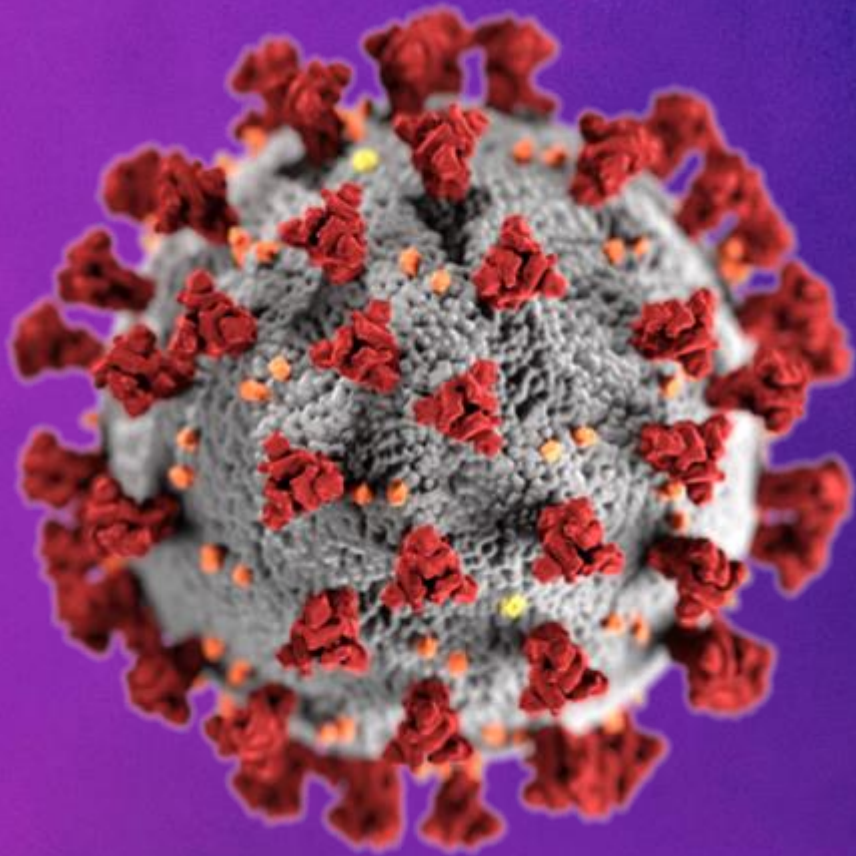


COVID-19

report 43: **OPTIMISTICALLY CAUTIOUS**

1.8.21





Just after the calendar turned from 2020 to 2021, two in three consumers indicated they were optimistic about the year ahead. Perhaps it's just the feeling of a fresh start, or maybe they believed the rollout of coronavirus vaccines meant we're at the beginning of the end of the COVID crisis.

One thing consumers also say, however, is that the true end of the pandemic can't be predicted with certainty. Until then, they plan to remain as cautious as they have been the past few months, when hopeful news about treatments for COVID had to compete with grim realities of rising hospitalizations and deaths, and new strains of the virus found in the UK.

The food industry should expect another period of hunkering down from consumers. But pent-up demand for restaurants and seeing long-missed friends over a meal continues to intensify, so operators and their partners need to stay ready and make every guest's first meal back a memorable experience. Read on for a roundup of consumers' hopes and expectations.

Here are highlights from Datassential's latest wave of coronavirus research, fielded January 4 with 509 US consumers.

RECENT KEY EVENTS

December 14

An ICU nurse in New York is the first American to be vaccinated for COVID-19

December 18

FDA authorizes Moderna vaccine for emergency use against COVID-19

December 21

New variant of coronavirus found in the UK, leading many places to shut off travel to and from the country

December 22

Congress passes aid bill, which includes \$600 stimulus checks and \$325 billion in small-business relief

December 28

President Trump signs aid bill; Congress begins negotiations to raise stimulus checks to \$2,000, but fails

January 4

In the UK, the first patient receives the Oxford University/AstraZeneca vaccine
UK Prime Minister Boris Johnson announces national lockdown for England

January 5

World Bank predicts 4% growth for global economy in 2021 — as long as vaccines are widely available

