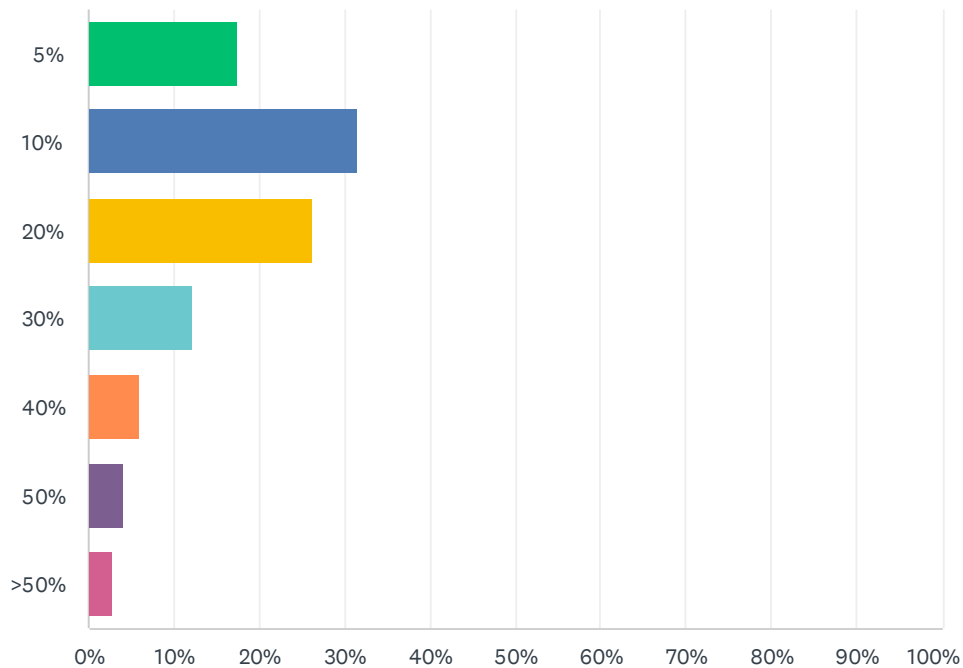
Answered: 179 Skipped: 30



| ANSWER CHOICES | RESPONSES |
|----------------|------------|
| 0-5% | 5.03% 9 |
| 5.1% - 10% | 19.55% 35 |
| 10.1% - 15% | 20.67% 37 |
| 15.1% - 20% | 20.67% 37 |
| 20.1% - 25% | 21.23% 38 |
| >25% | 12.85% 23 |
| TOTAL | 179 |

Q22 If you indicated that you would lay off employees in Question 20 above, what percentage of your total workforce do you anticipate would be laid off on January 1, 2025 to accommodate for the increased cost of operating your business (approximately \$14 minimum wage, \$14 tipped minimum wage, 72 hours of paid sick leave)? Please select the option that most closely matches your answer.

