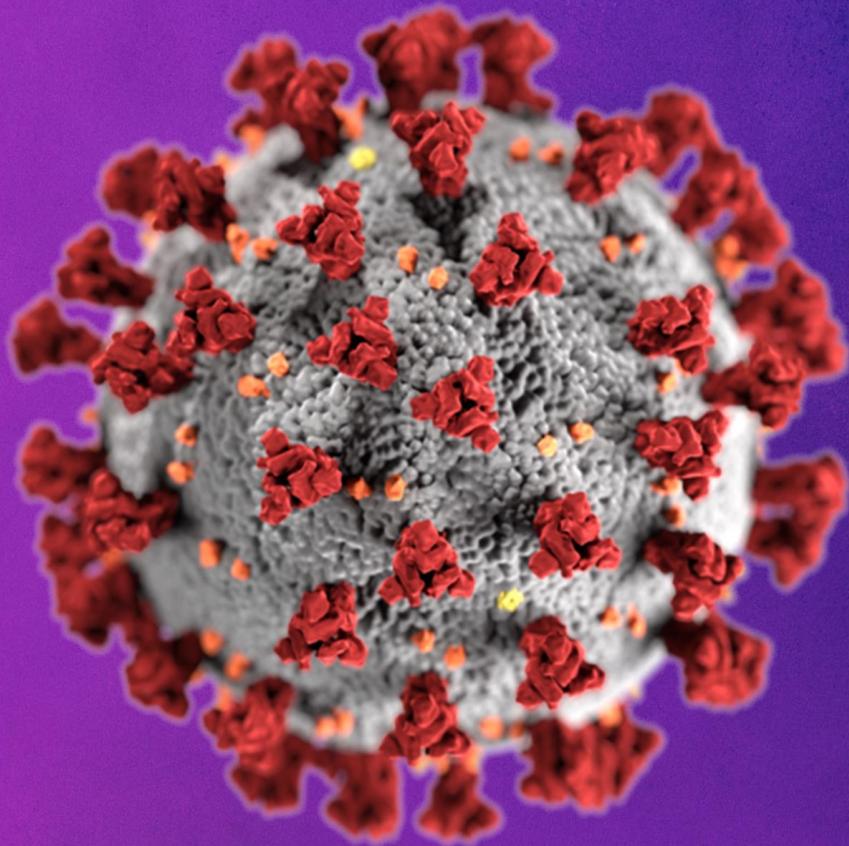




COVID-19

report 22: PAIN POINTS

5.29.20



Even as restrictions ease up and non-essential businesses start to reopen, the way in which we approach everyday life may be different for a long time to come. Food has been one of the hardest-hit areas, between restaurant dining room closures and food shortages at the grocery stores. We now have new shopping protocols to consider and an unfamiliar restaurant landscape to figure out. Layer on top of this all the necessary precautions we must now take to protect ourselves, and it's safe to say that the "diner journey" has become much more complicated. Consumers are limiting trips to the grocery store since it's become an added source of stress. Meanwhile, for restaurants, there's good news: While diners acknowledge restaurant meals now require more planning, it won't stop them from ordering their favorite meals.

With all the added steps and precautions when it comes to getting food, what do consumers consider their biggest pain points, and how can restaurants address these to make the process more turnkey once again?

Here are highlights from Datassential's latest wave of Coronavirus research, fielded May 18, 19 and 22 with 3,000 US consumers.

