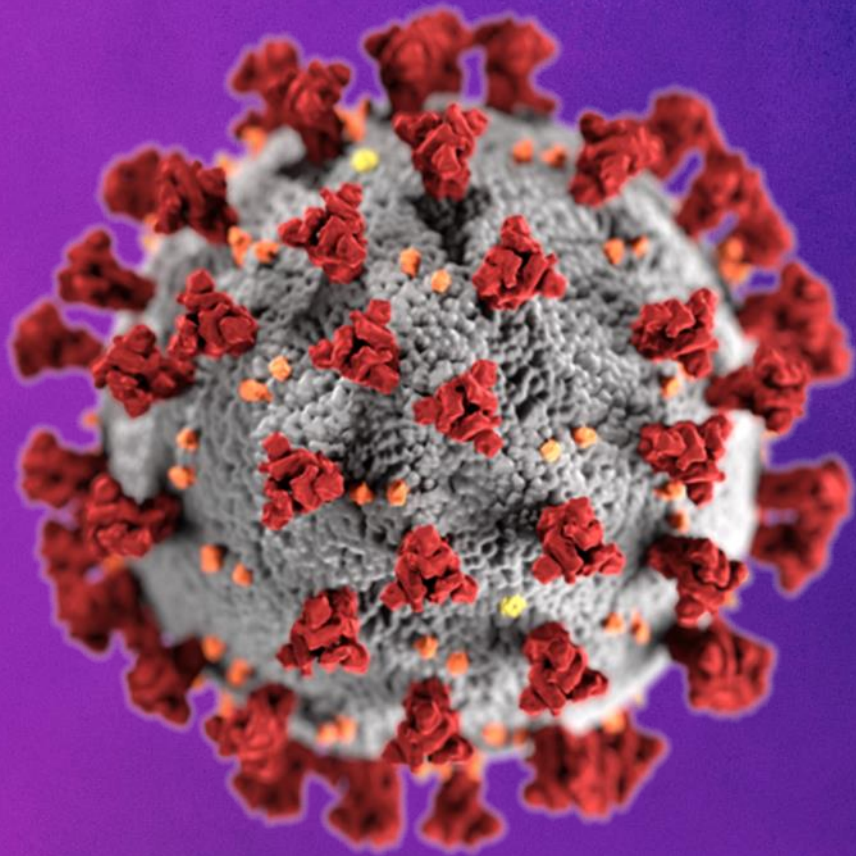


COVID-19

report 40: WINTER IS COMING

11.13.20





Consumers are bracing themselves for a negative turn in the COVID-19 situation. The crucial difference between now and last March, however, is that this time a worsening public-health crisis won't catch anybody off-guard. New cases per day surpassed 100,000 the day after Election Day, and most people share the conventional wisdom that flu season is likely to make the spread of coronavirus harder to contain in the winter months.

Foodservice operators can and should see this coming as well. Colder weather will complicate their ability to offer outdoor-seating options, which helped them recover some of their lost traffic and sales the past six months. There certainly are tactics worth experimenting with — which consumers are also willing to try — but restaurants are likely to rely even more on off-premise strategies to make it through the winter.

Here are highlights from Datassential's latest wave of coronavirus research, fielded November 6 with 503 US consumers.

RECENT KEY EVENTS

November 6

Unemployment rate falls to 6.9% after the US adds 638,000 jobs in October
Government officials from Oregon to Denver to Rhode Island call for curfews
Potbelly lowers its forecast of pandemic-related restaurant closures after renegotiating leases

November 7

Major media outlets declare Joe Biden the apparent winner of presidential election
US reports record number of COVID cases for fourth consecutive day, with more than 126,000

November 8

Total reported coronavirus cases passes 50 million worldwide

November 9

Taco Bell announces it will throw 400 socially distanced “hiring parties” to staff up
US surpasses 10 million coronavirus cases
Pfizer announces human trials of potential vaccine show effectiveness of about 90%
President-elect Biden rolls out coronavirus task force to advise him during transition

November 10

San Francisco shuts down indoor dining after 250% increase in COVID-19 cases
Recovery plan proposed by President-elect Biden includes aid package for small businesses, stimulus

