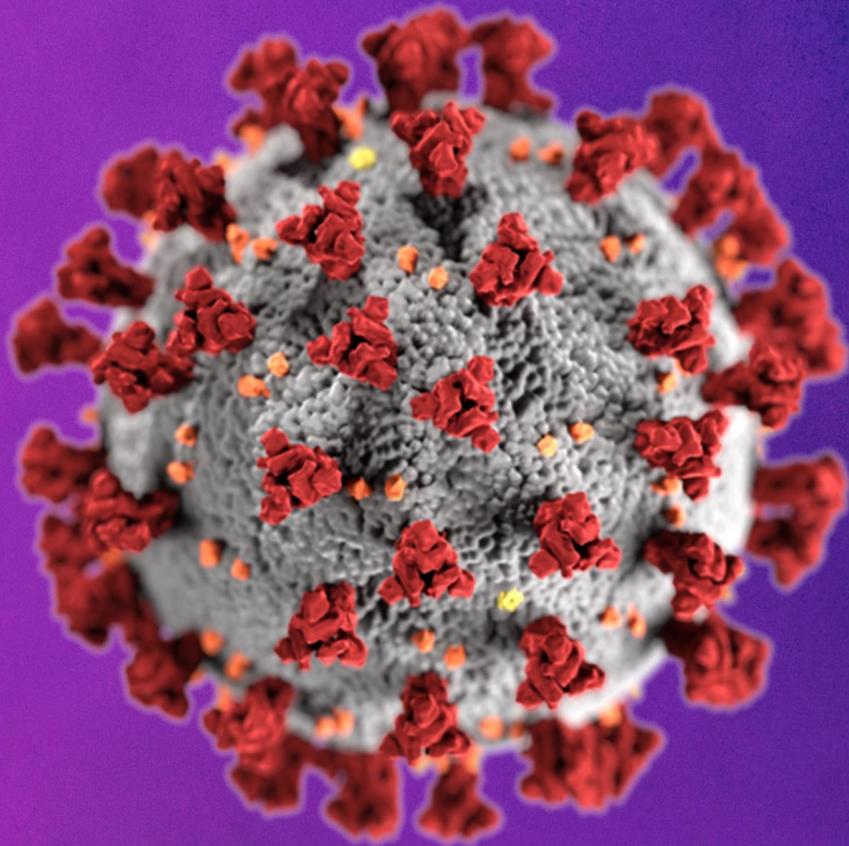




COVID-19

report 23: **NOT OUT OF THE WOODS**

6.04.20



With all states reopening to some degree, people are starting to emerge from months of being on lockdown. For some, this is a signal that things are getting better and helping to brighten outlooks. For others, it's a scary time not knowing if this will give rise to a spike in more cases. No matter which camp they fall in, Americans are expecting a second wave of COVID-19, and not all are convinced that we'll be able to handle it. The CDC recently released new guidelines stating that the virus spreads easily between people, but not easily in other ways, including touching surfaces or objects. While this news provides some degree of relief as Americans determine how to safely venture out, most prefer the security of maintaining their COVID precautionary habits.

As the economy reopens and restaurants prepare for more business, what will diners expect in light of the new CDC guidelines?

Here are highlights from Datassential's latest wave of Coronavirus research, fielded May 20, 27, and 28, and June 1 with 4,000 US consumers.

RECENT KEY EVENTS



May 27

Infectious disease doctor says he's in "deep mourning" as US reaches a deadly milestone
Wyoming announces it will allow large gatherings starting July 1

May 28

Amazon says it will keep most of the jobs it added during the Coronavirus pandemic
American Airlines to cut nearly a third of management and administrative jobs

May 29

Trump announces the US will withdraw support from the World Health Organization
Washington announces it will end stay-at-home order on May 31
Trump again claims coronavirus is "going away"

May 30

NYC mayor says large gatherings are "inherently dangerous in the context of this pandemic"
CDC resumes regular COVID-19 briefings
US Coronavirus death toll tops 102,000

May 31

More than 104,000 people have died from coronavirus in the US
Number of Coronavirus deaths in New York state continues to drop, governor says

June 1

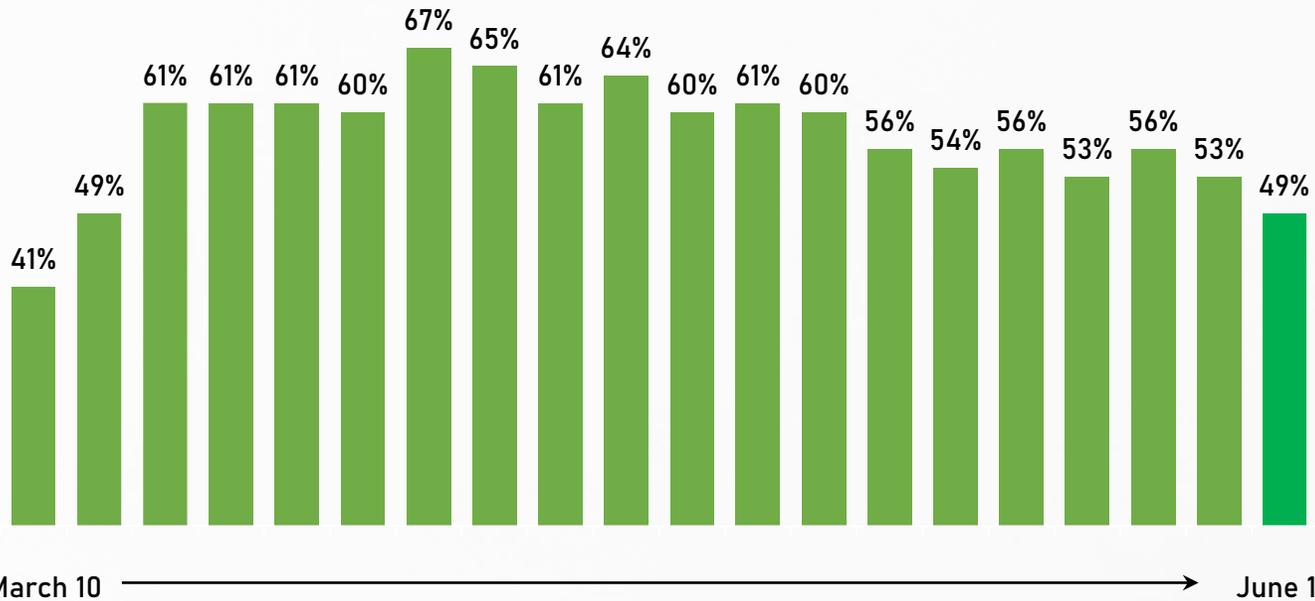
Las Vegas reopens this week
Protests are raising fears of a spike in Coronavirus cases

