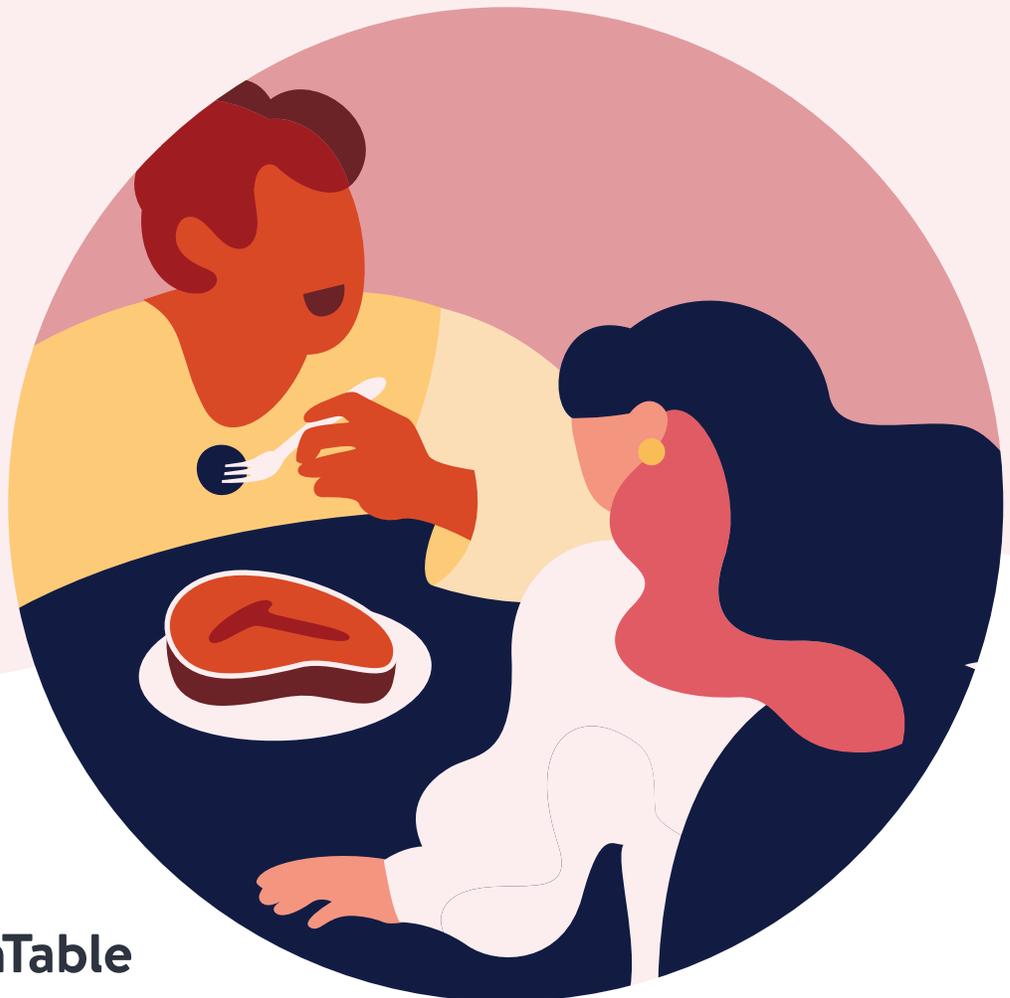


DINER INSIGHTS

# How people feel about eating out again

Get insights to deliver the best guest experience during the pandemic



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**As they navigate the coronavirus pandemic, restaurant operators need to understand how diners are feeling and anticipate their changing behaviors. How confident do diners feel about heading back to restaurants? How have their dining and spending habits changed? What safety measures do they want to see restaurants take?**

In July 2020, we asked over 3,300 diners on the OpenTable network across the U.S. and Canada to share feedback in our second COVID-19 Diner Survey. This survey follows the first questionnaire we fielded in April 2020, when the majority of diners were still sheltering in place. Now, as some markets have reopened and people venture out again, we're sharing more actionable, up-to-date insights to guide your road to recovery. In addition to survey findings, see OpenTable data and receive practical tips to help you welcome guests back, meet them where they are, and continue to deliver great hospitality.

In this survey, we incorporate questions from restaurateurs seeking to understand how they can deliver the best hospitality and experience to their guests during these ever-changing times. We thank them for contributing their questions and hope you find the insights valuable for your business.

# Key takeaways

- **People are dining out again.** In July, 25% of survey respondents report they're dining out at a restaurant with table service once a week or more. Based on OpenTable data, diners are also booking fewer days out.
- **Outdoor dining in the U.S. is up.** Diners feel safer and more confident about eating outdoors than indoors. And, it shows in OpenTable reservations.
- **Diners are willing to spend more on tips, but not certain surcharges.** Diners are willing to tip more, but their willingness to pay surcharges varies by type.
- **Diners feel it's extremely important to wear masks to protect themselves.** In July, the proportion of diners who say wearing a mask is extremely important increased by 36% compared to April. This, along with washing hands, top the list of actions that diners feel are "extremely important" to protect themselves from being exposed to COVID-19.
- **Restaurants can take steps to make people feel comfortable eating out.** In July, the proportion of diners who say it's extremely important for restaurant staff to wear personal protective equipment (PPE) increased by 51% compared to April. This is one of the steps restaurants can take to make diners feel comfortable about going out to eat.
- **Takeout and delivery are still up.** According to respondents, takeout and delivery are up compared to pre-COVID levels, but down, 14% and 39% respectively, compared to April when survey respondents were sheltering in place.

