



# Post Stay At Home Order Michigan Resident Survey

Summary of Findings April 29, 2020

Sponsored by:



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Post Stay At Home Order – Michigan Resident Survey

# INTRODUCTION

# Introduction

- Great Lakes Wine & Spirits (GLWAS) of Detroit commissioned Warrior Market Insight (WMI) of Dearborn on April 13, 2020 to conduct a survey of Michigan residents regarding their perceptions and expectations after the “Stay At Home” order is rescinded.
- A comprehensive online questionnaire was developed and tested among industry members; it was seeking to find answers to the following questions:
  - Overall demographics
  - Readiness to return to various activities
  - Reactions to continued mitigations
  - Readiness to return to restaurants
  - Expectations for restaurant preparedness
  - Willingness to pay more, reactions to potential tax deductions

# Underwritten By

- Great Lakes Wine & Spirits is a family-owned-and-operated Michigan-based business with over 1,000 employees with facilities throughout the state.
- Great Lakes Wine & Spirits serves all 83 Michigan counties and has developed into a multi-faceted industry leader in the alcoholic beverage wholesale business and provide goods and services to nearly 14,000 Michigan businesses.
- Warrior Market Insight is a Michigan-based business, led by native Michigan professionals, offering a range of B2B and B2C consumer and customer research and insight.
- For questions or further information, feel free to contact the following:

**Lew Cooper III**  
**Great Lakes Wine & Spirits**  
**(313) 453-2200**  
**LC3@GLWAS.com**

**Mark Barron**  
**Warrior Market Insight**  
**(248) 875-5503**  
**warriorinsight@gmail.com**



# Methodology

The survey was implemented online and fielded from April 20 to April 24<sup>th</sup>. There were three separate campaigns, soliciting participation from different sources. The intent here was to develop a comprehensive, representative sample of Michigan as a whole as well as having geographic and other demographic segmentations:

## Outside Consumer Panel

WMI worked with Qualtrics and its panel division, with a customer database in the tens of thousands of Michigan residents. Each respondent was targeted for their demographic type and geographic location. In total, there were 571 qualified, completed surveys.

## Social Media Campaign

WMI worked with the Facebook platform and set about a separate campaign, with a single post and share. The targets were Michigan residents and there were 475 surveys started. Each respondent was qualified by their geographic location as well as other criteria. In total, there were 308 qualified, completed surveys.

## Personal Circle of Contacts

WMI used a personal circle of contacts to test and socialize the survey, with a customer database of only 100 Michigan residents. This group was targeted for their demographic type and is used to bolster a certain segment for selected analysis. In total, there were 44 qualified, completed surveys.

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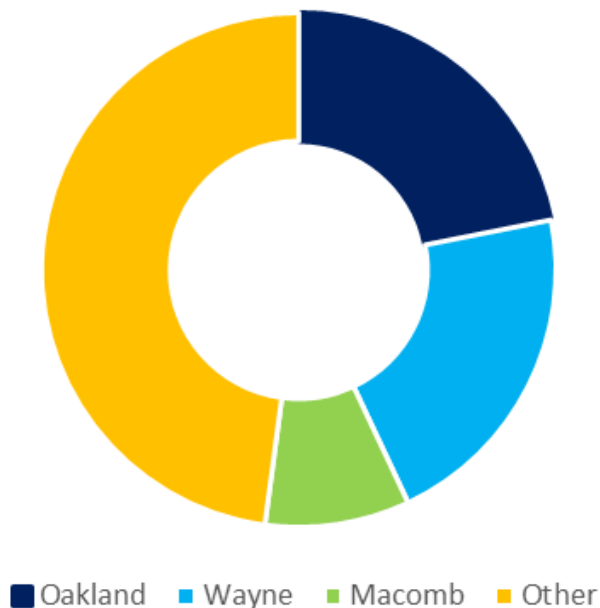
# SURVEY PROFILE



# Survey Profile - Location

Over 900 residents participating in the online survey from all points geographically in Michigan. There are 64 of 83 counties represented in the study, along with every MDHHS region:

Michigan counties represented

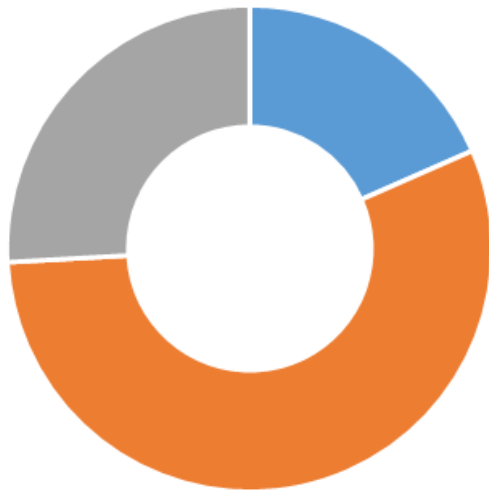




# Survey Profile – Age and Gender

Of the 923 residents participating in the online survey, only persons 21 or older were accepted to answer the questions. A wide range of ages is represented. Gender identity shows a slight majority for female respondents at 56.3%:

Age ranges represented



■ 21 to 30 years old ■ 31 to 60 years old ■ Over 61 years old

Gender identity

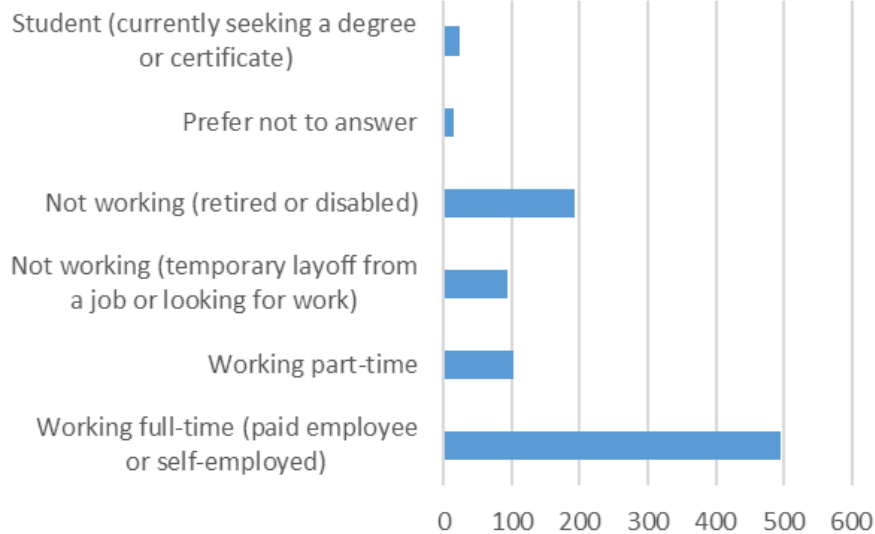


■ Male ■ Female

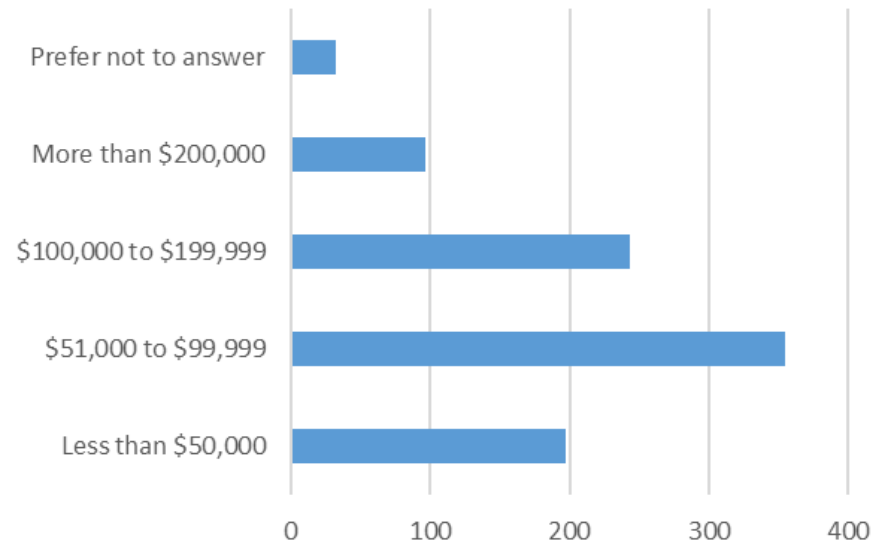
# Survey Profile – Employment and Income