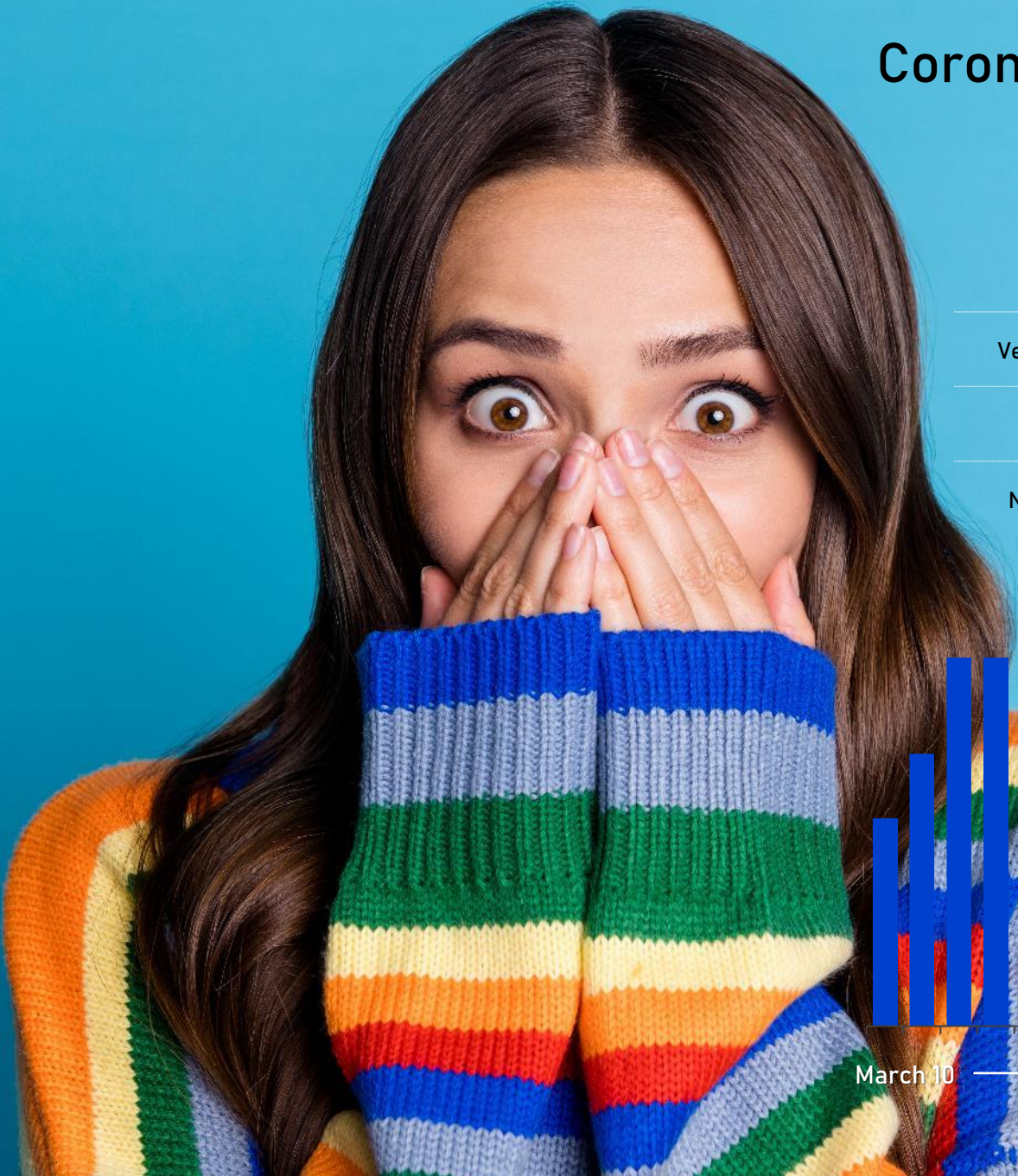
November 11

Hospitalizations for coronavirus reach record 65,368 in US, on ninth straight day of 100,000+ cases

