

A Seat at the Table: A Survey on Dining Out in a COVID-19 World

The COVID 19 pandemic—along with related economic, political, and personal struggles—continues to teach the whole world all at once an extended, real-time lesson in not knowing what’s going to happen next. In mid-May, the members of the Bowline group wanted to push back against one small part of this unsettling state of not knowing. The Danish government was about to allow restaurants to open up again, but the rules about how that should take place were in flux. On top of that, nobody knew how restaurant-goers would react, how they would expect restaurant staff to behave, or whether they would even show up. We put together the “A Seat at the Table” survey on the fly to try to answer some of these kinds of questions.

We did not expect to receive an overwhelming 4500 responses in under three days (the responses continue to pour in, but at a slower rate). As quickly as we could, we posted access to our raw data, along with some preliminary conclusions. But we wanted to provide the many people who graciously responded to our survey with a more complete analysis of the large amounts of data they provided.

Two researchers from the Copenhagen Business School have stepped in to help. Daniel Hardt is a computational linguist who studies how language works on the internet, and Jan Bauer is an economist who studies sustainable consumer behavior and food choices. They have pored over our survey data, and they provide the following, more rigorous interpretation of our data. We are grateful for their work, and we hope you find it useful. Events have caught up with our survey to a certain extent—restaurants in Denmark are back open. But many establishments are still struggling, the pandemic is far from over, and the crisis is unfolding on different timetables around the world. We hope that the following information will help us all to continue a conversation about how to get through this crisis, and to help revitalized the restaurant and hospitality industry, along with the communities of which it forms a vital part.

Thanks Daniel and Jan, and everyone who supported our survey!

Behind the numbers in the “A Seat at the Table” survey

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We were intrigued by the results of the Bowline survey and we found several really instructive things in the data. We felt that the most striking result is clearly the scale and speed of the

response itself—4500 people in just three days, and more still responding. You could say that this resulted from the relatively non-scientific way that Bowline circulated the survey on social media, but that is still a significant piece of data in itself, because it highlights the dedication and interconnected nature of the “foody” community in Denmark and around the world. The size of the response also indicates an intense amount of interest and concern about what is going to happen to restaurants and restaurant-going as a result of the pandemic.

With this in mind, we present below what we find most interesting about the responses to the Bowline survey. We begin with international differences in restaurant attendance, before focusing on the level of concern respondents expressed about returning to restaurants. Then we dive into some of the specific concerns respondents expressed about what to expect regarding things like staff behavior and table spacing. We will also raise several important caveats that anyone should keep in mind when drawing any conclusions from an online survey of this sort. Still, we suggest several intriguing observations coming out of the Bowline survey that we think can inform how events unfold from this point forward as more and more people return to the public sphere.

Frequency of Restaurant Attendance

The survey started out by asking respondents to specify how often they attended gourmet restaurants, ordinary restaurants, and bars/cafes in the six months before the crisis began.

For the purpose of explaining the results, we divide respondents into three groupings: residents of Denmark (DK), residents of other European countries including the UK (EU+UK), and residents of the United States (US).

As shown in Figure 1, Americans reported attending most types of establishments at higher rates than either Danes or Europeans.

