

COVID-19

report 32: **OPEN TO CHANGE**

9.03.20

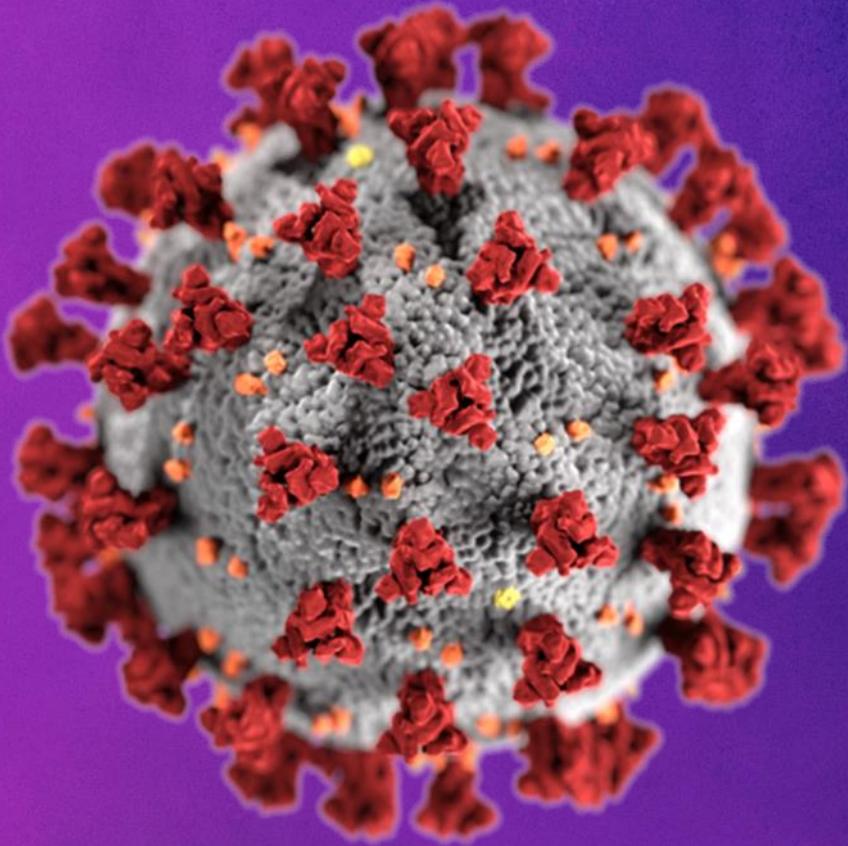


The days of social distancing, extra sanitation precautions, and altered menus are starting to pile up, and so are foodservice operators' worries about making it to the end of the Coronavirus crisis.

Restaurateurs and on-site decision makers continue to find as many ways to add properly distanced seating as they can, in addition to making off-premise strategies work for them. That's why most operations have managed to stay open in some form throughout the pandemic. Just because they've made do, however, doesn't mean they're not eager to get back to normal, rather than hear the phrase "the new normal" ever again.

In the following pages, excerpts from the PULSE August 2020 Operator Sentiment Report frame the big picture for the food industry heading into fall.