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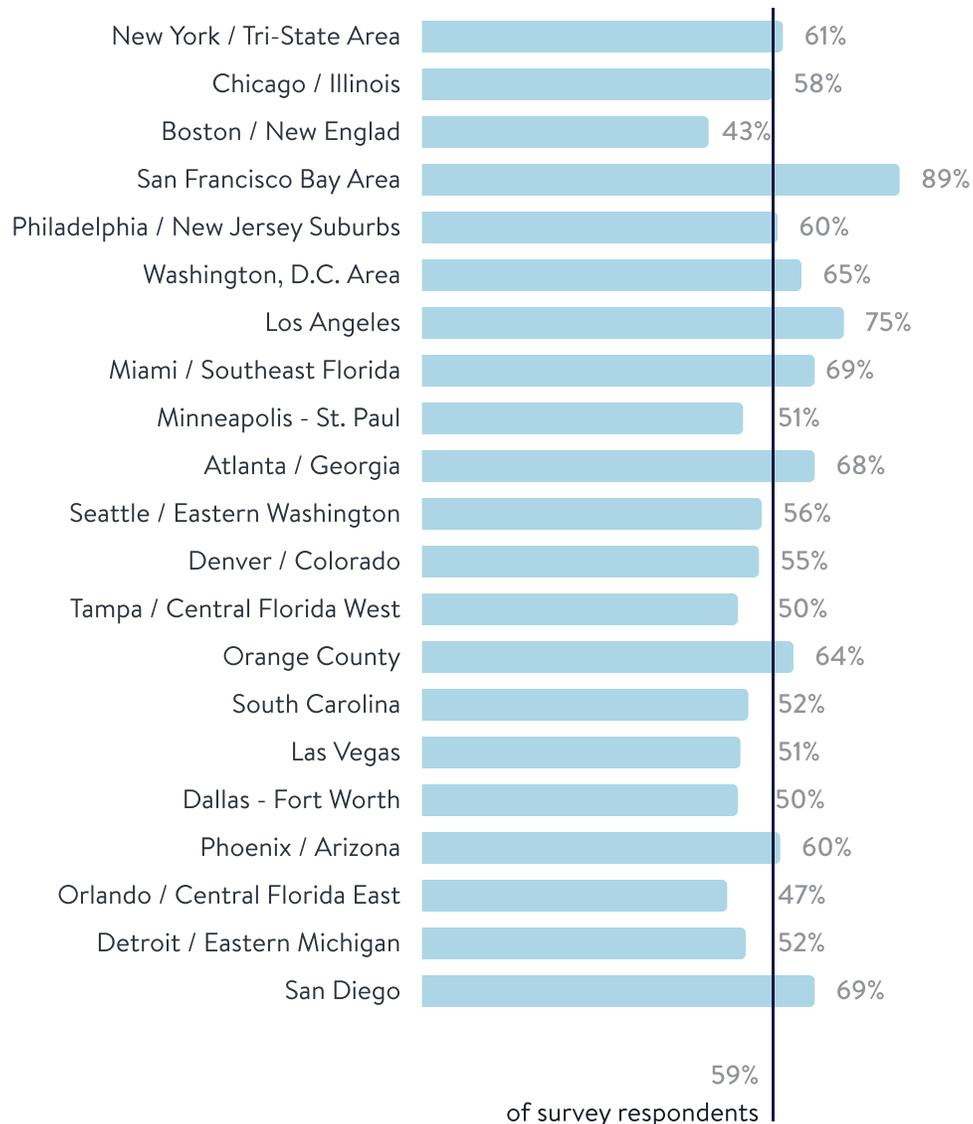
# Dining out again



## Who's staying in and who's going out

With states reopening and reclosing, it can be challenging to keep tabs on who's staying in and who's venturing out. In July, 59% of survey respondents say they're practicing shelter in place, with survey respondents in CA cities reporting this at higher percentages.

### SF and LA lead the pack among those who are currently practicing shelter in place

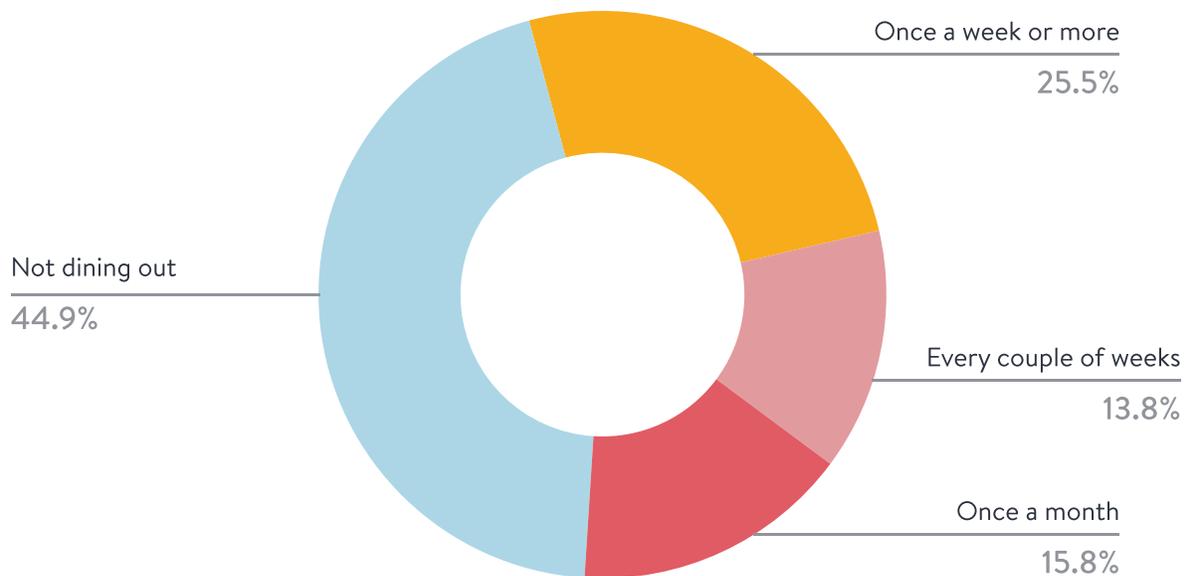


**The remainder of respondents (41%) say they are not practicing shelter in place.** On a daily basis, they're going out for essential activities (42%) and recreational activities (40%), such as walking or hiking. At least once a week, they're heading out for work (55%), social activities (60%), and to purchase groceries (85%). Out-of-town travel is infrequent. Most (54%) are not traveling for leisure activities.