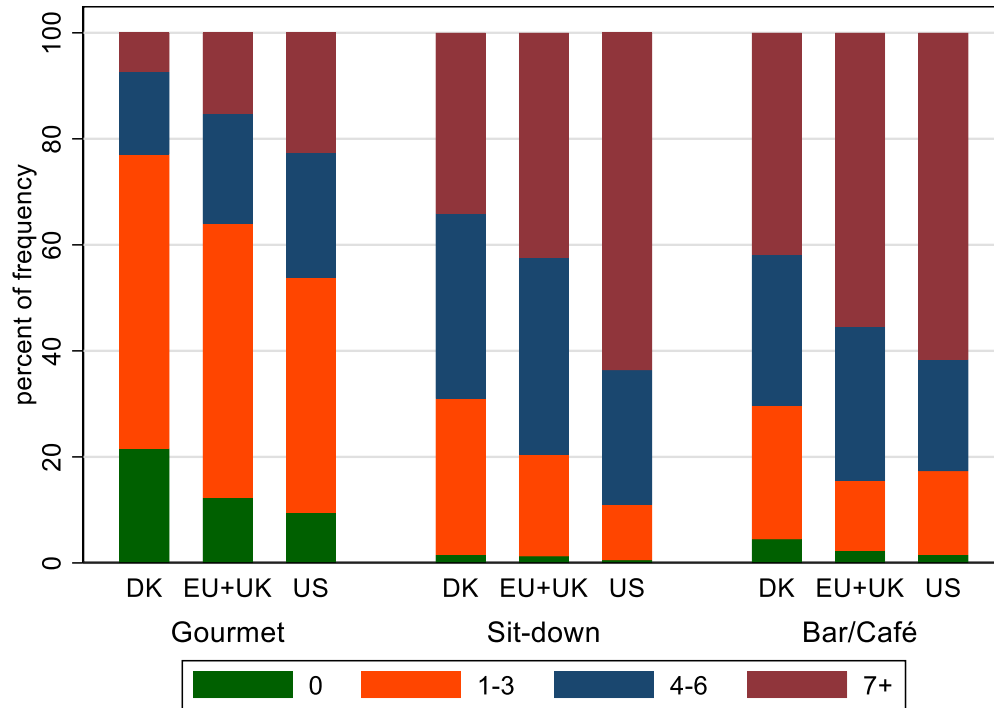


Figure 1: Restaurant Attendance

The next question on the survey got into more detail about specific concerns:

When you think about dining out again, how much do you worry specifically about the following?

The question addressed the following specific concerns: catching COVID-19, passing it to others, contact with restaurant staff, contact with surfaces, contact with other guests, other guests' contact with me. Here we focus on two of these concerns: catching COVID-19, and passing it to others. In Figure 2 we show the proportion of respondents who answered with 4 (I worry a lot) or 5 (I'm really worried).

Again, we observe a relatively low level of concern among Danes, with a higher level in other European countries and particularly in the U.S. In part, we suspect this reflects a generally higher level of confidence in public institutions in Denmark. We also observe a difference among the national groups when it comes to the relative concerns within one country: for Danes, the concern for *catching* COVID-19 is notably lower than the concern for *passing it to others*; for Americans, the reverse is true -- the concern for *catching* COVID-19 is higher than the concern for *passing it to others*. For other Europeans the two concerns are nearly the same. It is tempting to conclude that Danish concerns about COVID are less *self-oriented* than those of other nationalities. This might also be tied to demographic differences, for example, if Danish restaurant-goers tend to be younger than those in other countries. Unfortunately, the survey doesn't include such demographic information.

