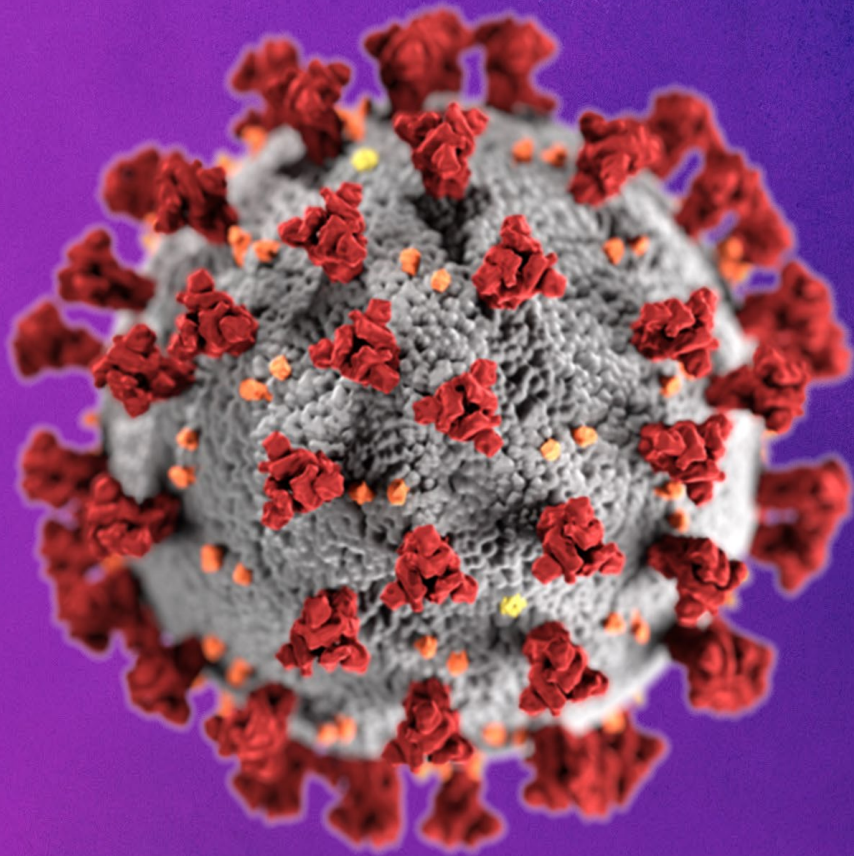


COVID-19

report 15: **READY OR NOT**

4.23.20





There are early signs that social distancing is helping the United States flatten the Coronavirus curve. But the overall improvement isn't consistent, with cases in some states subsiding and other states becoming the new "hot spots." While the country is just starting to see progress, some states are already talking about "reopening" prior to the May 1 target suggested by the White House. As experts warn that the country needs more testing and that reopening too soon could have catastrophic results, small groups of protesters have emerged, claiming that social distancing infringes upon their rights. While it will ultimately be left to the states to decide when the timing is right, most Americans are still very concerned and not ready to jump feet first back into normal pre-COVID life.

How will consumers respond to reopen the economy as we go forward?
What can restaurants do to reassure them that dining in will be safe?

Here are highlights from Datassential's latest wave of Coronavirus research, fielded April 17 and April 20 with 1,000 US consumers.



KEY EVENTS SINCE THE LAST FIELDING ON APRIL 15

April 17

President Trump tweets that states like Michigan and Minnesota should be “liberated”
660 sailors from USS Theodore Roosevelt have tested positive for Coronavirus
Gov. Andrew Cuomo says New York hasn't received aid from the federal government
Without a Coronavirus vaccine, US could face a “new normal,” former CDC director says

April 18

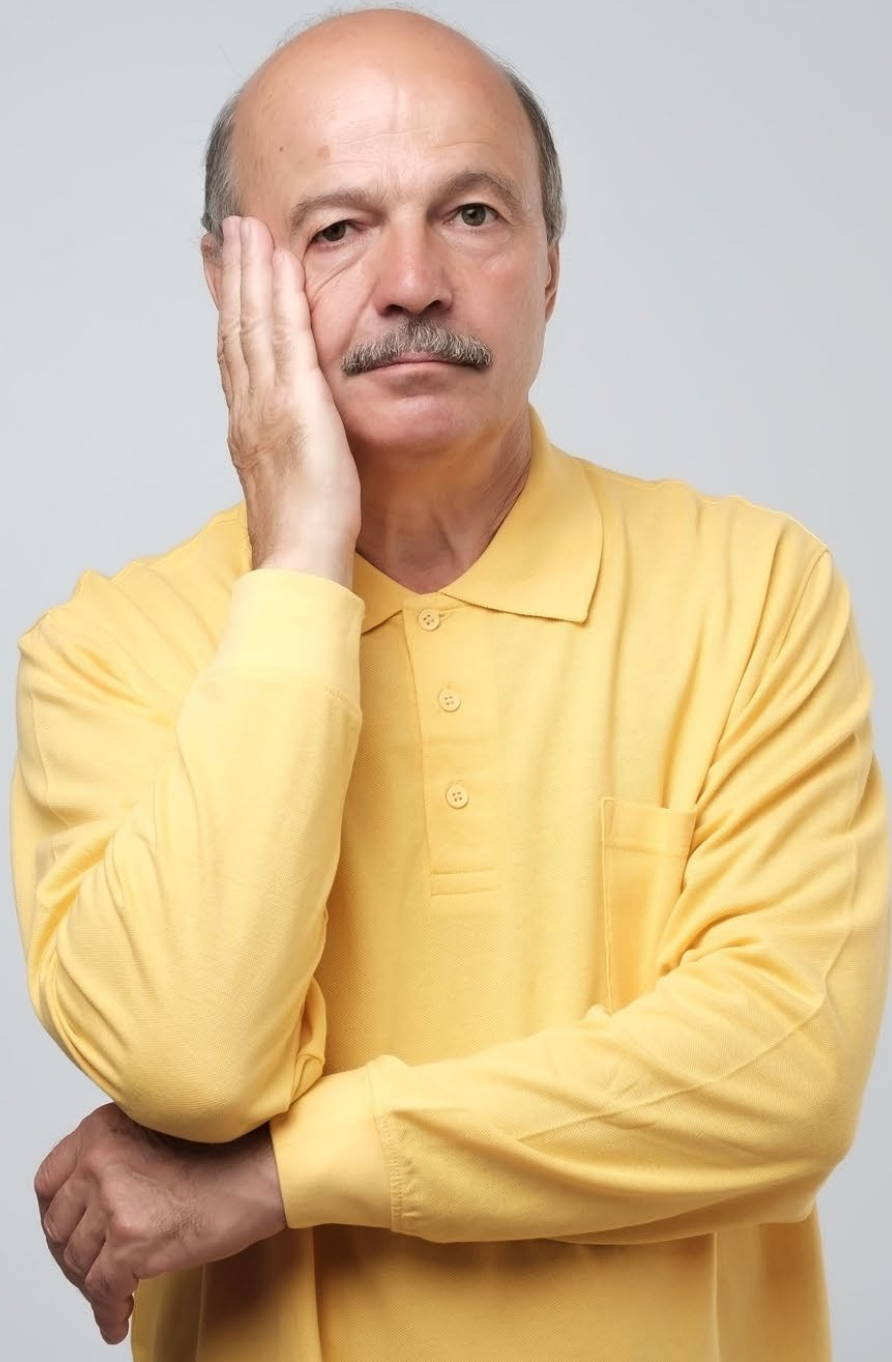
CDC publishes updated guidelines to “get and keep America open”
Coronavirus testing must increase by more than three times to reopen America, experts say
Trump says “some governors have gotten carried away” with social distancing measures

April 19

Trump calls social-distancing protesters “great people”
There are at least 755,533 cases of Coronavirus in the US

April 20

NRA asks Congress for more than \$200 billion in relief for the restaurant industry
Gov. Cuomo: “You don't need protests to convince anyone” of desire to reopen
Shake Shack returns \$10 million Paycheck Protection Program loan
Reopening the states won't be like “turning on a light switch,” former US official says



Absent any big news, concern remains steady.