## Diners are eating out again, but at a lower frequency than before

In July, 25% of survey respondents report they're dining out at a restaurant with table service once a week or more. While a positive sign for the industry, this remains lower than pre-COVID levels. Before the pandemic, 30% of people surveyed said they dined out at a restaurant with table service once a week or more.

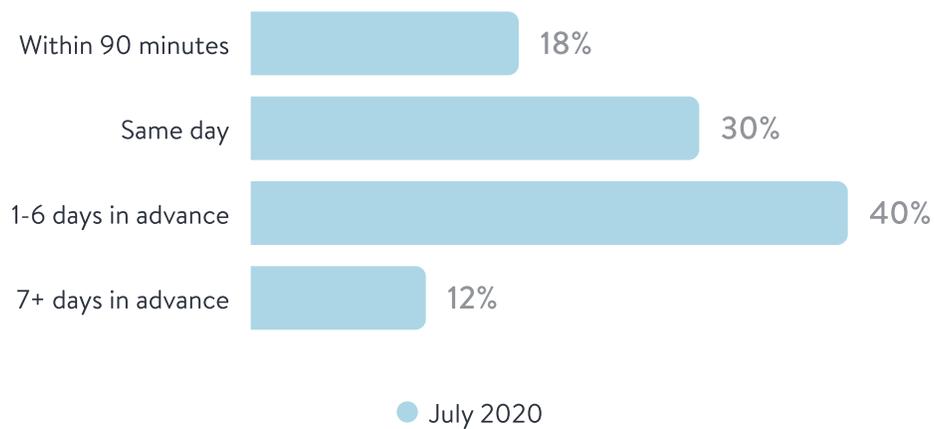
**As of July, 25% of people surveyed say they're dining out at a restaurant with table service once a week or more**



## Diners are booking fewer days out

In addition to survey data, we also dig into OpenTable data to see how far in advance people book. In July, based on a pool of nearly 16,000 restaurants in the US and Canada, we find that 48% of seated reservations are made within 90 minutes or on the same day. Conversely, only 12% of seated reservations are made 7 days or more in advance.

**In July, 88% of seated reservations are made less than 7 days in advance\***



\*Source: Based on OpenTable online seated reservations at a pool of nearly 16,000 US and CA restaurants in July 2020



## Tips: What you can do

- ✓ Open up your online availability so people can discover your restaurant when they're searching for a specific date, time, and party size.
- ✓ Offer your waitlist online to make it easy for diners to get on the list before heading out to your restaurant and to relieve congestion at your front door.
- ✓ Secure your reservations and earn up-front prepayment using experiences.
- ✓ Reach out to loyal guests who love you and are yearning to see you again through targeted and automated email campaigns that make them feel extra special.
- ✓ Target same-day bookers or fill last-minute cancellations by starting a targeted digital marketing campaign or by using Bonus Points.

2.

# Diner spend, tipping, and surcharges



## Average diner spend in July is relatively consistent with February

Based on OpenTable data, we see that average paid diner spend in July 2020 is relatively consistent with February 2020, based on a sample of nearly 3,000 restaurants in the U.S. and Canada with seated reservations during each month.

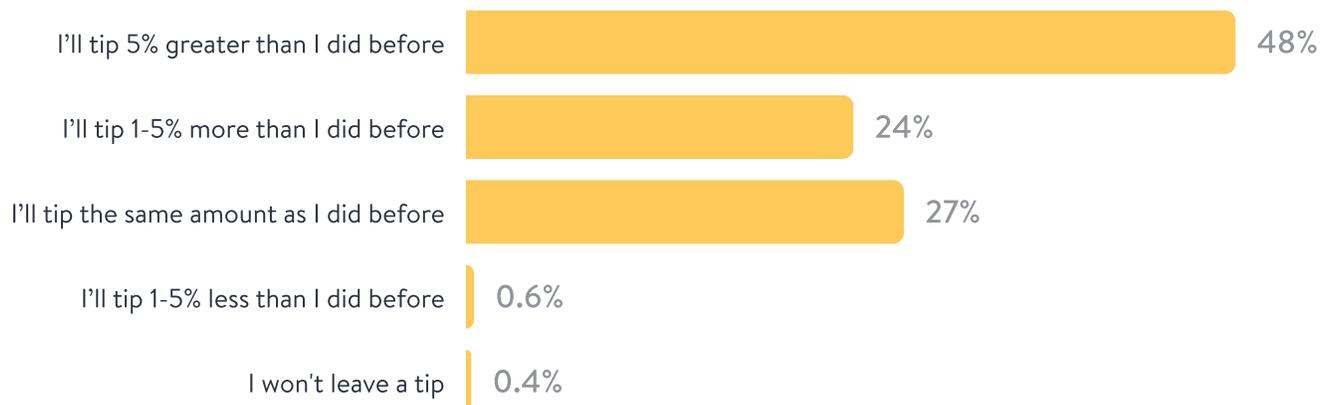


\*Source: Based on POS check data matched to reservations at nearly 3,000 restaurants in the U.S. and Canada with seated reservations in February 2020 and July 2020

## Diners say they are willing to leave a bigger tip

When it comes to tipping, diners say they are willing to tip more than they did before the onset of COVID-19. In July, diners say they're willing to leave a tip amount that is 5% greater (48%) or 1-5% more (24%) than the tip amount they left before. Only 28% of respondents say they'll tip the same or less than before.