RECENT KEY EVENTS

May 23

Early results from convalescent plasma study are encouraging, researchers say
Front page of Sunday's New York Times lists the names of Americans who died from Coronavirus
A cluster of coronavirus cases was reported in the US after a swim party

May 24

Report: Two hairstylists with COVID-19 may have exposed 140 people at salon
Houston enforces capacity rules after images of crowds surface over Memorial Day weekend
Washington sees a spike in Coronavirus numbers
More than 5,600 NYPD members return to work after recovering from Covid-19

May 25

Coronavirus pandemic is "far from over," researcher says
WHO warns there could be a second peak, not a second wave
Americans crowd public places as Covid-19 cases rise in some states

May 26

Dow Jones Industrial Average rises 530 points in one day
Domino's reports U.S. sales spike in April and May
Ford pauses production at Missouri plant
Merck to approach vaccine in 'very aggressive fashion,' CEO says



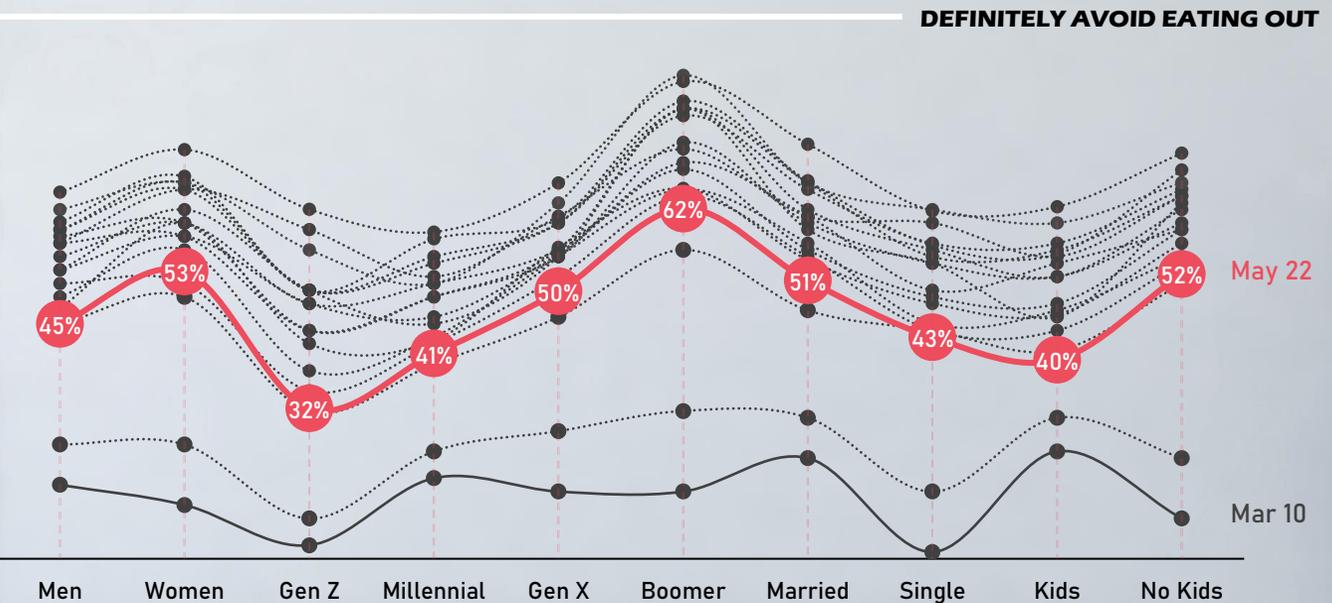
Concern levels remain steady in May.

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



Avoidance of eating out continues to wane.

With a soft reopening of businesses nationwide, avoidance of eating out has decreased further in just three days. Women have shown significant declines in such worries, down 13% since May 19.

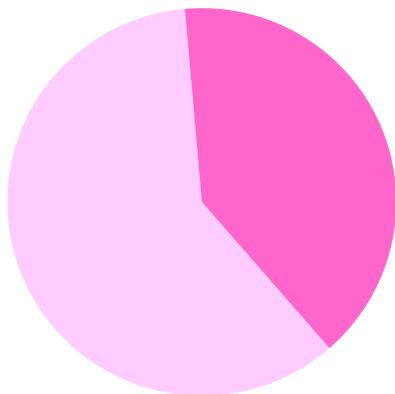


With the jury still out, a more widespread reopening has driven up concern over the health crisis.



which are you more concerned about?

