COVID-19
report 28: TEMPERATURE CHECK
7.24.20

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In the month since Datassential’s last COVID-19 Report, the United States has lived with a pandemic not yet under control. People’s prevailing response to the ongoing crisis has moved from fear to caution, and even while they are venturing outside the home for more than stocking up on essentials, they are staying ready if the pandemic forces the country back into emergency mode. Compared to how they answered similar questions asked at previous points this past spring, consumers now indicate that they’re being more careful than they were during the first attempt to reopen businesses and restart the economy.

People have their masks on and their eyes open, but how else are they changing their behaviors as the crisis drags on? How can the food industry best serve customers who are wary and weary of COVID-19?

Here are highlights from Datassential’s latest wave of Coronavirus research, fielded on July 17 with 500 US consumers.

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July 20
Republicans push back on White House proposal to zero out funding for COVID testing and tracing
Report: Half of Americans wouldn’t get a COVID-19 vaccine if it were available today
Officials say COVID-19 test results could take as long as two weeks

July 21
House Speaker wants a deal on the next recovery package done by the end of July
US needs to lower COVID-19 transmission rate to reopen schools, surgeon general says
All key COVID-19 numbers remain below thresholds in New York City, mayor says

July 22
The mask debate is still raging in the US, but much of the world has moved on
US daily COVID death toll tops 1,000
Study indicates immunity wanes quickly in people with mild COVID-19 infections
Many more have had COVID-19 than what’s showing up in official numbers, new CDC data reveals

July 23
CDC’s ensemble forecast now projects more than 164,000 US coronavirus deaths by August 15
White House concedes to Senate GOP demands in key areas of recovery package, senators say
Spike in COVID-19 cases may weaken the pace of economic recovery, analysts say
Infectious disease expert: “We will never eradicate this virus”
COVID’s resurgence has people very concerned.

<table>
<thead>
<tr>
<th></th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>7</td>
<td>14</td>
</tr>
<tr>
<td>Very concerned</td>
<td>54%</td>
<td>56%</td>
<td>53%</td>
</tr>
<tr>
<td></td>
<td>19</td>
<td>22</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>56%</td>
<td>49%</td>
<td>53%</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Somewhat concerned</td>
<td>53%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>9</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>47%</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td></td>
<td>17</td>
<td>9</td>
<td>17</td>
</tr>
<tr>
<td>Not concerned</td>
<td>53%</td>
<td>44%</td>
<td>58%</td>
</tr>
</tbody>
</table>

COVID's resurgence has people very concerned.
Avoidance of dining out has risen back to mid-May levels. As some states are forced to return to earlier phases of reopening, with cases spiking in the South and West, avoidance of dining out is on the rise again. Women, Gen Z, Millennials and Gen X are all taking a more conservative stance. Boomers have remained as cautious as ever over the past month.
Health concerns have grown and remain top priority as cases across the U.S are spiking again.

Which are you more concerned about?

- **39%**
  - Economic Crisis
    - +7% since June 15
    - +2% since April 7

- **61%**
  - Public Health Crisis
    - +7% since June 15
    - -2% since April 7
More than four months into the pandemic, most Americans are still at home.

Which of the following best describes your current situation?

- 24% Still going to school/work as normal
- 29% Working or attending school remotely
- 33% Not working overall
- 14% Laid off / furloughed
COVID’s next wave isn’t going to catch anyone off guard.

The pandemic has been nothing short of a roller coaster ride since it began. Health authorities pivot in their guidance to the public as they continue to learn. Politicizing of the virus has barraged us with mixed messages. And just when we thought it was safe enough to emerge from lockdown, COVID cases went from plateauing to exploding. Many are ready to take steps back if things truly get worse ... and we are watching closely. A lack of true direction throughout has left consumers defaulting back to conservative behaviors.

Restaurants can help cautious diners feel more comfortable by keeping COVID tactics in place, even as restrictions start to loosen. Consumers are in a long-haul mindset, so the food industry should be too.
Consumers agree it is appropriate to put the brakes on reopening the economy.

Given the recent surge in cases of COVID-19 (as of July 17), do you think we should...

- **45%**: Implement lockdown again
- **45%**: Continue opening up, but slower
- **10%**: Continue opening up as planned

If there is a second wave of COVID-19, do you think we should...

<table>
<thead>
<tr>
<th></th>
<th>May 28</th>
<th>June 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement lockdown again</td>
<td>40%</td>
<td>42%</td>
</tr>
<tr>
<td>Continue opening business back up, but slower than planned</td>
<td>43%</td>
<td>38%</td>
</tr>
<tr>
<td>Continue opening businesses back up as planned (no adjustments)</td>
<td>17%</td>
<td>20%</td>
</tr>
</tbody>
</table>
COVID surges are prompting more precautionary behavior than a month ago.

Throughout the pandemic, most Americans have erred more on the side of caution because no vaccines or definitive treatments have been identified yet. As the country was beginning to reopen in early June, in response to a similar question, very few were ready to let their guard down. Now, as we are seeing cases back on the rise across much of the country, more than half claim they are taking even more precautionary steps versus a month ago.