The majority (54%) of the 923 residents participating in the online survey are employed full time in Michigan. There was no effort to capture the current employment effect in Michigan but 10% identified as laid off. Income levels are represented across the board and suggest a median higher than the median household income of \$55,000:

Employment status



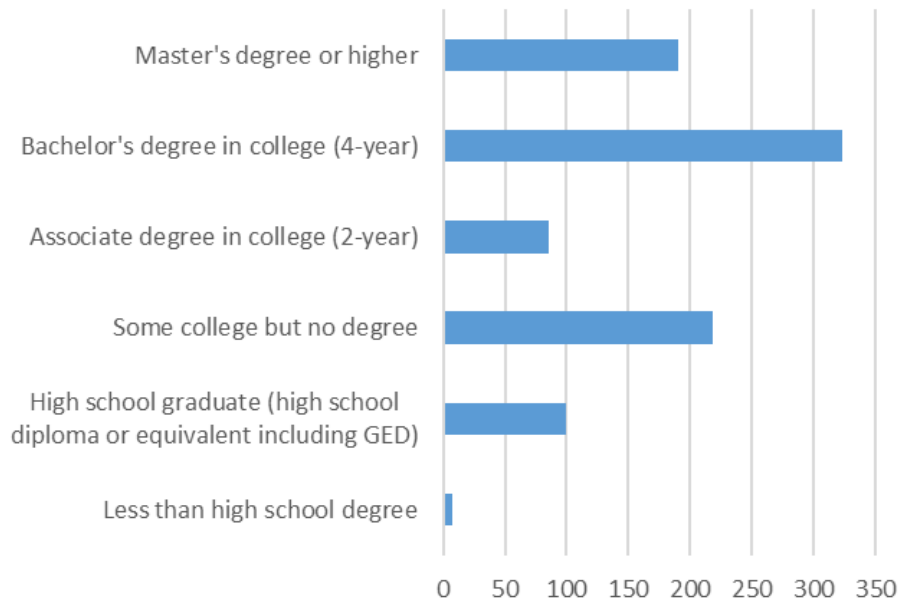
Household income



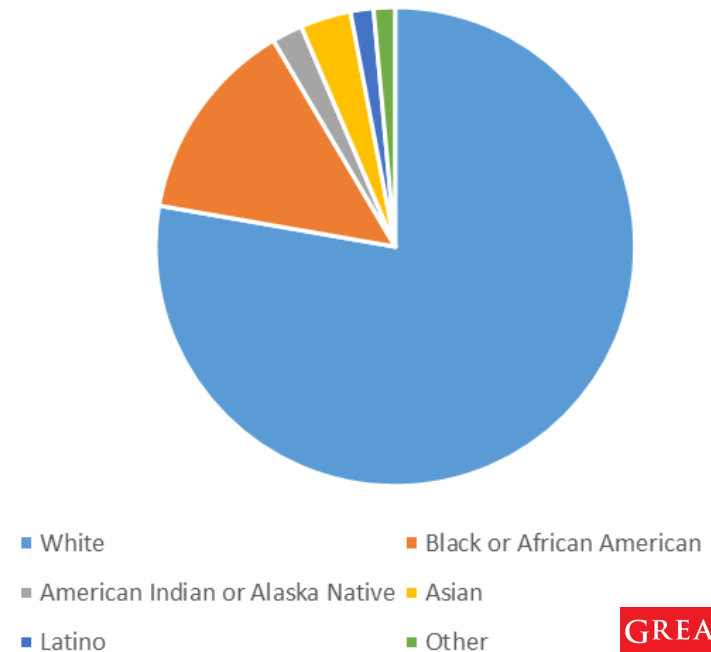
# Survey Profile – Race and Education

Every effort was made in the online survey to have a representative sample by race and education in Michigan. Caucasian and African American respondents represent 81% and 14.5%, respectively. Education levels are skewed to the high end, somewhat explained by qualifying only this 21 and older:

Education level



Racial identity

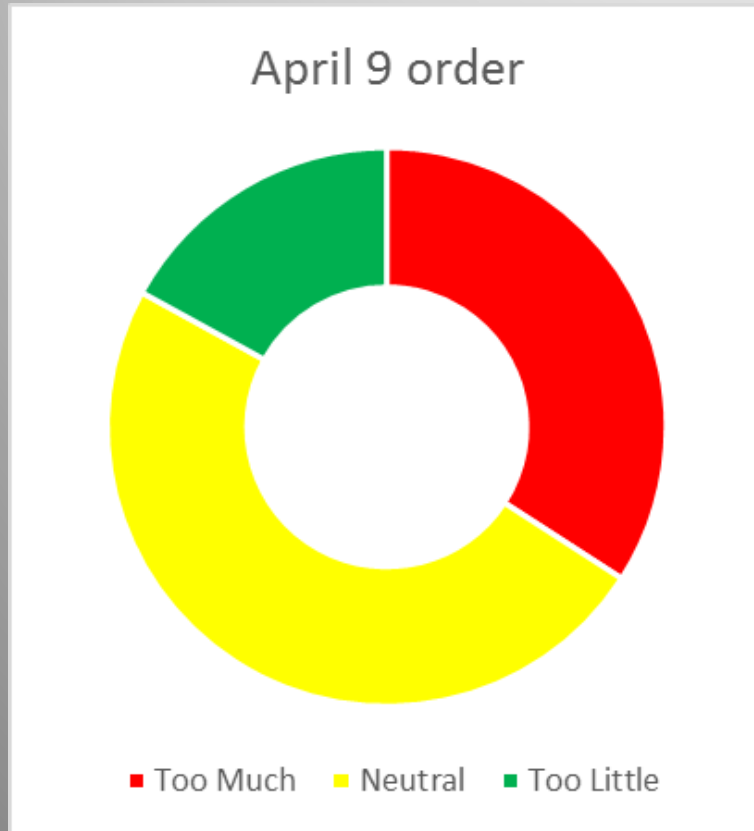


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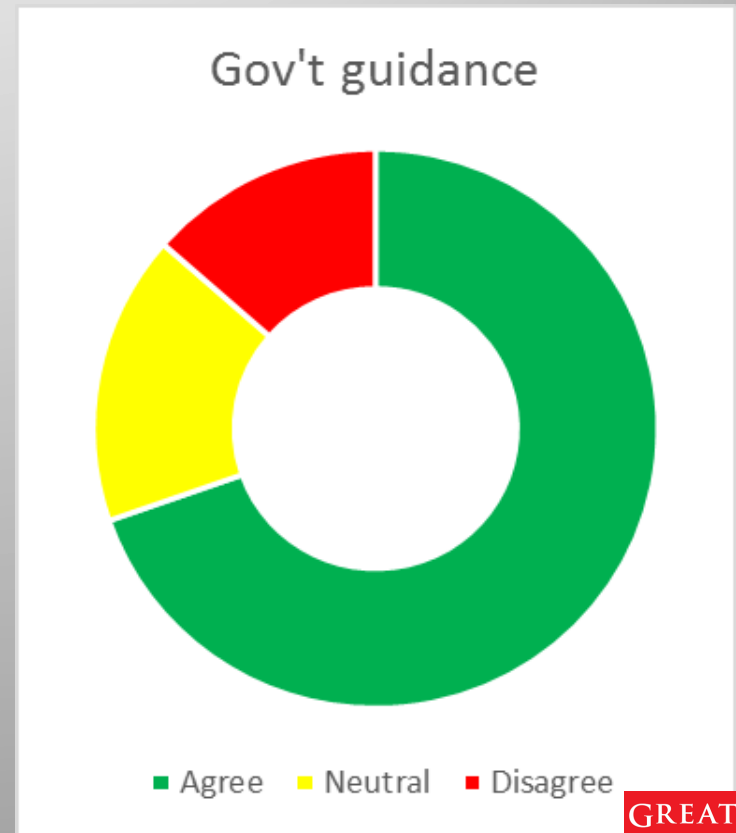
# CURRENT PERCEPTIONS

# Current perceptions

Q10. What do you think about the 'stay home, stay safe' order extended and expanded on April 9th?