60%
PUBLIC-HEALTH CRISIS
+5% since May 19
-3% since April 7



40%
ECONOMIC CRISIS
-5% since May 19
+3% since April 7

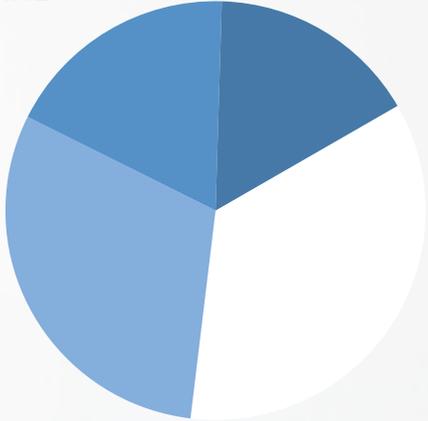


Americans remain working or learning at home.



19%
STILL GOING TO
SCHOOL/WORK AS NORMAL

17%
LAID OFF /
FURLOUGHED



27%
WORKING OR ATTENDING
SCHOOL REMOTELY

37%
NOT WORKING
OVERALL

**which of the following best
describes your current situation?**



Information is our lifeline amidst chaos.

The pandemic has been fraught with constant change, leaving us with very little we can count on. We don't know if our go-to brands will be in stock, whether there will be meat on the table, or even if our favorite restaurants will be open or closed tomorrow. The lack of constants adds extra work to our days and more angst to an already stressful situation. People often rise to the occasion and may even be apathetic over shared challenges, but it doesn't mean they like it. Information can go a long way. We may not always like what we hear, but it gives us permission to be flexible and to better navigate through chaos.

While restaurants are dealing with daily challenges, they still have some control to help make the dining journey more consumer-friendly. Where possible, try to keep the flow of information dynamic and transparent. Stay current on websites, social media, or even phone recordings about changes in things like hours, delivery status, and changes in menu items.

Diners are ready to take their meals back “into” restaurants.

47%

willing to dine in at a restaurant that has patio or outdoor seating

28%

have been eating more meals in my car since the pandemic

Gen Z (51%)
Millennials (45%)



Younger diners have modeled new ways to use restaurants.

have you personally done any of the following since shelter-in place restrictions began?



Restaurant meals have lost some of their spontaneity.

No thanks to COVID, getting restaurant meals has become a bit more stressful. What was often a last-minute decision now requires extra up-front planning and legwork. With restaurants struggling, many diners are also trying to avoid third-party apps, especially Boomers.

rate the following statements regarding any changes you've made with eating and living in response to COVID-19.

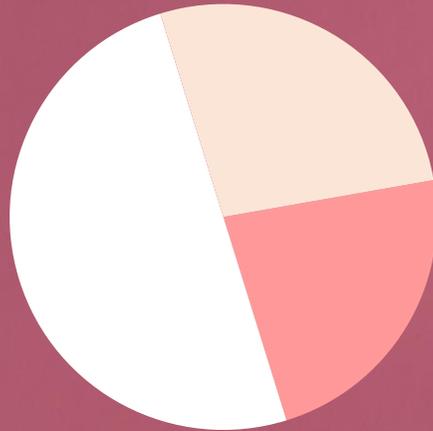


Find
Open
Restaurant!

But they're still worth the extra effort.

how do you feel about getting food from restaurants since the COVID shelter-in-place guidance began?

50%
WILLING TO TAKE
EXTRA STEPS
More likely among
HH's with kids (57%)



27%
TOO MUCH WORK
More likely among
HH income < \$50K (33%)

23%
JUST AS EASY AS
ALWAYS
More likely among
Millennials (31%)



Obstacles are most noticeable to younger generations.

