

# Tracking the effects of COVID 19 pandemic on restaurant and hotel customers' sentiments

## “Customers’ sentiments in November towards dining out, traveling to a destination and staying at hotels”

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This report provides a summary of *restaurant and hotel customers sentiments in November 2020* towards dining in at sit-down restaurant and staying at hotels based on a monthly study that tracks restaurant and hotel customers sentiments since May 2020. Data for this report were collected between November 1 and November 10, 2020.

Monthly restaurant and hotel customers sentiments study has been conducted by a group of researchers in the School of Hospitality Business Management, Carson College of Business at Washington State University since May 2020. [Please click here to access the reports for previous COVID-19 customer sentiments studies.](#) For more information, please contact Dr. Dogan Gursoy ([dgursoy@wsu.edu](mailto:dgursoy@wsu.edu)).

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# Preface

Due to the Covid-19 pandemic, the US economy was shut down almost overnight. The pandemic has confronted the restaurant and hotel industry with an unprecedented challenge. Almost all restaurants were asked to limit their operations to only take-outs. Restrictions placed on travel and stay-at-home orders issued by the governors of many states resulted in sharp decreases in hotel occupancies and revenues. While most of the hotels and restaurants have already reopened business, they are operating at a significantly reduced capacity. In most states, restrictions have been eased significantly, for example, allow dine-in restaurants to reopen at a reduced capacity with strict social distancing guidelines. Now the big question remains: what are the customers' sentiments about patronizing a restaurant or a hotel in the time of coronavirus? Are they ready to return?

This report presents the findings of a monthly study that investigates individuals' sentiments towards re-patronizing hotels and sit-down restaurants in the time of coronavirus, based on the data collected from 822 American consumers between November 1 and November 10, 2020.

[Please click here to access the reports for previous COVID-19 customer sentiments studies.](#)

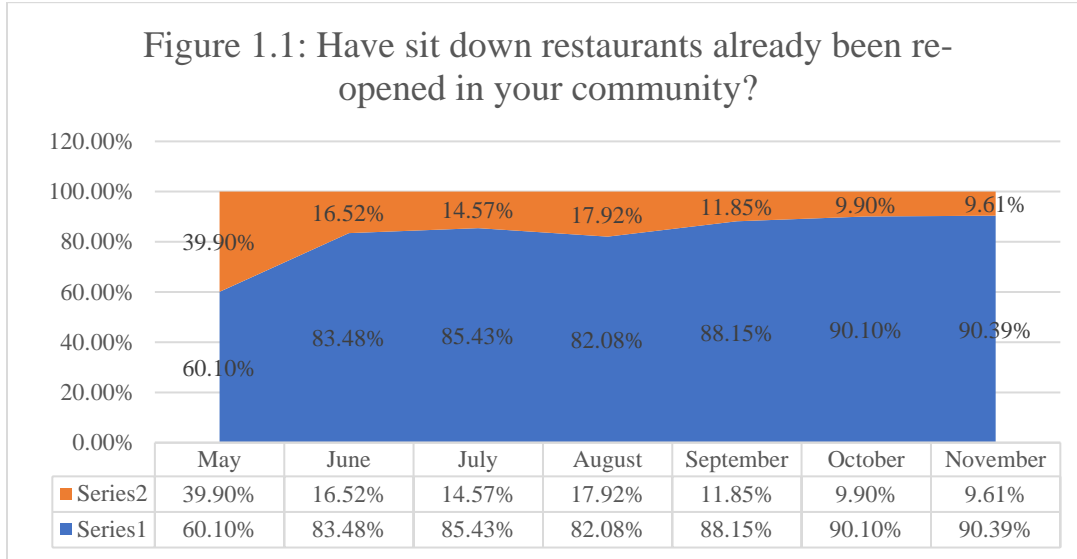
# Part 1: Customers' Sentiments towards Dine-in Restaurants

## Main Finding:

- 90.39 percent of the respondents indicated that restaurants have already been reopened in their communities.
- Around 46 percent of respondents indicated that they dined in at a sit-down restaurant once or more during the previous month.
  - Around 26 percent of the respondents have not dined in at a sit-down restaurant since the beginning of the COVID-19 pandemic.
- 49.39 percent indicated that they are planning to dine in at a sit-down restaurant within a month.
  - The number of consumers who would dine out within a month is increased by 2.02 percent compared to the previous month.
- 17.15 percent of the respondents indicated that they will only feel comfortable to dine in at a sit-down restaurant when their communities' ability to test, trace and isolate COVID-19 cases is significantly improved.
  - Increased by 9.10 percent compared to the previous month.
- 18.86 percent indicated that they will only feel comfortable to dine in at a sit-down restaurant when the COVID-19 vaccine becomes available.
  - Increased by 0.91 percent compared to the previous month.
- Visible sanitizing efforts (such as hand sanitizers at the entry, staff wearing mask), implementing social distancing, encouraging customers to wear masks, limiting the number of customers served, more rigorous and frequent cleaning of high-touch surfaces in common areas, and employee training of health and safety protocols are the most important safety precautions customers expect from a restaurant.
- While 40.93 percent indicated a willingness to pay more at sit-down restaurants that implement increased safety precautions, 31.06 percent expected sit-down restaurants to implement increased safety precautions without passing the cost to the customers.
  - While willingness to pay more is decreased by 8.13 percent, the percentage of customers who expect sit-down restaurants to implement increased safety precautions without passing the cost to the customers is increased by 5.90 percent compared to the previous month.
- A large portion of the respondents (70.28 percent) agreed that use of various technologies in service delivery at sit down restaurants would be necessary in the COVID-19 environment in order to minimize human-to-human contact. (Examples: service robots, contactless payment such as Apply pay or contactless bankcards, digital menus that can be viewed on personal mobile devices via QR codes, etc.).

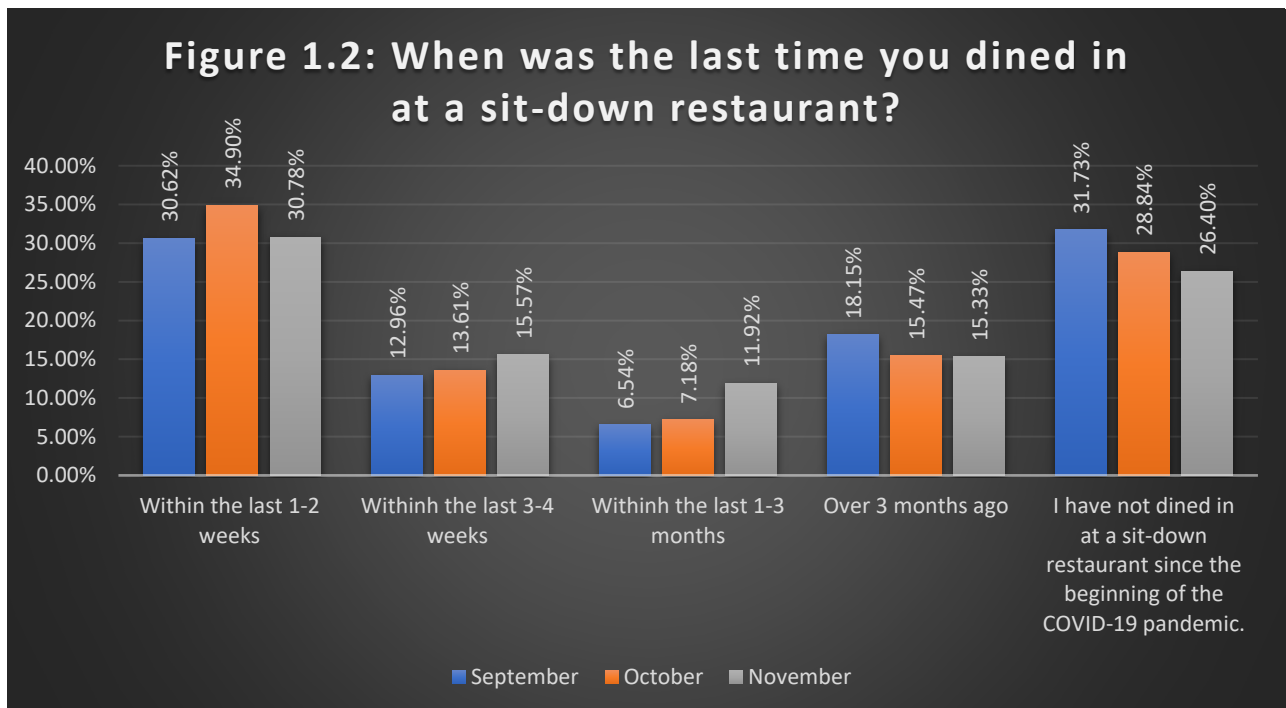
### 1.1: Have sit down restaurants already been re-opened in your community?

As presented in Figure 1.1, 90.39 percent of respondents indicated that restaurants have already been re-opened in their communities.



### 1.2: Last time they dined in at a sit-down restaurant

As presented in Figure 1.2, most respondents indicated that they dined in at a sit-down restaurant at least one since the beginning of the COVID-19 pandemic.



- 46.35 percent of respondents indicated that they dined in at a sit-down restaurant once or more during the previous month.
- 15.33 percent of respondents indicated that they dined in at a sit-down restaurant over 3 months ago.
- 26.40 percent of the respondents have not dined in at a sit-down restaurant since the beginning of the COVID-19 pandemic.