June 2

Americans worry COVID-19 outbreak will worsen as things reopen, according to CBS News poll
Summer heat unlikely to stop the spread of Coronavirus, NIH says
US surgeon general: "Every reason to expect" new COVID-19 clusters following protests

Concern continues to decrease to levels seen early in the pandemic.

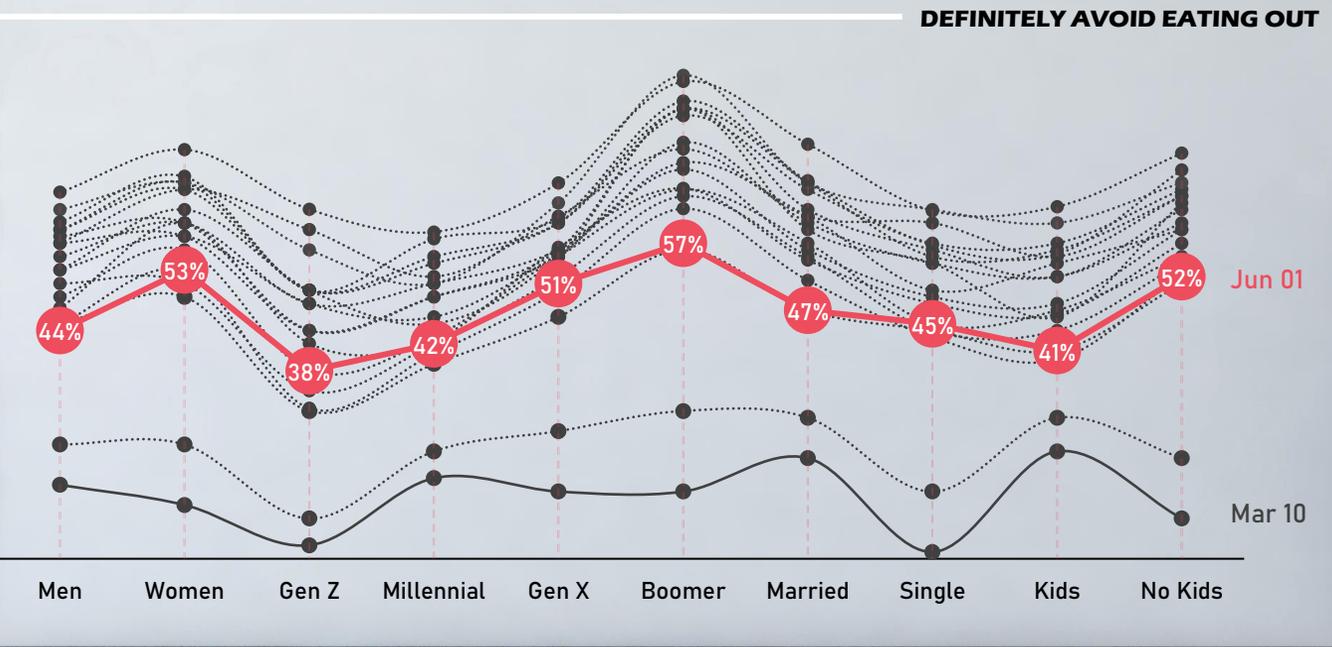
	April							May					June	
	1	3	7	10	15	17	23	27	1	7	14	19	22	1
Very concerned	67%	65%	61%	64%	60%	61%	60%	56%	54%	56%	53%	56%	53%	49%
Somewhat concerned	28%	28%	34%	31%	35%	33%	34%	37%	37%	34%	38%	37%	37%	40%
Not concerned	5%	7%	6%	5%	5%	6%	6%	7%	9%	10%	9%	7%	11%	11%





Avoidance of dining out remains steady.

Avoidant behavior is also consistent across demographic groups, compared with the prior week.



The health crisis remains top priority.

which are you more concerned about?



59%

PUBLIC-HEALTH CRISIS

-1% since May 22
-4% since April 7

41%

ECONOMIC CRISIS

+1% since May 22
+4% since April 7



As the US starts to reopen, there have been slight increases in those going back to work outside of the home.

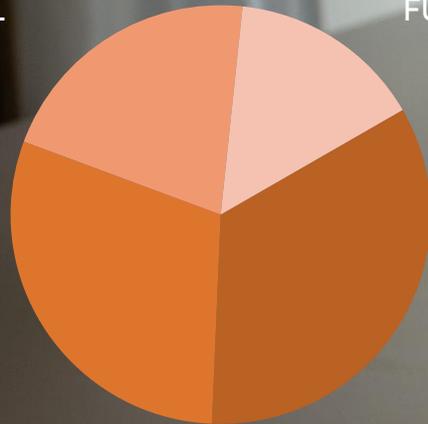
which of the following best describes your current situation?