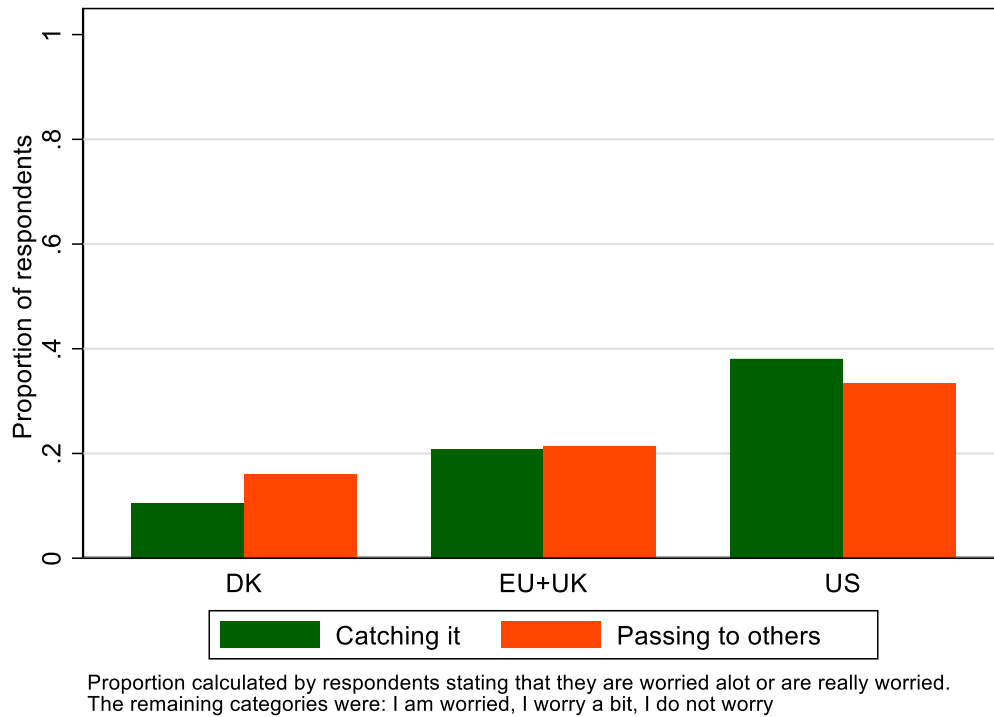


Figure 2: Self vs. Others

Concern Expressed About Restaurants and Other Environments

One of the interesting questions in the survey for us was this one:

How much do you worry about the spread of COVID-19 in the following environments?

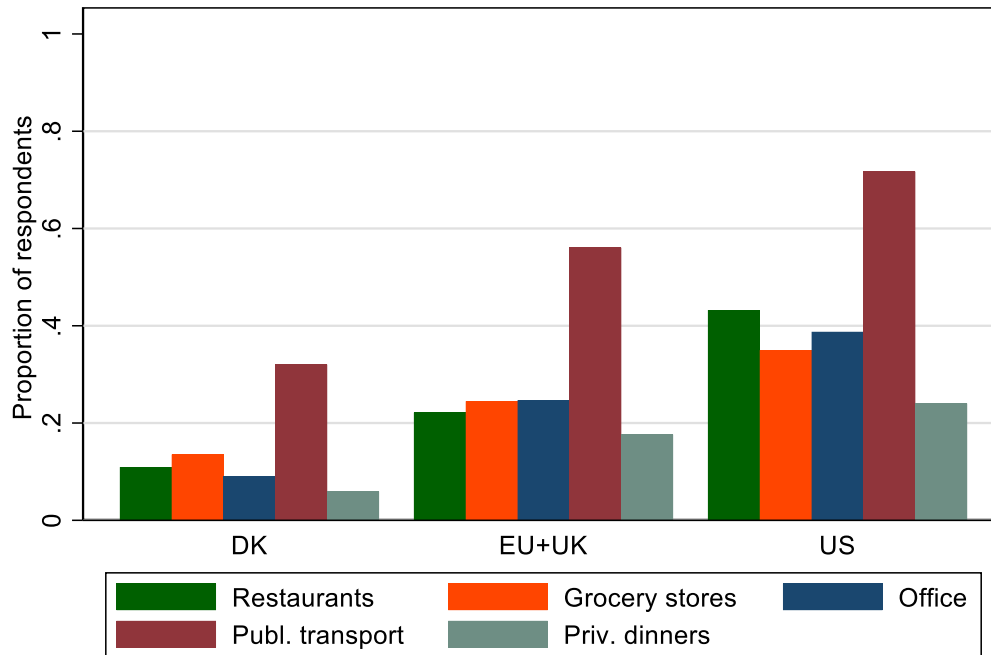
There were five possible answers:

1. I do not worry
2. I worry a bit
3. I worry
4. I worry a lot
5. I'm really worried

The environments the survey asked about included restaurants, grocery stores, offices, public transport and private dinner parties. In Figure 3 we show the proportion of respondents who answered with 4 (I worry a lot) or 5 (I'm really worried).

The first thing that jumps out is very interesting—it's clear that the general level of concern expressed by Danes is far lower than residents of the other countries. Americans in our survey express very high levels of concern, often at twice the level observed among Danes. All three

residency groups expressed the highest level of concern about public transportation, although again the Danes were the least concerned about that overall. Concern about restaurants was relatively low among all three residency groups.