With cases still growing in parts of the country and no breakthroughs in sight around testing or a vaccine, COVID concerns persist. Two-thirds of Americans continue to be very concerned and hugely worried about their own personal health.

very concerned with Coronavirus

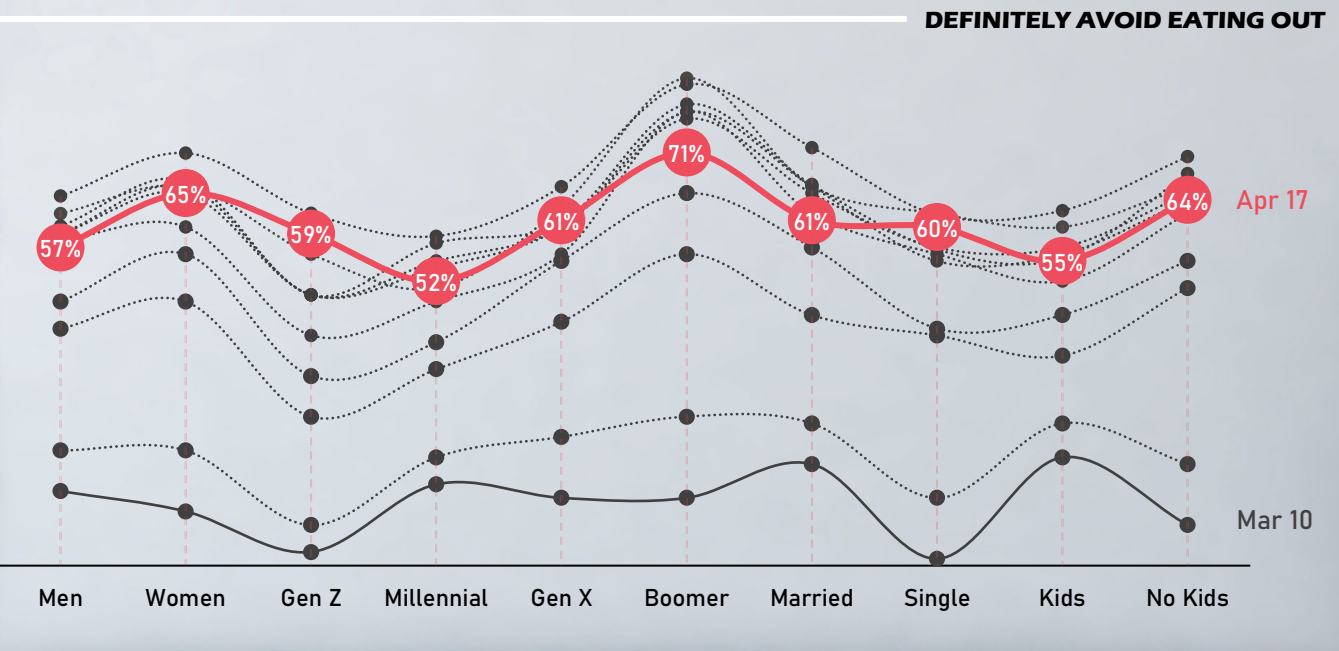
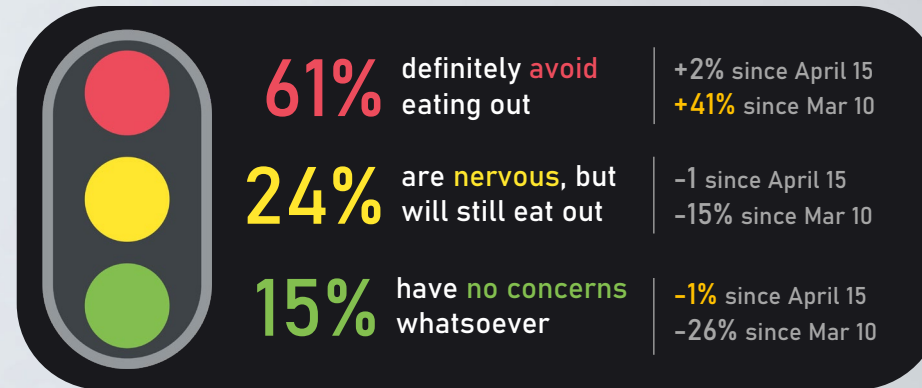
	3-10	3-14	3-18	3-22	3-25	3-29	4-1	4-3	4-7	4-10	4-15	4-17
Very concerned	41%	49%	61%	61%	61%	60%	67%	65%	61%	64%	60%	61%
Somewhat concerned	49%	42%	34%	35%	34%	33%	28%	28%	34%	31%	35%	33%
Not concerned	10%	8%	5%	4%	5%	7%	5%	7%	6%	5%	5%	6%





Avoidance of eating out trending down from prior peak.

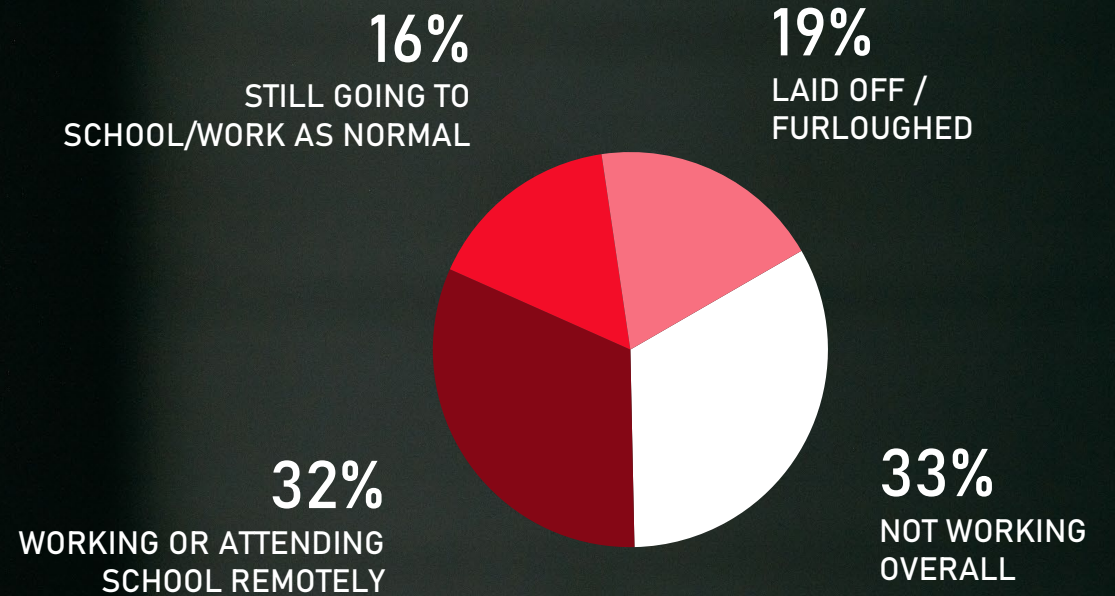
With talk about plans for the country's reopening, avoidance of dining in is starting to show signs of softening, though levels have stayed consistent in the past week. There has been some movement in demographic segments, with significant increases in avoidance among Gen Z and Gen X but declines among Boomers, who are perceived to be most at risk from Coronavirus.





America is still stuck at home.

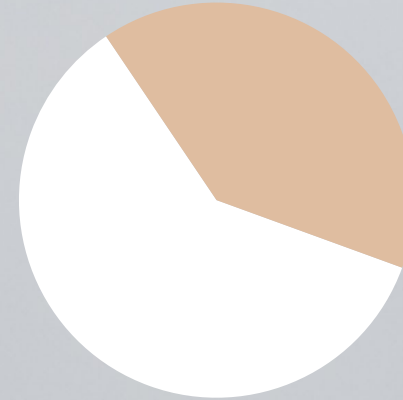
With most states still under social-distancing orders, only 16% of Americans are working or going to school outside of the home.



which of the following best describes your current situation?