21%
STILL GOING TO
SCHOOL/WORK AS NORMAL

15%
LAID OFF /
FURLOUGHED

30%
WORKING OR ATTENDING
SCHOOL REMOTELY

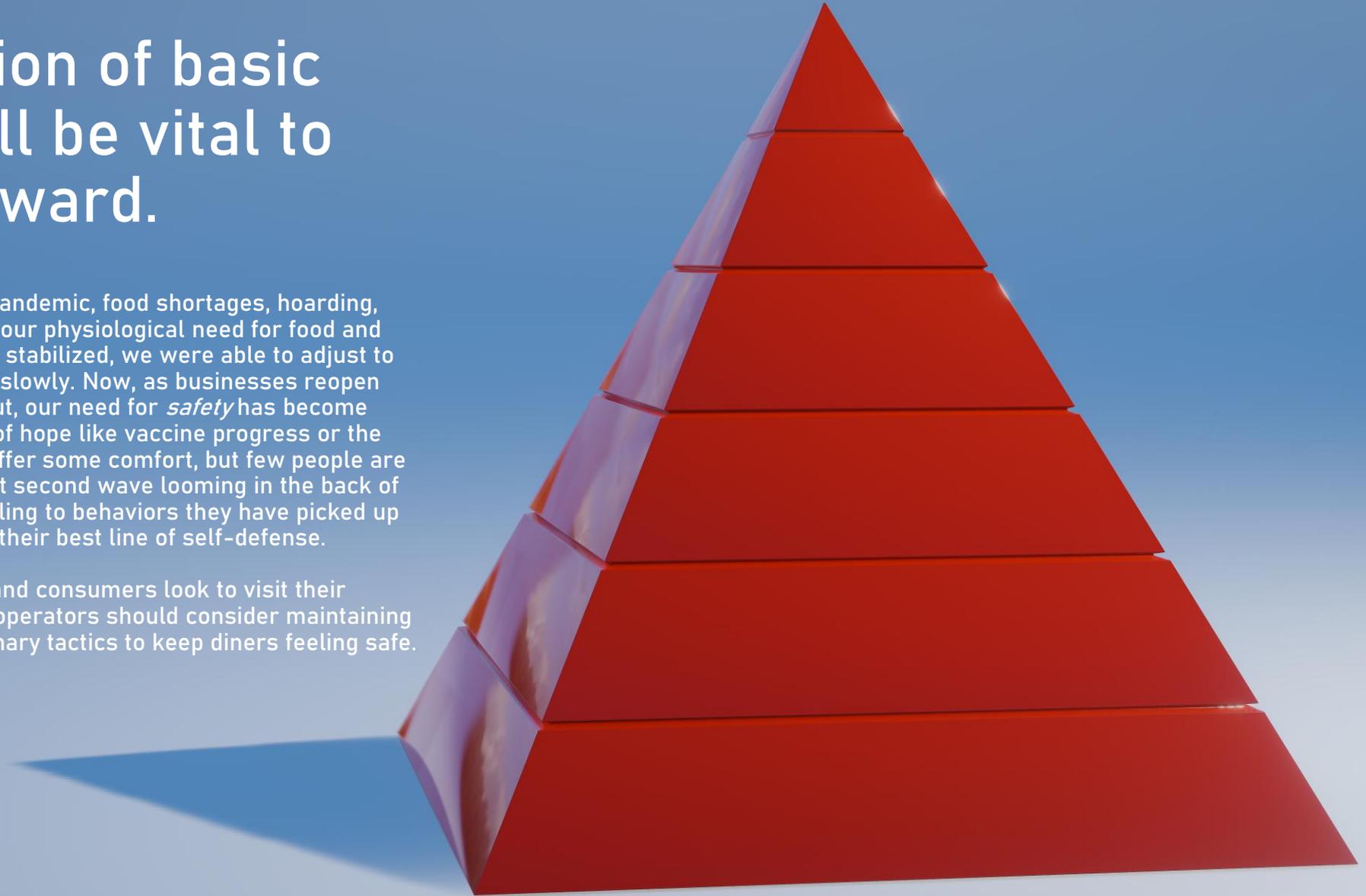
34%
NOT WORKING
OVERALL



Satisfaction of basic needs will be vital to move forward.

In the beginning of the pandemic, food shortages, hoarding, and job loss threatened our physiological need for food and shelter. As these issues stabilized, we were able to adjust to life in quarantine, albeit slowly. Now, as businesses reopen and we can step back out, our need for *safety* has become front and center. Signs of hope like vaccine progress or the recent CDC guidelines offer some comfort, but few people are “all in,” with an imminent second wave looming in the back of our minds. People will cling to behaviors they have picked up during the pandemic as their best line of self-defense.

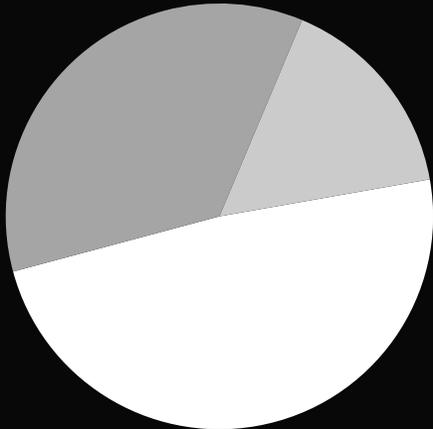
As restaurants reopen and consumers look to visit their favorite eateries again, operators should consider maintaining high levels of precautionary tactics to keep diners feeling safe.



Most people are preparing for another Coronavirus outbreak.

do you think there will be a "second wave" of COVID-19 infections here in the U.S.?