Generation Z and Millennials, accustomed to getting on-demand information and updates in real time, are most likely to recognize the difficulties in getting current information about their favorite eateries. Restaurants have an opportunity to offer more communication around areas such as status of openings, current menu items, and availability of delivery.

please rate each statement regarding your views on getting restaurant food amidst the COVID pandemic.

It's difficult to find out which restaurants have taken safety & sanitation precautions	52%	
It's difficult to find out which restaurants in my area are open or closed	40%	← More likely among Gen Z (59%) and Millennials (52%)
It's difficult to find out what menu items / specials are being offered by restaurants in my area	39%	← More likely among Gen Z (60%)
It's difficult to find out which restaurants in my area offer pickup or delivery	34%	← More likely among Gen Z (49%) and Millennials (45%)
I've given up on ordering at least once out of frustration with the online ordering process/website	32%	← More likely among Gen Z (47%) and Millennials (47%)
I've given up on ordering at least once because of being on hold too long/no one answering phone	30%	← More likely among Gen Z (51%) and Millennials (42%)



WHAT ARE YOUR BIGGEST PAIN POINTS IN REGARD TO RESTAURANT FOOD?

"Despite the stimulus check, I still do not feel like my frugal budget has enough discretionary leeway to pay for ordering restaurant food, and then paying for delivery and tipping also."

- a 68-year-old man in Lynwood, CA

"I hate when the people working there won't wear a mask. My delivery person recently didn't wear a mask. It was horrifying."

- a 69-year-old woman in Randallstown, MD

"Certain restaurants (local mom & pops) have closed, which has reduced my available options."

- a 42-year-old man in San Dimas, CA

"Being able to get through with phone orders for restaurants that don't have online ordering."

- a 42-year-old man in St. Louis, MO

"I worry that restaurants are not taking proper precautions on safety and cleanliness."

- a 77-year-old man in Rock Hill, SC

"The takeout places have way too many orders and not enough staff to fill. Really long waits and exhausted employees."

- a 54-year-old woman in Payson, AZ

"I am a retired restaurant GM of 25+ years, I know exactly how a restaurant operates and it's challenges without Covid-19. Therefore, I would trust very few restaurants under these circumstances, and I would trust the delivery options even less (it is not the systems I don't trust; it is the employees I don't trust)."

- a 63-year-old woman in Plymouth, MN



Diners are empathetic to restaurant operators' COVID challenges.

It's possible that heavy media coverage around restaurants' struggles during the pandemic has left diners more tolerant. Some complain about issues that might be more troublesome during normal times. Reduced menu options, needing to research which are still open, and long lines top the list of inconveniences, but even these are at fairly low levels.

Limited / reduced menu options	22%
Having to research which restaurants are open during coronavirus	19%
Long lines / waiting (in drive-thrus, for pickup, etc.)	18%
Food arrives cold / needs to be reheated	16%
Reduced or changed hours	16%
Prices seem higher than before coronavirus	16%
Foods you want that don't taste good for delivery / pickup	13%
Having to use third-party services (GrubHub, Uber Eats, Postmates, etc.)	12%
If no option for delivery (pick up only)	11%
Portions seem smaller than before coronavirus	10%
If no option to order online (have to make a phone call)	8%
Skimping on expensive ingredients (less meat, seafood, etc. in each dish)	7%
If no option for ordering ahead / pre-ordering	7%

which have been the most inconvenient aspects of ordering restaurant food?



Consumers mostly don't mind new safety precautions.

which have been the most inconvenient aspects of ordering restaurant food?

Having to wear a mask in restaurants	13%
Disinfecting takeout packaging once in the house	13%
Crowding / hard to stay safely distanced while picking up food	12%
Re-plating food once in the house	11%
Food isn't packaged properly / safely (leaky, hard to sanitize, etc.)	8%



Online ordering has been relatively hassle-free.

Overall, diners have been happy with their “click to order” experiences, with very few complaints. Millennials and households with kids are slightly more critical, where issues tend to focus on around costs, deliveries and wrong orders.

which of the following have been the most inconvenient aspects of ordering restaurant food online?