Health remains top concern.

Even with so much in the news about the economy and protesting to reopen America, consumers are still most concerned about the health crisis.



60%
PUBLIC-HEALTH CRISIS
-2% since April 10

40%
ECONOMIC CRISIS
+2% since April 10

**which are you more
concerned about?**



Even as we move beyond the crisis, uncertainty may be our new normal.

There's a reason why everyone is calling this a time of uncertainty. We don't know how or when Coronavirus will end, or if it will reoccur. On a personal level, we don't know who around us has it, if we'll be employed next week, or even if we'll find what we need at the grocery store. We have anxiously waited for signs of hope or a "magic" date when we can safely re-emerge into the world. With plans to reopen as soon as a week away in some places, the milestone we most looked forward to is now something that instead evokes fear.

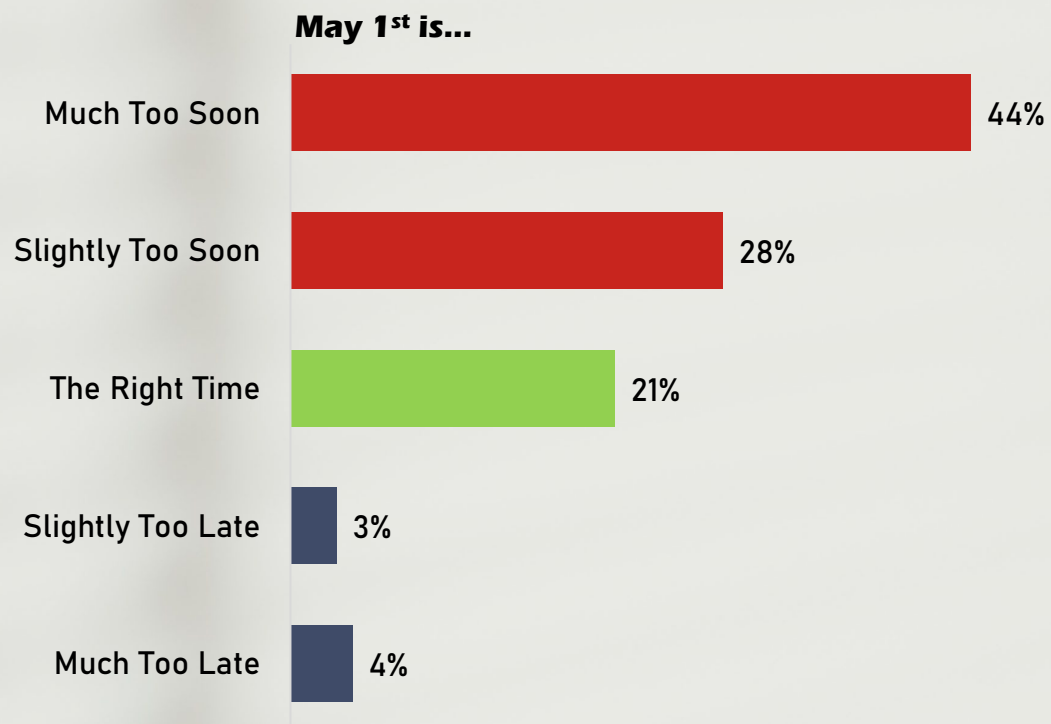
As dining in starts to reopen across America, restaurants can expect customers to proceed with more caution. They will vary in their risk tolerance and willingness to dine in. Each will come with their own desires, expectations and timelines in this new era of dining.

Restaurants can bring some certainty back to the dining process by setting clear expectations to help diners navigate the "new restaurant normal." People willing to dine in now will need very little reassurance. The more cautious "fence sitters," who will evaluate the safety of each situation, will need more coaxing, but will also represent the biggest opportunity for growth.



May 1st is too soon for some people.

With cases still growing in many states and talk of the need for more testing, many Americans don't feel we are ready to start reopening on May 1. Consumers in harder-hit states like New York, New Jersey, Michigan, California and Louisiana are even more adamant about waiting longer. About one in four think now is the right time.



what do you think about May 1 as the date to start reopening places that have been closed in response to COVID-19?

Locales that allow for social distancing are a place to start.

Social distancing is top-of-mind, so places like parks and playgrounds with wide open spaces will be a place for consumers to dip their toes in the water. Men are more ready than women for venues like restaurant dining rooms, buffets, cafeterias, and bars to reopen, though still not at high numbers.

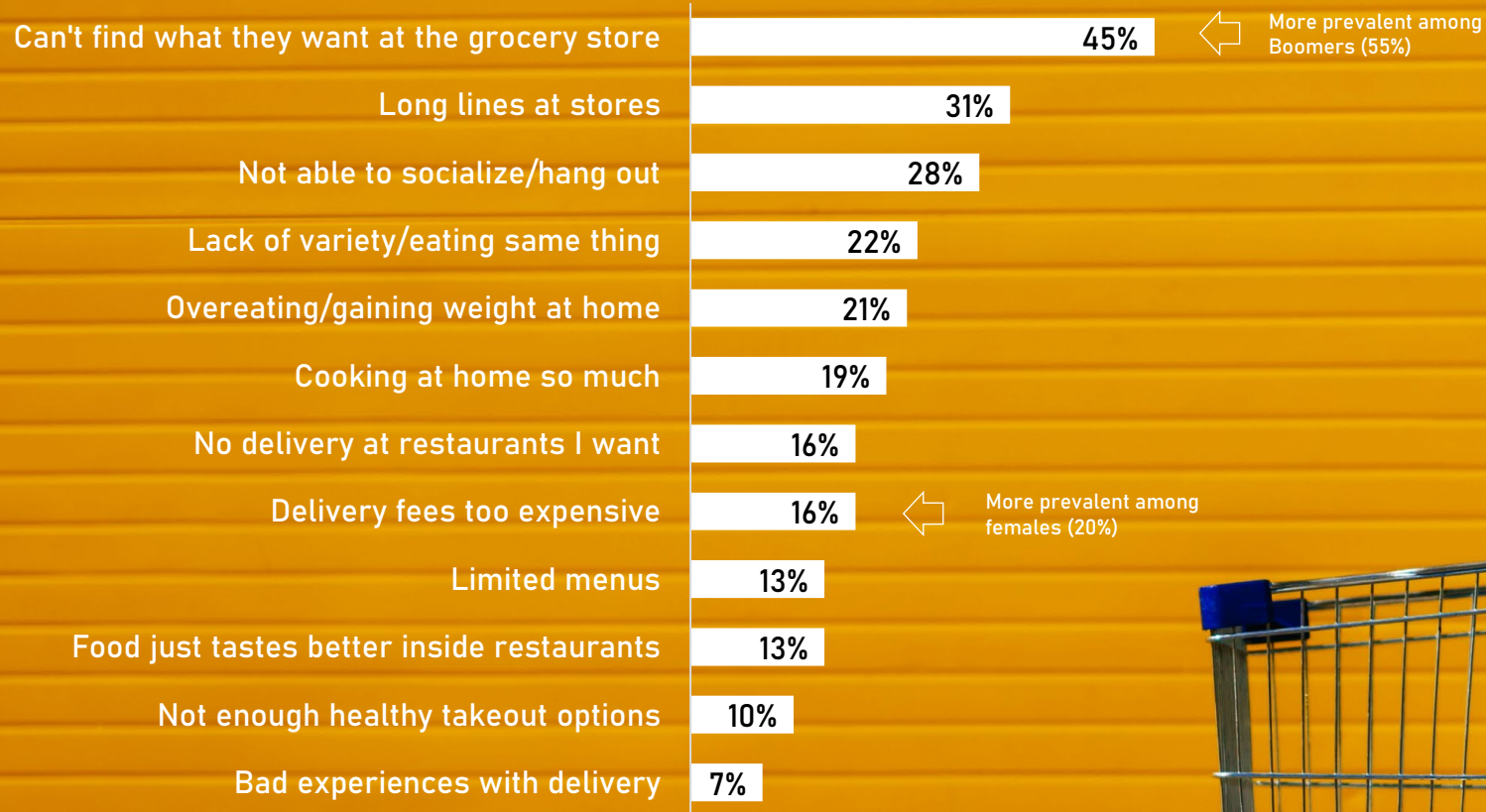
	Open May 1	Wait Longer
Public parks/playgrounds, libraries	50%	50%
Hair/nail salons	43%	57%
Grocery store prepared-foods areas (salad bar, hot bar)	41%	59%
Retail stores	38%	62%
Restaurant dining rooms	30%	70%
Gym/fitness centers	26%	74%
Cafeterias (schools, hospitals, offices)	26%	74%
Bars/nightclubs/lounges	18%	82%
Movie theaters/stadiums/concert halls	18%	82%
Buffet-style restaurants	16%	84%

how would you feel about the following places reopening on May 1?



