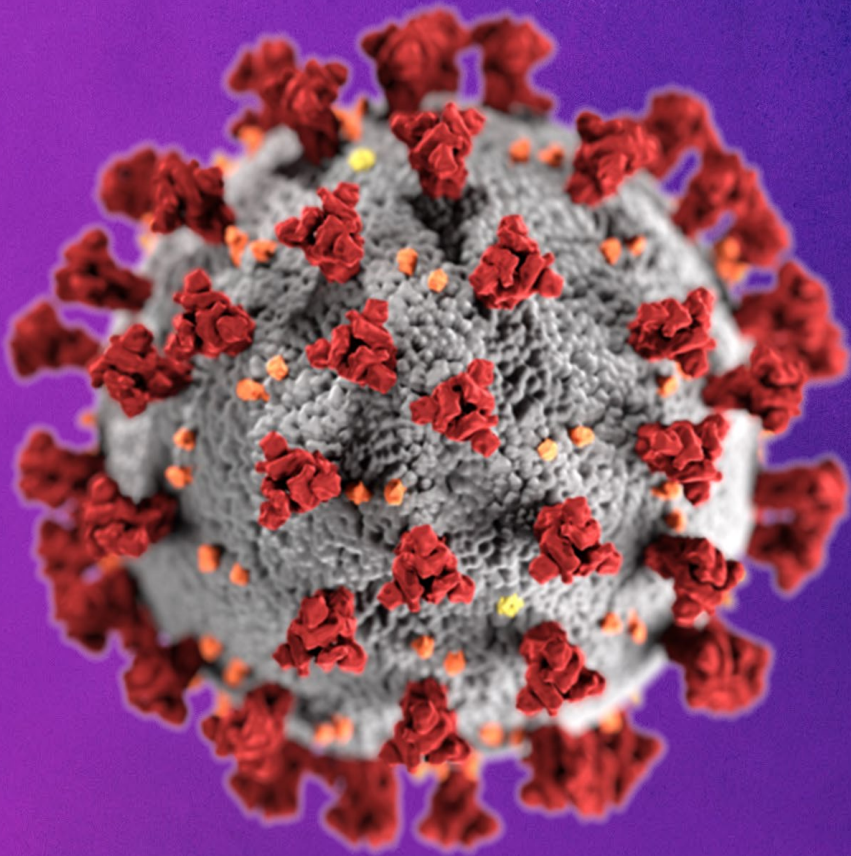


COVID-19

report 5: **SHELTERED**

3.27.20





Cases of COVID-19 in the US are growing exponentially, forcing major lockdowns. Cries for social distancing, protective equipment for healthcare workers, and badly needed supplies can be seen across all forms of media. Drastic measures are being put in place, from sneeze guards in the grocery stores to the \$2 trillion stimulus package to save our economy. While it's only been a few weeks since many Americans have been confined to their homes, for many it feels like a few months. COVID-19 has shattered our old way of life, and with developments changing by the minute, many of us are scrambling to secure some kind of "new normal."

While things are changing, some will remain the same, with eating still playing a central role in our lives. How have Americans' everyday food and social habits changed in the era of COVID-19, and what can restaurants do to stay part of people's new routine?

Here are highlights from Datassential's latest wave of Coronavirus research, fielded March 25 with 1,000 US consumers.



KEY EVENTS SINCE THE LAST FIELDING ON MARCH 22

March 23

Prime Minister Boris Johnson calls for a lockdown across the United Kingdom
India imposes a lockdown affecting 750 million people
CNN reports the US has more than 40,000 cases of novel Coronavirus
Papa John's joins Domino's Pizza in seeking thousands of new workers

March 24

The 2020 Olympics in Tokyo are postponed until at least 2021
The Dow rises 1,200 points at the open of the stock markets
President Trump suggests getting the economy "opened up" by Easter