**48% of diners are willing to leave a tip amount that's 5% greater than the tip amount they left before COVID-19**

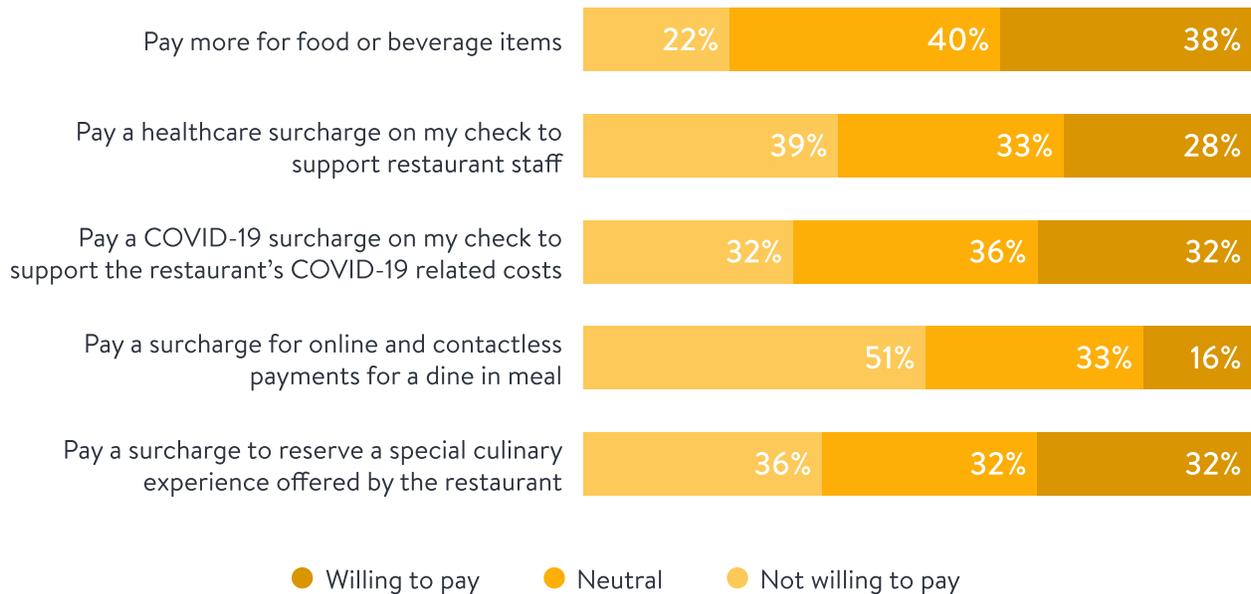


## But, they're more selective about the surcharges they're willing to pay

While diners are willing to spend more on tipping, they're less inclined to absorb new surcharges to help restaurants offset the additional costs they're incurring due to COVID-19.

Among the different types of surcharges, diners are most willing to pay more for food or beverage items, with 38% who say they're willing to spend more on these items and 40% who say they're neutral.

### 38% of diners are willing to pay more for food or beverage items



Among the surcharges diners are not willing to pay: 51% of respondents say they're not willing to pay a surcharge for online and contactless payment for a dine-in meal and 39% say they're not willing to pay a healthcare surcharge on their check to support restaurant staff.

When it comes to paying a surcharge to support restaurants' COVID-19 related costs or to reserve a special culinary experience, diners are about evenly split on their willingness to pay.



### Tips: What you can do

- ✓ Connect your reservations to revenue by integrating your POS system with OpenTable - at no additional cost.
- ✓ Build surcharges into the price of your prepaid set menus using experiences.
- ✓ Take a fresh look at your tipping policy and see if there are ways to provide diners with the flexibility to tip more during this time to thank your staff.
- ✓ Revisit your food and beverage menu. This could be a time to test, explore, and measure the impact of price adjustments on your menu. Start small and measure results to ensure any increases you introduce are well received and make an impact.

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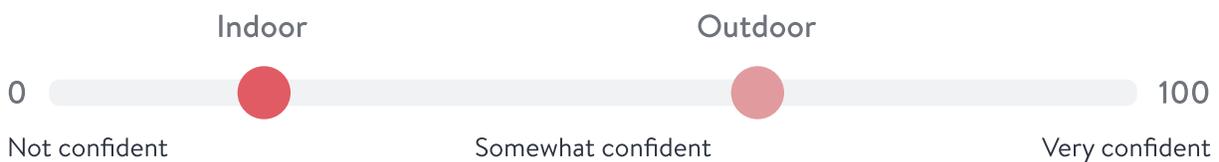
# Diner safety and confidence



## People feel safer and more confident about outdoor dining

With the opportunity to eat out again, diners feel twice as confident about dining at a restaurant outdoors versus indoors. When asked on a scale of 0-100, with 0 being not confident to 100 being very confident, diners feel much more confident about eating at a restaurant outdoors (average score of 60) compared to indoors (average score of 33).

### Diners feel twice as confident about outdoor versus indoor dining



They also feel eating at a restaurant outdoors puts them at less risk for COVID-19. **In July, 51% of diners consider outdoor dining low to somewhat low risk compared to only 19% who say the same about indoor dining.**

On OpenTable, we also see a rise in outdoor seating. When we compare July 1, 2020 through July 14, 2020 year-over-year, we see the percentage of parties seated outdoors trend upward, reaching a nearly 14X increase.\*

\*Data is based on the worldwide volume of outdoor seated parties from July 1, 2020 through July 14, 2020 compared to the same time period in 2019.