Compared to one month ago, are you being...?

- **56%** MORE CAREFUL
  - More likely among African Americans (74%) and Millennials (66%)
- **35%** NO CHANGE
- **9%** LESS CAREFUL

Compared to when the pandemic began, I am being....

<table>
<thead>
<tr>
<th>June 1</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>More careful</td>
<td>42%</td>
</tr>
<tr>
<td>Just as careful</td>
<td>45%</td>
</tr>
<tr>
<td>Slightly less careful</td>
<td>9%</td>
</tr>
<tr>
<td>Much less careful</td>
<td>5%</td>
</tr>
</tbody>
</table>
We should mandate wearing masks in public.

If everyone would wear masks in public, we'd have this pandemic under control in a month or two.

Americans support wearing masks.
People blame poor mask etiquette and crowding for COVID spike.

While top reasons tend to relate to poor adherence to basic precautionary steps, differences can be seen generationally: Boomers are more likely to see the protests as a key factor, while Millennials attribute some of the spread to travelers from hot spots.

**What are the two biggest reasons for the recent surge in infections?**

- People not wearing masks in public: 37%
- People crowding into places as they reopen: 33%
- People being less careful (Coronavirus fatigue): 25%
- Young people being unsafe / not social distancing: 25%
- People participating in George Floyd protests: 21%
- People not being careful to stay six feet apart: 17%
- People traveling from Coronavirus hotspot areas: 15%
- Lack of guidance from government / CDC: 12%
- Lack of testing: 9%
COVID chaos has eroded our trust.

When Datassential first explored the issue of trust in April, Americans looked to scientists, physicians and public-health experts for trusted guidance, while judging government and the mainstream media to be less credible. With three months of mixed messages and the virus again peaking, most Americans are no longer sure where to turn for credible information. Sizeable minorities of people have doubts about the danger of contracting Coronavirus if they personally take precautions.

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**which of the following statements are true?**

- I don't know who to trust about the state of the pandemic: 78%
- I feel safe doing "non-essentials" with safety precautions: 45%
- COVID cases are rising but I'm not willing to lockdown again: 43%
- Deaths are trending down so it's not that dangerous: 32% (More likely among Men (40%))
Just the essentials, please.

Whether it's our lack of knowledge about how the virus spreads or distrust of others to take precautionary steps, as things get worse, Americans are most comfortable doing “necessary” activities. While most feel safe on a grocery run or seeing their doctor, luxuries like manicures or massages seem less worth the risk. Nearly half of Americans have also made their peace with shopping in stores for non-essential retail items, and the “long tail” of other options means people have found a few activities outside the home that work for them.

today, I feel comfortable and safe...

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Going to the grocery store / supermarket</td>
<td>68%</td>
</tr>
<tr>
<td>Going to the doctor / dentist for a regular checkup</td>
<td>57%</td>
</tr>
<tr>
<td>Shopping in retail / clothing stores</td>
<td>48%</td>
</tr>
<tr>
<td>Going to a hair salon / nail salon</td>
<td>39%</td>
</tr>
<tr>
<td>Going to the beach to sunbathe</td>
<td>35%</td>
</tr>
<tr>
<td>Taking my kids to the park / playground</td>
<td>34%</td>
</tr>
<tr>
<td>Going to school / classes</td>
<td>28%</td>
</tr>
<tr>
<td>Getting a massage</td>
<td>27%</td>
</tr>
<tr>
<td>Going to a gym / fitness center</td>
<td>25%</td>
</tr>
<tr>
<td>Going to see a movie in the theater</td>
<td>22%</td>
</tr>
</tbody>
</table>

More likely among Men (35%)

More likely among Men (33%)

More likely among Gen Z (34%)
Dinners expect restaurants to ensure a safe environment.

83% Restaurants should require guests to follow safety guidelines

81% I will be more careful to check if places are strictly enforcing safety precautions before deciding where to eat

now that coronavirus cases have been rising in the past few weeks...
I will probably only get restaurant food for takeout / delivery now that coronavirus cases have been rising in the past few weeks... 72%
Diners shy away from eating in dining rooms with COVID cases on the rise. Just when consumers were getting more comfortable with the idea of dining in, the resurgence has re-ignited safety concerns. Most feel safest with carryout options or outdoor seating while weather permits. Even so, close to a third of consumers are still comfortable dining in, which could balance out restrictions in seating capacity.
Diners are now evenly split on where they feel the safest.

Compared to when Datassential asked a similar question in April, chain restaurants have made gains in consumers’ perception of their safety, reaching parity with independents.

If restaurants were to reopen for dine-in, which would you trust more to ensure a safe dining environment?

<table>
<thead>
<tr>
<th></th>
<th>April 20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent</td>
<td>54%</td>
</tr>
<tr>
<td>Large chain</td>
<td>46%</td>
</tr>
</tbody>
</table>

Considering the recent surge in COVID cases, where do you feel safer eating?
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.
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.