36%
YES, A MINOR ONE



16%
NO

49%
YES, A MAJOR ONE

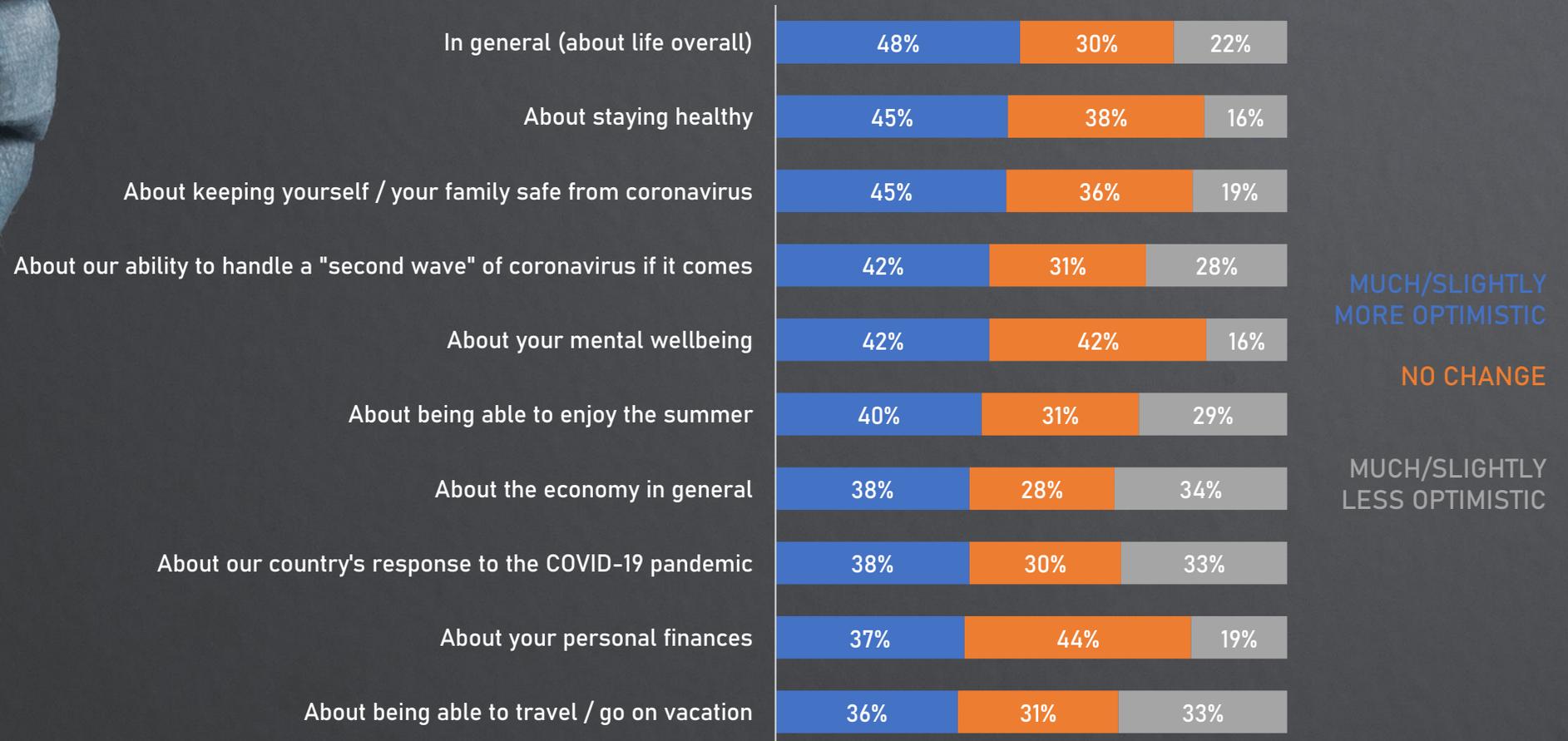




People doubt our collective ability to handle COVID.

Some of the biggest sources of pessimism regard the nation's response to the pandemic in the first place or to a potential second wave. That could be why there's less optimism for the economy in general, compared with feelings about our personal prospects for maintaining good physical and mental health.

as the country begins to reopen for "normal" business, how would you say you're feeling compared to when the COVID-19 pandemic first began?



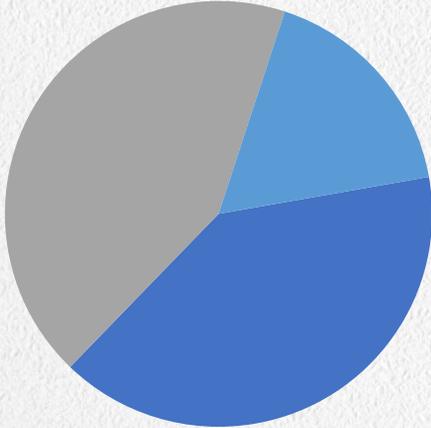


Yet more than half don't want it to derail reopening the US.

Gen Z stands out as the group more opposed to a second lockdown, in favor of a plan to open up more cautiously.

if there is a "second wave" of COVID-19 infections here in the US, do you think we should...

43%
CONTINUE
OPENING BACK
UP, BUT SLOWER



17%
CONTINUE OPENING
BUSINESSES BACK
UP AS PLANNED

40%
IMPLEMENT LOCK
DOWN AGAIN

Keeping it covered.

Consumers continue to find wearing face masks and carrying hand sanitizer to be a worthwhile effort, including many who have not personally dealt with Coronavirus or its effects. Millennials were most likely to have been affected firsthand by the pandemic.

% of consumers who....

I wear a face mask in some situations	71%	
I have a bottle of hand sanitizer that I keep with me when I go out	66%	
I wear a face mask anytime I go out in public	63%	
I personally know someone who has been diagnosed with coronavirus	31%	← More likely among Millennials (41%)
I wear gloves anytime I go out in public	30%	← More likely among Millennials (44%)
I think wearing face masks / gloves is a waste of time and effort	25%	← More likely among Millennials (36%)
I personally know of someone who has died as a result of coronavirus	21%	← More likely among Millennials (30%)
I believe I have already had coronavirus	17%	← More likely among Millennials (27%)



Consumers still perceive crowded, enclosed spaces to be too risky.



how risky do you consider each of the following as it relates to Coronavirus?