### **1.3: Intentions to dine in at a sit-down restaurant**

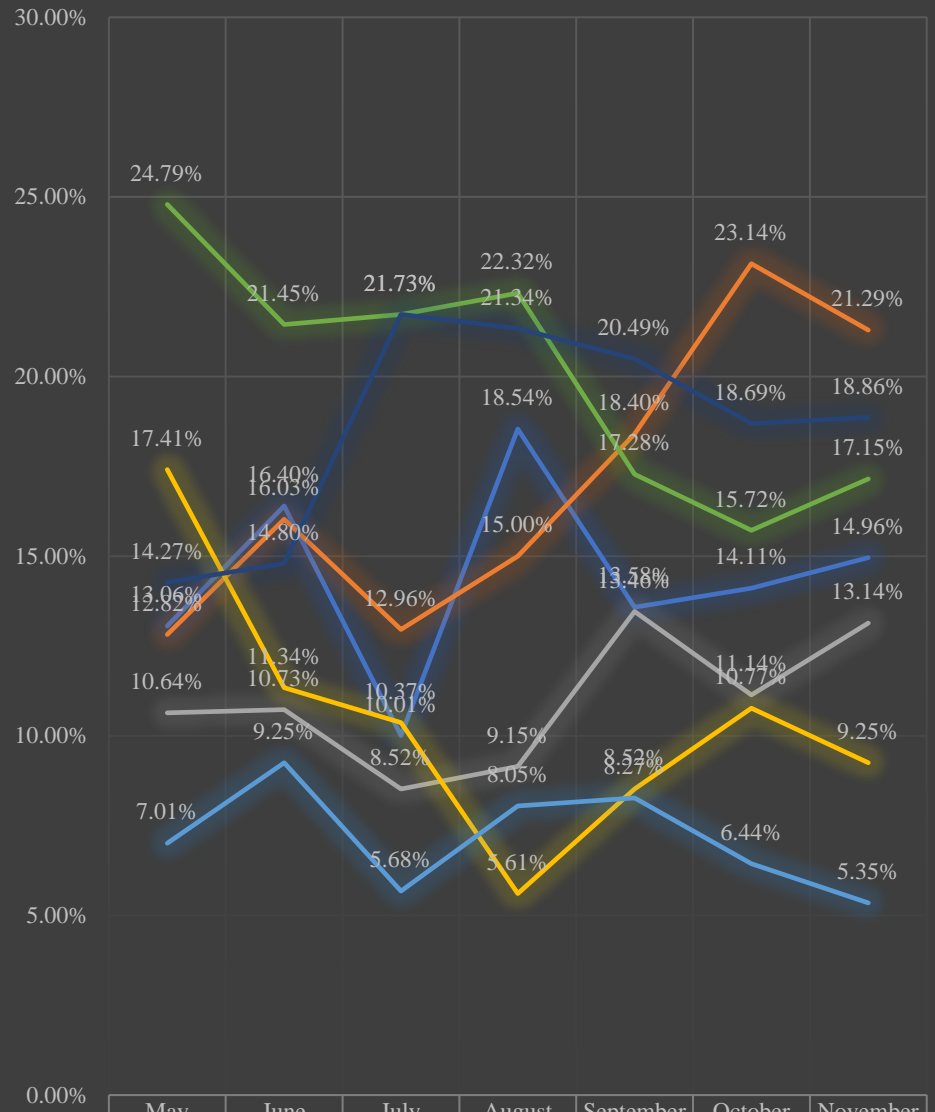
As presented in Figure 1.3, even though the percentage of customers who indicated that they are willing to dine in at a sit-down restaurant continues to increase, findings still suggest that a large portion of individuals are not willing to dine in at a sit-down restaurant. While 49.39 percent indicated that they are planning on dining in at a sit-down restaurant within the next 30 days, a large portion of the customers would delay dining out until they feel more comfortable. Around 9 percent (9.25%) said that they would wait for around 1-3 months and 5.35 percent indicated that they would wait even longer (over 3 months). However, the number of consumers who would dine out immediately is increased by 2.02 percent compared to the previous month.

17.15 percent of respondents indicated that they will only feel comfortable to dine in at a sit-down restaurant when their communities' ability to test, trace and isolate COVID-19 cases is significantly improved. Percentage of individuals who are not willing to dine in at a sit-down restaurant until their communities are able to test, trace and isolate COVID-19 is increased by 9.10 percent compared to the previous month.

Another 18.86 percent indicated that they will only feel comfortable to dine in at a sit-down restaurant when the COVID-19 vaccine becomes available. Percentage of consumers who indicated that they would only feel comfortable to dine in at a sit-down restaurant when the COVID-19 vaccine becomes available is increased by 0.91 percent compared to the previous month.

Consumers who responded to the survey this month indicated a higher likelihood to patronize sit-down restaurants within the next 30 days compared to those who responded the survey during the previous month. These findings indicate that number of consumers who is willing to dine out at a sit-down restaurant is increasing but very slowly.

**Figure 1.3: Intentions to dine in at a sit-down restaurant**



	May	June	July	August	September	October	November
In the next few days	13.06%	16.40%	10.01%	18.54%	13.58%	14.11%	14.96%
Within 1-2 weeks	12.82%	16.03%	12.96%	15.00%	18.40%	23.14%	21.29%
Within 3-4 weeks	10.64%	10.73%	8.52%	9.15%	13.46%	11.14%	13.14%
Within 1-3 months	17.41%	11.34%	10.37%	5.61%	8.52%	10.77%	9.25%
Over 3 months later	7.01%	9.25%	5.68%	8.05%	8.27%	6.44%	5.35%
I will only feel comfortable to dine in at a sit down restaurant when my community's ability to test, trace and isolate COVID-19 cases is significantly improved.	24.79%	21.45%	21.73%	22.32%	17.28%	15.72%	17.15%
I will only feel comfortable to dine in at a sit-down restaurant when the COVID-19 vaccine becomes available.	14.27%	14.80%	21.73%	21.34%	20.49%	18.69%	18.86%

#### **1.4: What safety precautions do you expect a restaurant to take during COVID-19?**

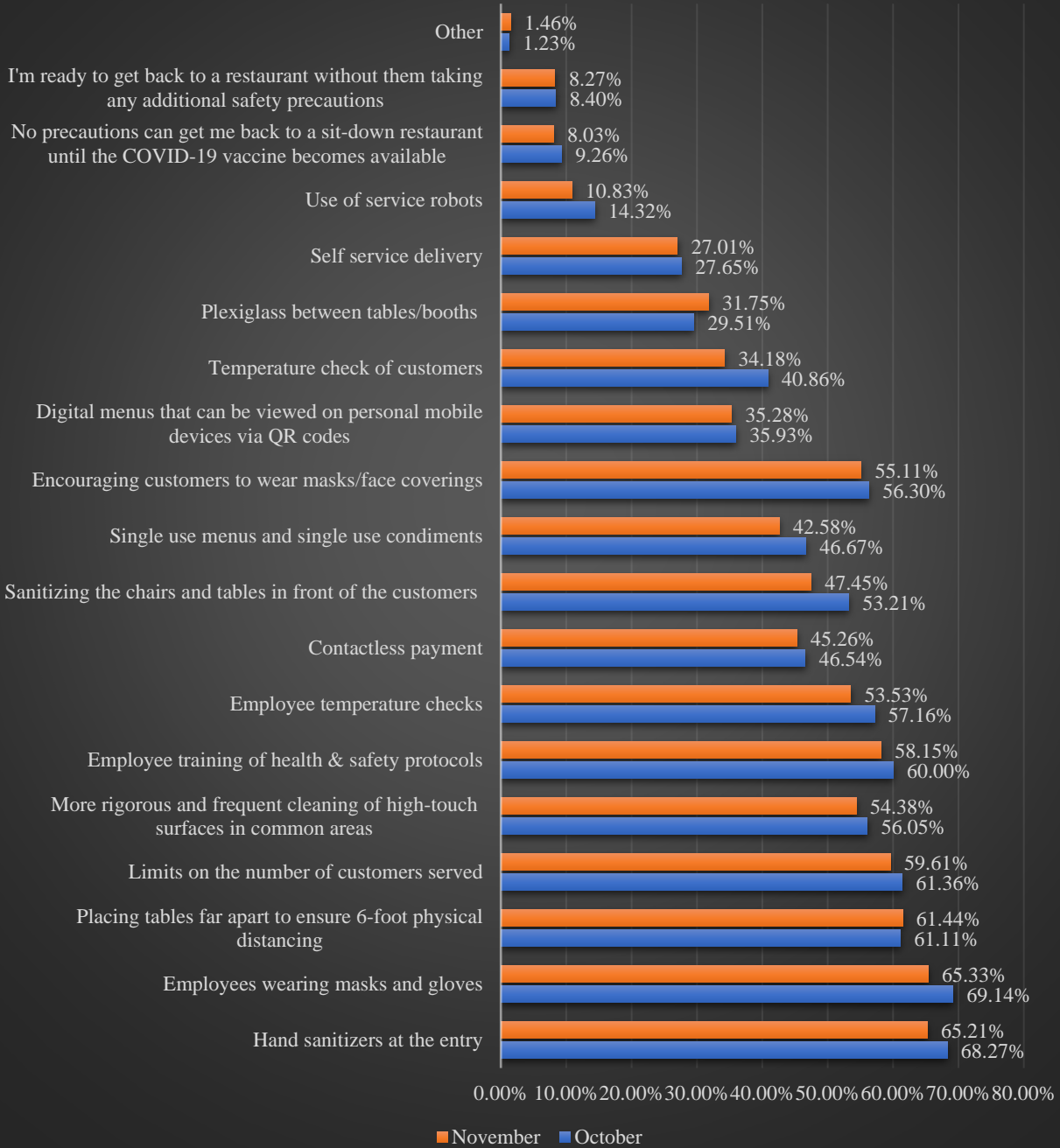
Customers were asked to indicate all safety precautions they expect to take place at dine-in restaurants during COVID-19 pandemic. As presented in Figure 1.4, around 92 percent of customers expect restaurants to take some safety precautions. Visible sanitizing efforts (such as hand sanitizers at the entry, more rigorous and frequent cleaning of high-touch surfaces in common areas, sanitizing the chairs and tables in front of the customers), employees wearing masks and gloves, implementing social distancing, limiting the number of customers served, employee temperature checks, and employee training of health and safety protocols are the most important safety precautions customers expect from a restaurant.