Food shopping is still incredibly frustrating.

Consistent with what we have seen since the onset of the COVID crisis, grocery shopping remains America's biggest sticking point when it comes to food during times of social distancing. Fewer than a quarter of consumers have major issues with eating at home, whether it's lack of variety or cooking too much. Good news for operators, consumers do not seem as bothered by issues related to restaurants.



which of the following have been most annoying regarding eating and getting food since social distancing began?



WHAT HAS BEEN YOUR BIGGEST INCONVENIENCE AROUND GETTING FOOD DURING SOCIAL DISTANCING AND CORONAVIRUS?

“Not being able to get basic food and cleaning supplies despite going to multiple stores on multiple days. Afraid to keep going to stores. We ordered groceries online, waited 10 days, and 35 out of my 78 items were out of stock. Basic food items were out of stock.”

- a 68-year-old woman in Boynton Beach, FL

“At grocery stores not being able to get products that people are being selfish and buying in bulk amounts, such as toilet paper.”

- a 44-year-old woman in Jacksonville, NC

“I miss going to a restaurant and having a relaxing meal. I miss having someone wait on me.”

- a 55-year-old man in Venice, FL

“The amount of takeout services has been great. Grocery stores are still lacking many, many items.”

- a 67-year-old man in Canfield, OH

“I like to support my local bar and restaurants and want them open again.”

- a 66-year-old man in Oroville, WA

“People not maintaining social distancing at grocery stores and at Costco. Otherwise, most food items are available. Senior hours are a joke, as there are more people in the stores at those times than other hours.”

- a 68-year-old man in Gardnerville, NV

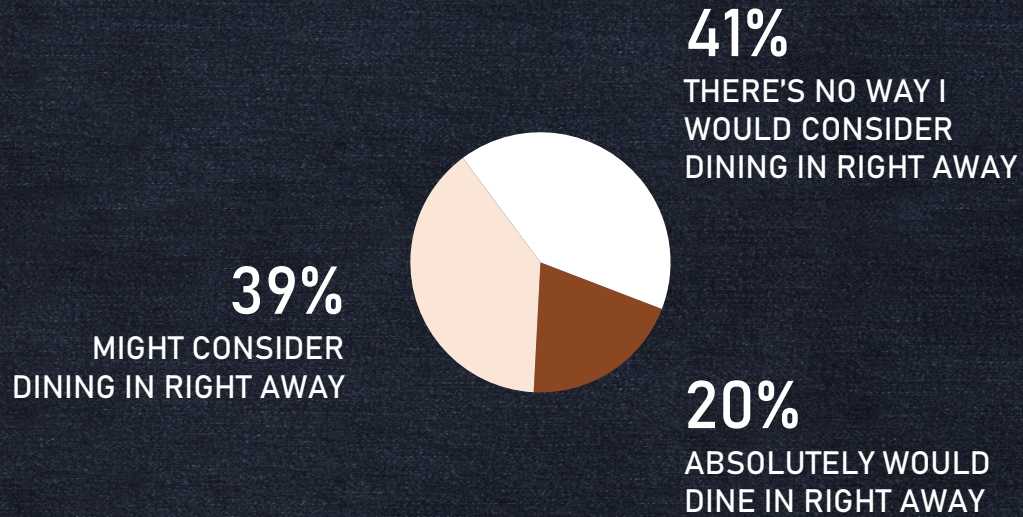
“Having the bowling alley closed, because we go there every Thursday for food, drinks, and sports. It is our family treat each week.”

- a 24-year-old woman in Brooksville, FL



When restaurants reopen, America will consider dining in.

More than half of diners would at least consider dining in at a restaurant right away after it reopens. Males, Millennials and households with kids are more likely to be ready as soon as they open.

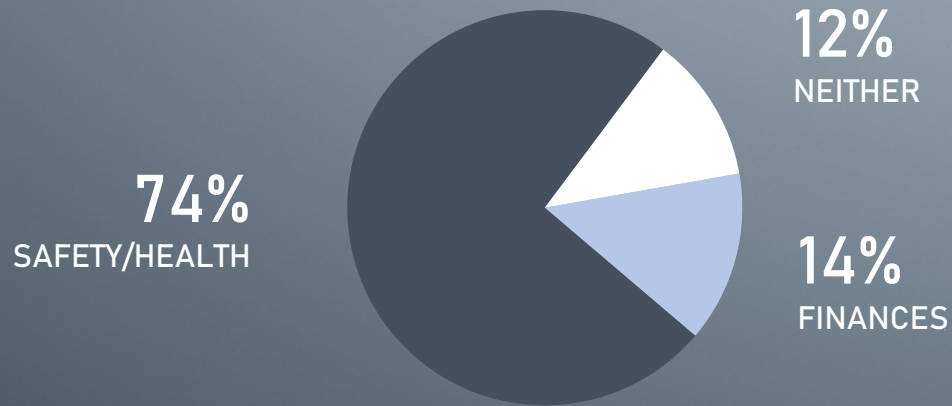


	Gen Z	Millennials	Gen X	Boomers
Absolutely	25%	31%	18%	10%
Might	46%	35%	37%	42%
No way	30%	34%	44%	48%

how would you feel about dining in at a restaurant right away once they reopen?

Social distancing is the biggest barrier to dining in for the near term.

With almost half of Americans feeling May 1st is too soon to reopen businesses, it's not surprising that consumers are most hesitant about dining in for health and safety reasons. As Datassential research has shown, many have also been financially impacted by the crisis, but when compared head to head, health is the priority hands down. Boomers, most at risk, show the greatest concern around safety. Operators who demonstrate enhanced efforts around social distancing may have an advantage in re-engaging diners.



if restaurants were to reopen for dining in on May 1, what would be the biggest factor preventing you from eating inside a restaurant?

51%
FULL-LENGTH
DINE-IN EXPERIENCE

63%
AMONG THOSE WILLING TO
DINE IN RIGHT AWAY



49%
FASTER DINE-IN
EXPERIENCE

The first customers returning to restaurants will want to savor it.

When asked whether their first trip back to a dining room should be a quick, streamlined affair to minimize their risk of exposure to Coronavirus or a full-length dining experience, consumers are split across all demographic cuts, with one notable exception.

People who indicate they “absolutely” would return to restaurants right away tend to want the entire eating experience they’ve been missing. Those who wouldn’t return right away nonetheless think restaurants should speed things up to make dining out safer.

would you want a faster, streamlined dining experience or a full-length dine-in experience with safety measures in place to make you feel safe and comfortable?

Diners see minimizing risk as a two-way street.

Consumers expect restaurants to maintain a safe environment once reopened, but they intend to do their part as well. They won't be quick to abandon COVID learned behaviors like social distancing and extra sanitizing. Many will also avoid open and uncooked foods. Consumers ready to dine right away put more trust in restaurants, while those who "might consider" feel safer taking extra precautions.