January 6

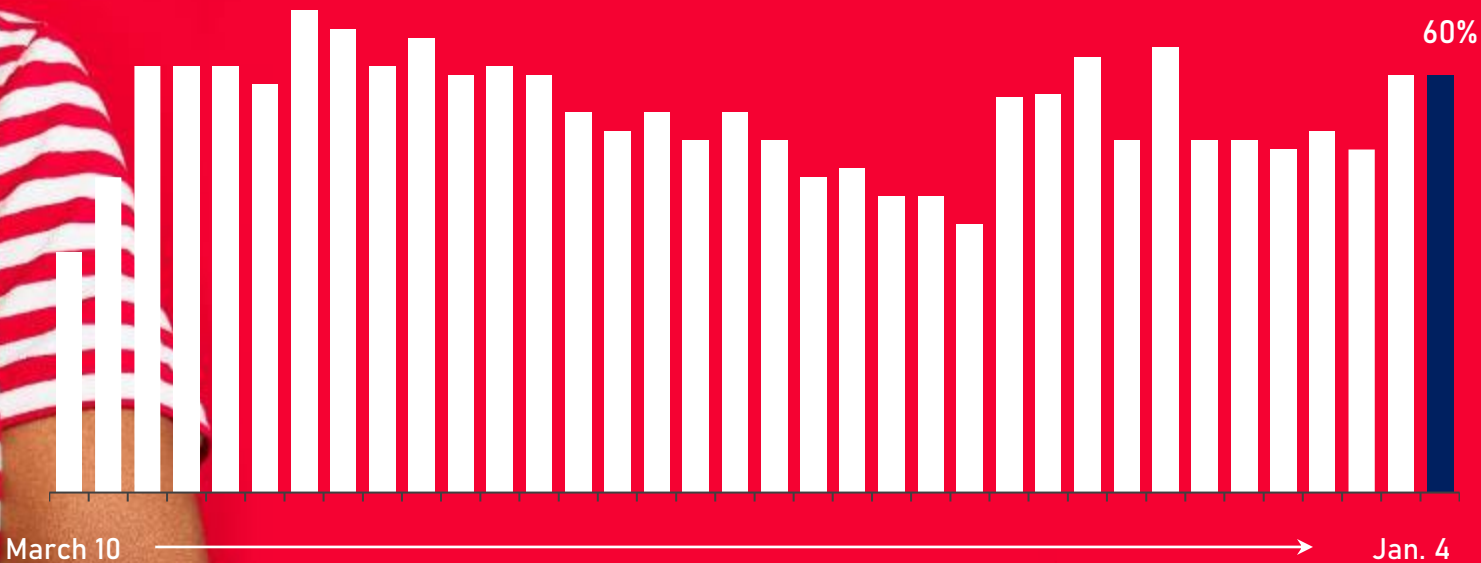
England's chief medical officer says one in 50 people in the country now has coronavirus

January 7

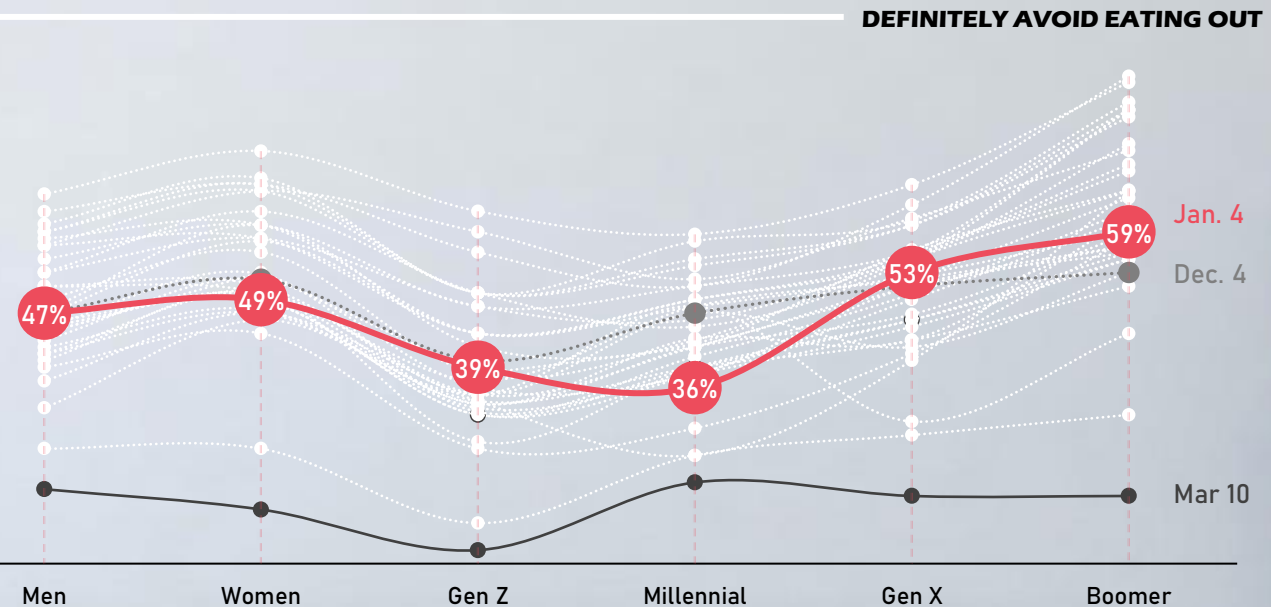
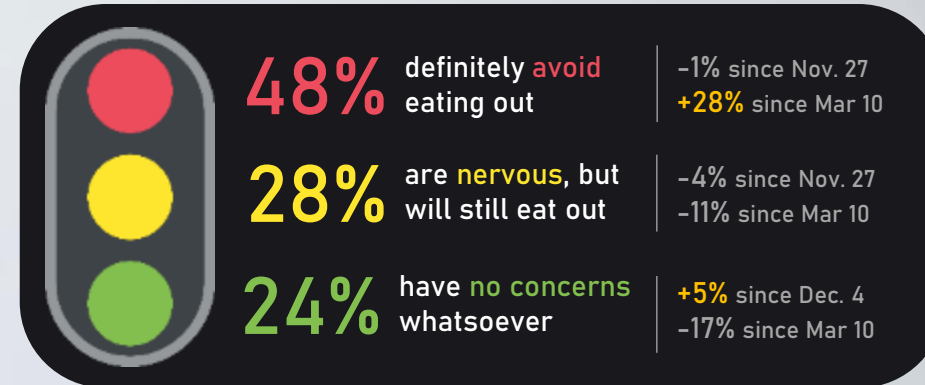
The United States reports more than 4,000 daily COVID deaths for the first time

Coronavirus concern is steady — but elevated.