Q15. Do you agree that the guidance from the Government have led you enough to act more responsibly?



# Current perceptions – reopen & odd/even days

Q53. Are you in agreement with the Government's overall thought for reopening the economy in phases?



Q14. If in order to promote social distancing you were asked to shop only on odd or even days based on your birth-date... how would you react to that order?



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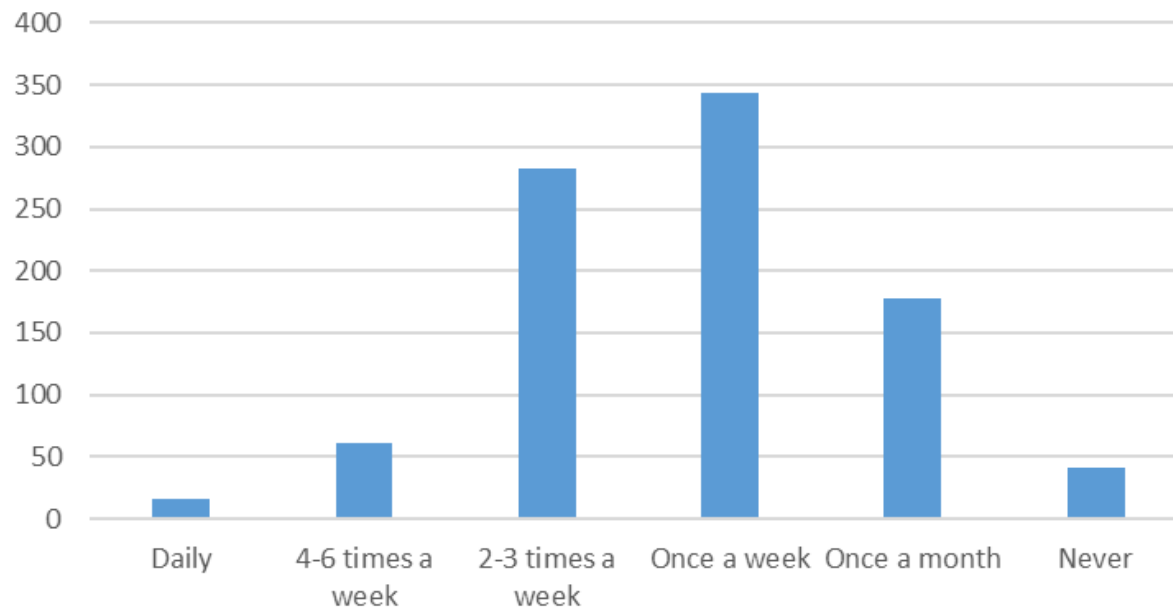
# READINESS TO RESUME ACTIVITIES



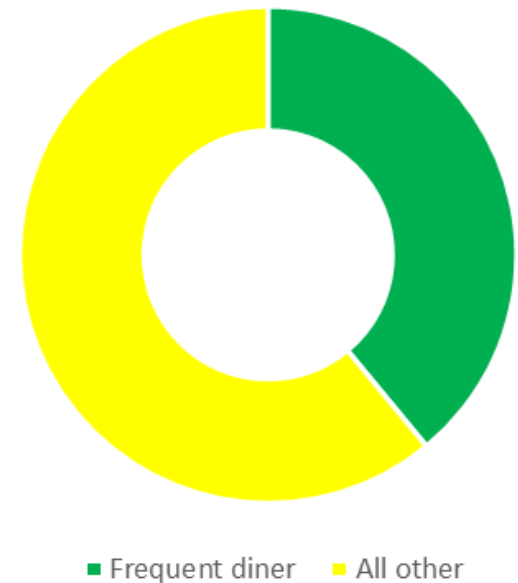
# Dinner at restaurants - Before

Q9. Before the 'stay at home' order was initiated back in March, how often did you go to a restaurant for dinner?