	(% of total consumers who PROBABLY WOULD do the following:)	I WOULD dine in right away	NO WAY I'D dine in right away
Wash hands more frequently	86%	70%	91%
Maintain distance from other diners	86%	69%	92%
Avoid crowded waiting areas	83%	63%	90%
Avoid restaurants with "open" food	79%	61%	88%
Disinfect / wipe down surfaces	66%	53%	75%
Avoid ordering raw / uncooked foods	64%	52%	71%
Avoid ordering shared foods	59%	52%	69%
Maintain distance from others in my party	52%	47%	58%
Wear gloves / masks to and inside restaurants	44%	42%	55%
Bring own utensils, straws, and pens	35%	43%	38%

what measures would consumers adopt to minimize risk at sit-down restaurants?



WHAT ELSE SHOULD RESTAURANTS ASK YOU OR OTHER PATRONS TO ENSURE THAT EVERYONE IS SAFE WHEN DINING IN?

“There should only be one person enter into the bathroom at a time.”

- a 21-year-old male in Miami, FL

“An affirmation of their belief of non-exposure.”

- a 69-year-old man in McLean, VA

“Restaurants should require everybody to sanitize hands before touching menu with sanitizing dispensers at the hostess stand.”

- a 20-year-old woman in Albemarle, NC

“Just be courteous and respectful of everyone’s personal space.”

- a 60-year-old man in Patchogue, NY

“I would put a reasonable time limit on the length of time you can spend in the restaurant, post it, and remind customers when they are seated. Operate on a reservation basis. This would allow staff to disinfect areas that have been used before next customers arrive without being rushed. Also, it would allow for smoother customer flow and more people served in a shift.”

- a 66-year-old woman in Cincinnati, OH

“A policy should be made that allows employees to ask customers to leave if they are putting others’ health at risk.”

- an 18-year-old man in Las Vegas, NV

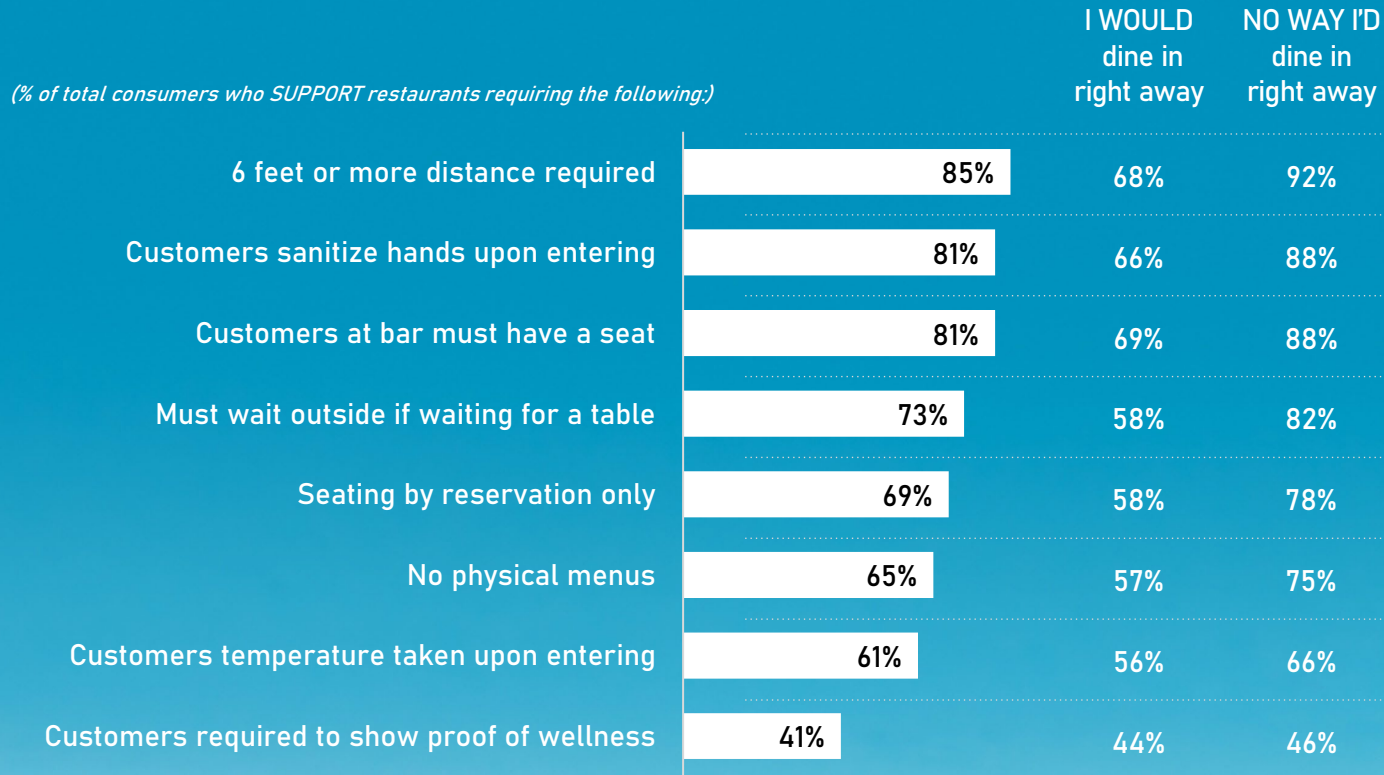
“To limit bags brought into the restaurant that aren’t deemed necessary (purses, backpacks, etc).”

- a 28-year-old woman in New Stanton, PA



Diners support tactics that promote social distancing and sanitation.

When it comes to staying safe at restaurants, diners are appreciative of just about anything that keeps them away from others and minimizes exposure to the virus. Tactics that get too personal, like requiring proof of wellness or taking temperatures, are less popular. As you might expect, the most risk averse are supportive of almost anything that reduces the possibility of exposure. Because the *Might Considers* evaluate each situation and are open to social distancing and sanitation efforts, restaurants that demonstrate extra precautions in these areas are more likely to win their business.



which would you support to ensure your safety dining in at a restaurant?



Initially, consumers are willing to tolerate some inconvenience.

Americans are getting used to maximum capacities and waiting in lines at the grocery stores, so they are fully supportive of social distancing maneuvers for a safe experience dining in. While most still support tactics that might inconvenience them to a degree, like pre-ordering before seating or cashless payments, they don't rank quite as high. As you'd expect, these are "good to have" for most willing to dine in right away, but much more important to those who might or wouldn't consider dining in now. Taking extra precautions that don't require the diner to be too inconvenienced may help to coax the more wary to start dining in sooner.



which would you support to ensure your safety dining in at a restaurant?

(% of total consumers who SUPPORT restaurants requiring the following:)

		I WOULD dine in right away	NO WAY I'D dine in right away
Staff member enforcing capacity at the door	83%	68%	91%
Pickup customers wait outside	77%	60%	86%
No large groups allowed	76%	60%	86%
Allow take-out only	75%	54%	87%
Seating by pre-order only	67%	54%	76%
Vulnerable customers allowed certain times to dine in	63%	56%	71%
No cash payment accepted	59%	54%	67%
Customers required to wear masks when not eating/drinking	52%	48%	63%