	July		Aug.		Sept.		Oct.		Nov.		Dec.	Jan.
	17	23	14	18	11	24	14	28	6	27	4	4
Very concerned	58%	58%	62%	53%	63%	53%	53%	52%	54%	52%	60%	60%
Somewhat concerned	33%	35%	31%	35%	30%	36%	35%	38%	36%	39%	33%	30%
Not concerned	10%	7%	7%	12%	7%	10%	11%	10%	9%	10%	8%	10%



Overall, consumers grew a little more willing to dine out over the past month, led by Millennials, who reported much less avoidant behavior.



Public health swings back to the top concern for three in five consumers.

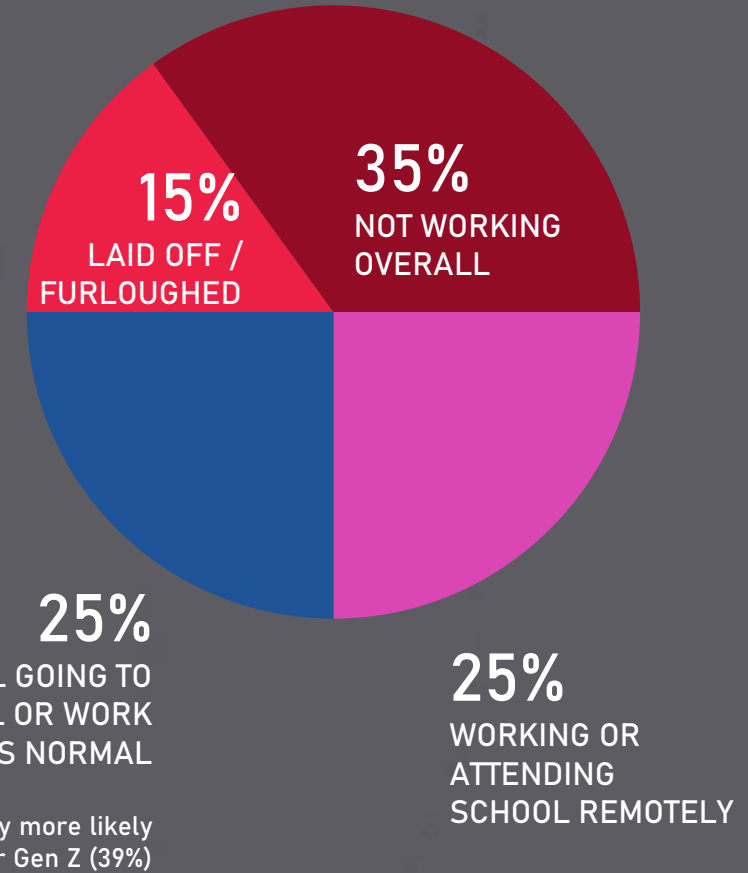



60%
PUBLIC-HEALTH CRISIS
+3% since Dec. 4

40%
ECONOMIC CRISIS
-3% since Dec. 4

which are you more concerned about?

Layoffs, furloughs persist another month.





Optimism is real, but it depends on keeping the virus in check.

Consumers want to make restaurant meals a big part of their post-pandemic plans, but until that moment arrives, they will be more careful than ever in the precautions they take to get food from grocery stores or restaurants, mainly to eat at home instead of dining on-site.

Off-premise ordering strategies are still the order of the day, and any guests who operators can serve, indoors or outdoors, have higher expectations for food safety and COVID precautions. Moves to reassure consumers now likely won't only pay off later when the pandemic appears to be over — they'll also be the new table stakes going forward.

People increased their social-distancing efforts for the December holidays, compared with changes they made for Thanksgiving.

Even after a holiday season and New Year's Eve spent mostly at home, two in three people woke up January 1 feeling optimistic.

“Because of the COVID pandemic, _____”

My holiday gatherings had fewer people than they traditionally would have had in a normal time

TRUE

80%

I did not travel for the holidays like I traditionally do

75%

I did not celebrate like I normally would for New Year's Eve

72%

The amount of food I ordered and served was cut down significantly from what I serve for the holidays

65%

67%

I FELT OPTIMISTIC
FOR THE YEAR
AHEAD ON NEW
YEAR'S DAY

Significantly more likely for
Millennials (77%)



Half the optimists think we have COVID on the run.

People envision a rush to reconnect with friends they haven't seen and to resume dining out like before.

[of those optimistic] what do you think will happen in 2021?

I will get to see my friends and family in person soon	50%
The country will have the coronavirus under control soon	50%
I'll get to do what I used to love doing outside the house (eating at a restaurant, go to the movies, etc.)	48%
Businesses in my area will be able to reopen	45%
The Biden administration will make positive changes	42%
Students will be able to return to school on-site	40%
I'll be able to find a fulfilling, well-paying job	24%
People will be less polarized over things like politics and race once the pandemic is behind us	22%
Prospects at my current workplace will improve	19%

Those bracing for a 2020 sequel fear coronavirus still has the upper hand.

Half the pessimists are simply burnt out and fear more polarization (this result came just days before the storming of the Capitol in Washington, D.C.), and many others, especially Boomer consumers, are preparing for another long lockdown.

[of those NOT optimistic] what do you think will happen in 2021?