March 25

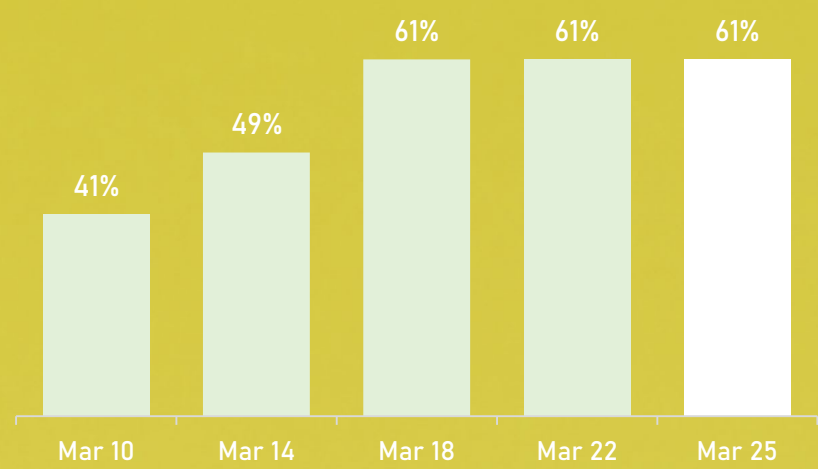
The Senate reaches a deal on a \$2 trillion stimulus package
Walmart, Kroger, Albertsons among grocers adding sneeze guards
Researcher STR finds that 70% of US hotel rooms were vacant the week of March 16
State Department says it's tracking 50,000 Americans abroad trying to return to the US

Concern has stabilized but remains high.

Despite the exponential growth in the number of cases, concern around COVID-19 has remained steady over the past week, with most Americans very concerned and hugely worried about their own personal health.

very concerned with Coronavirus

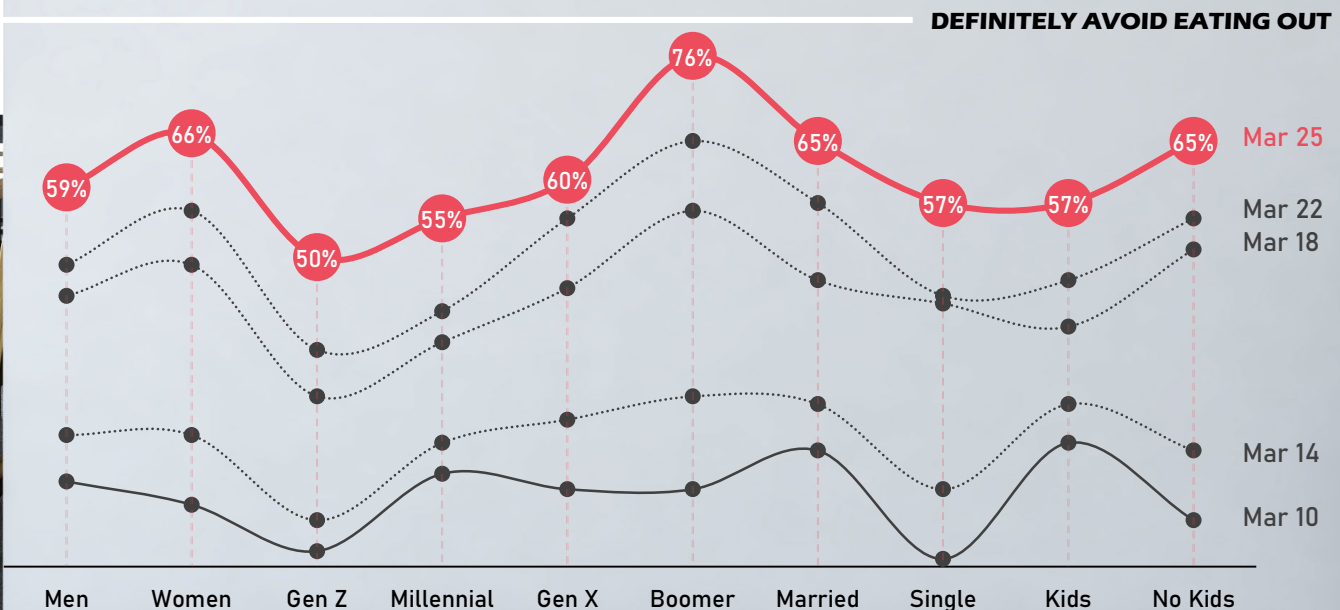
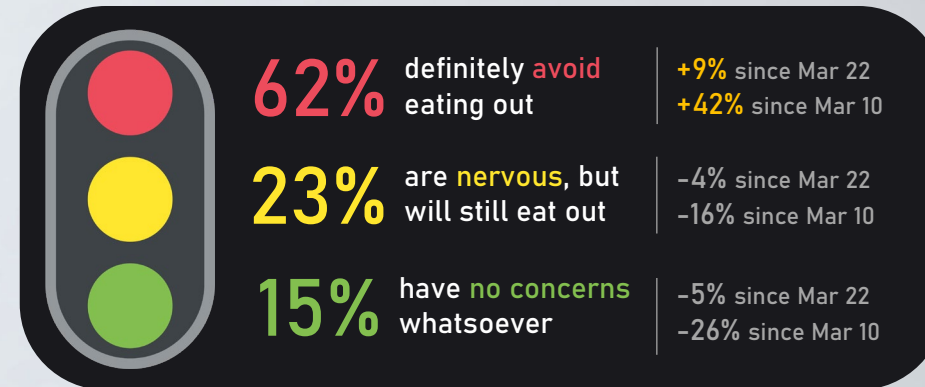
	Mar 10	Mar 14	Mar 18	Mar 22	Mar 25
Very concerned	41%	49%	61%	61%	61%
Somewhat concerned	49%	42%	34%	35%	34%
Not concerned	10%	8%	5%	4%	5%