While masks wearing for both employees and customers are fairly high on the list, significantly higher percentage of customers expects employees to wear masks compared to the expectation of other customers wearing a mask. Contactless payment, and single use menus and single use condiments are also highly desired. It is also interesting to see that while customers expect employees to undergo temperature check, they expect less for themselves to do so. There was a slight decrease in the expectation that hand sanitizers should be provided, employees should wear facemasks and gloves, all customers should undergo temperature checks, tables and chairs should be sanitized in front of customers while an increase was observed in the expectation that restaurants should provide plexiglas between tables.

Data indicated a significant shift in customers' safety precautions expectations from businesses and other customers. While a significantly larger percentage of customers expect other customers to take more safety precautions, a significantly larger percentage of customers expect restaurants to ensure the safety of their customers by providing hand sanitizers, making employees to wear face masks and gloves, limiting the number of customers served and ensuring 6-foot physical distancing at restaurants



**Figure 1.4: What safety precautions do you expect a restaurant to take in the COVID-19 environment?**

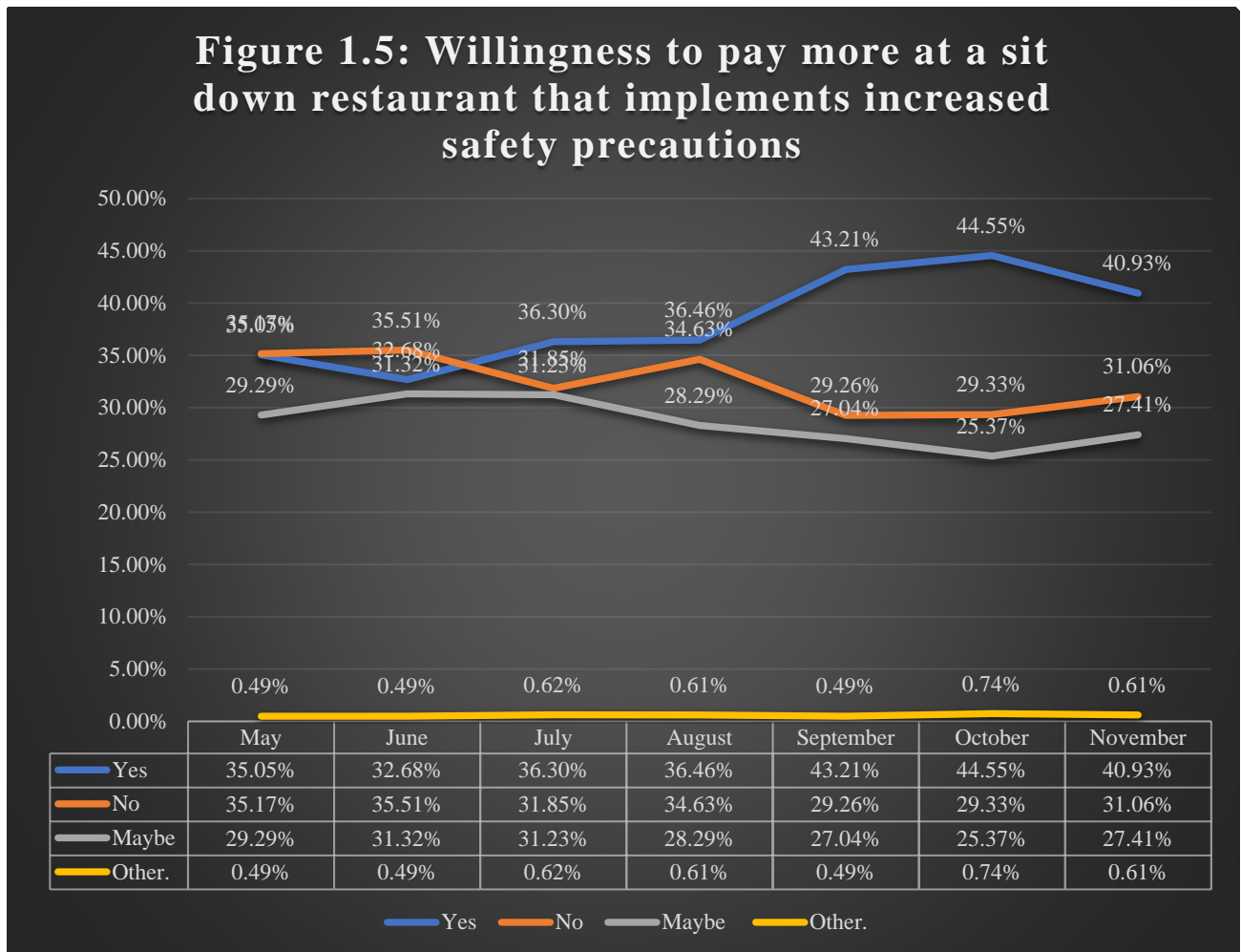


Note: Respondents were asked to indicate all safety precautions they expect to take at dine-in restaurants during COVID-19.

### 1.5: Willingness to pay more at a sit-down restaurant that implements increased safety precautions

Customers were asked to indicate if they are willing to pay more at sit down restaurants that implement increased safety precautions. As presented in Figure 1.5, 40.93 percent indicated that they are willing to pay more at sit down restaurants that implement increased safety precautions. However, another 31.06 percent indicated that they are not willing to pay more.

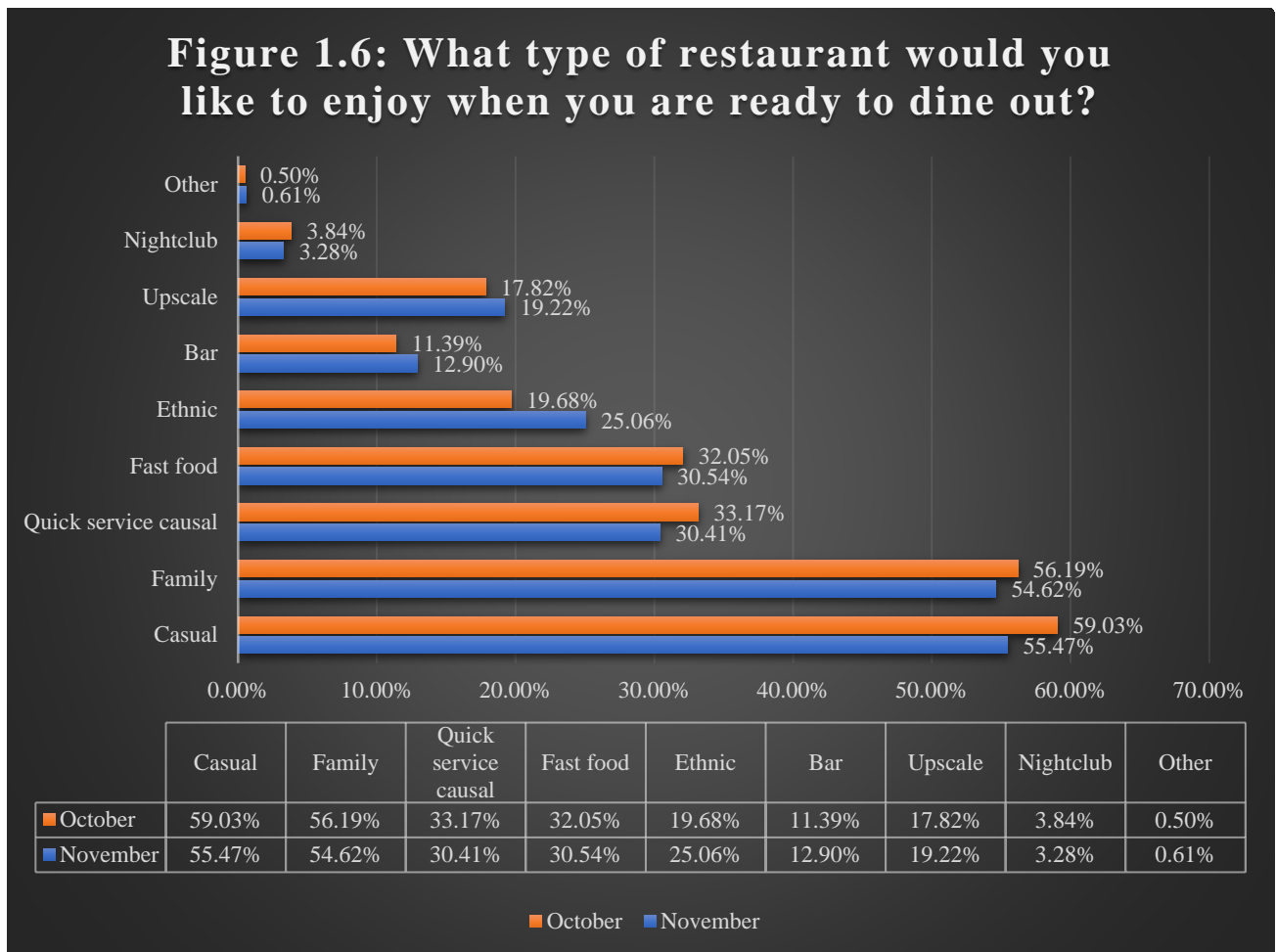
The percentage of customers who are willing to pay more at sit down restaurants that implement increased safety precautions decreased significantly (by 8.13 percent) this month while the percentage of customers who are not willing to pay more at sit down restaurants that implement increased safety precautions is decreased by 5.90 percent compared to those who responded the survey during the previous month.