Activities	Not Risky	Too Risky	
Going to a nightclub / lounge	14%	56%	More likely among Boomers (68%)
Taking local public transportation (bus, train, etc.)	14%	48%	More likely among women (56%)
Flying on a commercial airplane	15%	46%	More likely among Boomers (53%)
Going to the gym / fitness studio	19%	44%	More likely among Boomers (51%)
Having drinks at a neighborhood pub / sports bar	19%	44%	More likely among Boomers (52%)
Sitting in a classroom / going to school	18%	38%	
Taking a taxi / rideshare (like Uber, Lyft, etc.)	17%	37%	
Going to a public playground	25%	29%	
Going to the hair salon / barbershop	23%	28%	
Dining on the patio / outdoor seating at a restaurant	31%	20%	More likely among Millennials (29%)

Foodservice choices

Buffet-style restaurant (self-service hot foods)	13%	56%	More likely among Boomers (71%)
Salad bar-style restaurant (self-service cold foods)	14%	51%	More likely among Boomers (67%)
Salad / soup bar at the grocery store (self-service)	17%	48%	More likely among Boomers (65%)
Cafeteria-style serving line (not self-service)	18%	42%	More likely among Boomers (51%)
Dine-in / eating in at full-service restaurants	21%	37%	
Dine-in / eating in at limited-service restaurants	24%	36%	
Hot / prepared foods from convenience stores	21%	35%	More likely among Boomers (45%)
Restaurants where workers assemble your food	27%	27%	
Carryout / takeout food from restaurants	36%	17%	More likely among Boomers (31%)
Delivery from restaurants	34%	16%	More likely among Boomers (32%)

About half of consumers have options for on-premise dining.

One in three consumers are left with only delivery and takeout for the moment, especially in the Northeast and the West.

32%

NOT YET OPEN FOR DINE-IN

22%

OUTDOOR SEATING ONLY

More likely in the South (28%)



13%

NOT SURE

33%

FULLY OPEN FOR DINE-IN

More likely in the South (42%)

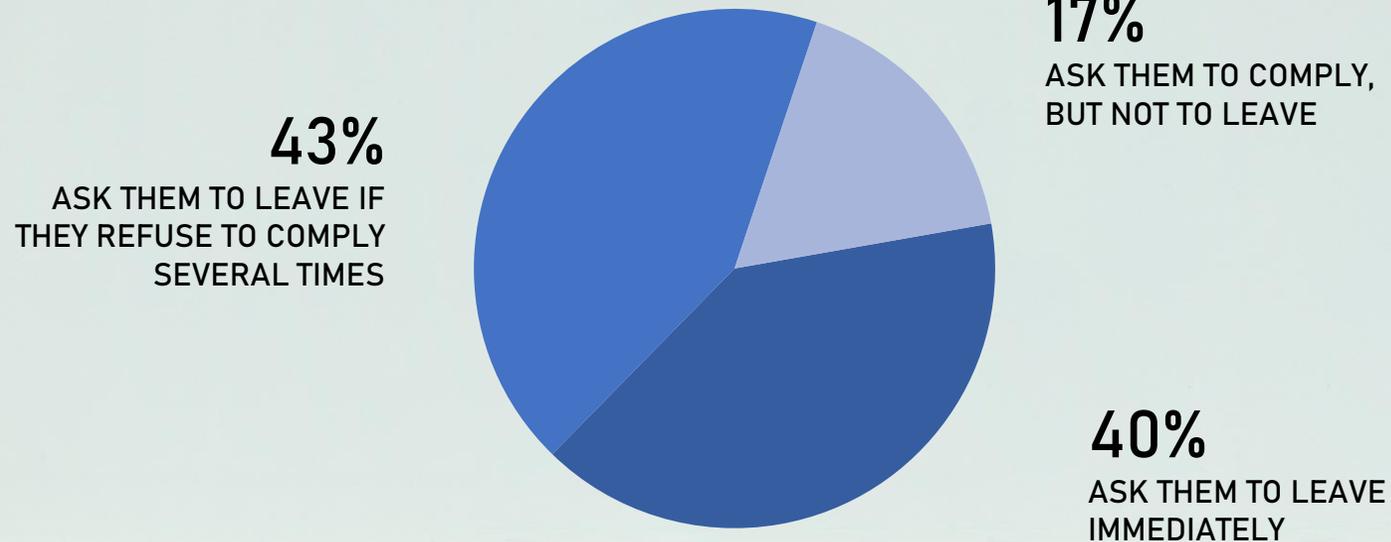
are restaurants open for dine-in in your area?



Americans have little patience for noncompliance.

No significant difference arises among demographic groups regarding tolerance for those who refuse to keep social distance.

what should a restaurant do if patrons refuse to practice social distancing while inside?

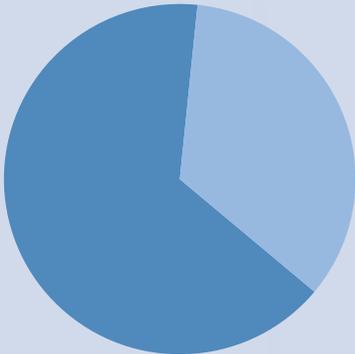




Most are aware of CDC guidance on surfaces but view it with a degree of skepticism.

were you aware of new CDC guidance that says COVID-19 "does not spread easily from touching surfaces or objects?"

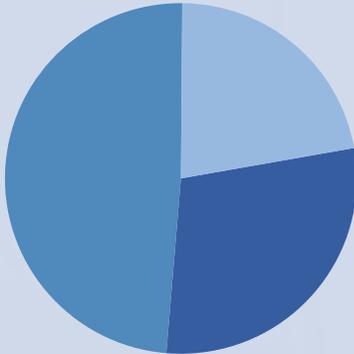
66%
AWARE OF NEW
CDC GUIDELINES



35%
NOT AWARE OF NEW
CDC GUIDELINES

do you find this guidance to be believable?