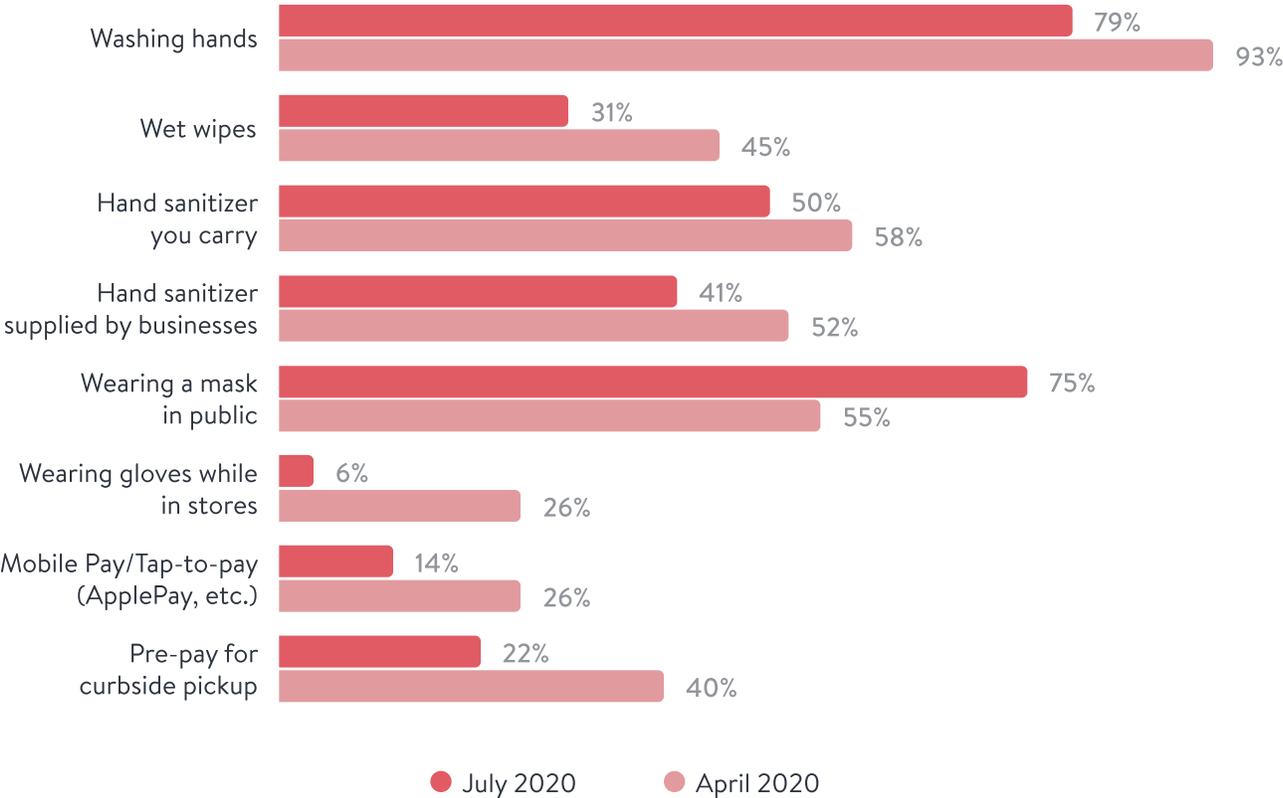
## To protect themselves from COVID-19, diners now feel it's more important to wear a mask - a 36% increase compared to April

To protect themselves from being exposed to COVID-19, diners say wearing a mask (up 36%) is extremely important, as is washing their hands.

In July, they also say the following actions are extremely important, although down compared to April: using hand sanitizer they carry (down 16%), using hand sanitizer supplied by a business (down 27%), and using wet wipes (down 45%).

Of the least important actions in July and April, diners say it's wearing gloves while in stores.

### Handwashing and wearing a mask top the list as “extremely important” to protect against COVID-19



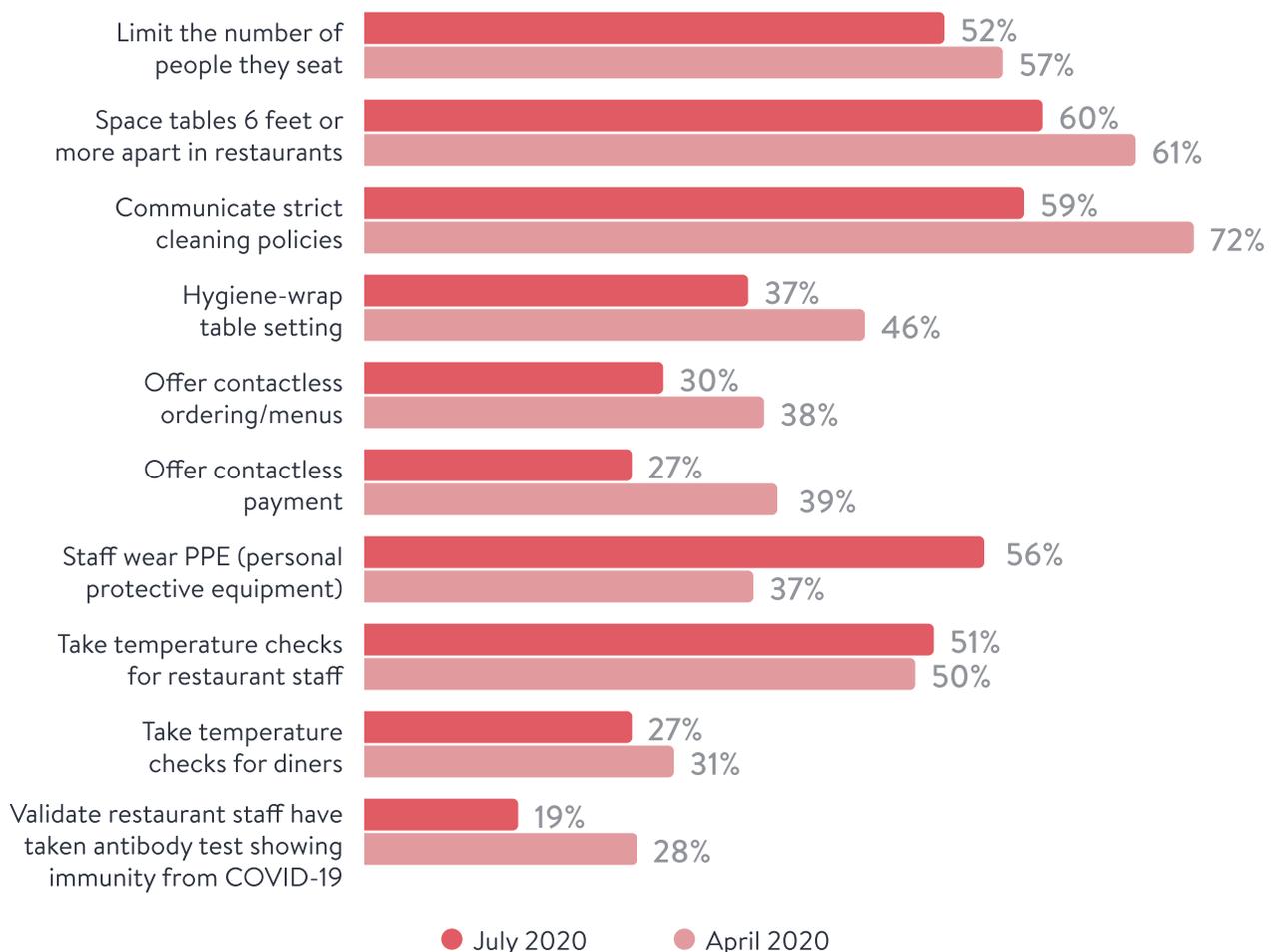
## Restaurants can take actions to make diners feel safe