## 1.6: What type of restaurant would you like to enjoy when you are ready to dine out?

Customers were asked to indicate the top two restaurant-types they would like to dine in when they have the opportunity to dine out at a sit-down restaurant. As presented in Figure 1.6, restaurants that offer casual dining (55.47%) experiences were the first choice, followed by family style restaurants (54.62%) and fast food restaurants (30.54%).

A lower percentage of customers indicated an intention to visit ethnic restaurants, upscale restaurants, bars and nightclubs. The demand for quick service casual restaurants decreased while the demand for ethnic and upscale restaurants increased compared to the demand levels reported previous month.

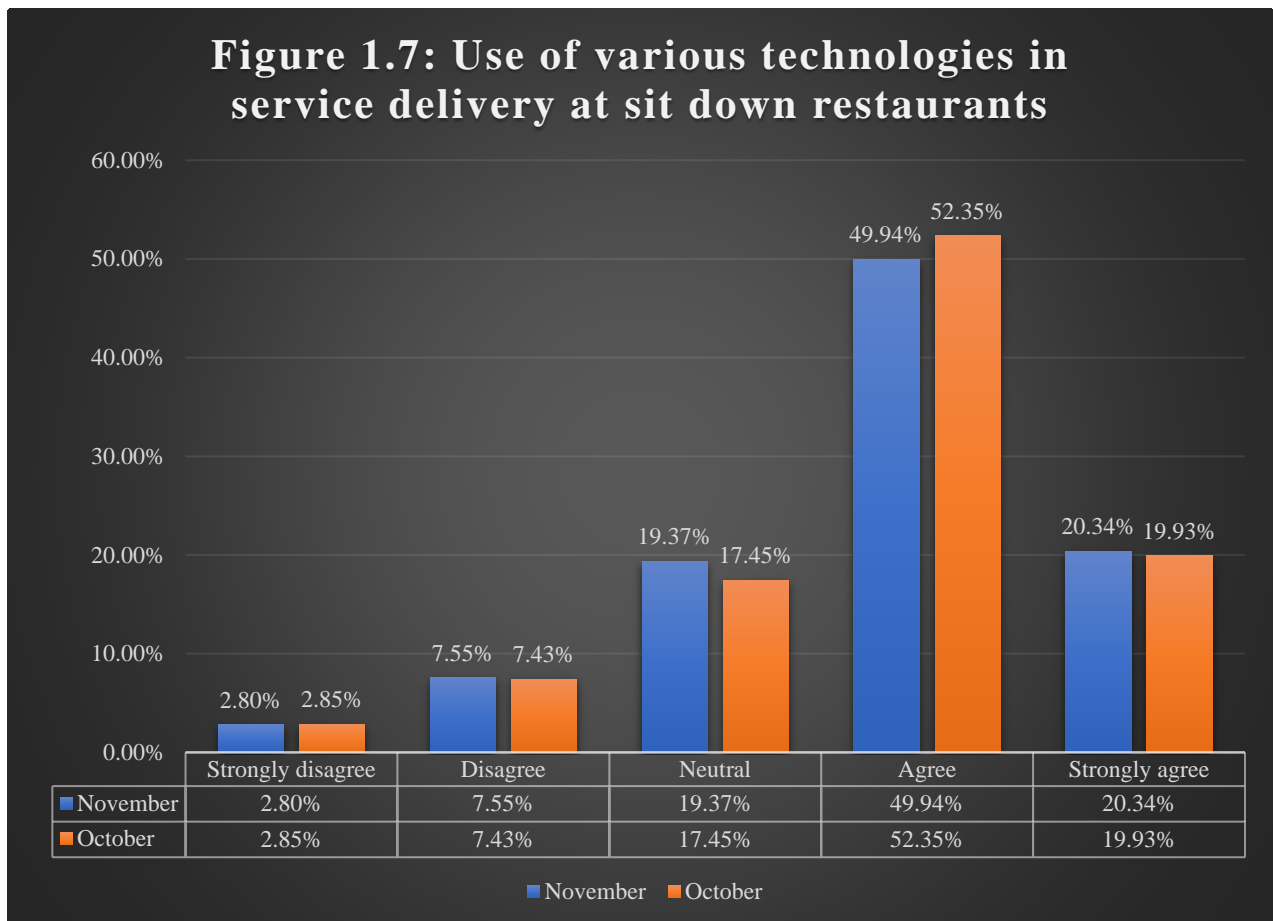


**Note:** Respondents were asked to indicate their top 2 choices.

### 1.7: Use of various technologies in service delivery at sit down restaurants

Respondents were asked to indicate their agreement/disagreement with the statement that the use of various technologies in service delivery at sit down restaurants will be necessary in the during COVID-19 environment in order to minimize human-to-human contact (Examples: service robots, contactless payment such as Apply pay or contactless bank cards, digital menus that can be viewed on personal mobile devices via QR codes, etc.). As presented in Figure 1.7, a large portion of the respondents agreed (49.94%) or strongly agreed (20.34%) with the statement.

The percentage of customers who agreed/strongly agreed with the statement that the use of various technologies in service delivery at sit down restaurants will be necessary in the COVID-19 environment in order to minimize human-to-human contact is decreased by 2.85 percent in November compared to those who responded the survey previous month.