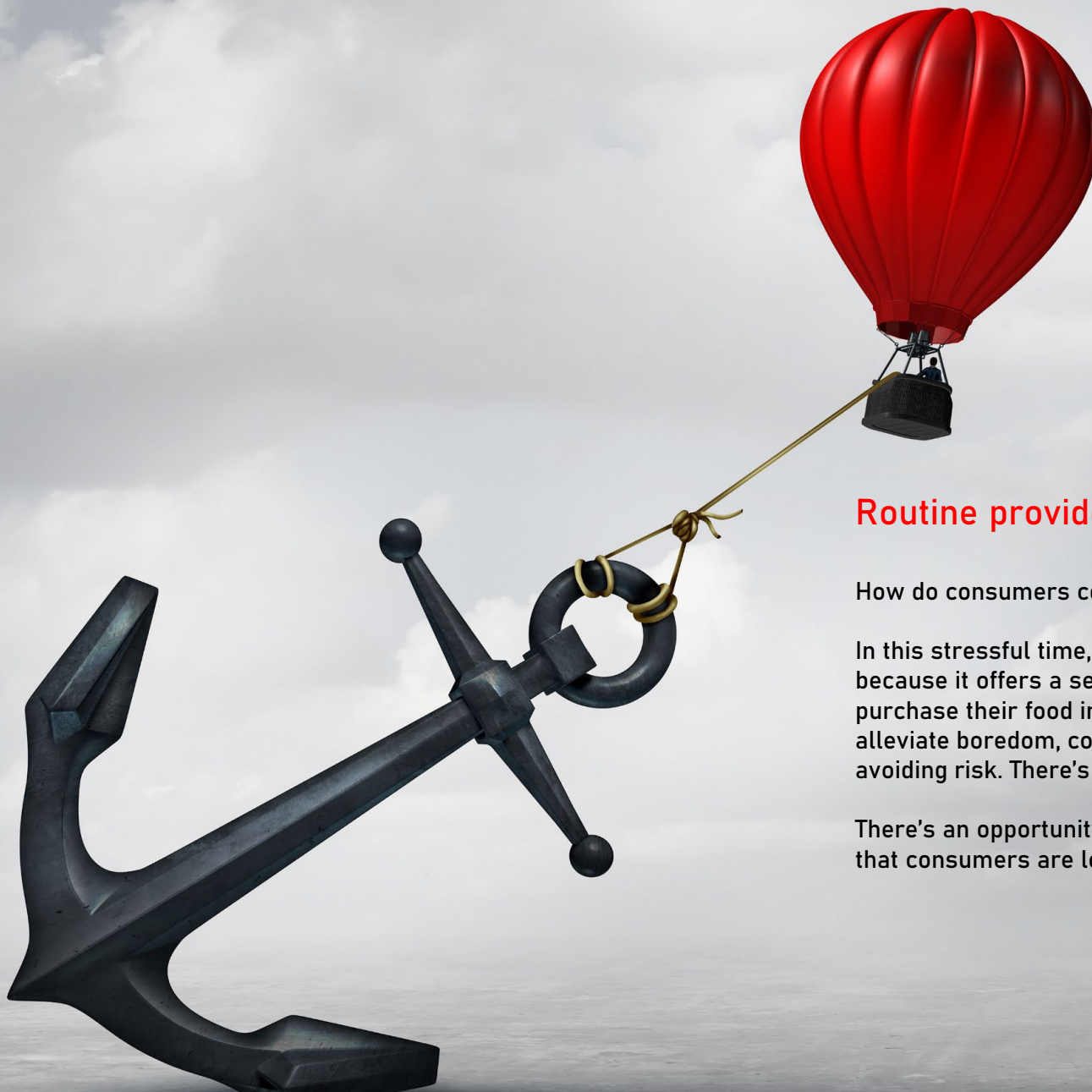




Almost two-thirds of consumers now avoid restaurant dining rooms.

As the number of states mandating the transition to delivery and takeout only continues to grow to now 45, so does consumer avoidance of dining at restaurants. Concern is steadily increasing across all demographics, with significant differences within each of the groups. While Gen Z remains less concerned than their elders, the number of avoiders increased 31% in just four days.





Routine provides an anchor in an uncertain post-COVID world.

How do consumers cope when everything feels up in the air?

In this stressful time, when so much is unknown, people are gravitating toward the everyday, because it offers a sense of control. Food is no exception. Whether consciously deciding to purchase their food in a grocery store versus a warehouse club or subconsciously eating to alleviate boredom, consumers are finding comfort in what they know. Decisions are driven by avoiding risk. There's not as much room for indulgence as you'd expect.

There's an opportunity for restaurants to associate themselves with the everyday comforts that consumers are longing for.

Risk perceptions shoot up for crowded venues.

When public health mandates social distancing, perceptions of food safety for venues housed within crowded areas — namely the prepared-foods sections at a grocery store or a serving line often used in an educational or B&I campus — are going to suffer. By contrast, restaurants' takeout and delivery options let the end user feel like they never stopped self-isolating, and with a meal kit, nobody else touched the food the end consumer is about to eat. Score another structural advantage for restaurants in this situation.

For each option, men are more likely than women to perceive no risk of contracting COVID-19, significantly so for restaurant takeout and delivery, as well as all the on-site prepared-food options.

how risky do you consider each of the following ways to get food as it relates to Coronavirus?	change since March 14		
	Not Risky	Somewhat Risky	Too Risky
Meal kit delivery service	35%	48%	18% -1%
Carryout / Takeout	28%	55%	18% +1%
Drive-thru from fast food	27%	56%	17% +0%
Delivery from restaurants	26%	55%	19% +0%
Grocery meat & seafood counter	17%	55%	27% +7%
Grocery bakery counter	17%	56%	26% +7%
Grocery deli counter	17%	56%	28% +8%
Cafeteria-style serving line	9%	34%	57% +21%



Consumers are taking calculated risks.