To feel comfortable going out to eat at restaurants again, diners say it's extremely important for restaurants to space tables six feet or more apart (60%), communicate strict cleaning policies (59%), limit the number of people they seat (52%), and take temperature checks of restaurant staff (51%), which is consistent with their responses in April.

**In July, 56% of diners also say it's extremely important for restaurant staff to wear personal protective equipment (PPE) - a 51% increase from April.**

When it comes to eliminating shared plates or family style meals, over 52% of respondents say this is not important or only somewhat important.

### Spacing tables 6 feet apart and communicating strict cleaning policies are “extremely important” to help diners feel comfortable



### Few diners are willing to sign a release

While diners feel it's important for restaurants to take safety precautions, the majority (57%) of diners surveyed say they are not willing to sign a release to limit the restaurant from legal or financial responsibility if they acquire COVID-19.

#### Are diners willing to sign a release?





### Tips: What you can do

- ✓ Highlight the safety precautions you're taking on your OpenTable profile, website, and social channels.
- ✓ Post behind-the-scenes photos and videos to show how you're going above and beyond to keep employees and guests safe.
- ✓ Reinforce your safety measures on interior and exterior signs at your location and arm staff with talking points to respond to commonly asked safety questions.
- ✓ Show your outdoor dining space and the safety measures you're taking on your OpenTable profile using gallery photos.
- ✓ Develop a game plan for how you can continue to utilize your outdoor dining space during the Fall and Winter.

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# Takeout and delivery



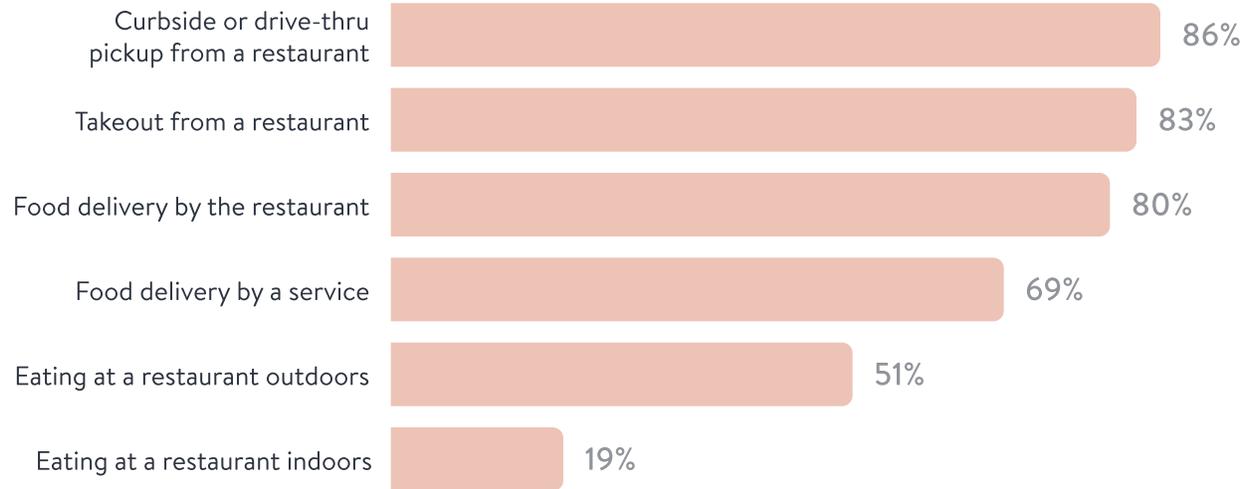
### Takeout and delivery are still up

For takeout, 83% of diners in July say they feel ordering takeout from a restaurant is low to somewhat low risk - a 32% increase compared to April.

For delivery, the proportion of diners who feel this is low to somewhat low risk also increased in July - up 27% for delivery by the restaurant and up 37% for delivery from a service compared to April.

Interestingly, though, they feel food delivered by the restaurant (80%) is less risky than food delivered by a service (69%), which is consistent with their sentiment in April.