## **Part 2: Customers' sentiments towards traveling to a destination and staying at a hotel**

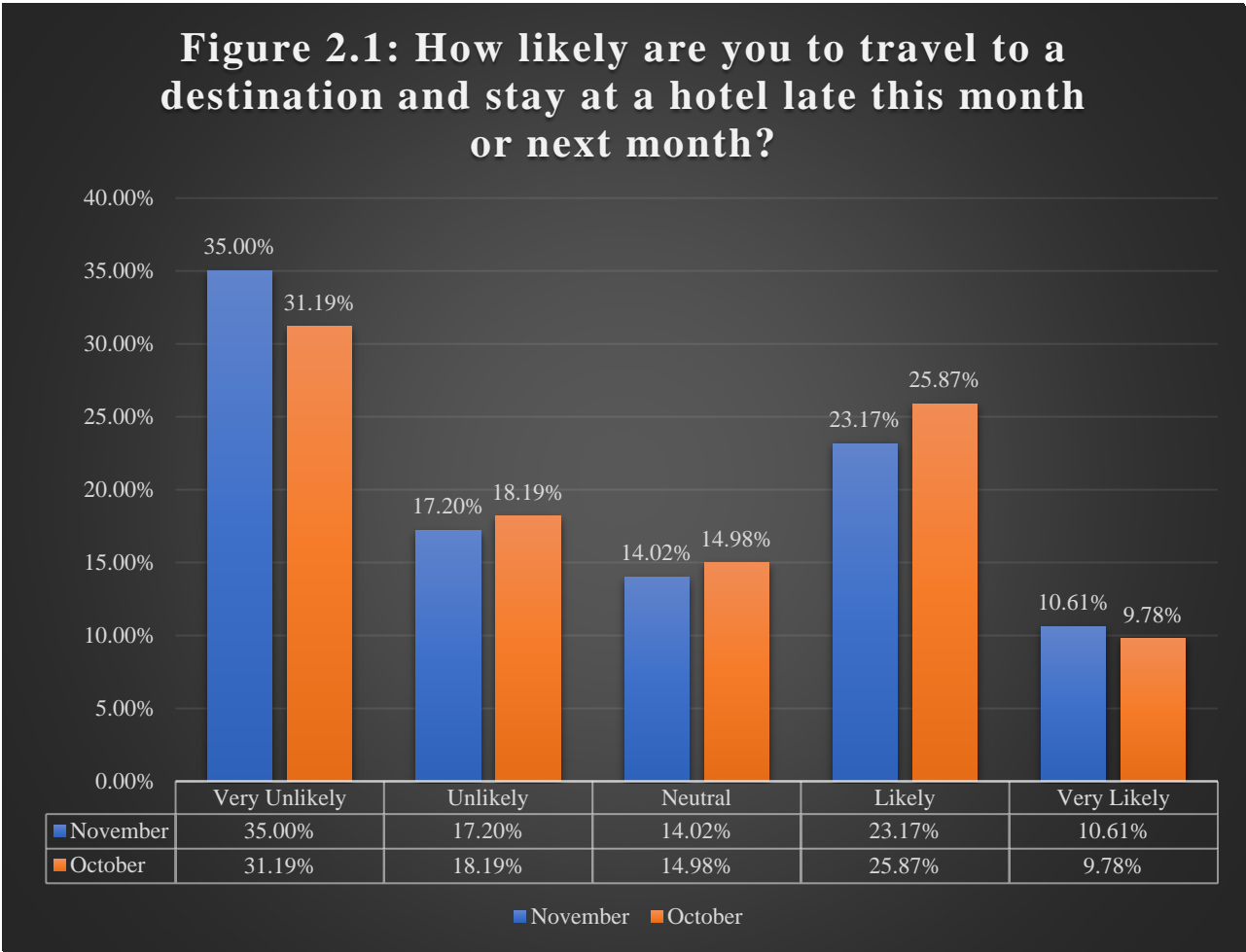
### **Main Finding:**

- 52.20 percent of respondents are not willing to travel to a destination and stay at a hotel late this month or the next month.
  - Increased by 5.44 percent compared to the previous month.
- 33.78 percent is willing to travel to a destination and stay at a hotel late this month or the next month.
  - Decreased by 8.49 percent compared to the previous month.
- While 33.4 percent of the respondents traveled to a destination and stayed at a hotel during the last 2 months, 24.63 percent is willing travel to a destination and stay at a hotel within the next 2 months.
  - Percentage of respondents traveled to a destination and stayed at a hotel during the last 2 months is decreased by 6.27 percent.
  - Percentage of respondents who is willing travel to a destination and stay at a hotel within the next 2 months is decreased by 0.97 percent
  - 33.34 percent will wait at least 3-6 months or longer to travel to a destination and stay at a hotel.
  - 17.68 percent will only feel comfortable traveling to a destination and staying at a hotel when that destination has very few COVID-19 cases and has the ability to test, trace and isolate COVID-19 cases.
    - Decreased by 4.74 percent compared to the previous month.
  - 22.44 percent will only feel comfortable traveling to a destination and staying at a hotel when the COVID-19 vaccine becomes widely available.
    - Increased by 9.25 percent compared to the last month.
- Respondents felt most comfortable to stay in chain hotels (42.93%) when they travel to a destination.
  - Increased by 7.06 percent compared to the last month
  - While the demand for RVs stayed almost the same, demand for and Airbnb accommodations and independent hotels was lower compared to the previous month.
- Most travelers prefer using their own personal vehicles (80.93 percent) while 7.58 percent indicated a preference for air travel.
- While 42.93 percent is willing to pay more at a hotel that implements increased safety precautions, 30.85 percent expects hotels to implement increased safety precautions without additional cost to customers.

**2.1: How likely are you to travel to a destination and stay at a hotel late this month or next month?**

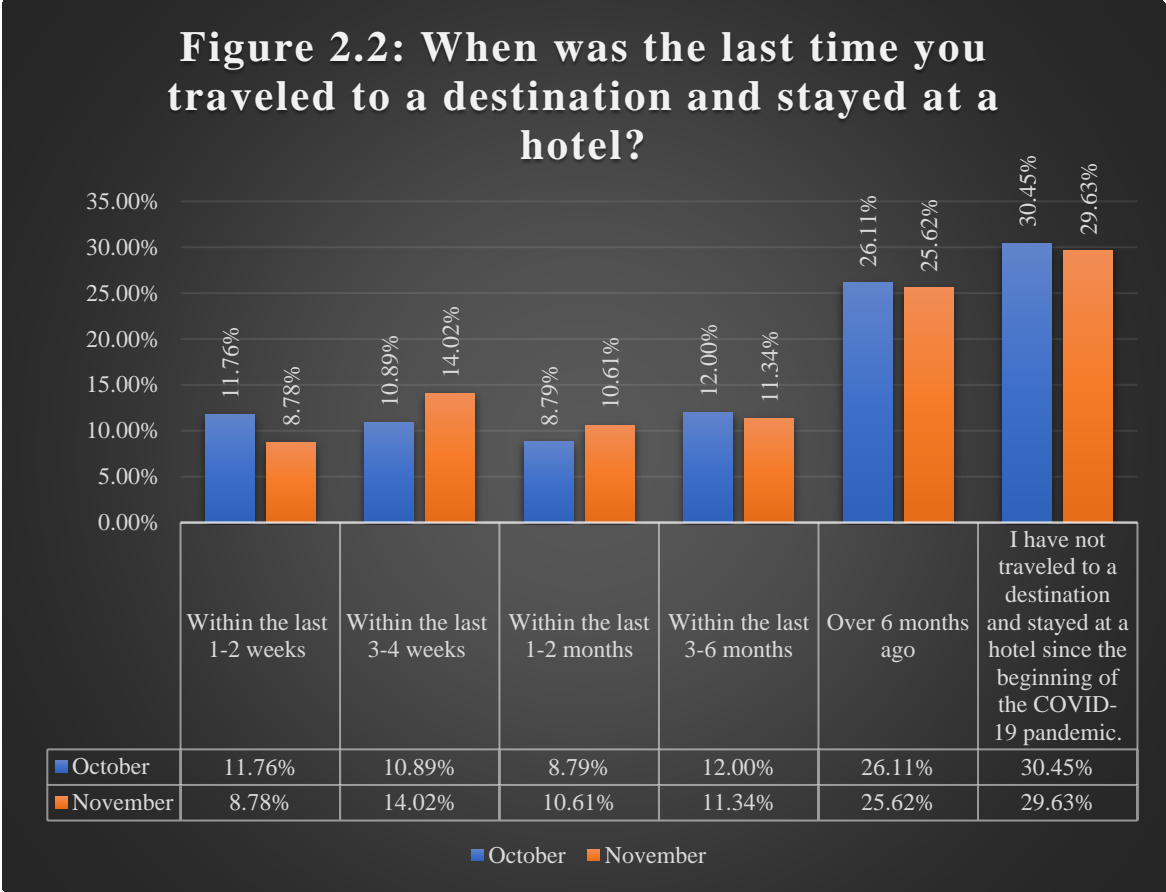
As presented in Figure 2.1, a large portion of customers are not willing to travel to a destination and stay at a hotel any time soon. 52.20 percent indicated that even they are able to travel, it is very unlikely (35.00%) or unlikely (17.20%) for them to travel to a destination and stay at a hotel late this month or next month. 33.78 percent indicated that it is very likely (10.61%) or likely (23.17%) for them to travel to a destination and stay at a hotel late this month or next month.

Percentage of consumers who are willing to travel to a destination and stay at a hotel late this month or next month is 8.49 percent lower than customers’ likelihood of traveling and staying at a hotel reported last month



**2.2: When was the last time you traveled to a destination and stayed at a hotel?**

As presented in Figure 2.2, 33.41 percent of respondents traveled to a destination and stayed at a hotel within the last 2 months while only 11.34 percent indicated that they traveled to a destination and stayed at a hotel within the last 3-6 months. Around one third of the respondents (29.63%) indicated that they have not traveled to a destination and stayed at a hotel since the beginning of the COVID-19 pandemic.

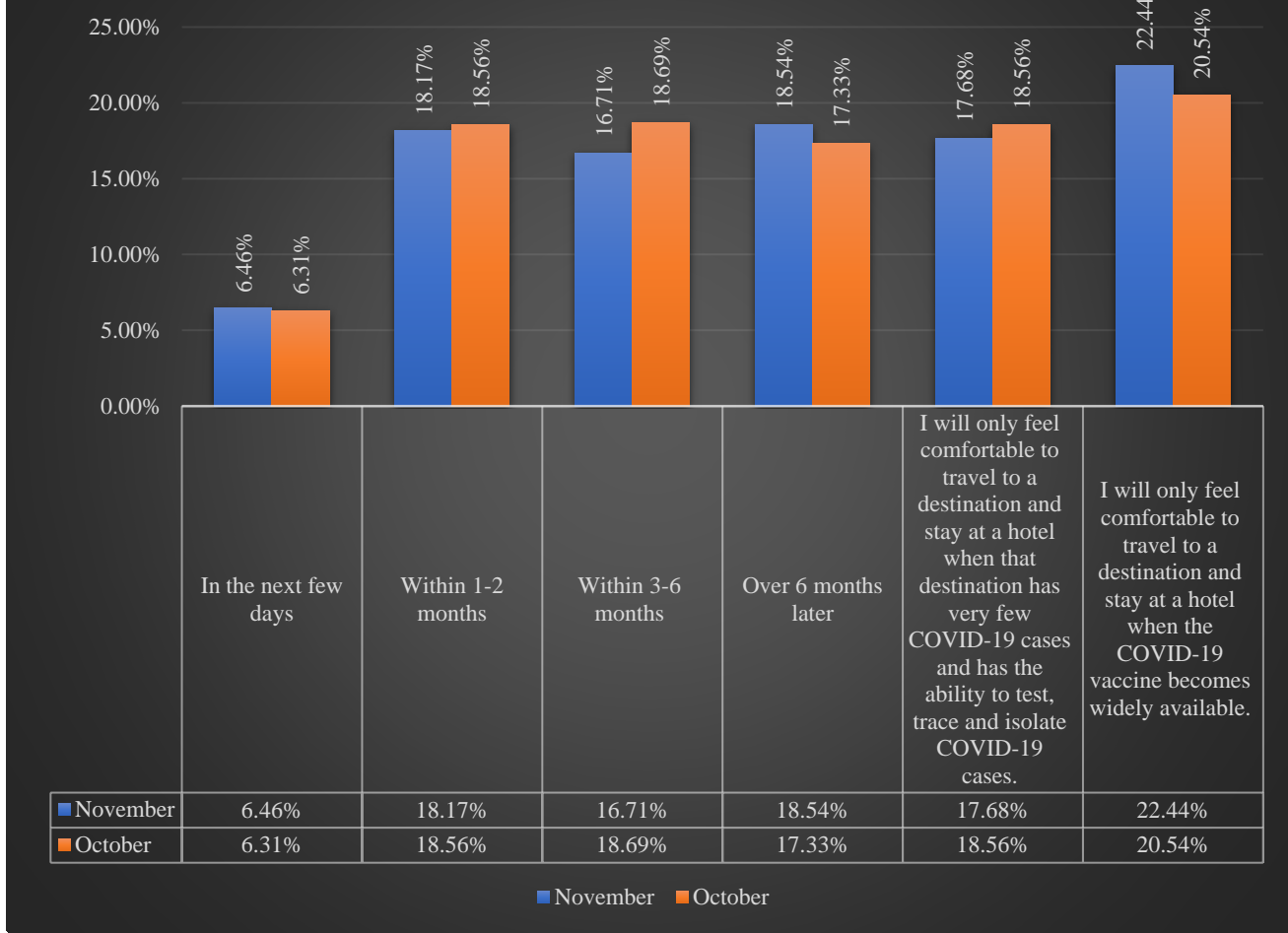


**2.3: When are you willing to travel to a destination and stay at a hotel?**

As presented in Figure 2.3, most customers are not willing to jump right into long-haul traveling and stay at a hotel. Only 6.46 percent indicated that they would do so immediately.