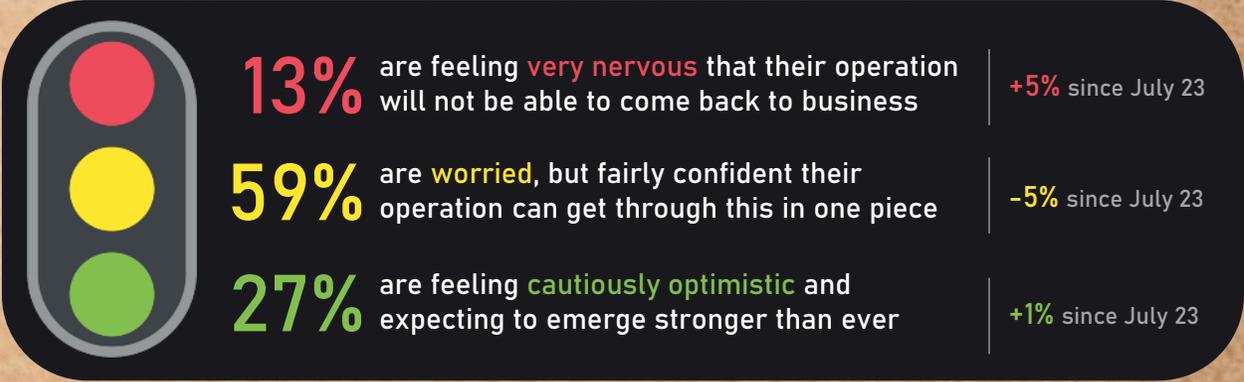
Here are highlights from Datassential's latest wave of operator-focused Coronavirus research, fielded August 19-20 with 410 decision makers for restaurants and on-site foodservice locations.



Operator worries about surviving this crisis are increasing.

As we settle into the “new normal,” some operators who perhaps had been braced for a short-term impact are now realizing changes may be long-lasting in ways that may challenge their ability to make it out of this crisis.

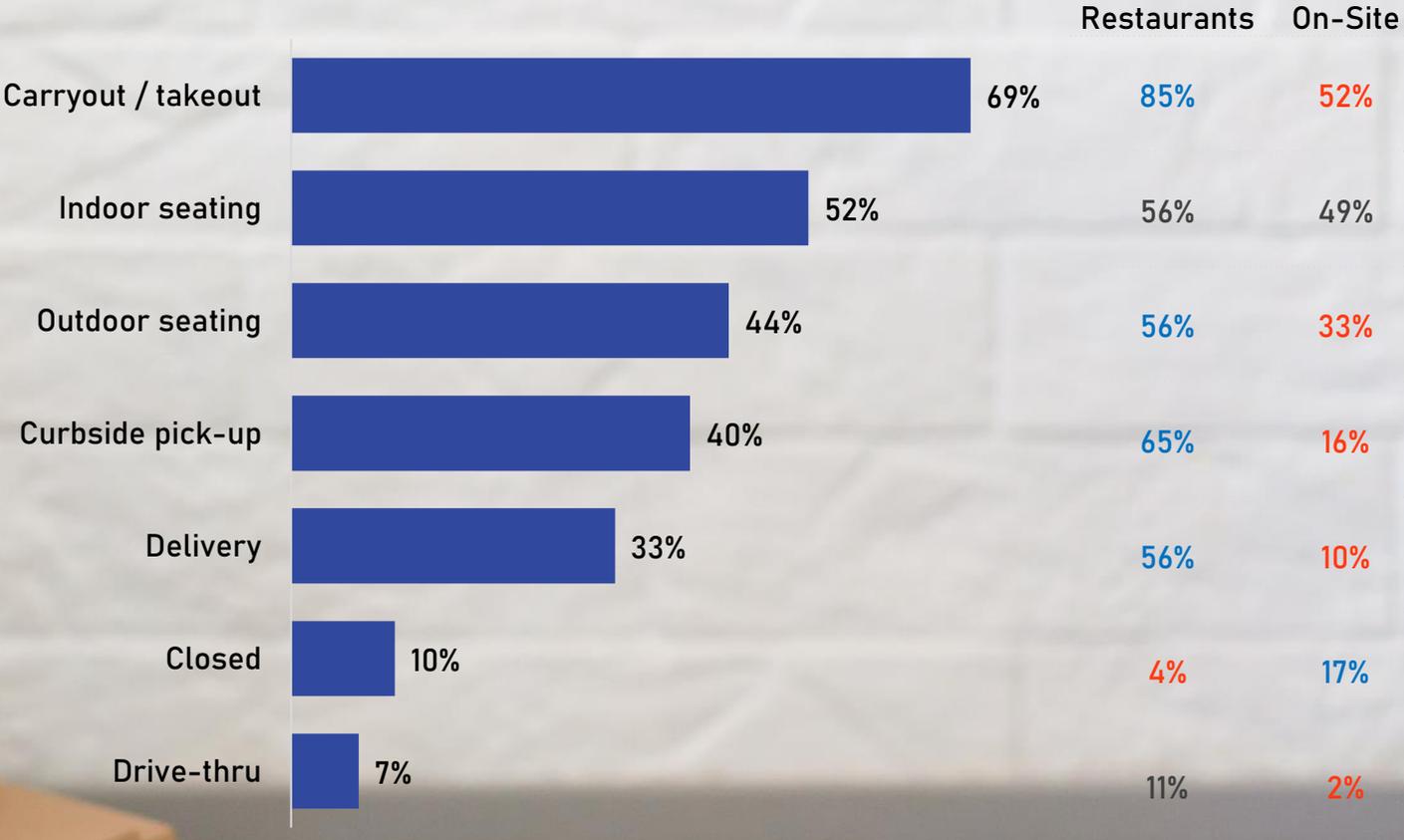
However, those who were optimistic at the start of the pandemic seem to remain optimistic. These operators largely come from segments that are simply less impacted by COVID.