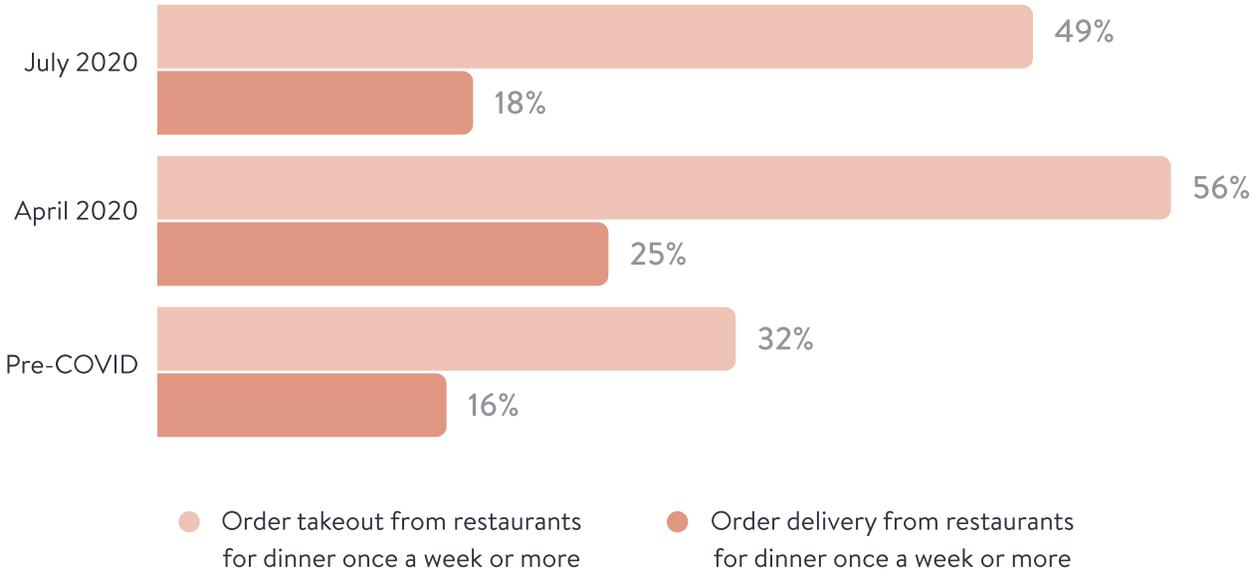
### Diners consider curbside or drive-thru pickup and takeout as the top “low to somewhat low risk” activities



Based on July survey responses, both takeout and delivery ordering are up compared to pre-COVID levels, but down compared to April.

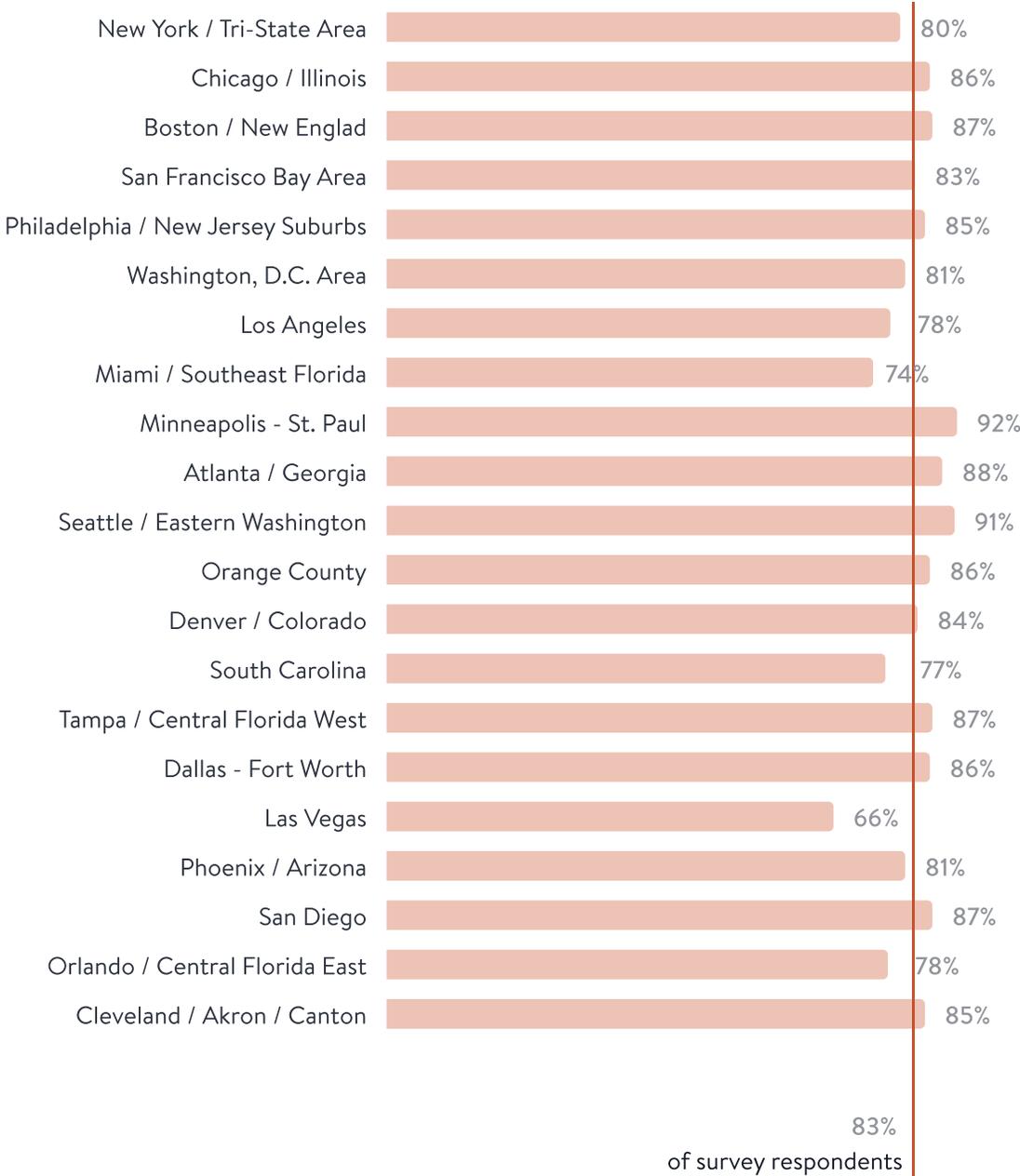
Diners also report they order takeout and delivery more often for dinner than for lunch, which is consistent with their responses in April.