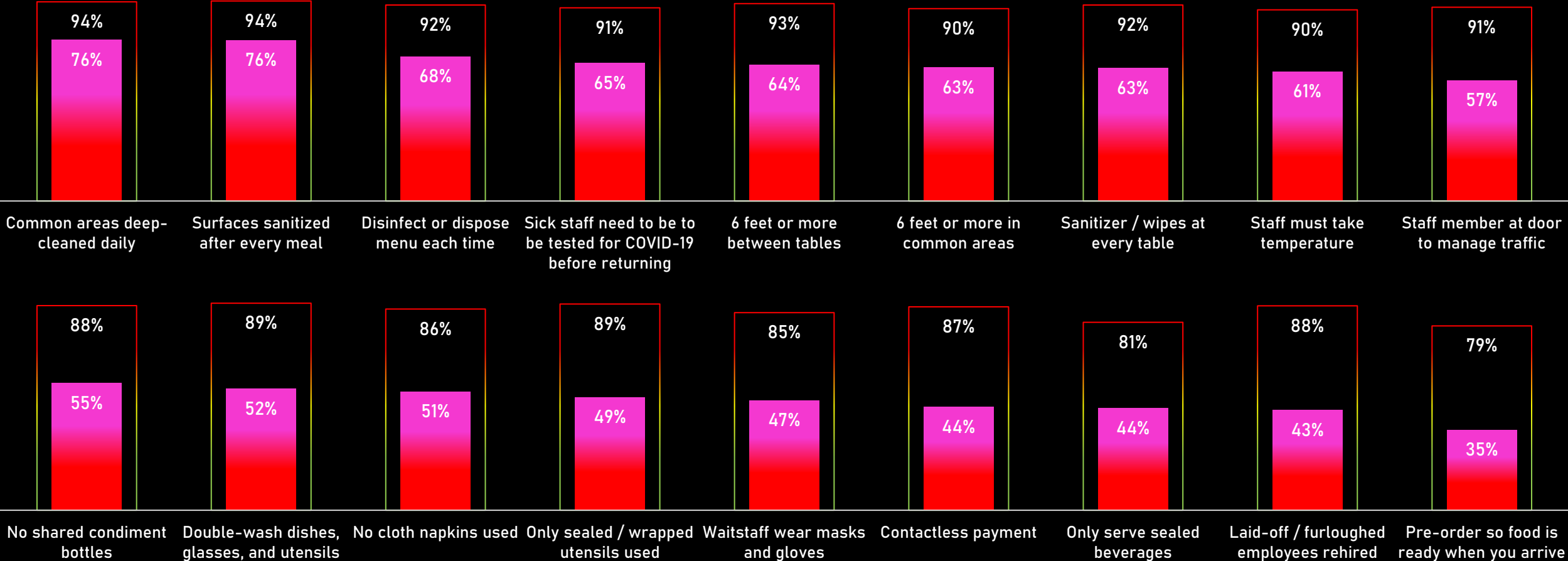
Diners insist on the basics, and everything else is gravy.

As restaurants reopen, consumers won't require them to jump through hoops to be part of their consideration set. Thorough and frequent cleaning will be a must, from common areas to surfaces to menus. Assurance of healthy staff and steps to social distance are also prerequisites. Extra assurances like double-washed dishes, wrapped utensils, and covered drinks are "nice to haves," but not necessarily deal breakers if you don't. Restaurants that go above and beyond may be more attractive to diners as they ease back into "normal" eating habits.

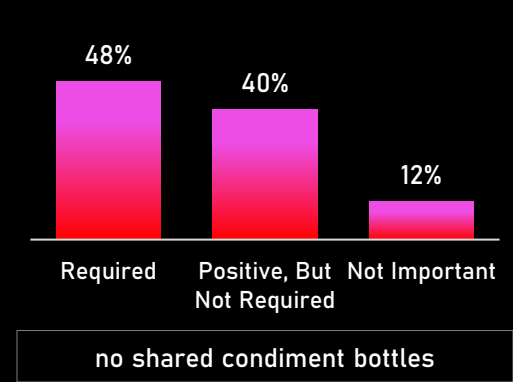
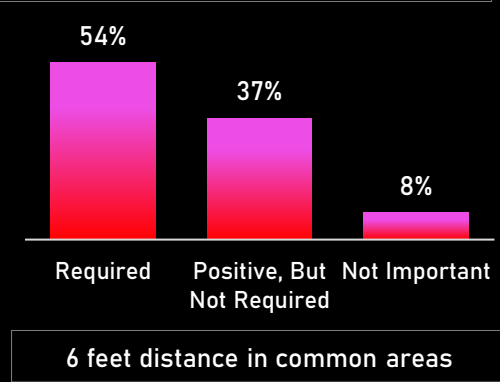
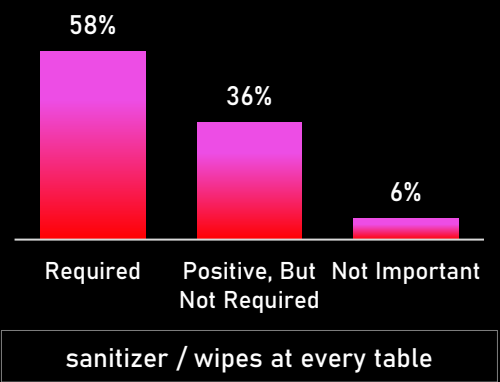
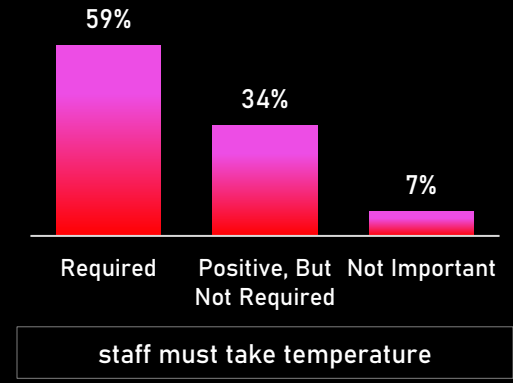
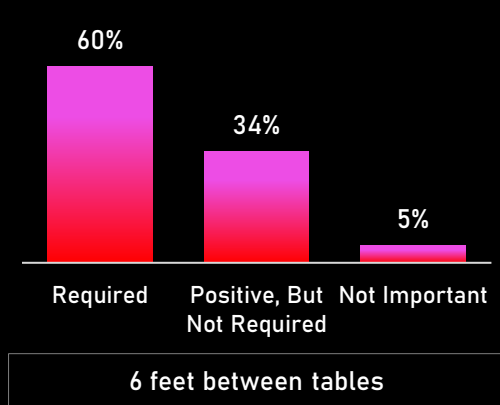
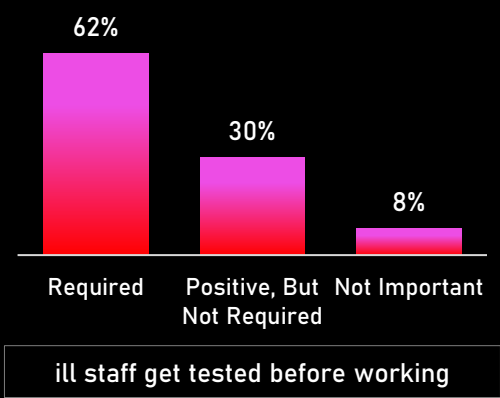
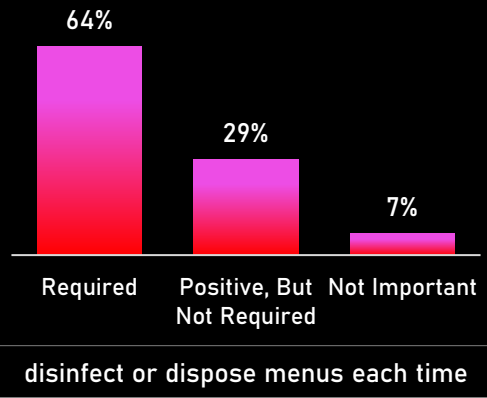
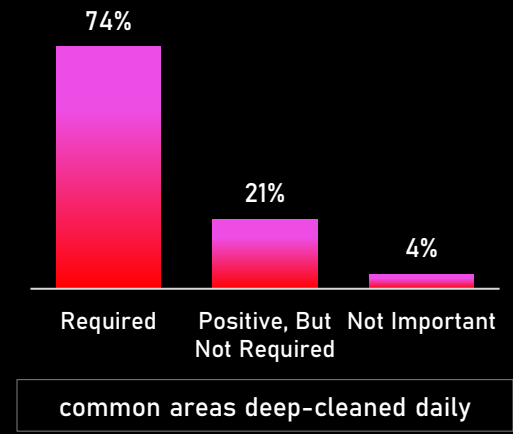
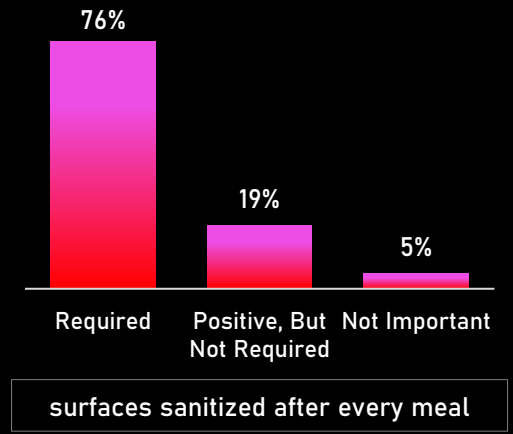
how do consumers feel about the following safety measures?