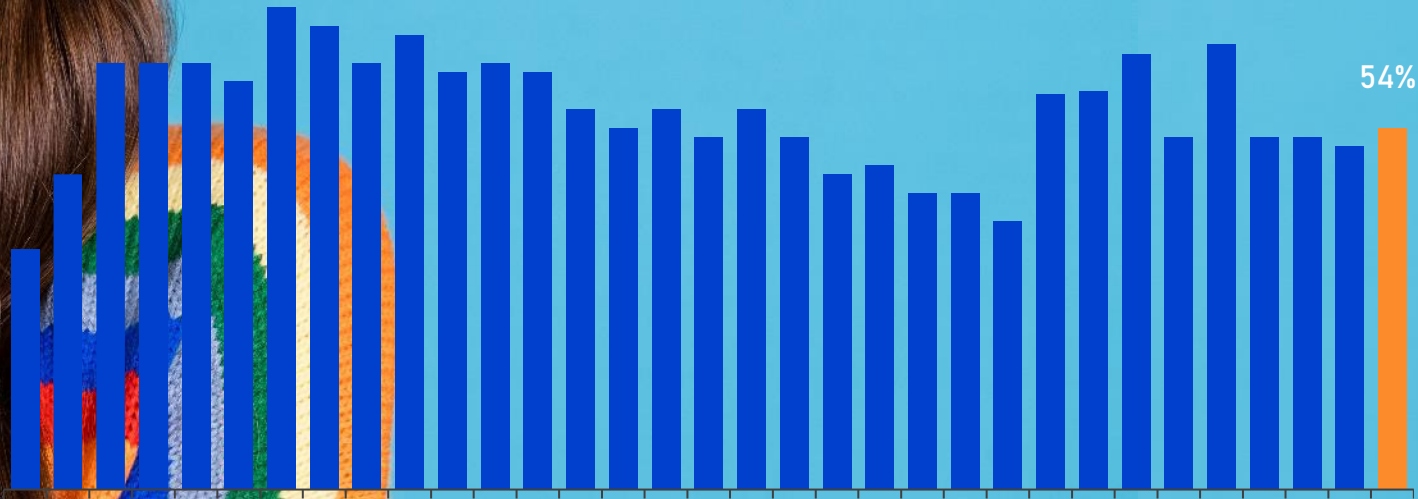
November 12

CDC updates guidelines: Mask wearing protects the people wearing it, as well as those around them
Dr. Michael Osterholm of President-elect’s task force: Lockdown of six weeks could control pandemic

Coronavirus concern remains steadily elevated.



	June				July			Aug.	Sept.		Oct.	Nov.		
	1	3	5	9	15	17	23	14	18	11	24	14	28	6
Very concerned	49%	50%	47%	47%	44%	58%	58%	62%	53%	63%	53%	53%	52%	54%
Somewhat concerned	40%	38%	41%	39%	42%	33%	35%	31%	35%	30%	36%	35%	38%	36%
Not concerned	11%	11%	13%	14%	14%	10%	7%	7%	12%	7%	10%	11%	10%	9%