These days, there isn't anywhere to get food that consumers feel doesn't pose at least some degree of risk. But we still have to eat. Traditional grocery stores and specialty retailers are considered the least risky, followed by warehouse clubs, super centers and discount retailers/grocers. Most are still willing to visit fast food and convenience stores, where they can use the drive-thru or not have to worry about high traffic in store. Higher-contact restaurants with sit-down service, open kitchens and make lines top the list of places "too risky" to get food.

There's an opportunity for restaurants perceived to be in the riskier category to reassure customers with emphasis on carryout options and enhanced efforts around safety and sanitation.



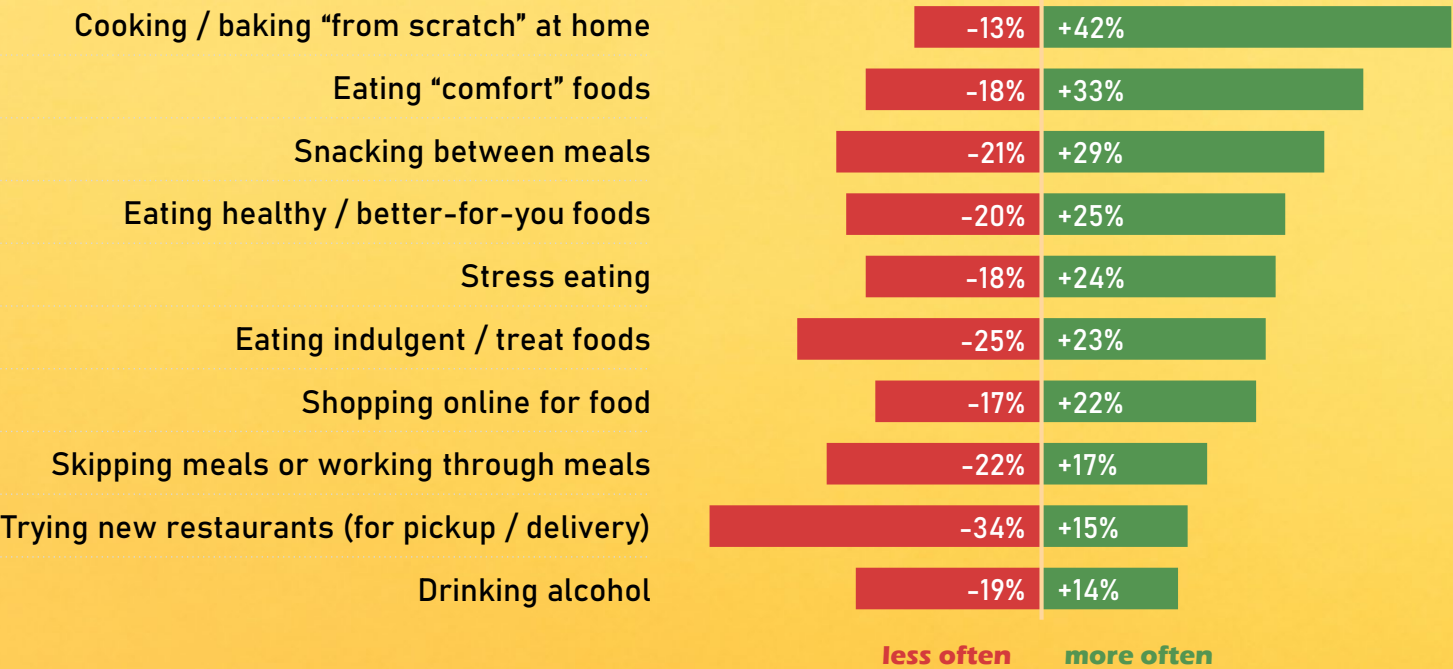
how risky do you consider each of the following places to get food?