A large portion of customers would delay traveling to a destination and staying at a hotel until they feel more comfortable. 18.17 percent said that they would wait for around 1-2 months and 33.34 percent indicated that they would wait even longer (> 3 months).

**Figure 2.3: When are you willing to travel to a destination and stay at a hotel?**



Around 18 percent (17.68%) indicated that they will only feel comfortable to travel to a destination and stay at a hotel when the destination’s ability to test, trace and isolate COVID-19 cases is significantly improved, which is decreased by 4.74 percent compared to the last month.

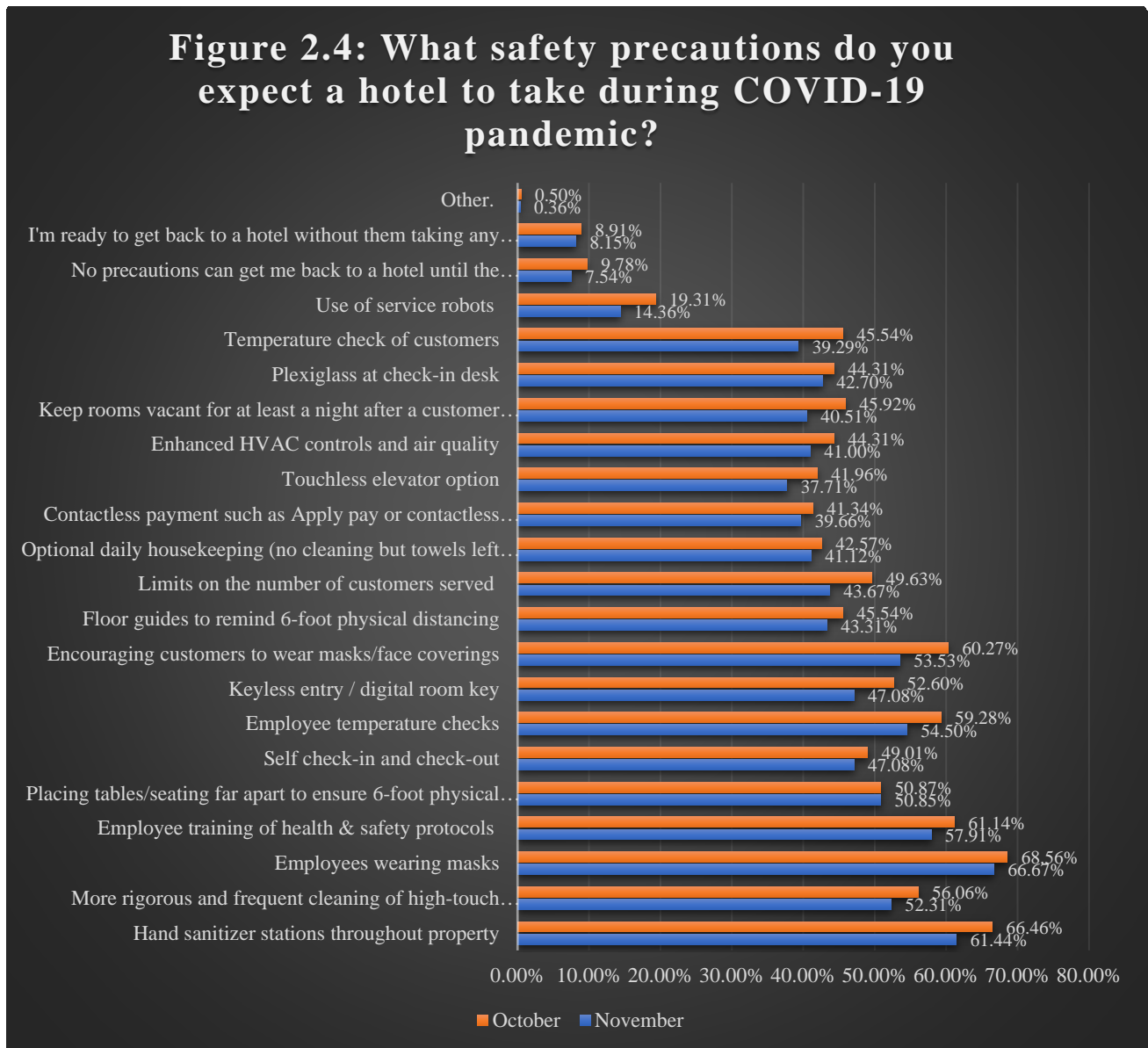
Around 22 percent (22.44%) indicated that they will only feel comfortable to travel to a destination and stay at a hotel when the COVID-19 vaccine becomes available, which is increased by 9.25 percent compared to the last month.

Consumers who responded to the survey this month indicated a significantly lower likelihood to travel to a destination within 2 months compared to the last month



## 2.4: What safety precautions do you expect a hotel to take during COVID-19 pandemic?

Customers were asked to indicate all safety precautions they expect a hotel to take during COVID-19 pandemic. Around 91 percent of customers indicated that they expect hotels to take some safety precautions. As presented in Figure 2.4, only a small percentage (8.91%) stated that they were ready to get back to staying at hotels without them taking any additional safety precautions.



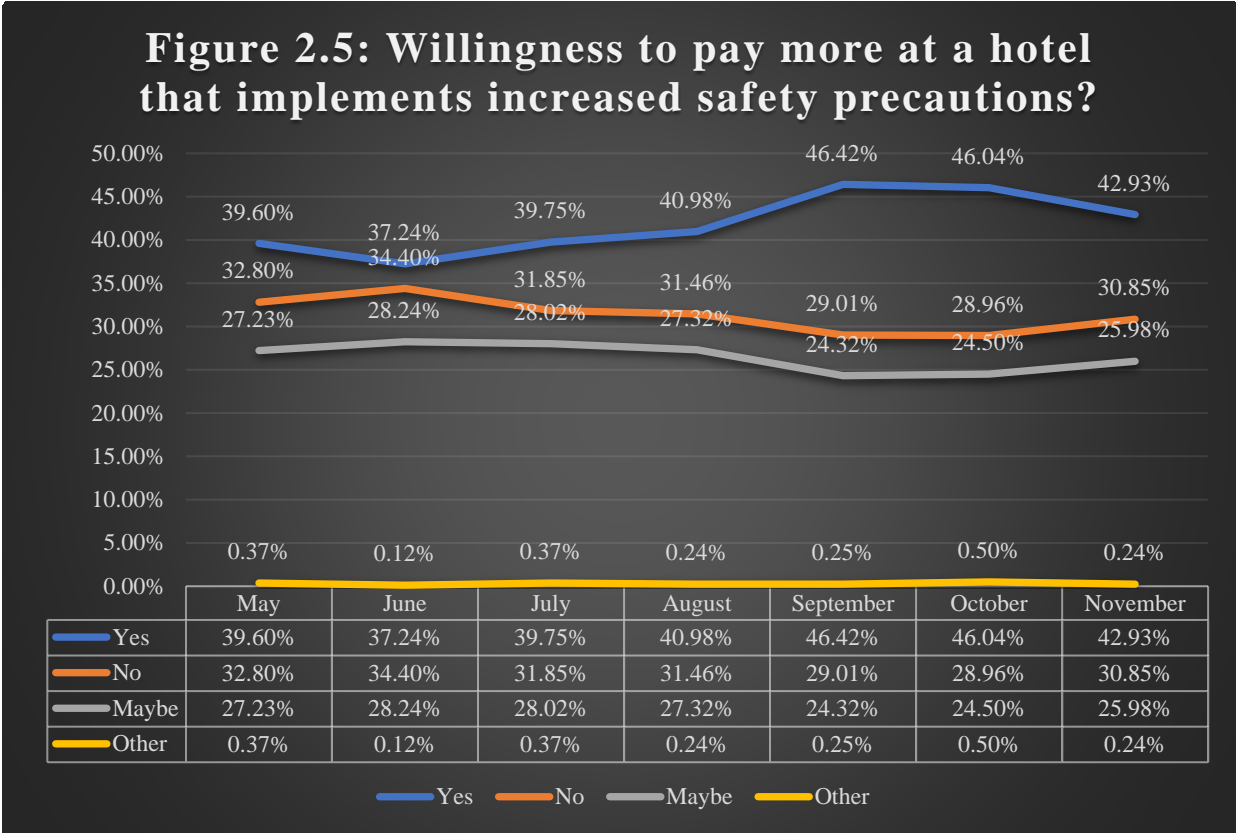
**Note:** Respondents were asked to indicate all of the safety precautions they expect a hotel to take during COVID-19.

Visible sanitizing efforts (such as hand sanitizer stations throughout the property, more rigorous and frequent cleaning of high-touch surfaces in common areas), employees wearing masks, encouraging employees to wear masks, employee temperature check, and employee training of health & safety protocols are the most important safety precautions they expect from a hotel.