Proportion calculated by respondents stating that they are worried alot or are really worried. The remaining categories were: I am worried, I worry a bit, I do not worry

Figure 3: Restaurants vs. Other Environments

Expectations about behavior in restaurants among Danes

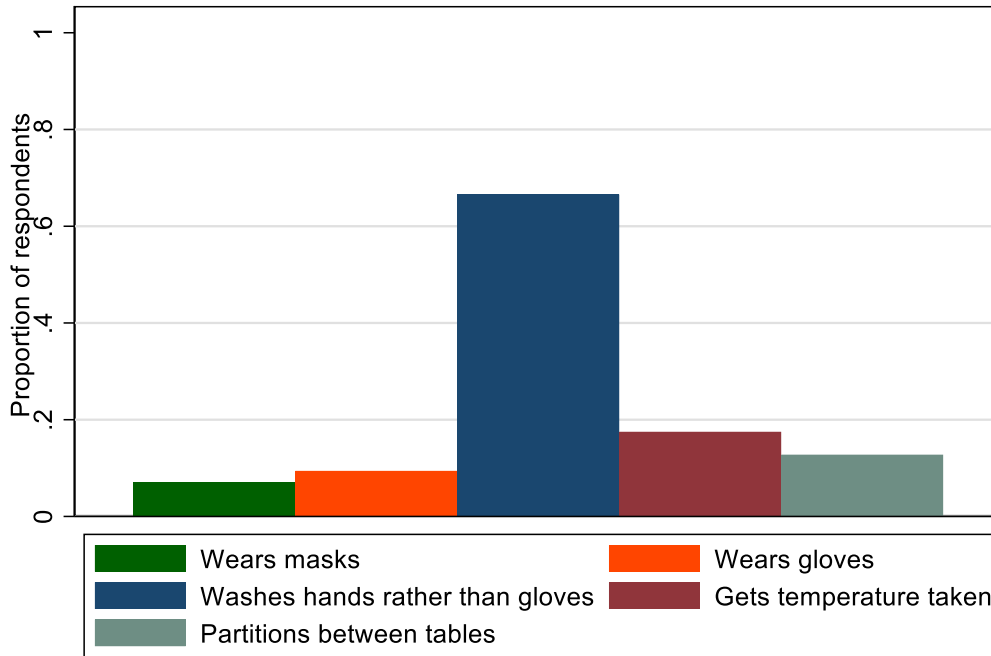
We turn now to expectations concerning staff precautions in restaurants. Here we focus on responses of Danish residents to the following question:

Which of the following extra precautions FOR STAFF will you consider important when dining out?

The survey asked about the following: Wearing face mask or covering, Wearing gloves, Staff washing their hands often instead of wearing gloves, Taking staff's temperature prior to work, Partitions between tables.

As shown in Figure 4, most respondents consider proper hand hygiene the most important, and restaurant visitors clearly prefer that staff washes hands often, rather than wearing gloves. This indicates that the Danish respondents had done their homework—because this is in fact what infectious disease experts recommend. For people who visit sit-in restaurants and bars more frequently, this aspect was more important than for infrequent visitors of these locations. Other

measures, such as wearing face masks by staff, partitions between tables are considered less important. Particularly frequent visitors of gourmet restaurants find those aspects less important when compared to those who never or rarely visit such places.



Proportion calculated by respondents stating that those measures are very or extremely important. The remaining categories were: important, somewhat important, not important at all.

Figure 4: Restaurant Expectations -- Danish Residents

The survey also asked restaurant guests what precautions *they* were prepared to take:

Which of the following requirements would you AS A GUEST accept when dining out?

The choices include: Use hand sanitizer, wear gloves, have temperature taken upon entry, and provide contact details. Again we focus on responses of Danish residents. Figure 5 shows the proportion of respondents that would not be willing to accept these measures. Virtually everybody was willing to use hand sanitizer (99%), but nearly half of the respondent would not be willing to wear gloves (46%) and little more than 12% said that they would not give their contact details. Frequent visitors of sit-in and gourmet restaurants were more willing to provide their details. For instance, among people who visited a gourmet restaurant more than 7 times in the last 6 months, the share of those reporting to be very or extremely willing to provide details was 48%, which was 9% higher than for those who have not visited a gourmet restaurant in the same period.