Extra fees and surcharges / high delivery costs	17%	← More likely among Millennials (22%) and HH's with kids (24%)
Delivery takes too long	15%	← More likely among Millennials (21%)
Limited options / poor selection	15%	← More likely among HH's with kids (21%)
Wrong orders / mistakes	14%	← More likely among Millennials (19%) and HH's with kids (20%)
Pricing listed online are higher than normal menu prices	12%	← More likely among Millennials (19%) and HH's with kids (17%)
Items described poorly (size, quantity, ingredients, etc.) online	10%	
Communication with restaurant is poor	9%	
Unreliable delivery times / couriers	9%	
Item substitutions (when what you ordered is not available)	9%	
Couriers improperly / unsafely handling my food	9%	
Online apps / websites are confusing to navigate	9%	
Difficult to get problems resolved / refunds	8%	
Couriers stealing items	5%	



HOW COULD RESTAURANTS ADJUST THE PROCESS TO BE MORE CONVENIENT DURING THE PANDEMIC?

“Have a standardized approach and implementation of contactless delivery and pickup options to enact social distancing. Drive-thrus still work great in their current form, but ordering takeout and delivery still are not consistent.”

- a 23-year-old man in Los Angeles, CA

“Make better use of the text message system to advise or update us on the progress of our order and how their process for curbside pickup works. Concise, detailed wording is always helpful.”

- a 69-year-old woman in Randallstown, MD

“Sanitize the packaging (if possible) right in front of the customer's view prior to hand off, so the customer is assured they can conveniently bring the food inside the house without re-plating.”

- a 42-year-old man in San Dimas, CA

“Have the deliverers wear masks when bringing my food. Have good discounts or give out more coupons during this time.”

- a 64-year-old man in St. Louis, MO

“Have a person assigned to handle phone calls pertaining to problems or concerns with orders.”

- a 64-year-old woman in Linden, NJ

“Create more options on their website to allow you to be more specific about how you want your food cooked and prepared.”

- a 65-year-old man in Wichita, KS

“Post daily menu online and take orders for later in the week, days ahead of time to cut down wait time.”

- a 64-year-old man in Elgin, IL

“I am just glad they are open. I think they are doing the best they can with what they have.”

- a 44-year-old woman in Laguna Niguel, CA



A trip to the grocery adds to pandemic stress.

It used to be easy to run to the store for a few things, but COVID has changed all of that. Safety concerns, social distancing and long lines has made pandemic grocery shopping stressful, so much so that many try to avoid it. Millennials and households with kids are most bothered by the experience.

please rate each statement regarding your views on grocery shopping amidst the pandemic.

Grocery shopping has become much more stressful since Coronavirus	66%	
I'm trying to avoid grocery shopping as much as possible due to safety concerns	64%	← More likely among HH's with Kids (70%)
I don't trust my fellow shoppers to act responsibly while grocery shopping	60%	
Just quickly grabbing one or two missing items that I need feels difficult and frustrating	59%	← More likely among HH's with Kids (67%)
I'm trying to avoid grocery shopping as much as possible because it's such a pain	57%	
I avoid certain grocery stores that I would normally shop at now (because of long lines, etc.)	47%	← More likely among HH's with Kids (56%)
I don't trust delivery drivers to handle my groceries properly safely	46%	← More likely among Gen Z (56%)
I don't trust grocery store staff to handle my groceries safely	36%	← More likely among Gen Z (47%), Millennials (43%), and HH's with kids (44%)
I'm trying to avoid grocery shopping as much as possible because of finances	35%	← More likely among Millennials (43%), and HH's with Kids (47%)
My grocery store doesn't seem to be doing enough to ensure my safety while shopping	31%	← More likely among Gen Z (48%), Millennials (40%), and HH's with Kids (39%)



WHAT ARE YOUR BIGGEST PAIN POINTS WITH REGARD TO GROCERY SHOPPING?