49%
YES, SOMEWHAT
BELIEVEABLE



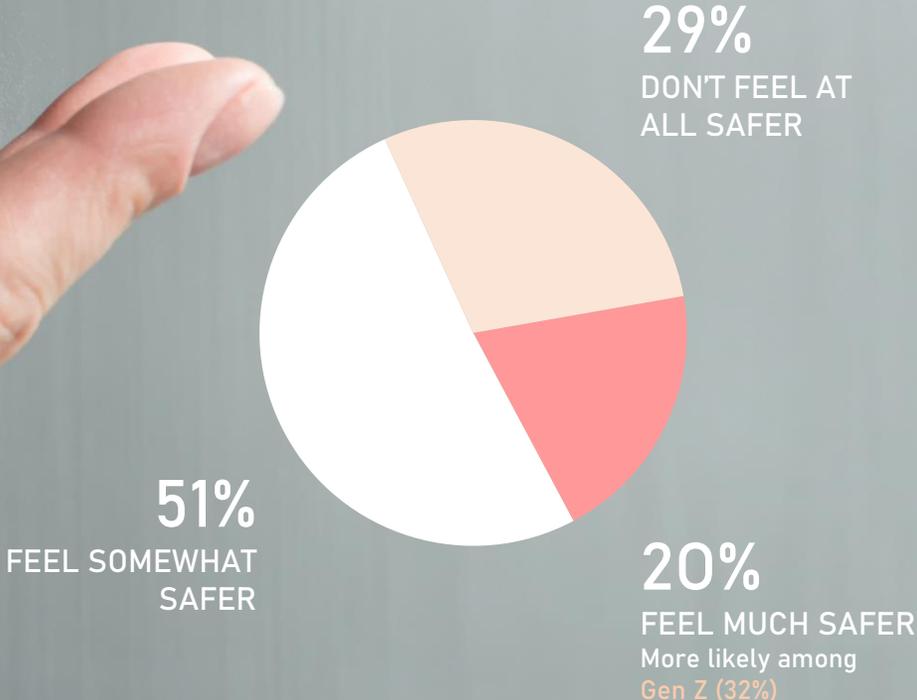
22%
NO, NOT BELIEVABLE

29%
YES, VERY BELIEVABLE
More likely among men (34%)

New CDC guidelines on touching surfaces provide some peace of mind.



how does knowing CDC guidelines say that COVID does not spread easily from touching surfaces make you feel?



But it won't stop people from taking precautions.

While the new guidelines bring a sense of relief, "less risky" does not equate to "no risk," so people will continue to practice safe hand sanitation almost universally. There is also a strong fear that this news may serve as a gateway to more irresponsible behavior. Millennials may be most impacted by the news. While the majority are skeptical of the CDC, just as many will redefine what they now consider safe behavior. For slightly less than half of people, the new guidelines are "permission" to relax safety precautions and feel more comfortable about dining in.

regarding the CDC's guidance that COVID-19 "does not spread easily" from touching surfaces or objects, please rate the following statements

I'm still going to be very careful to wash hands / wipe surfaces after touching them	84%	← More likely among women (89%) and Boomers (93%)
I'm still nervous because "does not spread easily" is not the same as "does not spread"	72%	← More likely among Boomers (78%)
I'm worried this guidance will make people behave irresponsibly / in unsafe ways	70%	← More likely among women (76%)
I'm skeptical of Coronavirus-related guidance that comes from the CDC	53%	← More likely among Millennials (61%)
Knowing this will greatly impact how I behave / what I think is "safe" to do	47%	← More likely among Millennials (60%)
This makes me feel relieved	46%	
I will feel safer dining shopping for groceries now	45%	
I can relax more / be less careful about COVID-related safety precautions	35%	← More likely among Gen Z (48%) and Millennials (43%)
I will feel safer dining inside of restaurants now	33%	← More likely among Millennials (41%)



Food packaging poses some risk, but not enough to steer clear.

While food packaging is considered to have at least some risk by most, one in three don't perceive it a danger at all. Interestingly, Gen Z, who have expressed the lowest levels of fear throughout the pandemic, are more likely versus older generations to see all types of food packaging as "too risky."

How risky do you consider each of the following types of food packaging as it relates to Coronavirus?

	Not Risky	Too Risky
Plastic straws	34%	20%
Saran wrap (plastic covering)	32%	17%
Styrofoam or other foam packaging	33%	17%
Plastic utensils	34%	17%
Foil wrapping (foil burrito / sandwich wrappers, etc.)	33%	16%
Cardboard food containers	33%	16%
Plastic bags	33%	15%
Paper bags / paper napkins	35%	15%
Plastic food containers (clamshell/"tupperware"-style)	36%	15%
Plastic-wrapped / sealed plastic utensils	44%	14%



Diners don't expect more than the basics to feel safe.

Consistent with earlier Datassential learnings, when it comes to feeling safe with takeout food, consumers just want to know the staff is healthy and wearing protective gear. Tactics like special packaging or including disinfecting wipes aren't necessary but could be a bonus to help differentiate restaurants.

if you were to order delivery or takeout, what would you want to know the restaurant was doing in order to handle your food safely?

Sending ANY sick staff members home	58%	← More likely among Boomers (81%)
Requiring cooking staff to wear protective gloves, masks, and hairnets	57%	← More likely among Boomers (80%)
Requiring delivery / food packers to wear protective gloves, masks, and hairnets	52%	← More likely among Boomers (72%)
Not handing food directly to me	41%	← More likely among women (46%) and Boomers (49%)
Tamper-proof seals on food packages	40%	← More likely among Boomers (49%)
Packing my food in wipeable / cleanable containers	36%	
Running kitchens with fewer staff	35%	← More likely among Boomers (42%)
Telling me about its sanitation / food safety procedures via email / signage	33%	
Including disinfectant wipes with each order	29%	
Individually-wrapping each part of my order, rather than placing everything in one bag	26%	



Most will maintain precautionary behaviors with takeout.

Diners who took extra precautions with takeout will continue to do so when it comes to disinfection and using their own plates and utensils. Reheating food and avoiding produce is less of an issue, with close to half never having felt the need to take these steps. Gen Z and Millennials are most likely to stop risk-mitigating measures across the board.

how do you feel about each of the following precautions for takeout / delivery food from restaurants?