Number of times going to dinner at restaurant



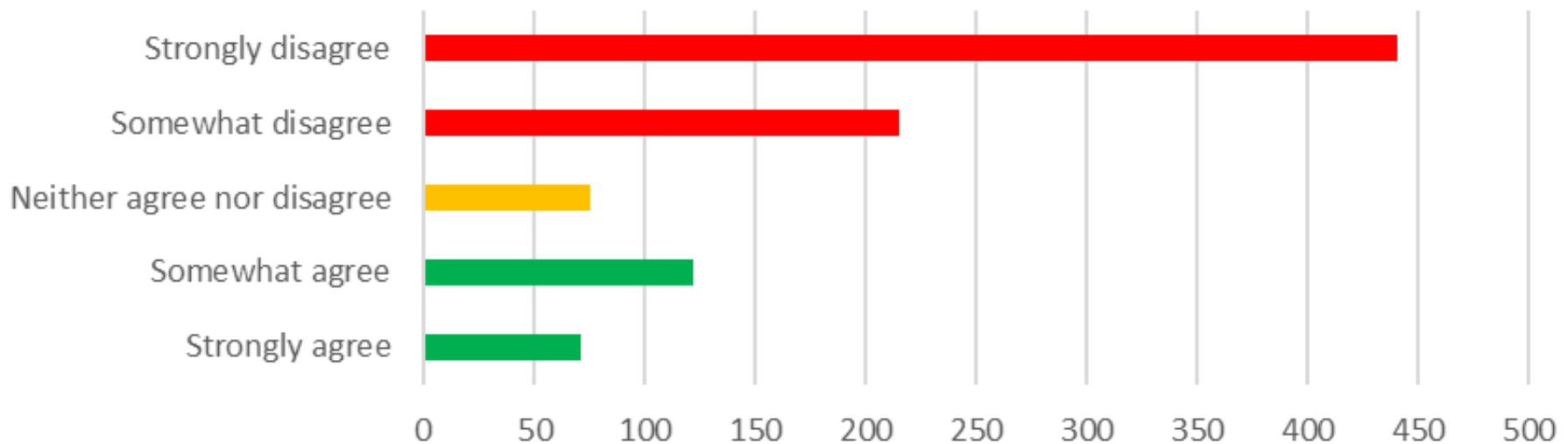
Frequent Diners



# Dinner at restaurants - After

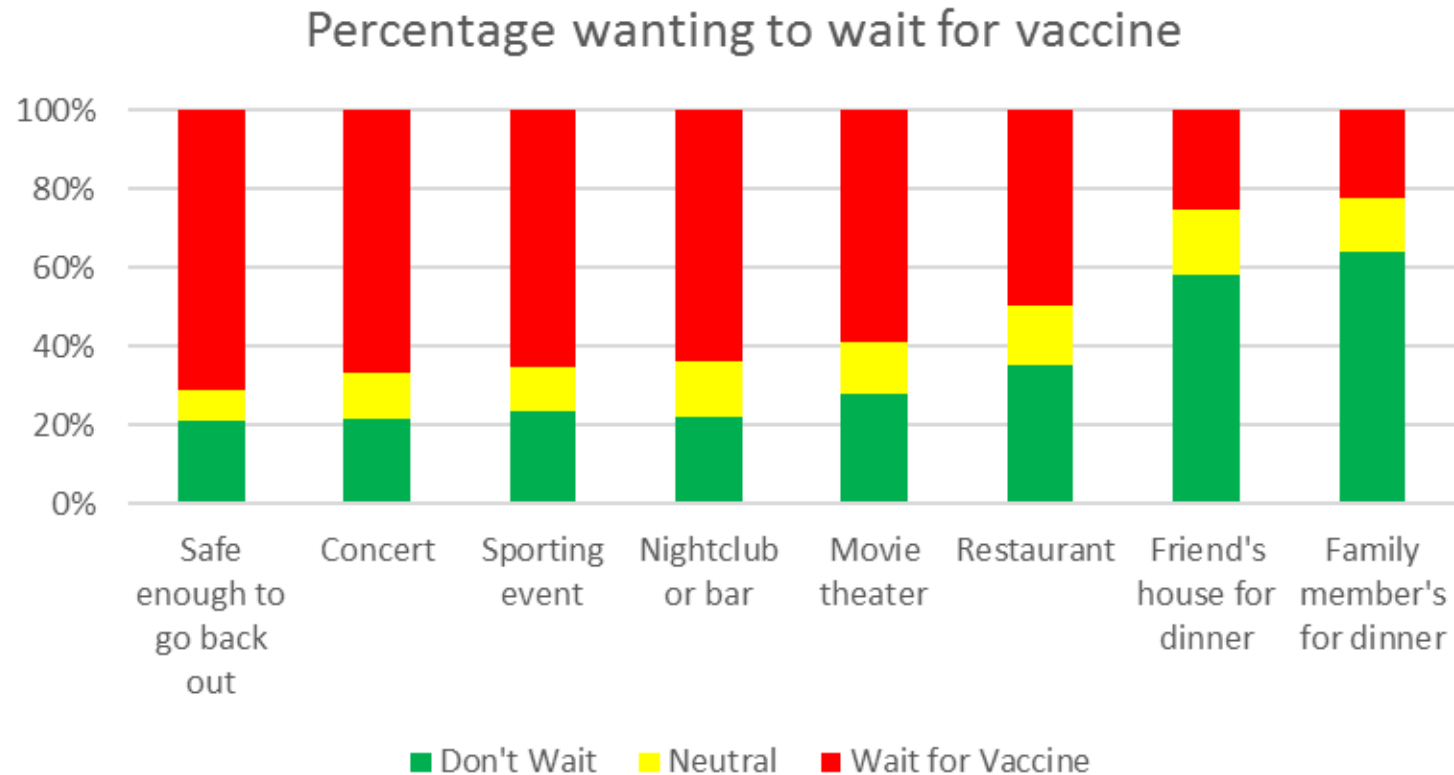
Q11. Do you agree with the following statement: I feel safe enough right now to go back out to a restaurant or bar?