As presented in Figure 2.4, physical distancing efforts are highly valued. Masks wearing for both employees and customers are also highly expected. Various technology solutions that minimize human contact are highly desired, such as self check-in/check-out and keyless entry. It is also interesting to see that while customers expect employees to undergo temperature check, they expect less for themselves to do so.

**2.5: Willingness to pay more at a hotel that implements increased safety precautions**

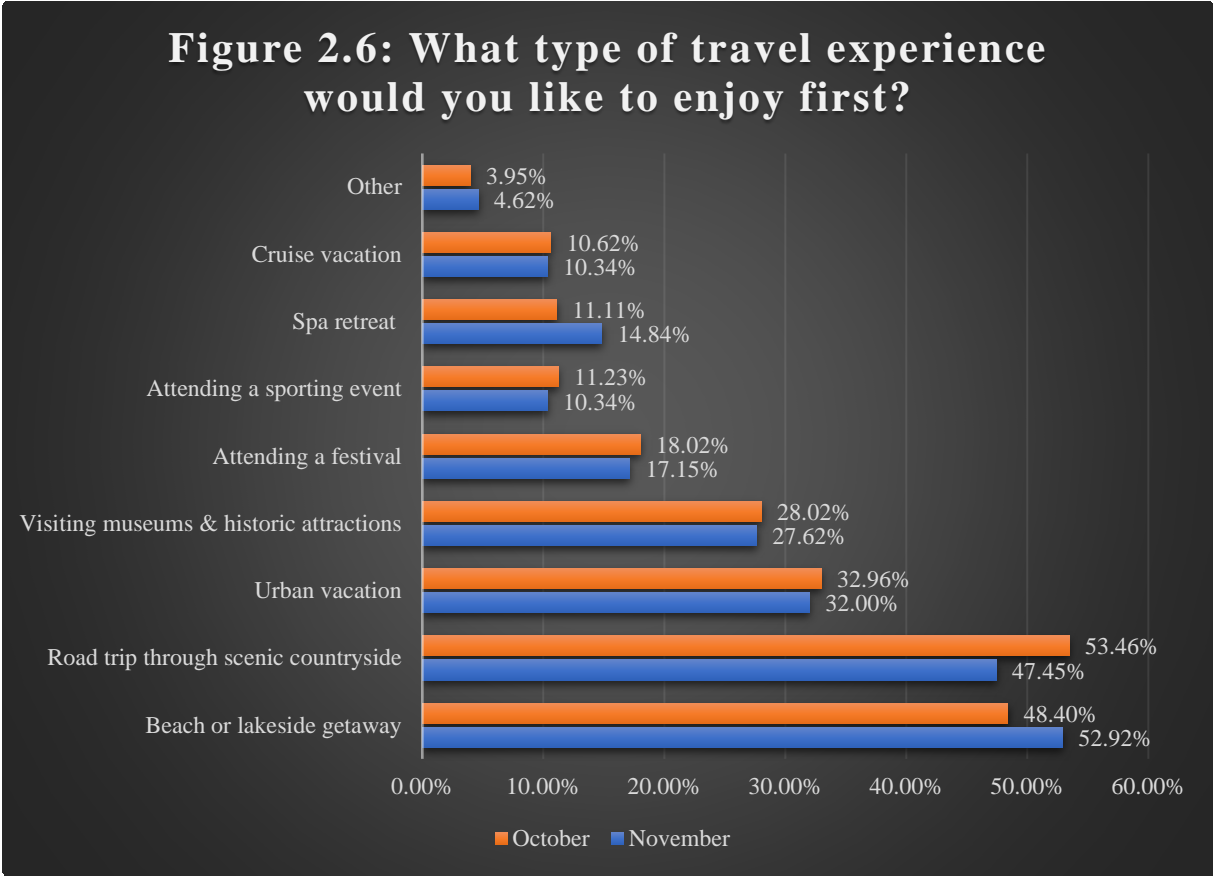
Consumers were asked to indicate if they are willing to pay more at hotels that that implement increased safety precautions. As presented in Figure 2.5, about 43 percent (42.93%) indicated that they are willing to pay more while 30.85 percent expects hotels to implement increased safety precautions without additional cost to customers.



The percentage of customers who are willing to pay more at hotels that implement increased safety precautions is decreased significantly while the percentage of customers who are not willing to pay more at hotels that implement increased safety precautions is increased compared to those who responded the survey previous month.

**2.6: When you feel comfortable to travel, what type of travel experience would you like to enjoy first?**

Consumers were asked to indicate the top two travel experiences they would like to enjoy first once they feel comfortable to travel. As presented in Figure 2.6, beach or lakeside getaways (52.92%) was the first travel experience consumers would like to enjoy, followed by road trips through scenic countryside (47.45%), urban vacations (32.00%), and visiting museums and historical sites (27.62%). Attending a festival (17.15%), spa retreat (14.84), attending a sporting event (10.34%), and cruise vacation (10.34) were the least desired experiences.

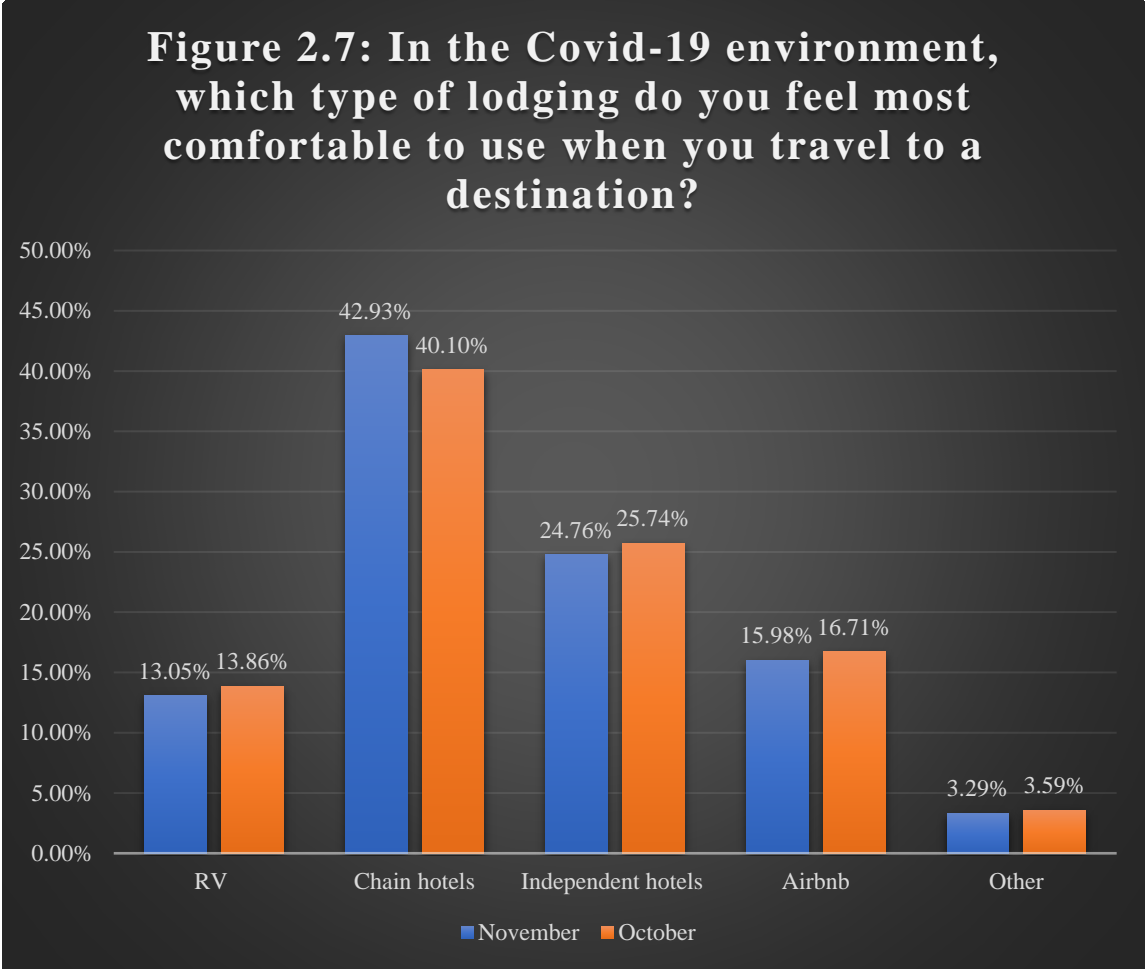


**Note:** Respondents were asked to indicate the top two travel experiences they would like to enjoy first once the shutdown is over.