I think the country will not get the coronavirus under control fast enough	57%
I am burnt out after a difficult 2020 and don't feel very motivated	50%
People will be just as polarized, if not more so, over things like politics and race	50%
Businesses in my area will stay shut down and perhaps close permanently	41%
I'll still be locked down and unable to visit a restaurant or a movie theater for a while	41%
I don't believe I will get to see my friends and family in person soon	37%
The Biden administration will make negative changes once the new president takes over	35%
Students will still have to go to school remotely	33%
I won't be able to find a job that pays enough or is fulfilling	18%
Prospects at my current workplace will decline	11%



As in typical years, the most popular resolutions for the coming year revolve around health and personal finances.

Fewer than one-fourth of respondents had an optimistic outlook for advancement at work or prospects for a new job, likely signaling reluctance to rock the boat at work.

New Year's Resolutions:

Improving my health / losing weight 57%

Improving my finances / saving money 49%

Challenging myself intellectually 36%

Strengthening or repairing personal relationships 32%

Starting a new hobby 27%

Getting more involved in my religious faith 24%

Finding a more fulfilling job or career 22%

Being a better parent 20%

Achieving more at work / getting a promotion 19%

Getting more involved in my local community 16%

Health in 2021 appears to be more about keeping perceived “bad stuff” out.

Quick-service restaurants face the same uphill battle against perceptions of unhealthy food, especially among Gen Z, who are also less likely to increase dining out this year.

Cutting back on sugar	41%
Cutting back on fast food	39%
Cutting back on soft drinks	32%
Cutting back on desserts	31%
Supporting local restaurants by ordering more	29%
Cutting back on carbohydrates	28%
Cutting back on fried appetizers or side dishes	26%
Taking nutritional supplements	24%
Eating more plant-based foods and meat alternatives	22%
Eating more organic or non-GMO foods	20%
Cutting back on alcoholic beverages	20%
Supporting local restaurants by buying gift cards or merch	19%
Eating more seafood	17%
Ordering off value menus or combo deals to save money	15%
None of these	12%



Significantly MORE likely for Gen Z (53%)



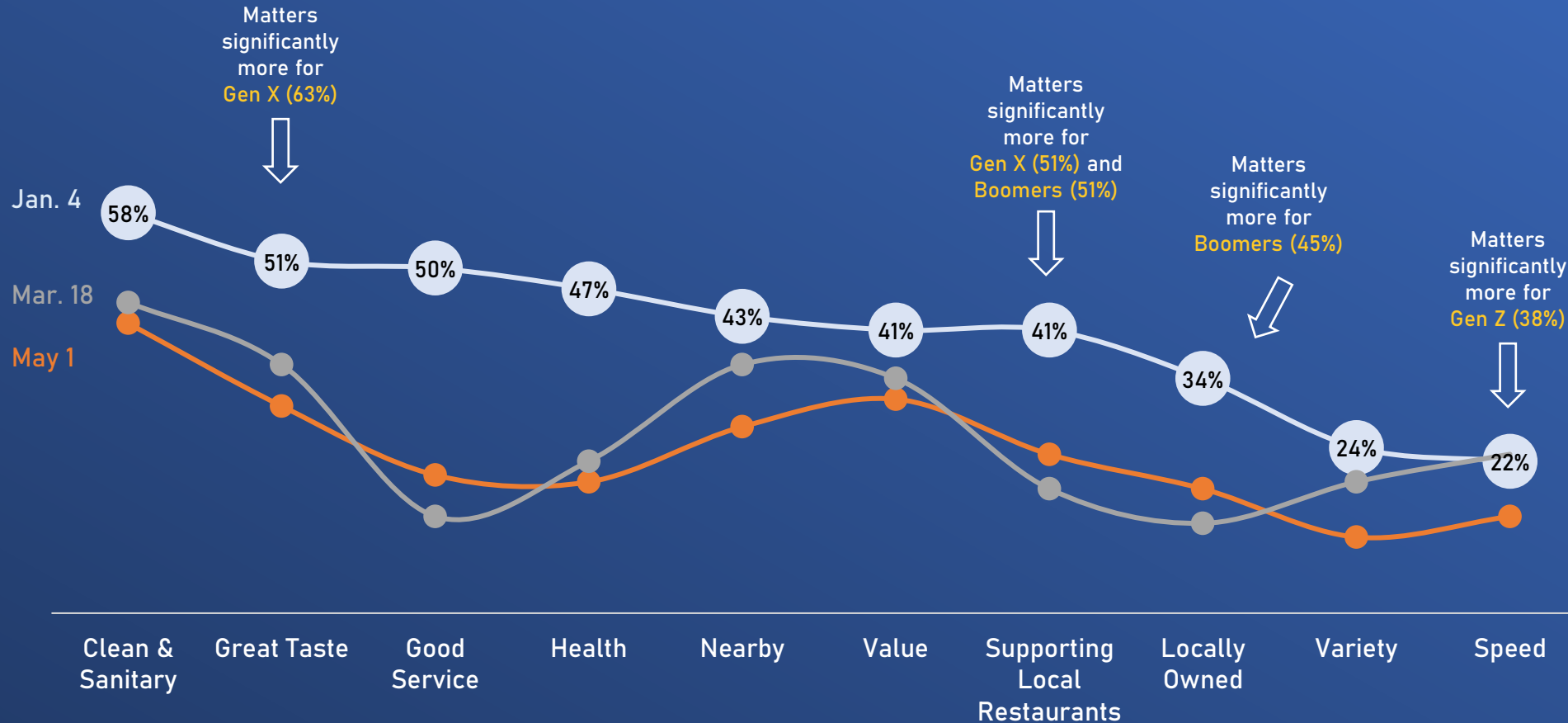
Significantly LESS likely for Gen Z (16%)

**thinking about changes you want to make in the new year,
how might you change the way you eat or buy food?**



Cleanliness is still the top COVID-era consideration affecting restaurant selection, but all factors have risen in importance.