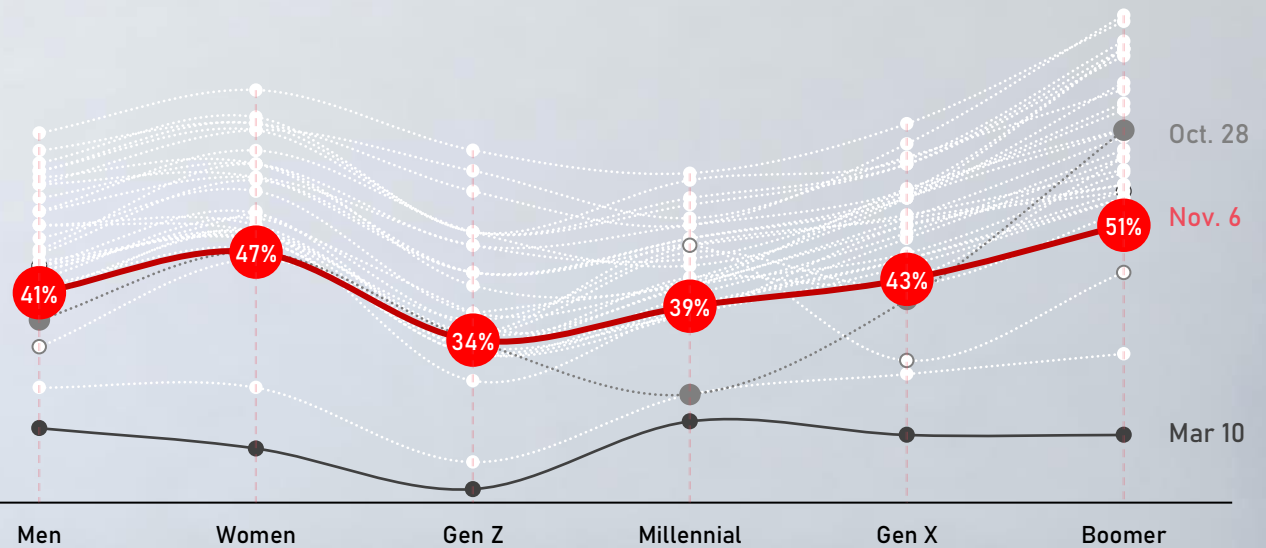


March 10 Nov. 6

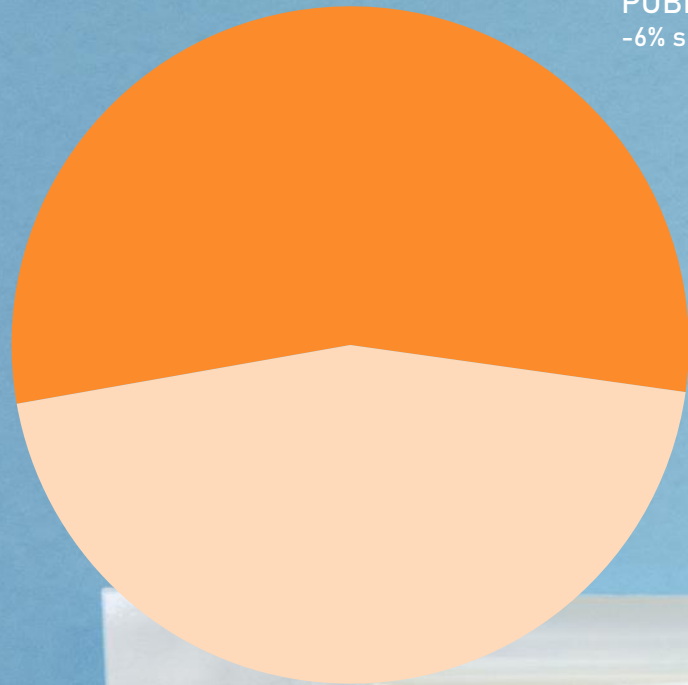
Demographic differences in avoiding restaurants reverted to previous levels, with Millennials and Boomers moderating prior behaviors.



DEFINITELY AVOID EATING OUT



Concerns between public-health and economic fallout neared an even split.



55%
PUBLIC-HEALTH CRISIS
-6% since October 14

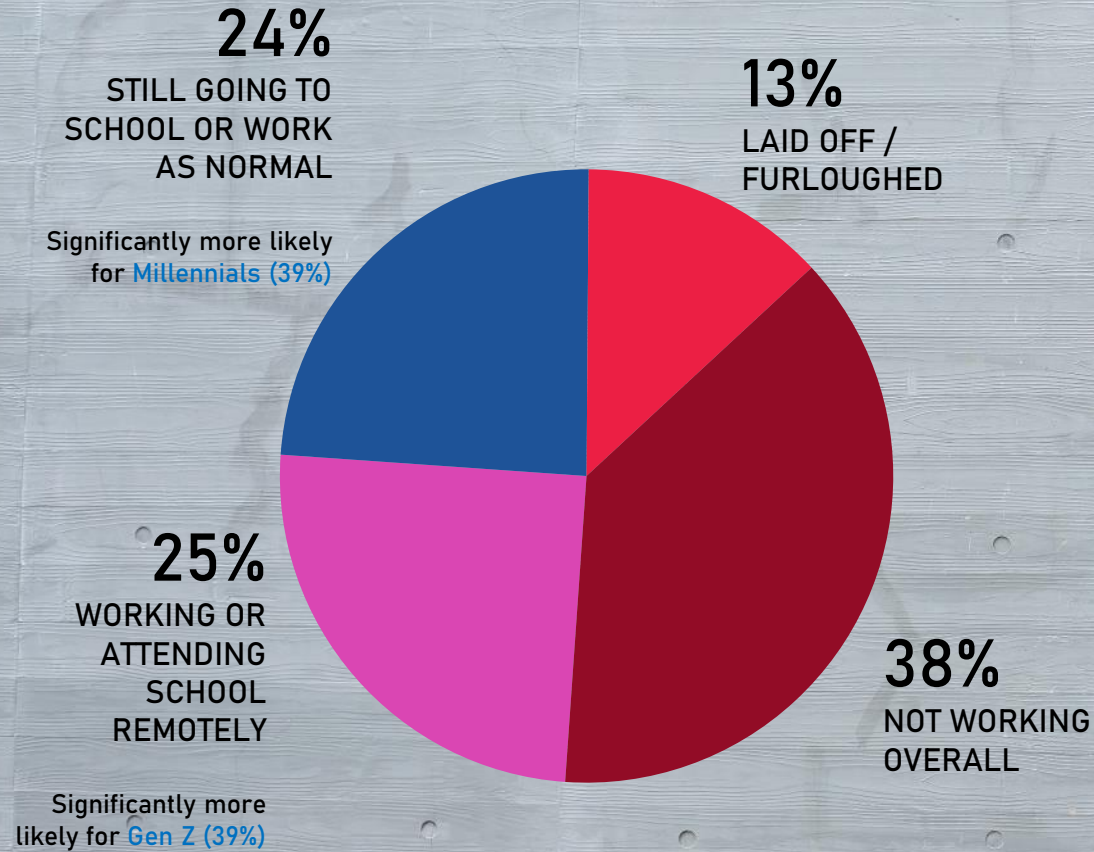
45%
ECONOMIC CRISIS
+6% since October 14