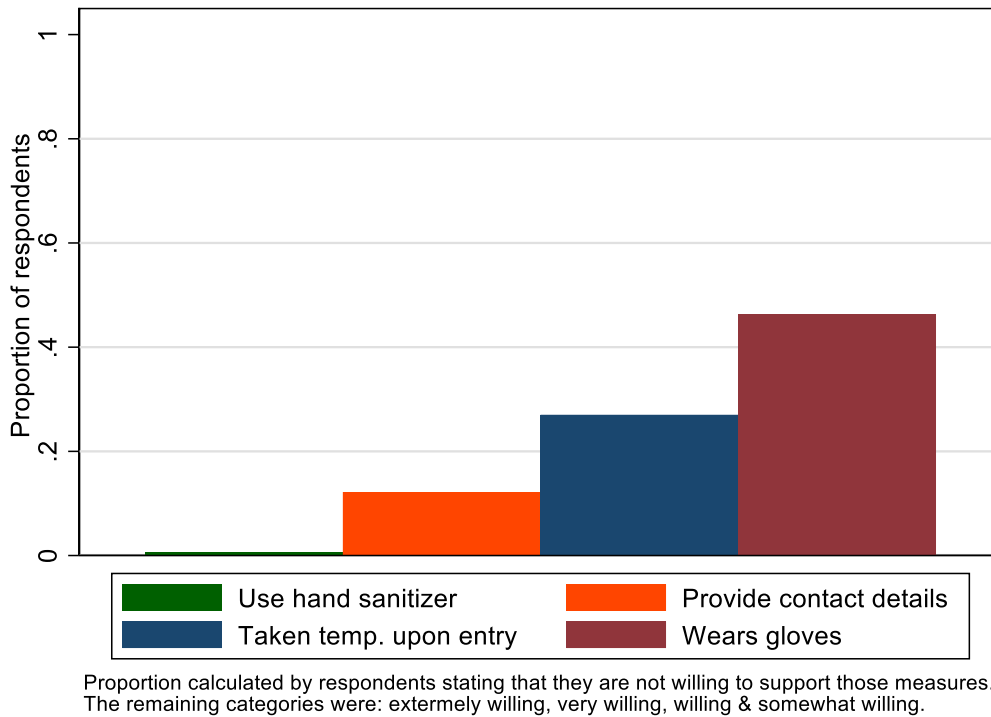


Figure 5: Restaurant Guest Unwillingness to take Precautions -- Danish Residents

Willing to Pay Extra

A related question about measures guests would take willingly, is this:

Would you be willing to pay extra when you dine out to help cover increased costs connected to keeping guests safe in the face of COVID-19?

The survey provided three options to choose from: No; Yes, a percentage of the bill; and Yes, a fixed fee per guest. We continue to focus on responses of Danish residents. As shown in Figure 6, about 20% of respondents answer No, with the remainder willing to pay extra, with the preference being for a fixed fee per guest. We note that particularly people frequently visiting gourmet restaurants were more likely to prefer a fixed fee over a percentage of the bill. Forty-four percent of people who not visited a gourmet restaurant in the last 6 months were willing to pay a fixed fee, support was higher for people visiting these places more than one a month (55%). Willingness for a percentage charge of the bill showed the opposite trend with frequent gourmet visitors showing the lowest willingness (24% vs. 32%). Presumably because a percentage of higher tabs would be significantly more expensive.