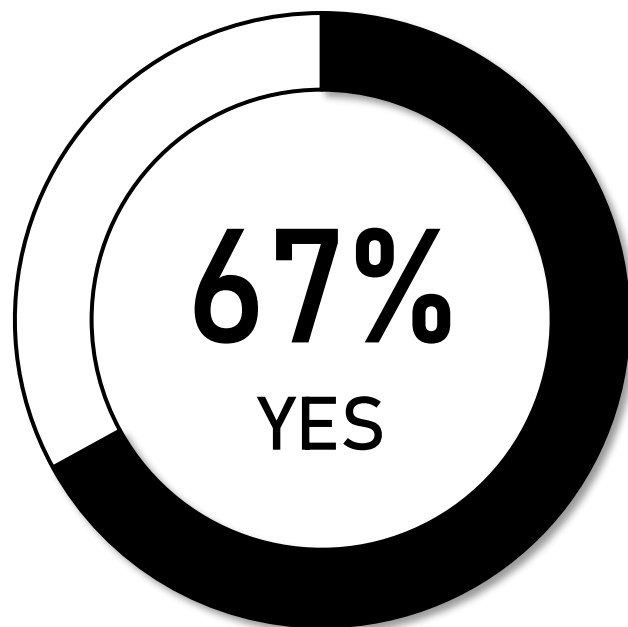
Importantly for foodservice, people — especially Boomers and Gen X — want to support local, independent outlets that need help.



what are your top considerations when choosing a restaurant during this time of coronavirus?

Two in three Americans plan to get the COVID-19 vaccine, with notable holdouts.

Men and Boomers are significantly more likely to vaccinate themselves, as are most people who feel very concerned about contracting the virus, yet fewer than half of Gen Z respondents indicated they were likely to get the treatment.



do you plan to get vaccinated
for COVID-19 when the
vaccine is available to you?

78% among men
83% among Boomers

56% among women
44% among Gen Z
57% among Millennials

85% among those very concerned
51% among those somewhat concerned
29% among those not concerned



what are you looking forward to, once vaccinated?

Getting with friends and family at somebody's house 60%



Significantly MORE likely for Boomers (74%)

Going out to restaurants 58%

Going to a movie theater 43%



Significantly MORE likely for Gen Z (68%) and Gen X (57%)

Traveling and staying in hotels 36%

Going to a barber shop / beauty salon 35%

Walking through an airport and flying on a plane 33%

Attending a live show at a club, music hall, or public theater 32%

Attending a live sporting event 28%

Working out at a gym 27%

Going out for drinks at a bar 23%

Going on a date in person, outside the home 21%

Playing a sport with friends 16%

Taking mass transit 14%

Attending a public demonstration / outdoor gathering 13%

Taking a cruise 13%



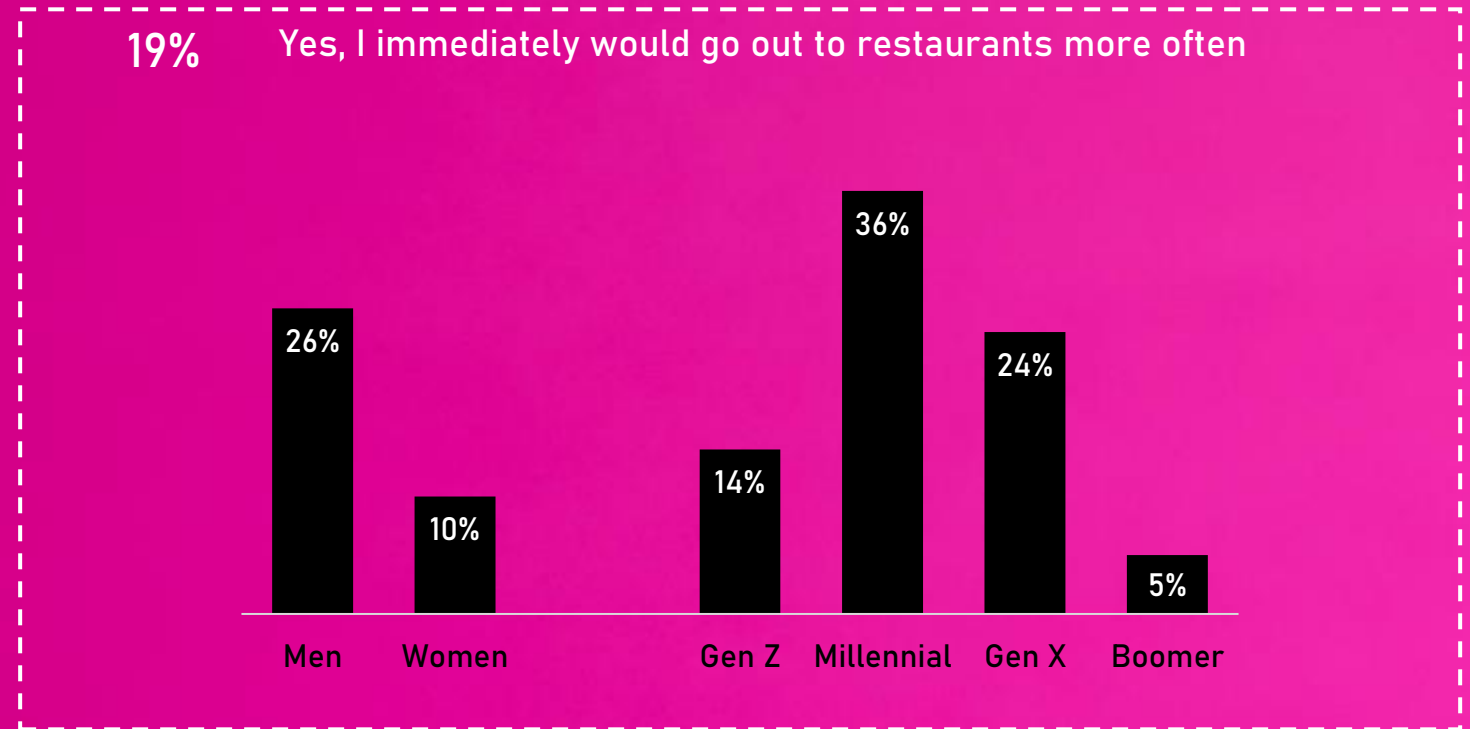
Getting vaccinated would spur two in three people to visit restaurants more.