I feel safe enough right now to go back out to a restaurant



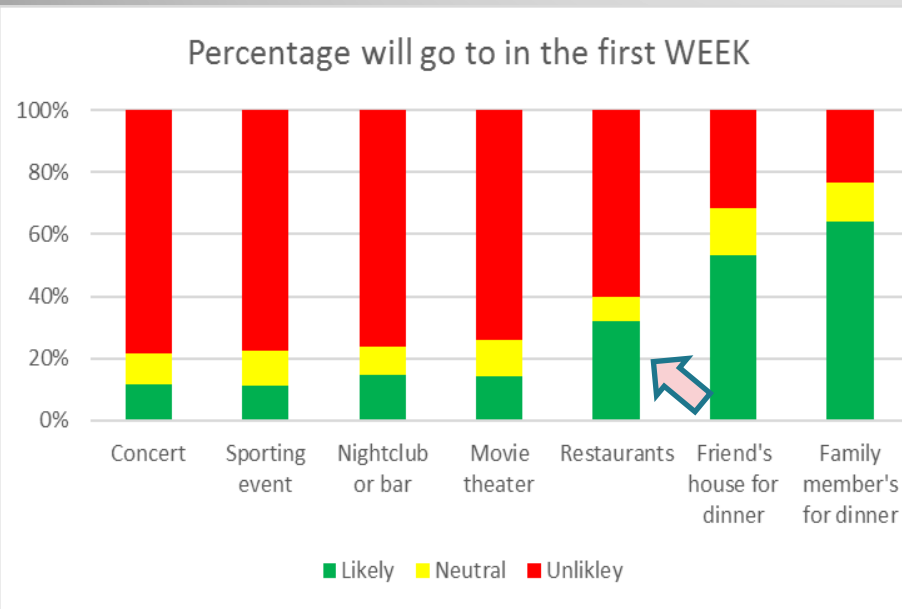
# Waiting for Testing

Q12. Do you agree with the following statement: I would wait for a vaccine or antibody test before going back out to any of the following places in order to feel safe enough?