which are you more concerned about?

The employment situation has not improved for many Americans.

Compared with two weeks prior, slightly more people report being laid off or furloughed; younger generations are driving remote work.



which of the following best describes your current situation?





Consumers batten down the hatches.

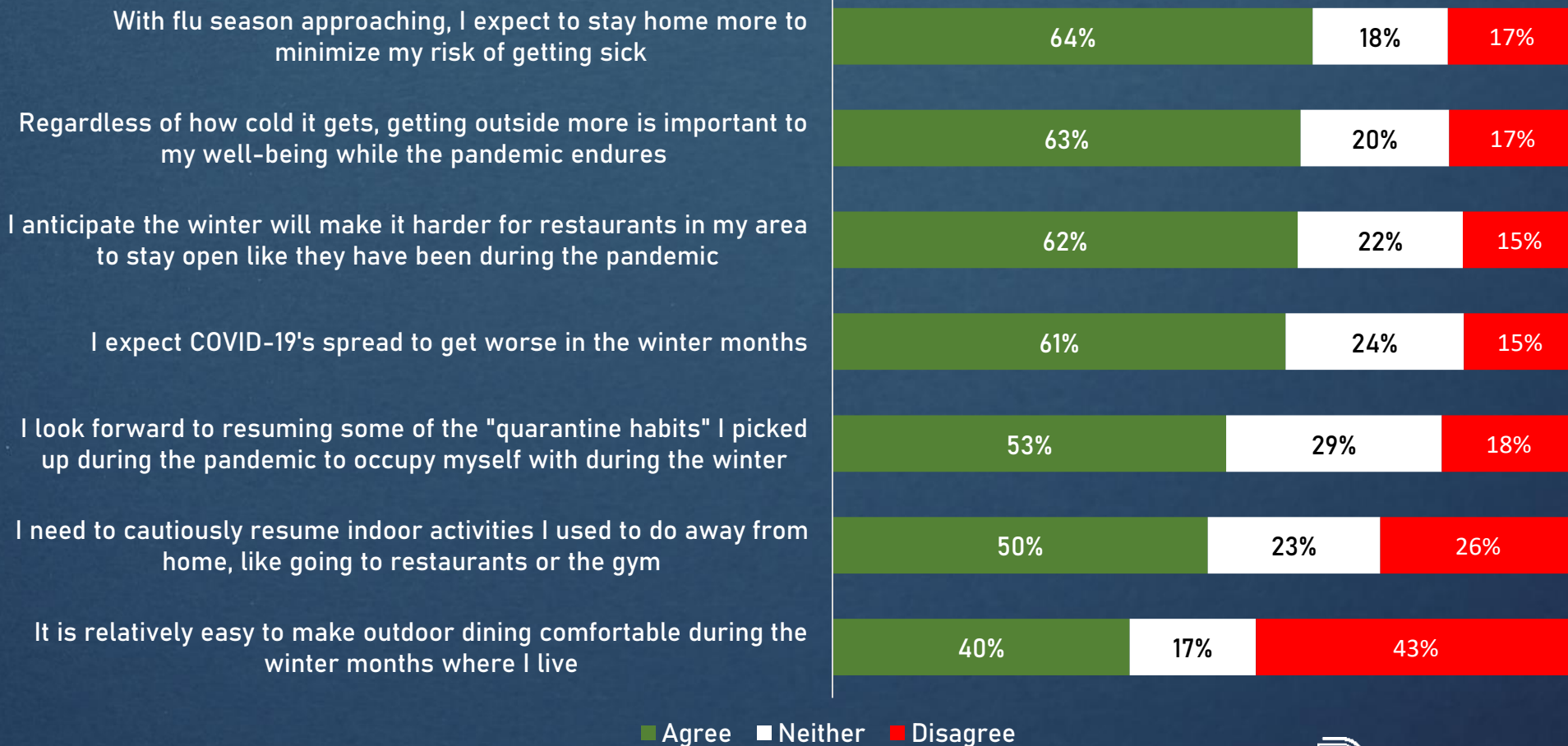
Restaurants and their patrons likely are facing a reversion to quarantine and social distancing, as concerns about COVID-19's resurgence and this year's flu season lead many people to take no chances. At least this time, it's old hat for the entire country.