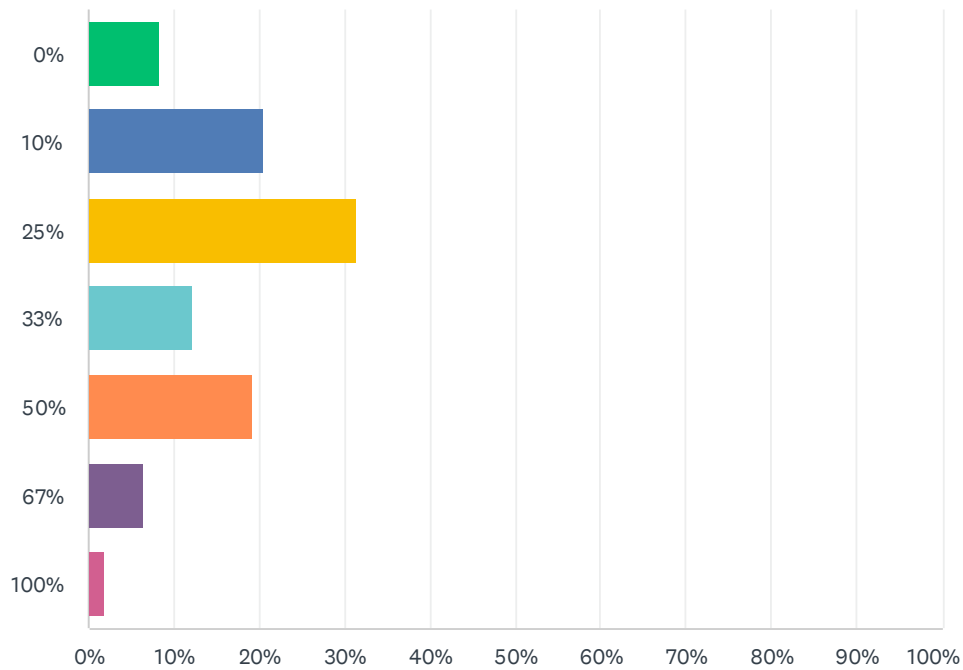
Answered: 149 Skipped: 60



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| 5% | 17.45% | 26 |
| 10% | 31.54% | 47 |
| 20% | 26.17% | 39 |
| 30% | 12.08% | 18 |
| 40% | 6.04% | 9 |
| 50% | 4.03% | 6 |
| >50% | 2.68% | 4 |
| TOTAL | | 149 |

Q23 ****This question is specifically for businesses operating full-service restaurants that employ tipped employees.**** If you selected that you would lay off employees in Question 20 above, what percentage of your tipped workforce do you anticipate needing to lay off in 2025 if the tipped minimum wage were to increase to \$14 per hour from the current rate of \$3.93? Please select the option that most closely matches your answer.

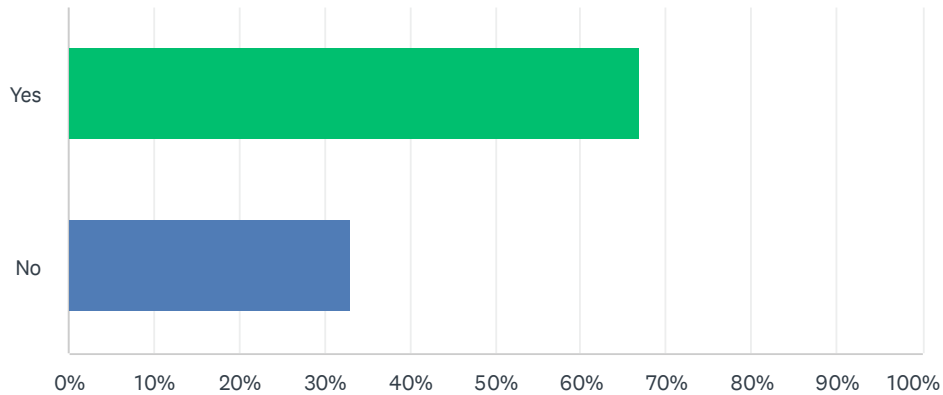
Answered: 156 Skipped: 53



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| 0% | 8.33% | 13 |
| 10% | 20.51% | 32 |
| 25% | 31.41% | 49 |
| 33% | 12.18% | 19 |
| 50% | 19.23% | 30 |
| 67% | 6.41% | 10 |
| 100% | 1.92% | 3 |
| TOTAL | | 156 |

Q24 ****This question is specifically for businesses operating full-service restaurants that employ tipped employees.**** If the tipped minimum wage were to increase to \$14 per hour in 2025 (from the current rate of \$3.93) would you consider changing your business model away from full-service? (An example might be counter service that is often seen in the Fast Casual segment of the industry).