people like it

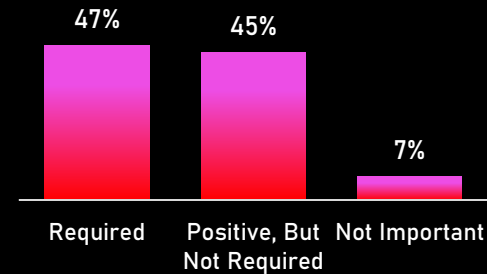
people require it



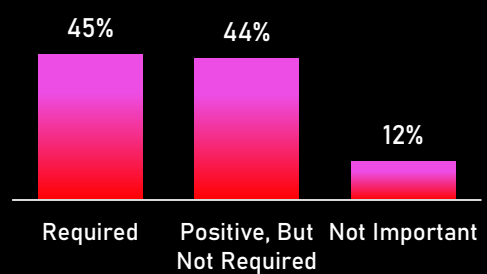
For the “might consider” fence sitters, extra precautions may be just the difference that sways them to dine in at your establishment.



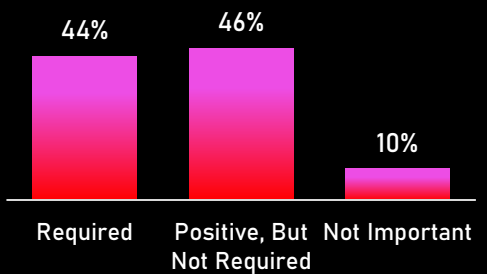
% responses from consumers who MIGHT CONSIDER DINING OUT RIGHT AWAY



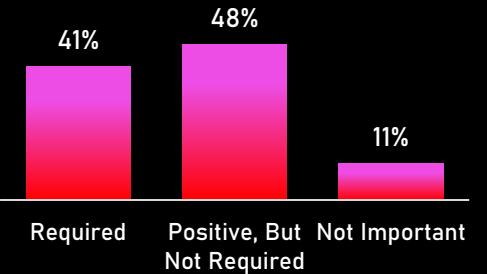
staff at door managing traffic



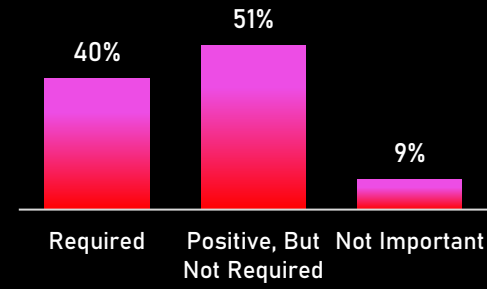
no cloth napkins



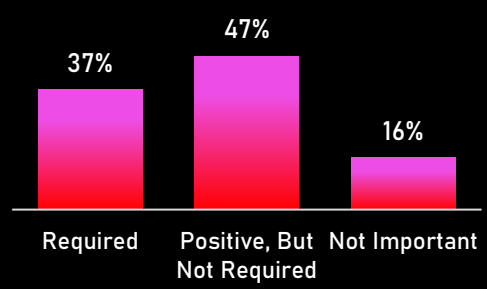
double-wash utensils and equipment



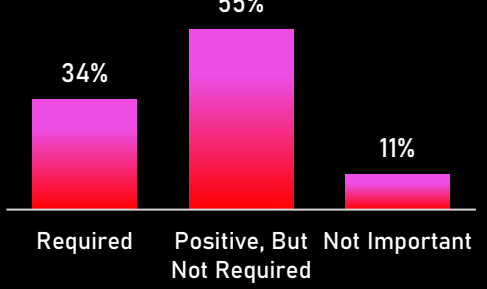
rehire laid-off/furloughed employees



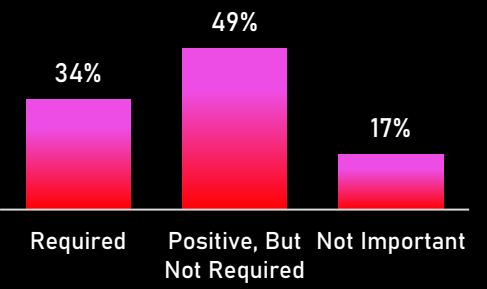
only sealed / wrapped utensils



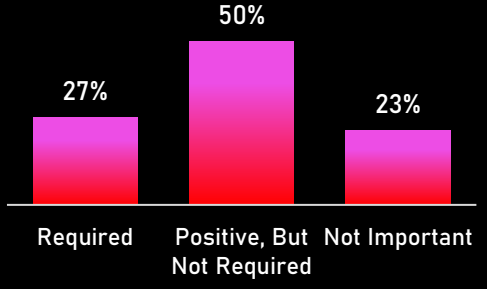
waitstaff wear masks & gloves



contactless payment



only serve sealed beverages



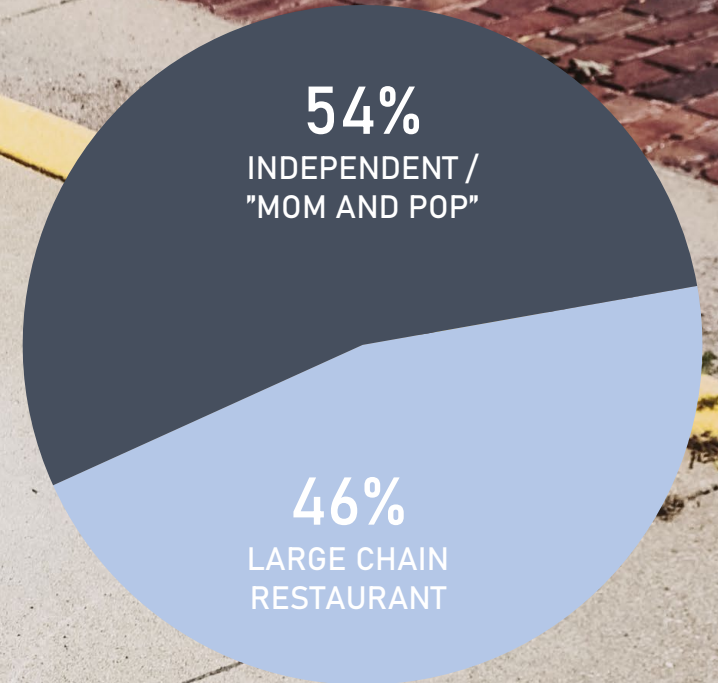
pre-order so food is ready when you arrive

% responses from consumers who MIGHT CONSIDER DINING OUT RIGHT AWAY



People see independents as moderately safer than chains.