For foodservice operators looking to try new outdoor-dining tactics, like enclosing tables with tents, fancy "greenhouse" structures, or plexiglass, these experiments are perceived as mostly safe and appealing. They could be worth trying to keep traffic up during the cold winter months.

Another big marketing opportunity could be the holidays: Many consumers plan to reduce travel and the size of their gatherings for Thanksgiving and the December holidays, and are open to help from restaurants this year.

Consumers are bracing themselves for a difficult winter.

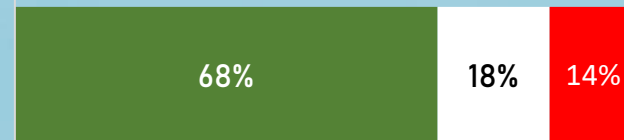
More than three in five people anticipate COVID's spread to get worse as temperatures drop and flu season arrives, but they also rate getting outside as important for beating cabin fever and staying active. Most potential diners also agree, however, that many restaurants will struggle to provide outdoor-seating options during the winter.



Thanksgiving and December holiday get-togethers will be smaller this year.

Two-thirds of consumers plan to gather with fewer friends and family members, and half won't even travel for the holidays like in normal times.

The pandemic will cause me to gather with fewer people than I usually do for Thanksgiving and the December holidays



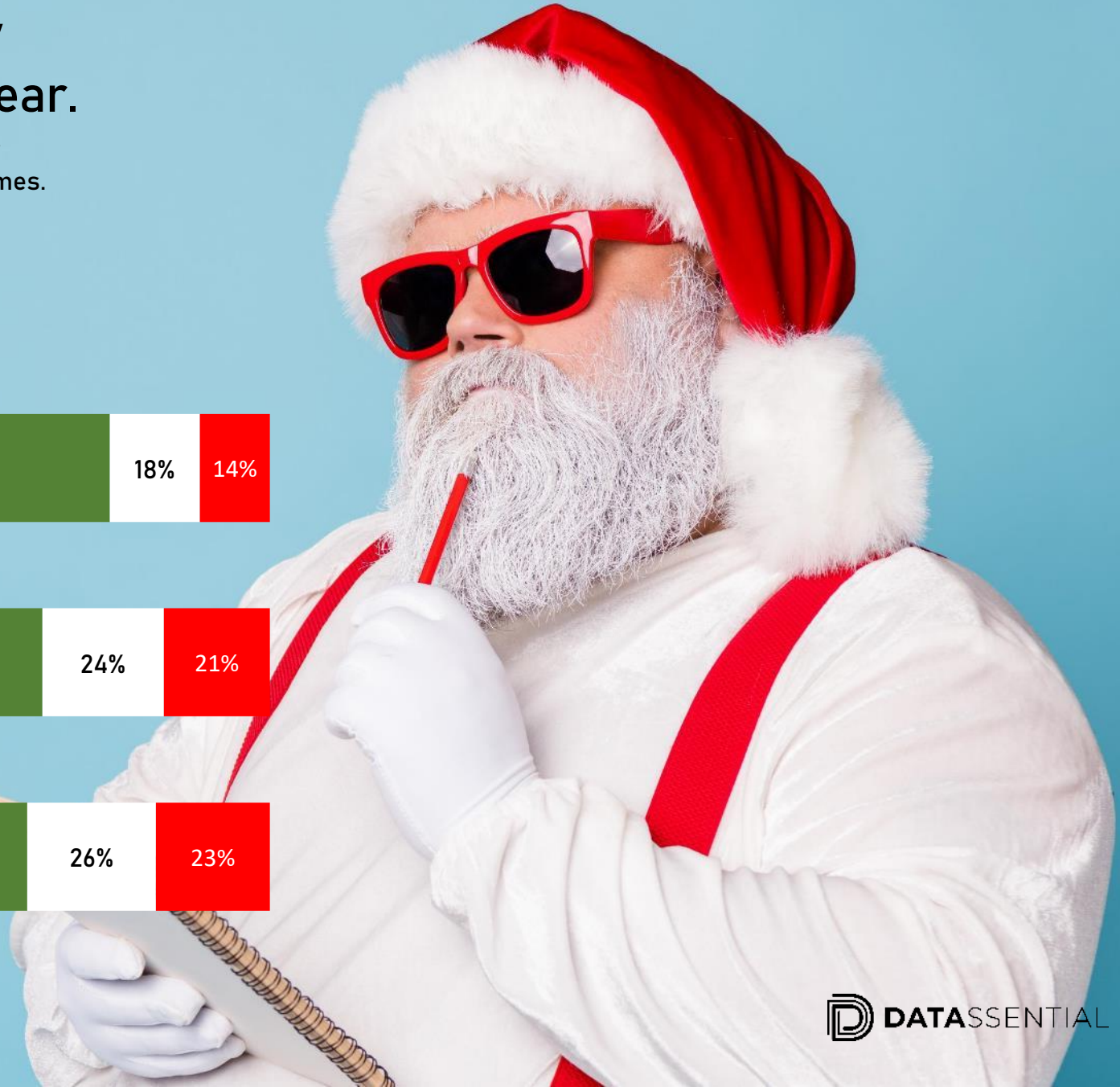
The pandemic is having a noticeable, negative effect on how I feel about the upcoming holidays