	Not Risky	Somewhat Risky	Too Risky	
Traditional grocery stores	17%	66%	17%	Higher among Gen Z & Millennials.
Discount grocers / dollar stores	16%	60%	24%	
Specialty retailers	16%	65%	20%	Higher among Millennials.
Warehouse club stores	16%	60%	24%	
Supercenters	15%	61%	24%	
Fast-food restaurants	15%	55%	30%	
Fast-casual restaurants	14%	49%	37%	
Fine-dining restaurants	13%	42%	45%	Higher among Boomers.
Convenience stores	12%	57%	31%	
Casual sit-down restaurants	10%	38%	52%	Higher among Boomers.

In a crisis, food takes on a new role.

With food front and center to much of the turmoil around COVID-19, it's no surprise that we are beginning to see changes in daily eating routines. Whether it's having more time at home or opportunities for shared family meals, almost half of consumers are now cooking/baking from scratch more often. "Emotional eating" is also on the rise, with increases in consumption of "comfort foods," stress eating, and as is common with too much time on your hands, snacking between meals. Consumers are also less likely to try new restaurants, whether driven by less choice or simply being more risk averse. Households with kids are shifting the most, with significantly more change across almost all activities than their single counterparts, where it's more "life as usual."

how have consumers' daily routines changed since the onset of COVID-19?



less often more often



Life becomes “eat to live” temporarily.

Necessity is the mother of invention, or so you might think from many of the headlines. Articles themed around how to keep entertained and connected during social distancing highlight the creative ways people are entertaining themselves. But the numbers tell a different story, at least when it comes to food-focused entertainment. Eating seems to be more function than fun, with small numbers doing things like cooking new recipes or purchasing desserts or carryout as a special treat. Even fewer are sharing food and drink occasions with others virtually. Yet many are open to the idea, especially if it involves friends or family.

In what was once a “live to eat society,” food has gotten a bad rap in the COVID conversation: sustenance, shortages, safety. Can restaurants change the narrative by not just selling food, but selling meals as a happy occasion to connect with loved ones?



**which of these quarantine activities
have you tried or would you consider?**

	Have Done This	Have Not Done This, But Am Open To It
Cook a special / new recipe as a treat	33%	45%
Purchase or make special treats or desserts that you normally wouldn't eat	26%	45%
Do “date night in” with your spouse / partner	25%	42%
Order-in a restaurant meal as a special treat	22%	41%
Take online classes (cooking, music, art, etc.)	16%	43%
Do a “virtual happy hour” with family or friends (over the phone or on video chat)	15%	36%
Have “virtual movie / TV” night with family or friends (over the phone or on video chat)	15%	39%
Have “virtual dinner” with family or friends (over the phone or on video chat)	13%	40%
Have “virtual lunch” with coworkers during the day (over the phone or on video chat)	12%	36%
Do a virtual version of a “pub crawl” or “brewery / winery tour” with online socializing	10%	30%

Consumers will help, if it fits their normal routine.

Consumers are willing to support restaurants, but they want to do it in ways that align with their current purchasing habits. They prefer to order directly from restaurants, versus using a food delivery service. They'd rather order more frequently than order more than they need for that occasion. They'll opt to leave a bigger tip over investing in gift cards or making donations. Gen Z and millennials are the exception, with greater interest in unconventional options like delivery services and GoFundMe campaigns.

Order food for pickup / delivery directly (so restaurant gets all the proceeds)	42%
Order food for pickup / delivery more frequently	37%
Tip more than usual to support the restaurant staff / delivery person	34%
Spread the word online to encourage people to support restaurants	24%
None of these	23%
Purchase restaurant gift cards so I can support them now	22%
Sign up for a food delivery service (UberEats, Doordash, etc.)	16%
Order more food to increase the check size	15%
Donate to a fund or GoFundMe page in support of restaurant employees	13%

Greater motivation among Millennials (25%)

Greater motivation among Gen Z (22%)

Greater motivation among Gen Z (22%) and Millennials (20%)

which of these are consumers most motivated to do in support of the restaurant industry during the COVID-19 crisis?



