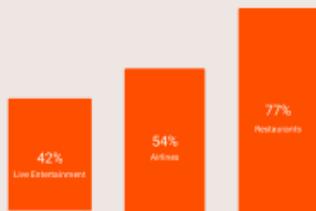


# HOW WILL RESTAURANT DINING BEHAVIOUR SHIFT AFTER COVID-19

In partnership, Measure Protocol, Decode Consulting and Garden Social Beer Garden & Kitchen surveyed 795 individuals ages 18+ across the USA in April 2020 to understand consumer sentiment toward local restaurants and dining post-pandemic.

## RESTAURANTS HIT THE HARDEST



77% felt local restaurants/pubs/bars have been hit the hardest by the pandemic. Airlines (54%) and live entertainment (42%) follow a bit more distantly.

### RESTAURANTS ARE NOT THE RISKIEST OF PLACES

Consumers are more concerned about attending a public event like sporting or concerts (57%), taking a flight (52%), going to a mall (41%) or staying at a hotel (33%) than going to a restaurant (31%).

Concern is prevalent but eating out is likely to come back sooner than live entertainment, traveling or shopping.

**31%** Of consumers are VERY concerned about going to a restaurant

### DESPITE REAL CONCERNS

We are still ready and willing to enjoy ourselves: 67% of respondents are engaged in activities they enjoyed such as a new hobby, class, music, a book or a movie.

70% of respondents believe that 'We will eventually get back to normal but it will take a while'. Where could we start? Likely, eating out:

46% of respondents are ready to stop cooking or are dying for a cold beer or a glass of wine!

### CAUTION IS A LEADING SENTIMENT WHEN CONSIDERING A FUTURE RESTAURANT VISIT

Restaurant customers are ready and willing to be back, but expect things to be different.

Above entertainment, socialization, pleasure or nourishment, participants ranked building a **sense of security and safety** as the number one in priority for restaurants.

**48%** will be very cautious when visiting a restaurant when allowed to do so.

## OUR HABITS HAVE CHANGED DRAMATICALLY.

And they will continue to change. Assuming restrictions are lifted and restaurants are allowed to re-open:

There will be fewer frequent guests

- **37% decrease** among respondents who plan to dine at local restaurants at least weekly
- **25% increase** among those who said they plan to dine at local restaurants monthly
- Younger customers (25-39) will change their dining out frequency the least post-pandemic (-4% decline vs. a -17% decline for ages 50+)

### FOOD & MENU USED TO BE EVERYTHING.

Now, visitors ranked evidence of cleanliness first. Visible evidence of cleanliness, sanitation and safety protocols also rank significantly higher than protocols about social distancing.

### CHANGES SHOULD STAY IN PLACE FOR A WHILE.

**73%** Consumers expect new requirements and protocols to be in place for 6 months to at least a year.

## THERE ARE THINGS RESTAURANTS CAN DO.

When asked specifically what restaurants can do to help them make a decision to visit their local restaurant, participants responded:

**79%**

Kitchen staff wearing protective gear

**75%**

Hand sanitizer dispensers on all tables and near exits

**73%**

Posted policies on food handling and cleanliness

**70%**

Size of the restaurant dining section (i.e. more space)



"As a small business owner we are all thinking about what's the new norm, and what does America 2.0 look like in terms of dining — that's what we're trying to figure out." "It's not about who makes the best burger anymore. It's about who makes the customer feel most comfortable." "We believe this research begins to paint that picture."

— Dave Boller, Owner, Garden Social