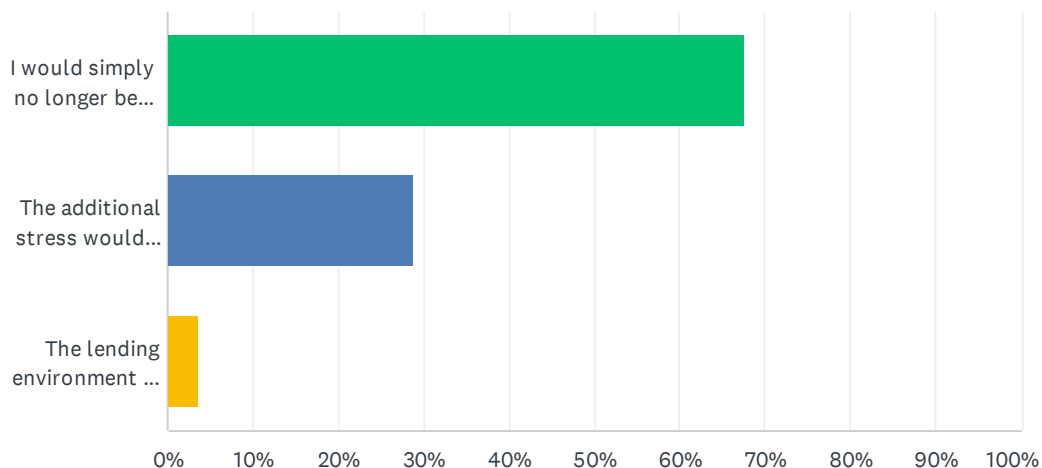
Answered: 175 Skipped: 34



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| Yes | 66.86% | 117 |
| No | 33.14% | 58 |
| TOTAL | | 175 |

Q25 If you selected that you would sell or close your business in Question #20, can you please provide your primary reason for doing so? Please select the one answer that most reflects your thinking.