**In July, 49% of diners say they order takeout from a restaurant for dinner once a week or more whereas only 18% say the same for delivery**



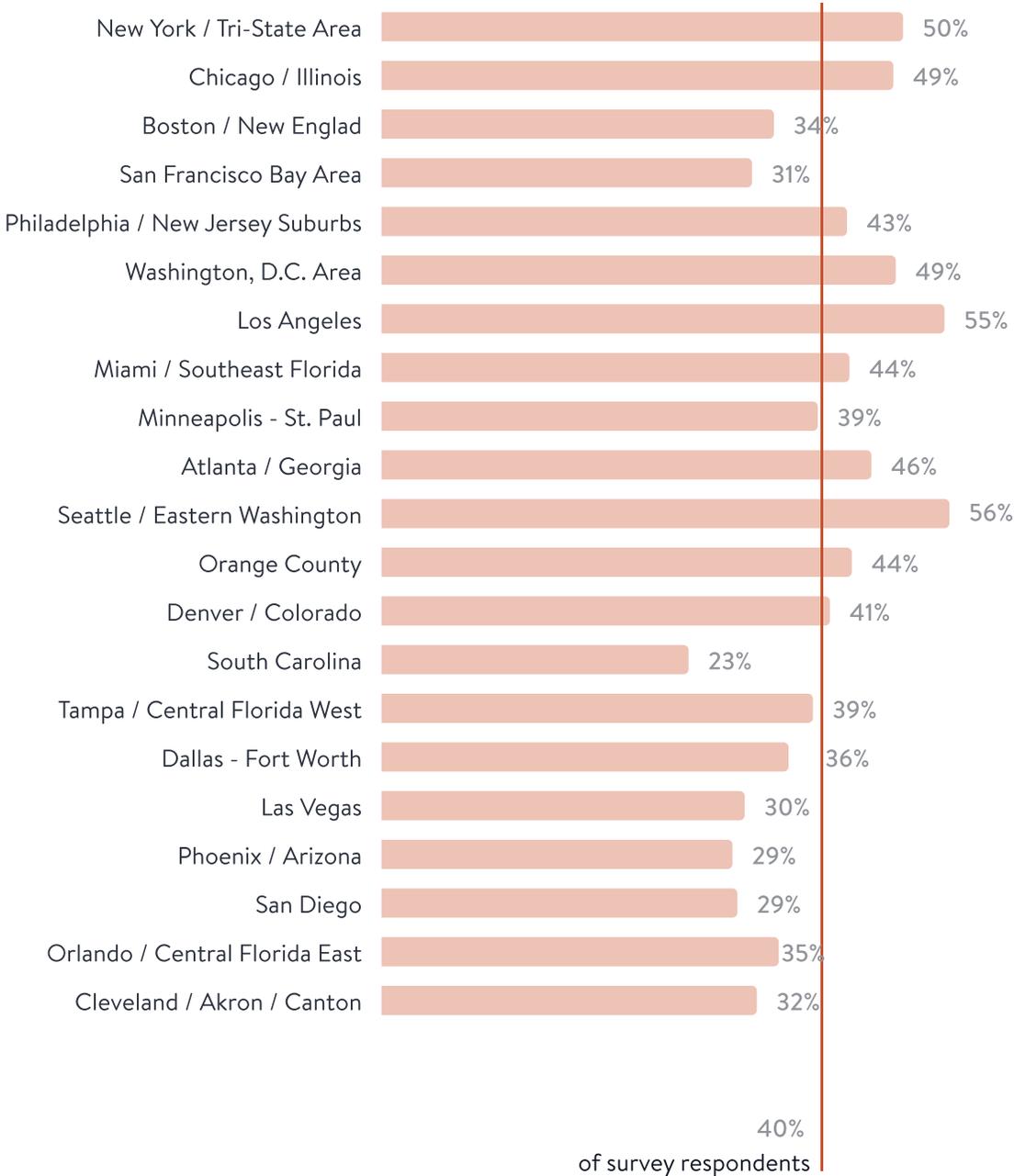
For takeout, 83% of survey respondents say they order takeout for dinner in July. Minneapolis and Seattle lead with 92% and 91%.

**The proportion of diners who say they order takeout for dinner at least once a month**



For delivery, 40% of survey respondents say they order delivery for dinner in July. Los Angeles and Seattle lead with 55% and 56%.

**The proportion of diners who say they order delivery for dinner at least once a month**





### Tips: What you can do

- ✓ Make it easy for people to bring your restaurant home, while driving more revenue for your business, by offering online and in-app takeout ordering and payments on OpenTable.
- ✓ Once you're set up with takeout, promote your takeout options and share your unique order link on your website and across your marketing channels so people can quickly book.
- ✓ Add your delivery options on your OpenTable profile.

5.

# Looking ahead



**As restaurant doors reopen, chefs will stand at stoves, guests will fill (distanced) tables, and communities will come together. People may dine out differently than they did before, with a range of comfort levels and changing protocols, but one thing is sure: they can't wait to be your guests again.**

When restaurants *do* welcome them back, diners say they're most looking forward to enjoying the ambiance of restaurants, connecting with friends and family, and supporting their favorite, go-to spots. (Having someone else cook for them is also a plus.)

This crisis has proven that hospitality, in all its many forms, plays a powerful, irreplaceable role in communities across the world. Though the future may look uncertain, restaurants will certainly be an essential part of that future.

Whether you're planning to reopen your dining room or adapting to takeout and delivery, OpenTable is here to help you welcome back guests and rebuild your business.

Start charting the future of your restaurant using country, state, and city-level data and insights on [OpenTable's state of the restaurant industry hub](#).

Join the most reliable, easy-to-use restaurant management platform. Manage your operations in one place and get guests when you need them most.

[restaurant.opentable.com](https://restaurant.opentable.com)

\*Source: 3,393 people on the OpenTable network in the US and Canada responded to this diner survey between July 17, 2020 to July 29, 2020. "Pre-COVID" or "Before COVID" refers to the period prior to the announcement of governmental restrictions such as shelter in place, around March 2020.