Millennials are not more likely than other groups planning to get the COVID-19 vaccine, but more than one-third of those intending to would be back at their favorite foodservice locations immediately. Boomers are indicating the reverse preference.

33% No, getting vaccinated would not change my restaurant usage

48% Yes, but I might wait a little while

19% Yes, I immediately would go out to restaurants more often



once you were vaccinated, would that cause you to go out to restaurants more often?

Consumers have not given up on taking precaution.

Every pandemic-era safety measure for limiting coronavirus spread at grocery stores and foodservice locations increased in people's intent to practice, with very few differences by generation or gender.

		Jan. 4		April 1
	Never Started	Probably Stop	Probably Continue	Probably Continue
Wash my hands more than before	9%	8%	83%	77%
Maintain social distance out in public	8%	12%	80%	64%
Carry hand sanitizer wherever I go	17%	9%	74%	66%
Disinfect shopping carts / baskets	19%	9%	72%	68%
Wear a mask whenever I leave the house	7%	21%	72%	--
Order for delivery or takeout (instead of dining in)	20%	18%	62%	50%
Avoid open / self-serve food stations	26%	18%	56%	52%
Use my own dishes for takeout / delivery meals	39%	8%	53%	47%
Disinfect takeout packaging and eating surfaces	38%	10%	51%	49%
Shop for food online	40%	10%	50%	41%



over the next few months, which coronavirus safety habits are you likely to keep up when you are deciding to get food from restaurants or retail outlets?



Most food shopping habits will persist in this stage.

As the pandemic nears the eleventh month, with worrisome numbers but hope for further distribution of vaccines, consumers are keeping the meals to their own dining rooms, not those at restaurants.

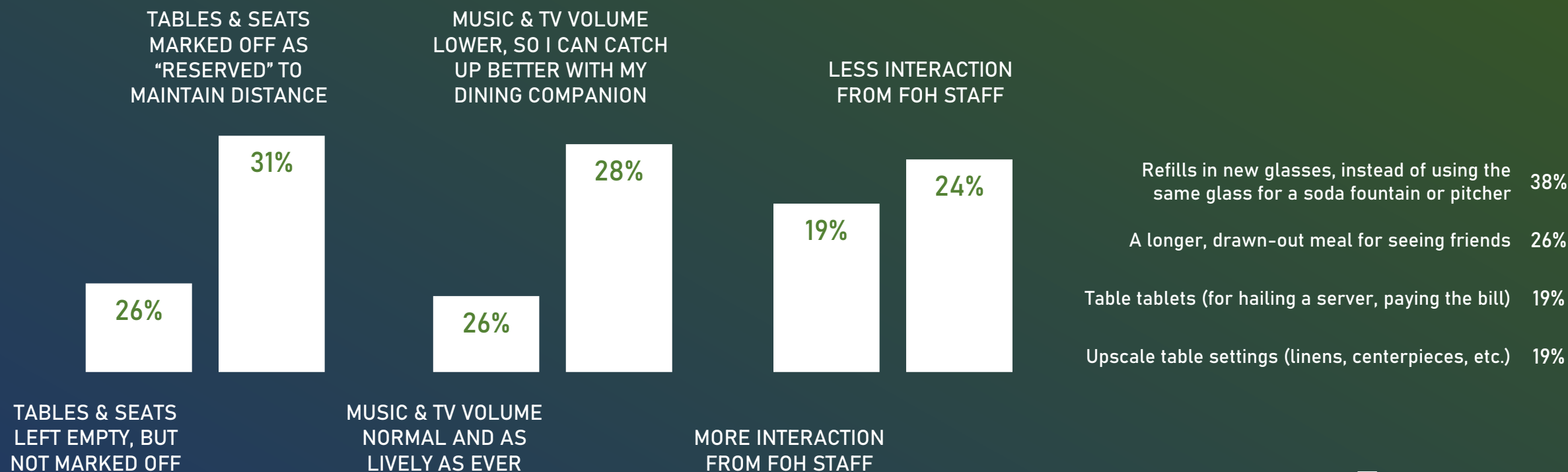
	More Often	Same Amount	Less Often
Shop at a supermarket for groceries to cook at home	33%	60%	7%
Get takeout from a restaurant (curbside pick-up, carryout, etc.)	25%	58%	17%
Shop at a supermarket for prepared foods (deli, bakery, etc.)	25%	58%	17%
Use a restaurant drive-thru	24%	60%	16%
Dine inside at a restaurant	24%	45%	31%
Dine outside at a restaurant	22%	47%	30%
Get a restaurant meal delivered	21%	54%	25%
Have groceries delivered	19%	50%	30%
Order a meal kit from a subscription service	14%	49%	37%

thinking about recent increases in hospitalizations and deaths due to COVID-19 and warnings that the winter months will be difficult for controlling the pandemic, do you plan to change any behaviors relative to getting food from restaurants or grocery stores?