The pandemic will cause me to NOT travel for Thanksgiving and the December holidays, when I usually do travel to see family



■ Agree ■ Neither ■ Disagree



because the holidays will occur during the pandemic this year, are you open to using a restaurant in any of the following ways?

	TOTAL	Gen Z	Gen Y	Gen X	Boomer
Getting parts of my holiday meal from a restaurant	26%	47%	31%	23%	17%
Getting a holiday meal kit from a restaurant	23%	29%	35%	26%	11%
Having a restaurant prepare and deliver a holiday meal	21%	25%	29%	24%	13%
Eating a holiday meal at a restaurant	17%	19%	24%	17%	13%
Having a restaurant deliver alcohol or cocktail kits	17%	32%	27%	17%	5%
None of these	52%	32%	34%	54%	72%

Significantly MORE likely

Significantly LESS likely

Restaurants could play a bigger role this season, particularly for young families.

Consumers making different holiday plans are open to using foodservice this year, particularly to supplement their meals with prepared side dishes, appetizers, and desserts. Meal kits and delivered meals could also drive sales, more than merely being open for dine-in traffic on Thanksgiving or other holidays.





Consumers have become very familiar with restaurants' off-premise tactics.

Over the summer months, many people increased their usage of carryout, takeout, drive-thru, and delivery, so foodservice operators can market those options to customers without having to explain their ease and convenience.

	I did MORE of this	My behavior DID NOT CHANGE	I did LESS of this
Ordered takeout / carryout / drive-thru and took it home	46%	36%	18%
Stayed home and ordered food for delivery	43%	40%	17%
Ordered from a drive-thru and ate in my car	31%	45%	24%
Dined at a restaurant outside (existing or makeshift patio)	17%	38%	45%
Dined at a restaurant inside (with social-distancing measures)	16%	30%	54%

did you do MORE or LESS of the following dining-out activities during the summer, compared with the start of the pandemic?

Many people are willing to try new winter outdoor-dining strategies.