WHAT HAVE CONSUMERS DONE TO MAKE MEALTIMES MORE INTERESTING AT HOME?

"Meals have always been a social point at my house. Now, we just can eat more leisurely and outside (in our backyard) more often."

- a 24-year-old woman in Athens, GA

"We try to eat outside when it's not raining. Picnics. We've tried new recipes and baking some new stuff."

- a 32-year-old woman in Dalton, GA

"The entire family is helping with the meal, setting the table and deciding what we can cook. Then sitting down before dinner saying prayers as a family."

- a 53-year-old woman in Fremont, OH

"We've been trying different recipes and meals that we find on YouTube or any other social media, such as an app that asks everything you have in your pantry and suggests meals from what you have."

- a 42-year-old man in Las Vegas, NV

"Have had lots of "from scratch" meals and have had movie and diner nights. Also have FaceTime calls with family to check in on them during meals or at all."

- a 32-year-old man in Greenville, WI

"We'd been eating keto but our grocery selection is limited and we've been bored, so we're eating what we want right now, cooking all the comfort foods we haven't eaten since the holidays."

- a 42-year-old woman in Chesapeake, VA

"Going to the supermarket is like the worst version of 'Chopped' you can imagine, so you have to get creative on what you buy and how you cook it."

- a 44-year-old man in Fresno County, CA





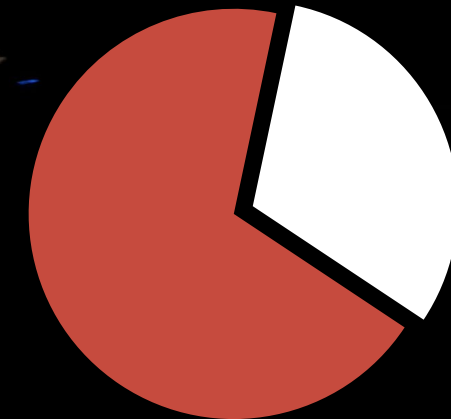
Heart for the locals.

Beyond the healthcare front, some of the biggest social media efforts and headlines have rallied around helping to keep local independent restaurants afloat, and consumer sentiment mirrors this desire. But attitudes and behaviors are not always consistent. With many independents falling into full-service and having limited carryout options, 75% of traffic is going to chains, according to a separate Datassential study.

Independents need to make sure customers are aware of takeout options and what those locations are doing to ensure food safety and cleanliness. Chains should consider efforts that help link local units to the communities around them.

which type of restaurant are
consumers more willing to support?

69%
INDEPENDENT
RESTAURANTS



31%
CHAIN
RESTAURANTS



which restaurants are consumers
more likely to support?

65%

restaurants that donate
their proceeds to **STAFF /
RESTAURANT / DELIVERY
WORKERS IMPACTED BY
CORONAVIRUS**

35%

restaurants that donate their
proceeds to **FIRST
RESPONDERS / HEALTHCARE
WORKERS IMPACTED BY
CORONAVIRUS**



Charity begins at home.

When given the choice, consumers would more readily support restaurants that donate proceeds to help staff impacted by COVID-19. Baby Boomers feel strongest about this (73%) while Gen Z shows the strongest favor of all age groups, toward donations to support healthcare workers (50%)

REGISTER HERE!

A DATASSENTIAL WEBINAR:

Refusing to Shut Down: FOOD + CORONAVIRUS

Consumers have formed new routines and shifted attitudes in the wake of the COVID-19 pandemic, but the foodservice industry has responded actively too.

This webinar from Datassential and IFMA connects the data points from Datassential's ongoing coronavirus research to tell the story of how consumers and operators are coping, how the supplier and manufacturer community can help, and how much of this "new normal" might persist in people's approach to food.

Register with [this link](#) and tune in **FRIDAY, APRIL 3, 3:00 EST.**





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](#)