When consumers go back to restaurants, they won't demand everything as it was.

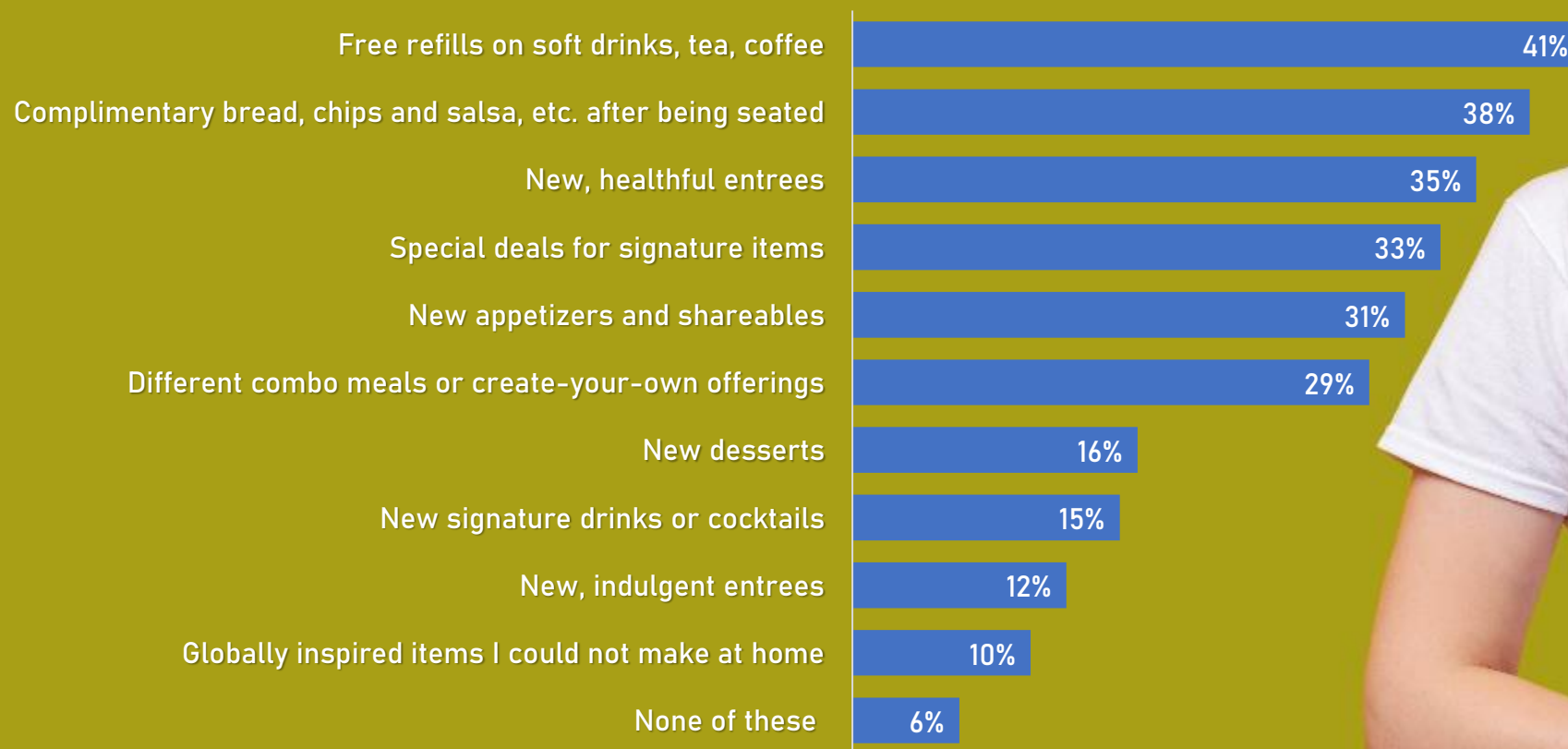
Guests will likely want their first meal back at a restaurant to be a more subdued affair so they can catch up with people they missed, and they won't mind if precautions are overt, such as the way operators ensure social distancing or food safety in the dining room.

when dining-in restrictions are eased in your local area, and you go to a restaurant or bar for the first time in a while, what would you want from that restaurant in terms of **AMBIANCE** and **SERVICE**?



Little freebies and deals best say, “Welcome back.”

As for what returning guests would want from the menu, very few are looking for new menu items that are an adventurous break from pre-pandemic life. But touches that make it more comfortable to linger and socialize with friends for a while could make that first time back memorable.



when dining-in restrictions are eased in your local area, and you go to a restaurant or bar for the first time in a while, what would you want from that restaurant in terms of THE MENU?



Consumers intend to support local, independent restaurants.