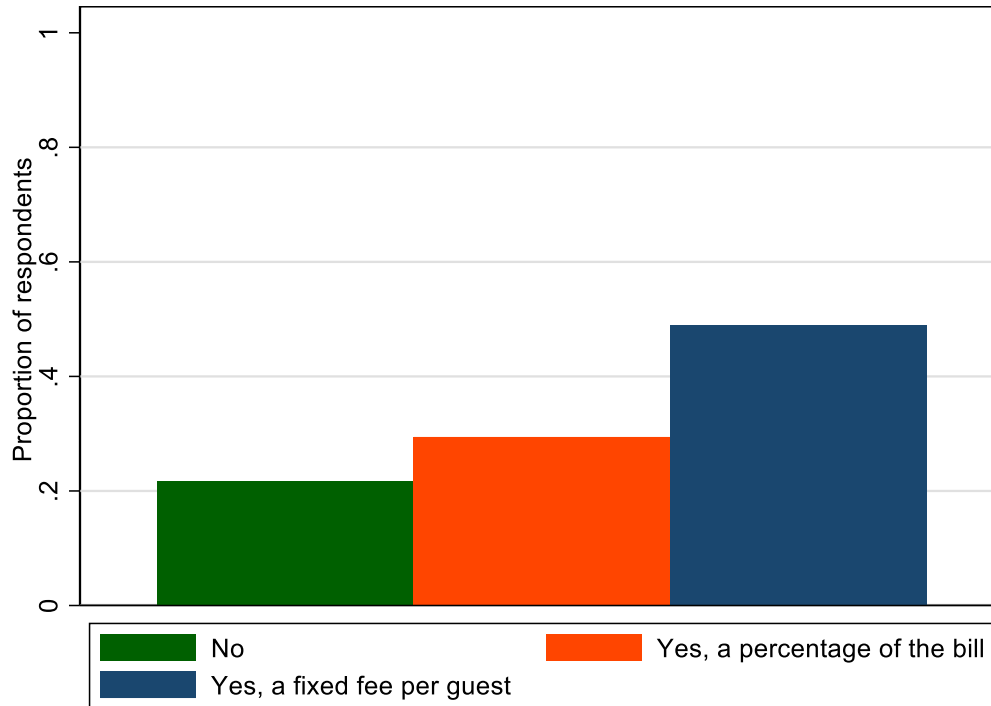


Figure 6: Willingness to Pay Extra-- Danish Residents

Some Closing Reflections

In general, we observe that Danish residents have a rather low level of concern about COVID-19; this extends beyond restaurants to other issues such as public transport, offices and private dinners. In the survey, Americans and other Europeans have notably higher levels of concern. Another general observation is that Danes are less self-oriented in their concern; i.e., compared to other Europeans and Americans, Danes focus more of their concern on the danger of passing COVID-19 to others, and less on the danger to themselves.

These observations would suggest that restaurants in Denmark would be able to successfully attract customers as they re-open, and in fact, in the weeks since the survey was performed, we have seen this to be the case. As restaurants begin to re-open elsewhere in Europe and in the U.S., one might expect, based on these results, that there would be greater concern and perhaps reluctance in those countries. On the other hand, we note that Americans in general had higher levels of restaurant attendance prior to the crisis, and in general, countries might differ in terms of the priority of restaurant attendance as a part of daily life. For example, a higher level of concern among Americans might not necessarily keep them away from restaurants, since restaurant attendance had been higher to begin with.

More generally, it is important to be cautious in drawing any conclusions about future behavior, in Denmark or elsewhere, based on the results reported in the Bowline survey. One reason for

this caution is the dynamic nature of the crisis: even if the survey presented a perfect snapshot of attitudes in early May, the situation has changed since then. For example, the situation in New York was far more dire in early May than it is as we write this, a month later—and it may be that many of the U.S. respondents were New Yorkers.

Unfortunately, the survey does not include that information -- we don't have specific residency information from respondents, in the US, which is a big place compared to little Denmark. In the rush to get the survey out quickly, Bowline didn't ask for demographic information about respondents, such as age, gender, or other variables which might exert influence over their response. We don't know, for example, if the Danish respondents perhaps skewed younger than respondents from other countries. Since younger people have comparatively less to worry from COVID health-wise, this might explain the fact that Danish respondents expressed more concern about the risk to others.

Because of the way the Bowline survey caught fire and spread on social media, for example via the Instagram accounts of some well-known chefs, our results likely reflect the attitudes of a specific group of people; rather than being a representative cross-section of the population, the respondents might well consist of individuals with a particularly high interest in food and restaurants. Maybe the survey says more about like-minded, glove-hating, gourmet foodies on Instagram than it does about the general population. But then again, this might be an appropriate subgroup of the overall population for the purposes of this survey, since the opinions of frequent restaurant-goers are probably more relevant to restaurants than the opinions of those who only go rarely.

The ideal, of course, would be to get more of these latter people dining out too, because we know that the restaurant sector contributes to a vital, local economy. At the end of the day, this is why the Bowline survey matters. Restaurants employ very large numbers of people, and they contribute to the pulse of the urban environment and to the health of the economy. But the COVID crisis may end up disrupting restaurants more than any other sector of the economy. This no doubt also explains the very high levels of rapid response to the Bowline survey.

The folks at Bowline paraphrased on their website something we said the first time we discussed the results of their survey with them—statistics can often function as the beginning of a conversation, not the final word. Especially since we don't know what's going to happen next, we need to keep asking questions, and we need to keep talking about the answers.