"Keeping the social distancing is a major change. Also more careful to clean hands after touching merchandise and carts."

- a 77-year-old man in York County, SC

"There are a lot of items that become out of stock online, mostly dairy and meat. You also can't select the optimum freshness of whatever you buy, with the furthest out sell-by date."

- a 50-year-old man in Mukilteo, WA

"Social distancing, understanding where the checkout line begins and ends, remembering when I can and can't bring my own reusable bags."

- a 40-year-old man in Santa Clara, CA

"People not following the store directions for social distancing for staying safe (one-way indicators on floor)."

- a 59-year-old woman in Muskegon, MI

"I used to enjoy the small bit of social interaction I had with employees at the store, that doesn't happen anymore."

- a 69-year-old woman in Albuquerque, NM

"People not social distancing, wearing masks, having no consideration for others. Since this pandemic has started, I've noticed how rude people are now."

- a 62-year-old woman in Warrenton, MO

"I am not shopping at my preferred store, as they do not have same safeguards/options in place as who I now currently use. Online shopping slots mean waiting days for delivery. I used to be an every-few-days shopper, I now am more strategic/planned in my purchases, and I shop during early-morning senior hours only."

- a 63-year-old woman in Plymouth, MN



Scarcity issues are more bothersome than process.

Items being out of stock, whether due to hoarding or shortages, and rising grocery prices are the biggest inconveniences on consumer shopping trips. Most are fine with adapting to operational changes like increased lines and waiting times, reduced hours, and navigating store aisles to social distance.

which have been the most inconvenient aspects of grocery shopping?

Items I want being out of stock	53%	← More likely among Boomers (70%)
Prices seem higher than usual / fewer sales and discounts	33%	← More likely among Boomers (48%) and women (39%)
Lines / waiting to get through the checkout process	25%	
Lines / waiting to get inside the store	23%	
Reduced or changed hours	20%	
Navigating aisles and walkways (confusing signs and instructions)	19%	
Not being able to use my reusable shopping bags	12%	
Less staff available to help me / answer questions	8%	
Having to bag my own groceries	8%	← More likely among Millennials (12%)



Safety measures are challenges that most shoppers can live with.

More than a third of people, especially Boomers, feel inconvenienced by social-distancing measures like wearing masks and keeping a safe distance from other grocery shoppers. Other issues related to touching surfaces, foods, and carts are less bothersome.

which have been the most inconvenient aspects of grocery shopping?

Trying to keep a safe distance away from other customers 36%

← More likely among Boomers (43%)

Wearing a mask while shopping 34%

← More likely among Boomers (41%)

Customers touching items and putting them back on the shelf 24%

← More likely among HH's with Kids (30%)

Having to touch shopping carts / baskets 22%

Not having hand sanitizer available around the store 22%

Staff improperly / unsafely handling my groceries 9%

← More likely among HH's with Kids (13%)



Online grocery shoppers also encounter limited selections and occasional long waits, but relatively fewer headaches.



which have been the most inconvenient aspects of online grocery shopping?

Limited options / poor selection	19%
Extra fees and surcharges / high delivery costs	15%
Not getting to choose your own items (produce, meat, etc.)	15%
Long wait for an open delivery window	15%
Pricing listed online are higher than normal prices	13%
Item substitutions	13%
Unreliable delivery times / couriers	12%
Wrong orders / mistakes	9%
Couriers unsafely handling my groceries	9%
Communication is poor (don't know if order is confirmed / when it will come, etc.)	9%
Difficult to get problems resolved / refunds	8%
Online apps / websites are confusing to navigate	8%
Items described poorly (size, quantity, varieties included, etc.) online	8%
Couriers stealing items	5%
N/A – I have not shopped online for groceries since the pandemic began	39%



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.