	TOTAL	Gen Z	Millennial	Gen X	Boomer
Neighborhood sit-down restaurants (non-chain)	42%	31%	32%	51%	50%
Ethnic-food restaurants (Mexican, sushi, Thai, etc.)	41%	42%	38%	49%	36%
Fast-food restaurants	39%	56%	36%	42%	34%
Chain restaurants	30%	22%	30%	40%	27%
Counter-service restaurants where food is assembled to order (Chipotle, Subway, etc.)	30%	33%	28%	35%	26%
Local coffee shops	27%	30%	29%	32%	20%
Upscale or fine-dining restaurants	22%	17%	18%	29%	23%
Local bars or pubs	22%	14%	22%	30%	17%
Sports bars	20%	23%	22%	22%	13%
Buffet / salad bar restaurants	19%	27%	26%	18%	11%
Prepared-foods areas at supermarkets	18%	17%	16%	25%	13%
Prepared-foods areas at convenience stores	13%	20%	18%	16%	3%
Dining facilities at work or school	9%	14%	10%	13%	2%
None of these	16%	14%	15%	10%	21%

Consumers are more split on how restaurants have responded to the pandemic, but they agree the industry needs targeted relief.

please indicate whether you AGREE or DISAGREE with each of the following statements relating to the way restaurants and bars have been required to shut down during periods of the coronavirus crisis	
Restaurants and bars have been affected disproportionately by the coronavirus pandemic, and that industry needs an economic relief package tailored to it specifically.	86%
The federal or state government is not justified in shutting down or fining businesses like restaurants and bars; consumers have the responsibility to keep themselves safe in situations like a pandemic.	55%
Restaurants and bars put their employees and customers at risk by trying to pivot to outdoor dining, socially distanced indoor dining, or carryout/delivery, rather than shutting down temporarily.	52%

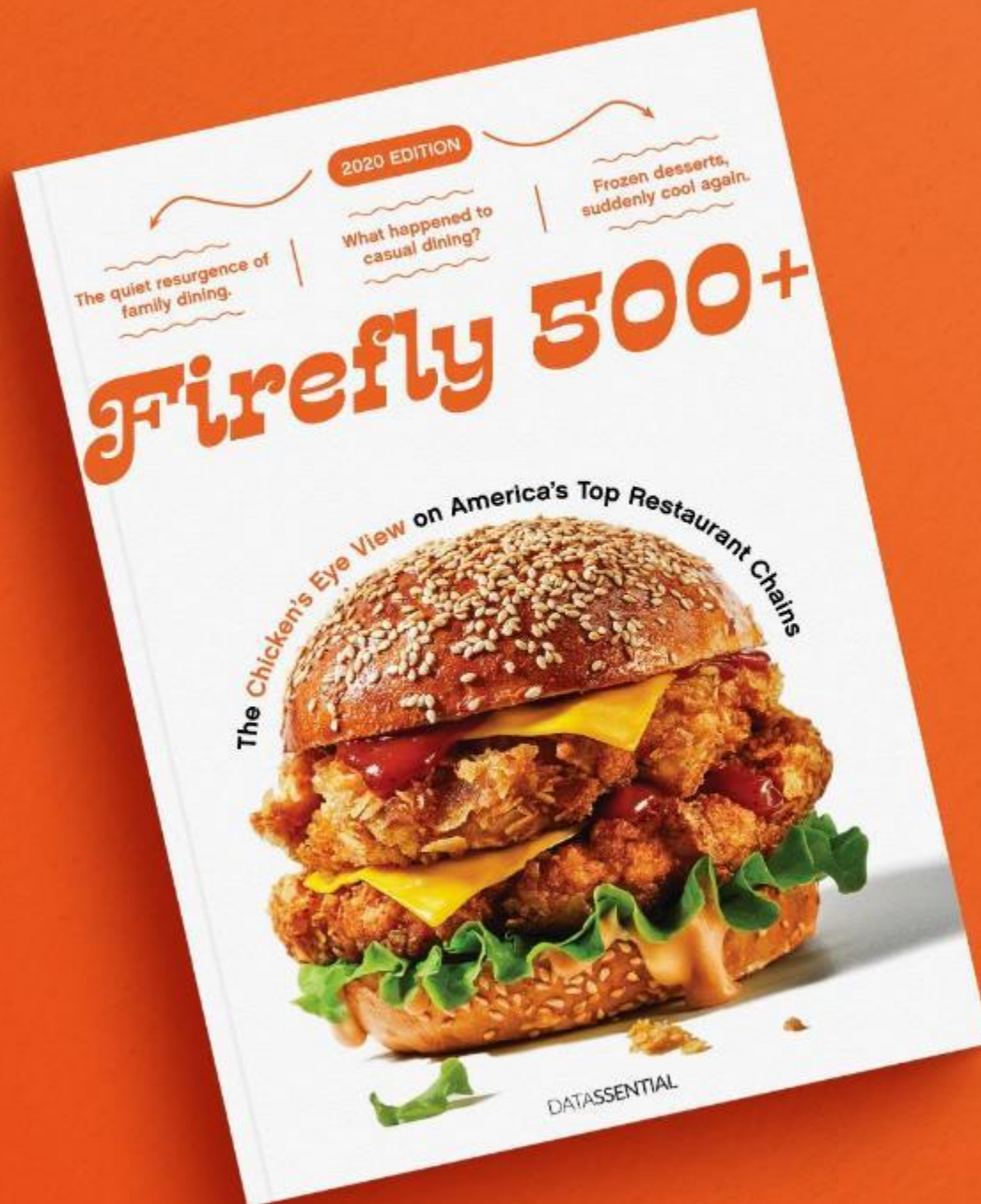




HOTSHOT REPORT

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.

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