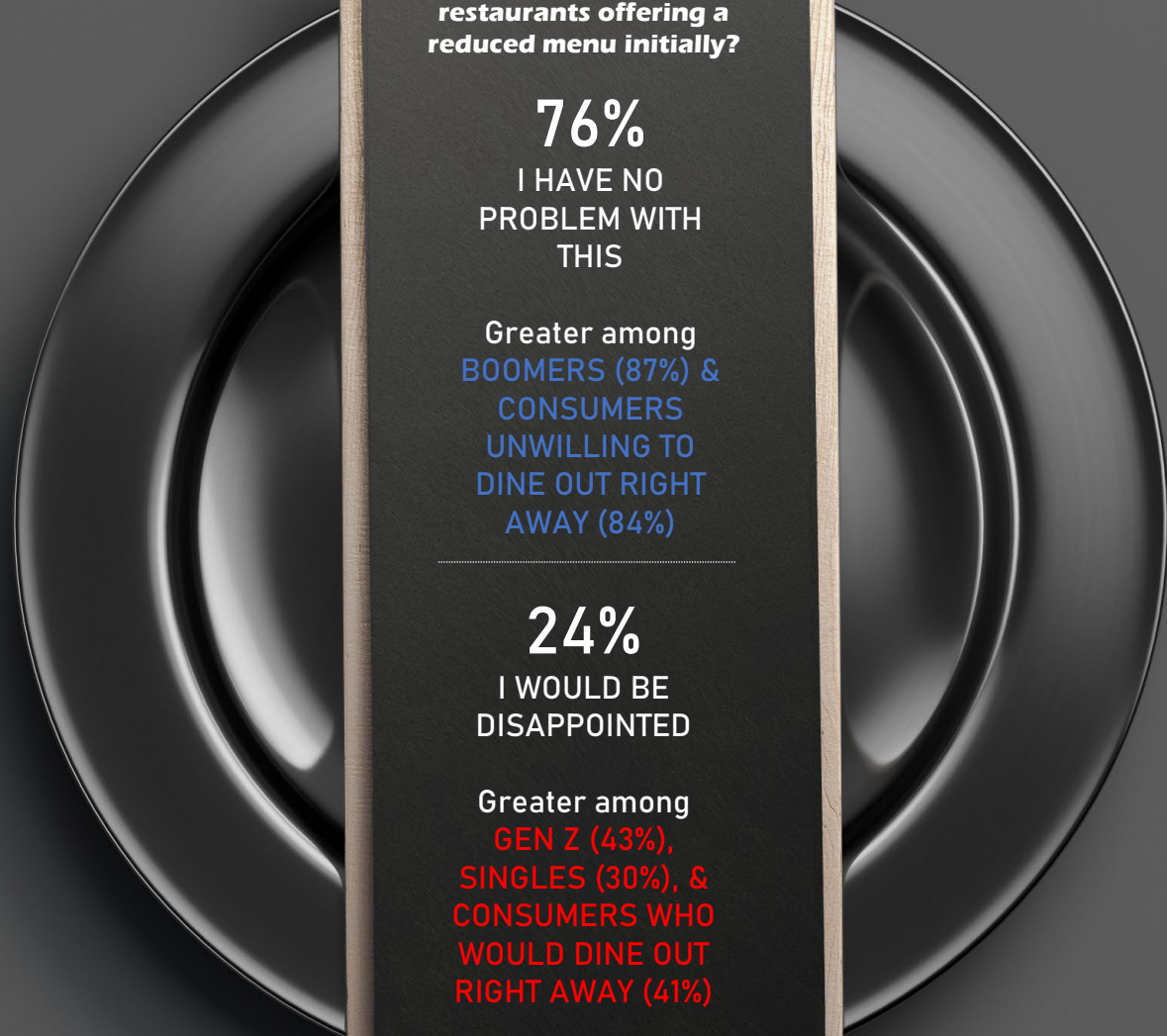
The main exception here is for consumers most eager to dine in right away, who trust large chains more to ensure a safe experience post-lockdown.



if restaurants were to reopen for dine-in, which would you trust more for to ensure a safe dining environment?

Diners are all right with a right-sized menu.

For operators needing to pare back their menu offerings because of product shortages, fewer available cooks and servers, or having pivoted to what's best for delivery and carryout, there's some good news: Customers won't necessarily be upset if dining rooms open up with a limited menu at first. It's another opportunity for a restaurant to be transparent about why some quarantine-era changes persist. Consumers will likely appreciate the fact that their local operators are open in more ways than one.



how do you feel about
restaurants offering a
reduced menu initially?

76%

I HAVE NO
PROBLEM WITH
THIS

Greater among
BOOMERS (87%) &
CONSUMERS
UNWILLING TO
DINE OUT RIGHT
AWAY (84%)

24%

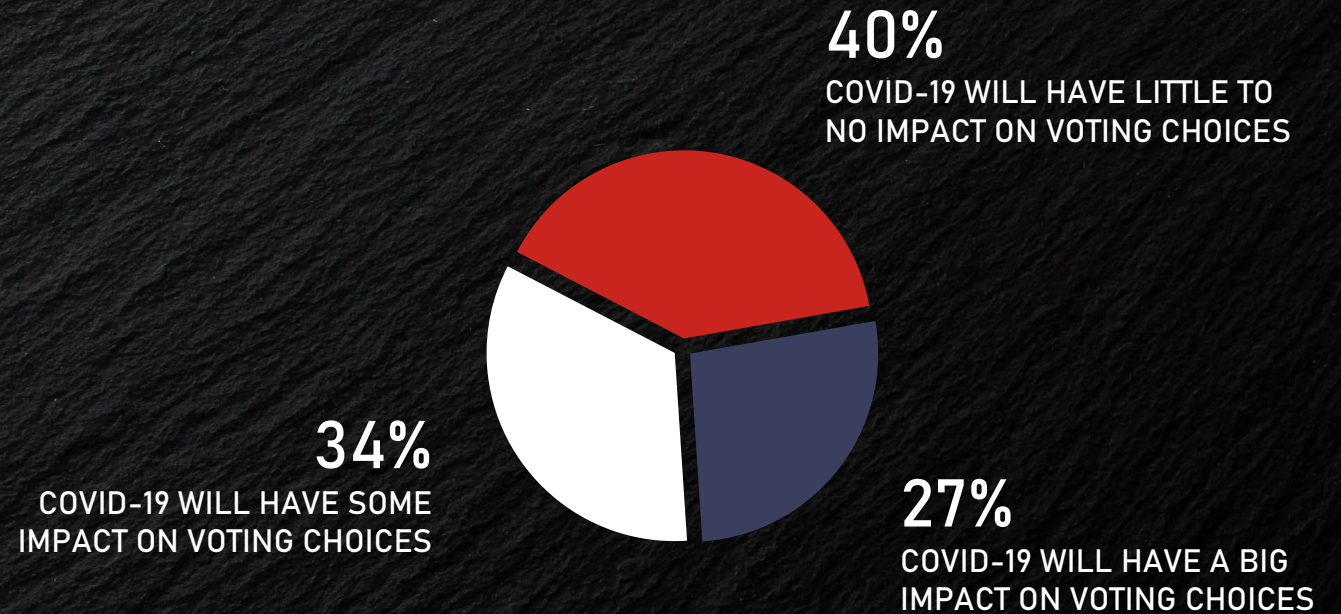
I WOULD BE
DISAPPOINTED

Greater among
GEN Z (43%),
SINGLES (30%), &
CONSUMERS WHO
WOULD DINE OUT
RIGHT AWAY (41%)



The COVID crisis will have some impact on the election.

COVID will impact more than just American's health and finances. Come November, for over half of Americans, management of the crisis will be a consideration in voting decisions. Gen Z choices are most likely to be heavily impacted.



how will coronavirus impact the way you vote in November?



HOTSHOT REPORT

Visit Datassential's Coronavirus Resource Library at datassential.com/Coronavirus, your one-stop shop for all COVID-19 research reports, video interviews, restaurant closure maps, and Traffic Briefings, all updated daily as new data come out of the field.



Help us help you.

As the Coronavirus situation continues to evolve rapidly, just tell us what you want to know. If it's something that benefits the food industry, we'll do our best to incorporate it into an upcoming report and provide the results to everyone for free.

And if you have a need that's specific to your company or brand, we would love to design a custom research solution for you.

[click me](#)