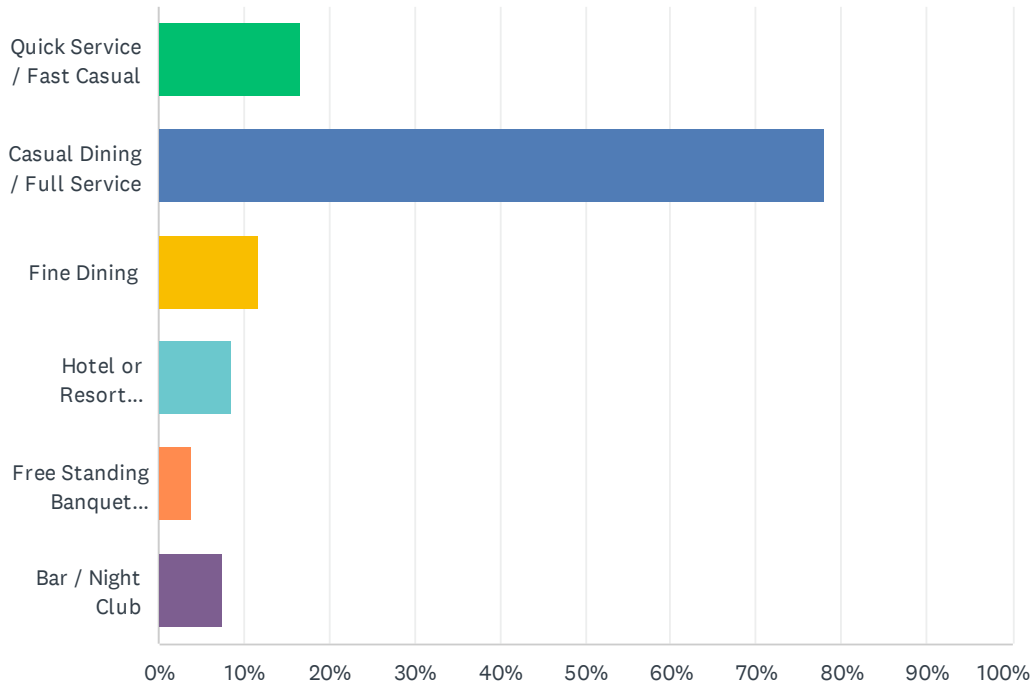
Answered: 111 Skipped: 98



| ANSWER CHOICES | RESPONSES | |
|---|-----------|------------|
| I would simply no longer be able to operate my business in a profitable manner | 67.57% | 75 |
| The additional stress would no long be worth it to me as operator and/or to my business partners | 28.83% | 32 |
| The lending environment is so fraught at the moment that I do not think I could secure the liquidity to successfully transition my business to comply with the new laws | 3.60% | 4 |
| TOTAL | | 111 |

Q26 What type of foodservice establishment(s) do you operate?

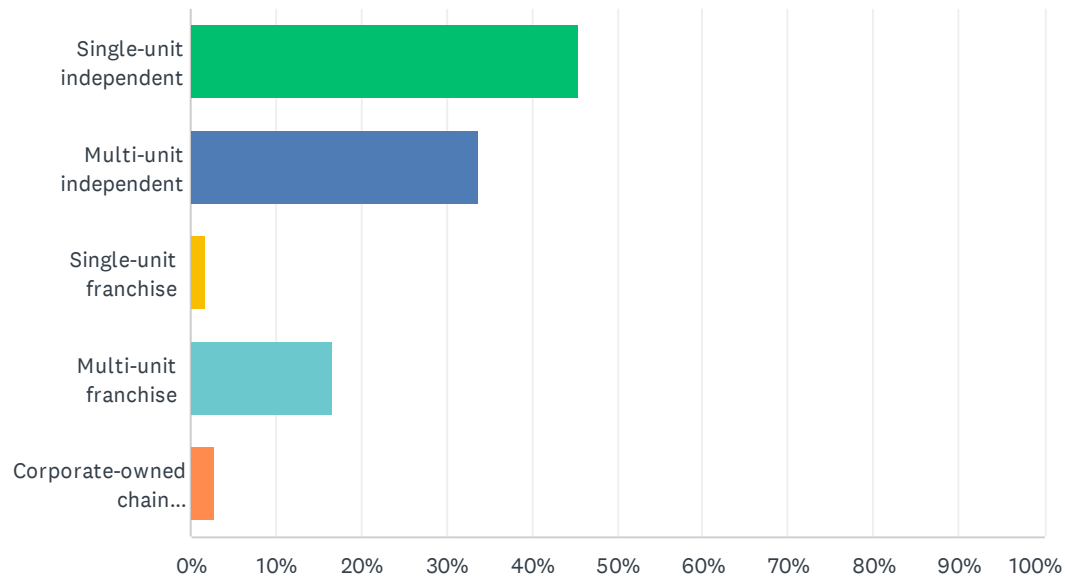
Answered: 187 Skipped: 22



| ANSWER CHOICES | RESPONSES | |
|---|-----------|-----|
| Quick Service / Fast Casual | 16.58% | 31 |
| Casual Dining / Full Service | 78.07% | 146 |
| Fine Dining | 11.76% | 22 |
| Hotel or Resort Restaurant (or related foodservice) | 8.56% | 16 |
| Free Standing Banquet Facility/Hall | 3.74% | 7 |
| Bar / Night Club | 7.49% | 14 |
| Total Respondents: 187 | | |

Q27 Which of the following best describes your foodservice business?

Answered: 187 Skipped: 22



| ANSWER CHOICES | RESPONSES | |
|----------------------------------|-----------|----|
| Single-unit independent | 45.45% | 85 |
| Multi-unit independent | 33.69% | 63 |
| Single-unit franchise | 1.60% | 3 |
| Multi-unit franchise | 16.58% | 31 |
| Corporate-owned chain restaurant | 2.67% | 5 |
| Total Respondents: 187 | | |