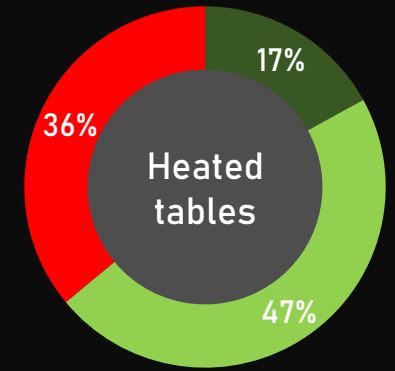
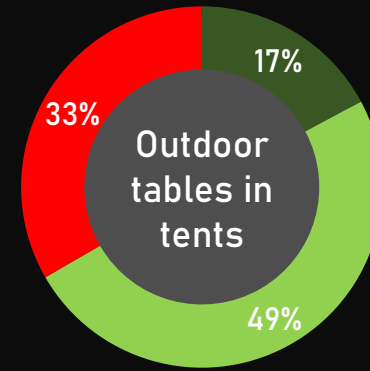
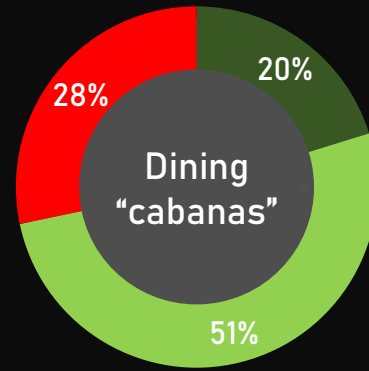
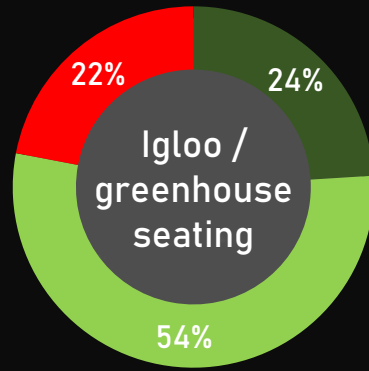
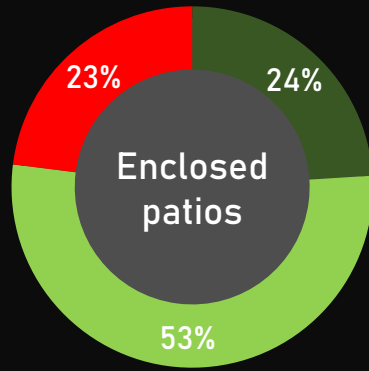
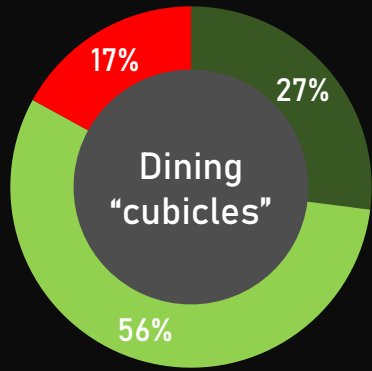
Cities with colder climates are experimenting with ways to maintain the outdoor seating that was a lifeline over the summer, and Gen Z and Millennials are much more likely to find all of them appealing.

	VERY appealing	SOMEWHAT appealing	NOT appealing
Cabin / igloo / greenhouse seating	27%	40%	33%
Heated tables (i.e. kotatsu tables)	26%	37%	38%
Heated patios enclosed by plastic or plexiglass	24%	44%	31%
Dining “cubicles” of tables set off by plexiglass dividers	24%	40%	37%
Dining “cabanas” with sliding doors, erected from construction kits or repurposed shipping containers	16%	30%	54%
Outdoor tables enclosed in tents	19%	39%	42%

how appealing do you find the following ideas for providing outdoor restaurant seating in the colder winter months?



do you find the following outdoor-dining ideas to be **VERY SAFE**, **SAFE ENOUGH**, or **NOT SAFE** to try?



Consumers also mostly see these new tactics as safe ways to eat.

Delivery and outdoor dining have become safer in consumers' eyes.

Most still perceive crowded venues to be too risky as COVID cases spike.

	Nov. 6		May 28	% Change
	NOT Risky	TOO Risky	TOO Risky	
Getting food delivered from a restaurant	52%	8%	16%	-8%
Dining on the patio / outdoor seating at a restaurant	30%	17%	20%	-3%
Going to the hair salon / barbershop	22%	27%	28%	-1%
Sitting in a classroom / going to school	17%	39%	38%	1%
Taking a taxi / rideshare (like Uber, Lyft, etc.)	15%	38%	37%	1%
Going to a public playground	24%	30%	29%	1%
Flying on a commercial airplane	14%	49%	46%	3%
Going to the gym / fitness studio	14%	49%	44%	5%
Taking local public transportation (bus, train, etc.)	14%	53%	48%	5%
Having drinks at a neighborhood pub / sports bar	14%	52%	44%	8%
Going to a nightclub / lounge	10%	68%	56%	12%
Dining inside at a restaurant	16%	38%	-	-

how risky do you consider each of the following activities, as it relates to coronavirus?



Surprisingly, a few more people can tolerate other guests refusing to mask up or keep their distance.

34%
ASK THEM TO LEAVE
IMMEDIATELY
-6% since May 28

21%
ASK THEM TO COMPLY
BUT NOT TO LEAVE
+4% since May 28



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

45%
ASK THEM TO LEAVE IF
THEY REFUSE TO COMPLY
+2% since May 28





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.





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.

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](#)