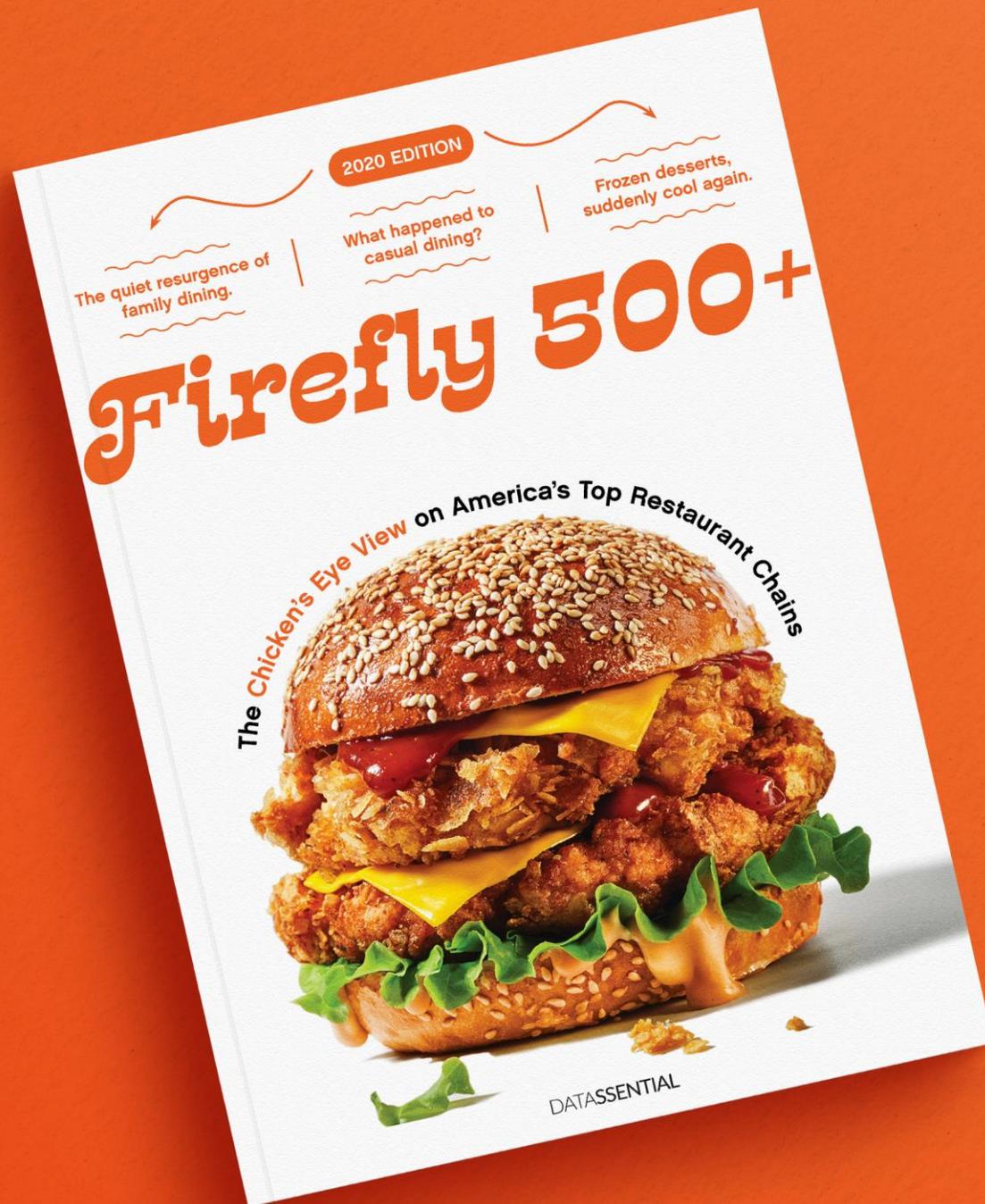


Help us help you.

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.