**2.7: In the Covid-19 environment, which type of lodging do you feel most comfortable to use when you travel to a destination?**

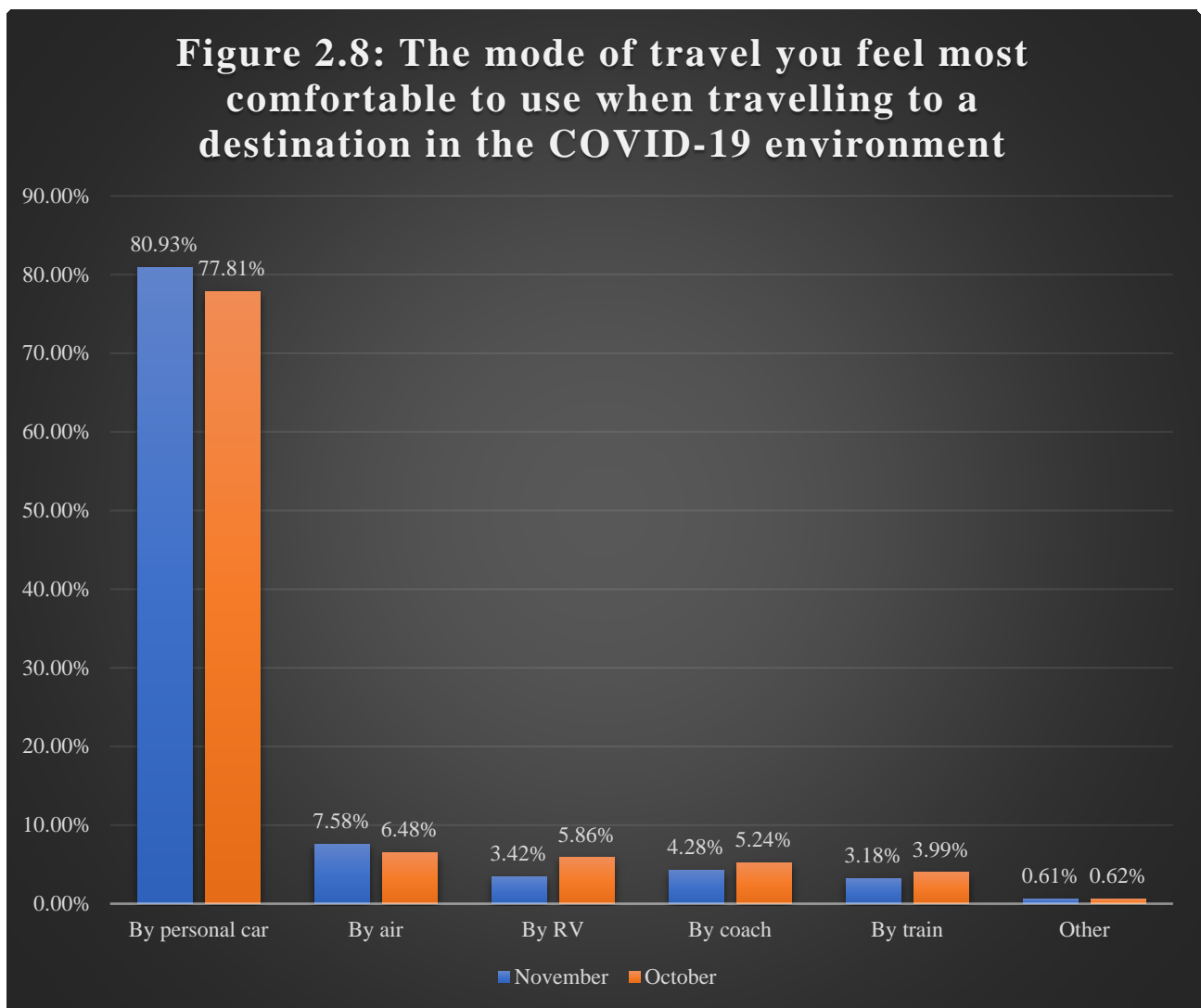
Respondents were asked to indicate the type of lodging they would consider staying at during the COVID-19 pandemic. Traditional hotel industry is found to be clearly winning here. Chain hotels (42.93%) are the most preferred type of lodging when they travel to a destination, followed by independent hotels (24.76%), staying at an Airbnb (15.98%) and RVs (13.05%).

While consumers’ preference for chain hotels increased significantly, preference for independent hotels and Airbnb decreased, and the demand for RVs stayed almost the same compared to those who responded the survey previous month.



## 2.8: The mode of travel you feel most comfortable to use when you travel to a destination during the COVID-19 pandemic

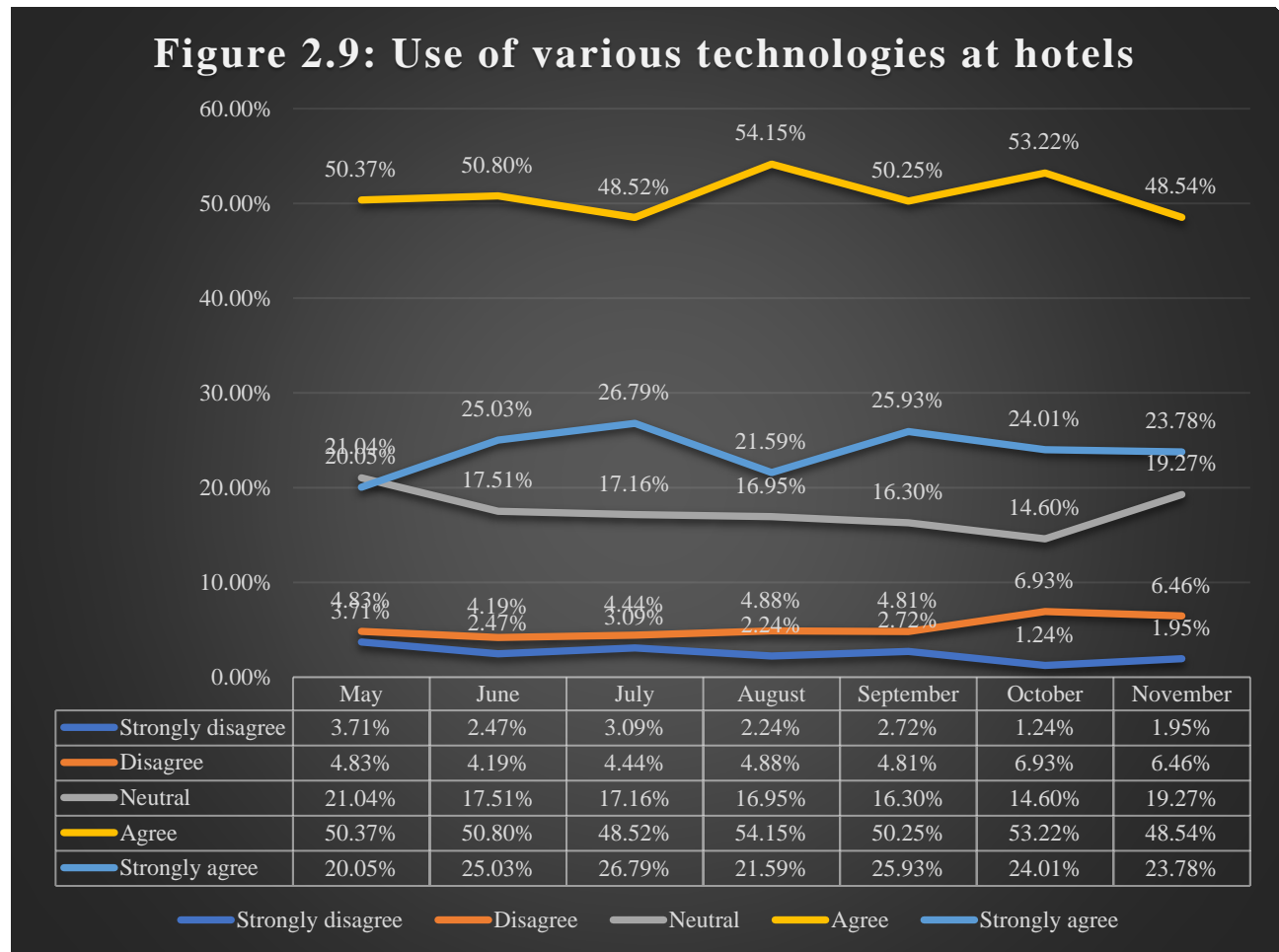
Respondents were asked to indicate the mode of travel they feel most comfortable to use when traveling to a destination during the COVID-19 pandemic. As presented in Figure 2.8, traveling by personal car (80.93%) is the most preferred mode of transportation followed by air travel (7.58%). Demand for air travel is increased by 16.98 percent compared to the previous month. Around 3 percent (3.42%) of the respondents indicated a preference for recreational vehicles (RV), 4.28 percent indicated a preference for coach and 3.18 percent for train.



## 2.9: Use of various technologies at hotels during the COVID-19 pandemic

Respondents were asked to indicate their agreement/disagreement with the use of various technologies at hotels during the COVID-19 pandemic in order to minimize human-to-human contact. (Examples: service robots, contactless payment, keyless entry, touchless elevators, etc.). As presented in Figure 2.9, a large portion of respondents agreed (48.54%) or strongly agreed (23.78%) with the statement.

The percentage of customers who agreed/strongly agreed with the statement that the use of various technologies in service delivery at hotels will be necessary in the COVID-19 environment in order to minimize human-to-human contact decreased compared to those who responded the survey previous month.



### Part 3: Respondents' Socio-Demographic Profile

Respondents' demographic profile is presented below.

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<b>Are you in a high-risk category as defined by the CDC?</b>	
I am not in a high-risk category	72.93%
Yes, I am 65 years or older	3.66%
Yes, I live in an Assisted Living Facility	4.51%
Yes, I am immune compromised	6.71%
Yes, I have an underlying health condition (such as: heart disease, lung disease or severe asthma, diabetes, obesity, kidney disease, liver disease)	12.20%

#### **Gender**

Male	43.46%
Female	55.93%
Other	0.61%

#### **Age**

18-25	9.51%
26-34	34.63%
35-54	44.27%
55-64	8.41%
65 or over	3.17%

#### **Marital Status**

Single	30.12%
Married	56.22%
Divorced	4.88%
Widowed	1.10%
Live together	7.68%

**Region of the USA respondents reside**

Central Region	19.15%
Northeast Region	25.61%
Southern Region	36.46%
Western Region	18.78%