Takeout is everything, especially for restaurants.

More than half of restaurants are currently open for seating (indoor and outdoor) and are also offering delivery. Seating availability is increasing, with more operators offering seating today than were in July, led by increased indoor and outdoor seating at on-site locations. In addition, on-site operators are much less likely to have on-premise or takeout/delivery options than restaurants and are more likely to be temporarily closed than are restaurants.



Significantly MORE likely than total

Significantly LESS likely than total

which services are you currently offering to patrons?



Most operators are open.

Half have stayed open through the pandemic, and another quarter closed and have since re-opened. On-site operators are more likely than restaurants to still be closed, often because they are part of larger institutions (such as B&I or C&U) that remain closed.

	TOTAL	Restaurants	On-Site
Closed completely at first, then re-opened and have been open ever since	25%	26%	24%
Stayed open at first, but have since closed completely	3%	3%	2%
Have closed and re-opened multiple times since the start of the pandemic	9%	9%	9%
Have been closed completely since the start of the pandemic	10%	3%	16%
Have stayed open (in some way - takeout only, etc.) since the start of the pandemic	53%	58%	49%



COVID staffing cuts were significant, but restaurants have been bringing staff back.

Nearly three-fourths of restaurants cut at least some staff due to the pandemic, and nearly nine of 10 operators who laid off staff have since hired some of them back, with nearly one quarter of those bringing all their employees back.

On-site venues, on the other hand, are less likely to have cut staff due to the pandemic but are also less likely to be hiring back staff that may have been laid off.

have you laid off staff in response to COVID-19?

	TOTAL	Restaurants	On-Site
NO STAFF CUTS due to coronavirus so far	32%	28%	36%
We cut staff but have since been able to hire ALL OF THEM back	17%	17%	16%
We cut staff but have since been able to hire SOME OF THEM back	36%	47%	26%
We cut staff and have not been able to hire ANY OF THEM back	15%	8%	22%

Significantly MORE likely than total

Significantly LESS likely than total

Understand foodservice operators.

Datassential's PULSE service is a multi-part subscription that examines the needs and motivations of menu makers, managers, and executives across the foodservice industry, including restaurants, retail, and on-site.

Get monthly access to tracked readings of operator optimism, segment-level detail of COVID-19's effect on the industry (restaurant and on-site), and responses to topical questions in the Operator Sentiment Report.

Additional PULSE benefits include:

- The 2019 PULSE Topical Report (out now)
- The 2020 PULSE Topical Report, available in December
- The 2020 PULSE Market Overview
- Deep-dive chapters for 14 industry segments (restaurant, retail, on-site)



Pulse

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.

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