	Will KEEP doing	Will STOP doing	NEVER DID
Wash hands after handling food containers/before eating	73%	9%	19%
Use my own silverware, not the disposables provided	65%	8%	27%
Disinfect eating surfaces before eating	62%	8%	30%
Transfer everything into my own plates / cups first	55%	9%	36%
Disinfect delivery containers / bags before opening	54%	9%	37%
Reheat food to make sure it's completely cooked through	47%	9%	45%
Avoid eating raw produce	37%	12%	51%



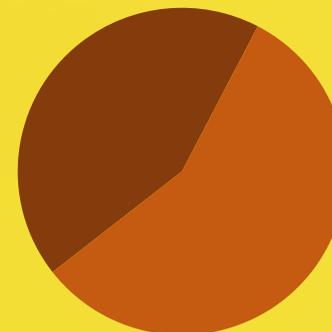
Condiments are best upon request.

Boomers, more than others, prefer condiments kept behind the counter, where they are less likely to be handled.



which would you most prefer for food condiments at restaurants?

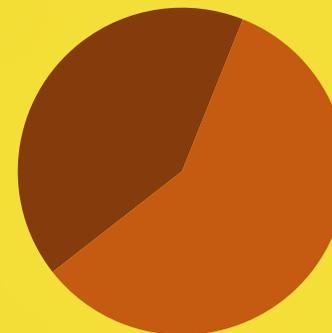
43%
INDIVIDUAL PACKETS
SELF-SERVICE
More likely among Gen Z (54%)



57%
INDIVIDUAL PACKETS
UPON REQUEST
More likely among Boomers (68%)

which would you most prefer for beverage condiments at restaurants?

42%
INDIVIDUAL PACKETS/TUBS
SELF-SERVICE



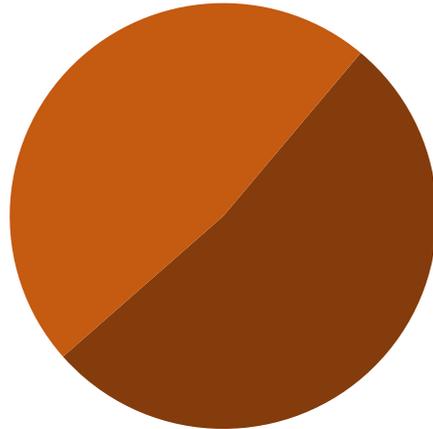
58%
INDIVIDUAL PACKETS
UPON REQUEST
More likely among Boomers (67%)

The verdict is split on fountain drinks.

Boomers are slightly more likely to prefer staff-served drinks where access to fountains are limited.

which would you prefer for fountain beverages at restaurants?

48%
FOUNTAIN DRINKS
VIA STAFF
More likely among
Boomers (55%)



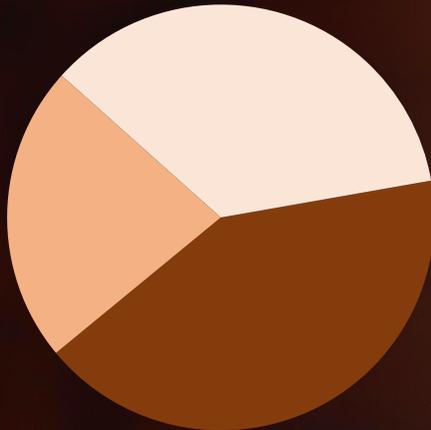
52%
FOUNTAIN DRINKS
SELF-SERVICE
More likely among Gen Z (65%)



Customers prefer to “doctor” their own coffee.

which would you most prefer for coffee service at restaurants?

23%
CREAM/SUGAR
ADDED BY STAFF
More likely among
Millennials (30%)



36%
DON'T TAKE CREAM/SUGAR, OR
DON'T DRINK COFFEE AT ALL
More likely among **Boomers (48%)**

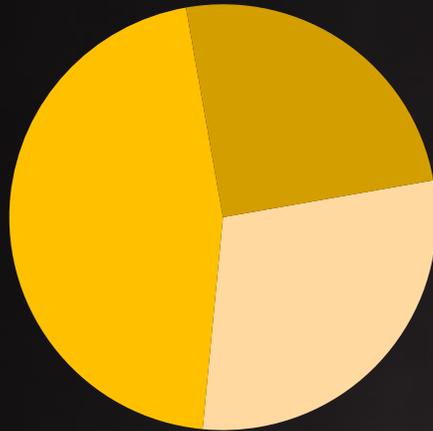
42%
ADD CREAM/SUGAR
YOURSELF



Garnishes are mostly optional.

how would you most prefer for restaurants to handle beverage garnishes?

46%
GARNISHES UPON
REQUEST ONLY
More likely among
Boomers (57%)



25%
GARNISHES SERVED
ON THE SIDE

29%
SKIP FRUIT
GARNISHES





HOTSHOT REPORT

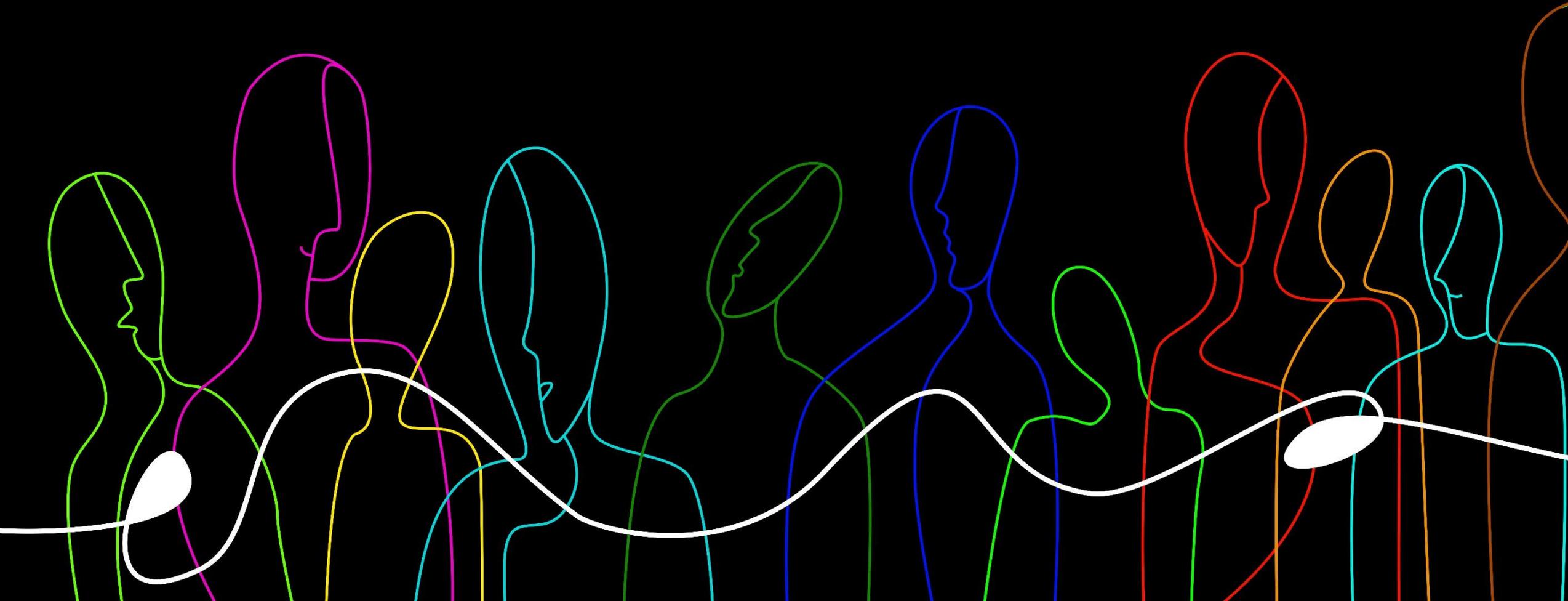
Visit Datassential's Coronavirus Resource Library at datassential.com/Coronavirus, your one-stop shop for all COVID-19 research reports, video interviews, restaurant closure maps, and Traffic Briefings, all updated daily as new data come out of the field.

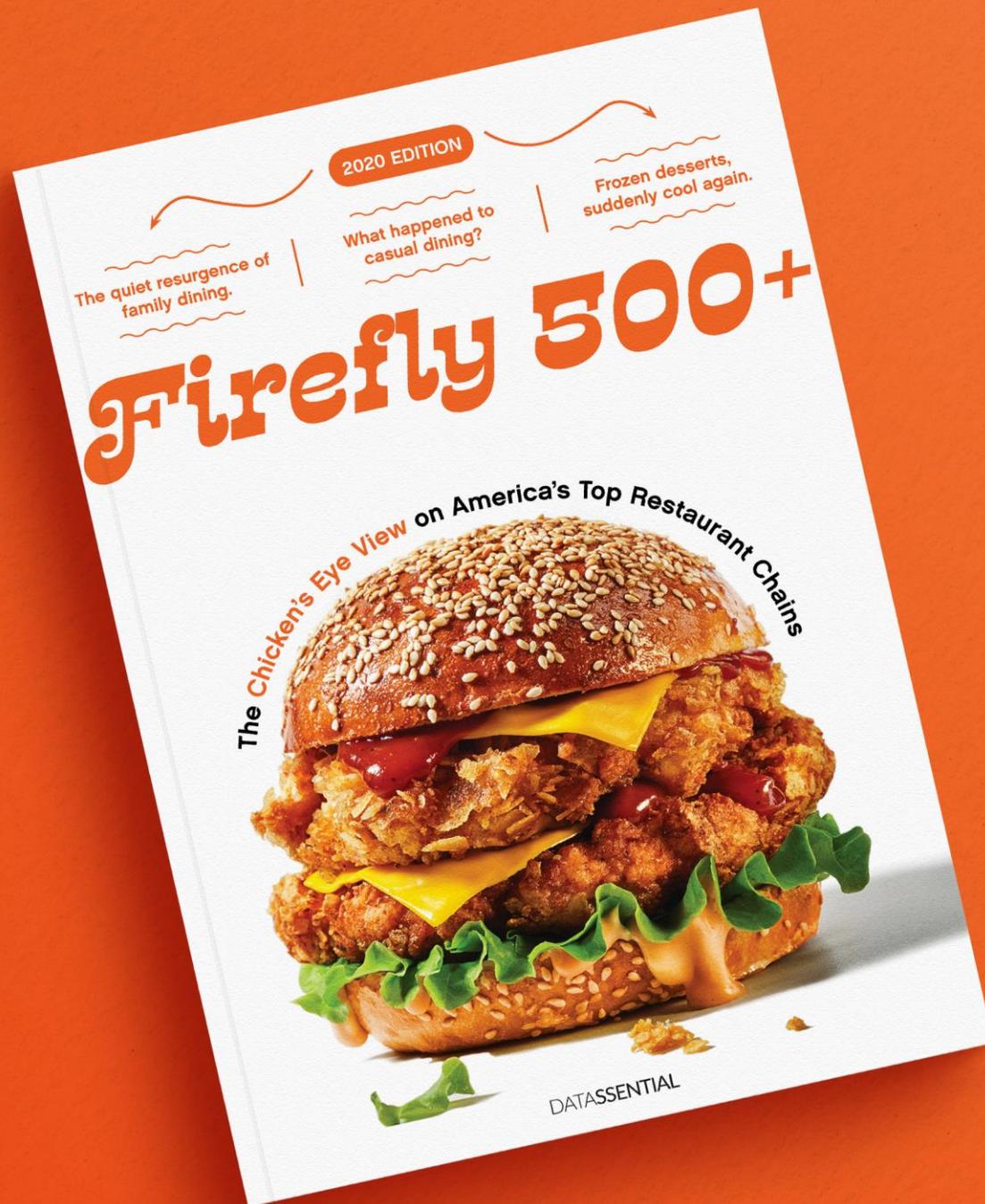


Help us help you.

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](#)



America's chain restaurant landscape, reframed in the age of COVID-19.

Datassential's recently-released Firefly 500+ Report dives deep into the metrics of chain restaurant success: annual sales, unit counts, and AUVs; year-over-year growth numbers; and consumer insights from SCORES and BrandFingerprints. This year, the report also includes custom research about COVID-19's impact on the chain restaurant landscape, compiled from March to early May.