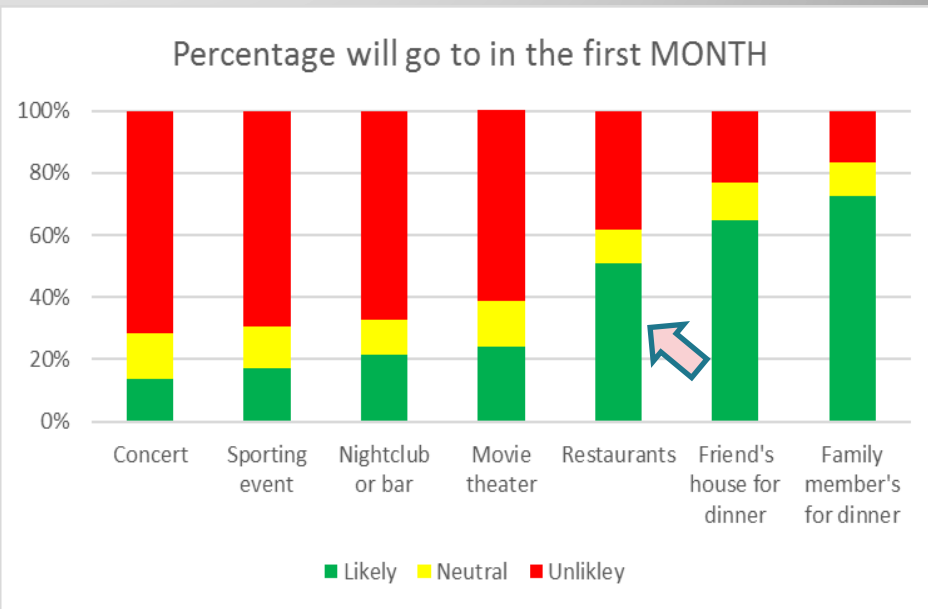


# First Week and First Month

Q16. When the 'stay at home' order is lifted, how likely will you be to go to... in the FIRST WEEK?



Q17. When the 'stay at home' order is lifted, how likely will you be to go to... in the first MONTH?



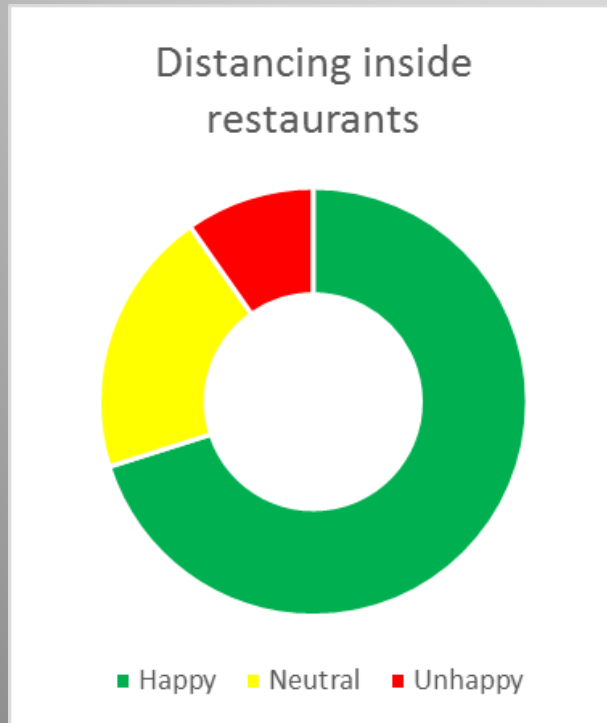
Note: biggest change occurs with going to a Restaurant, jumping from 32% to 51% from First Week to First Month

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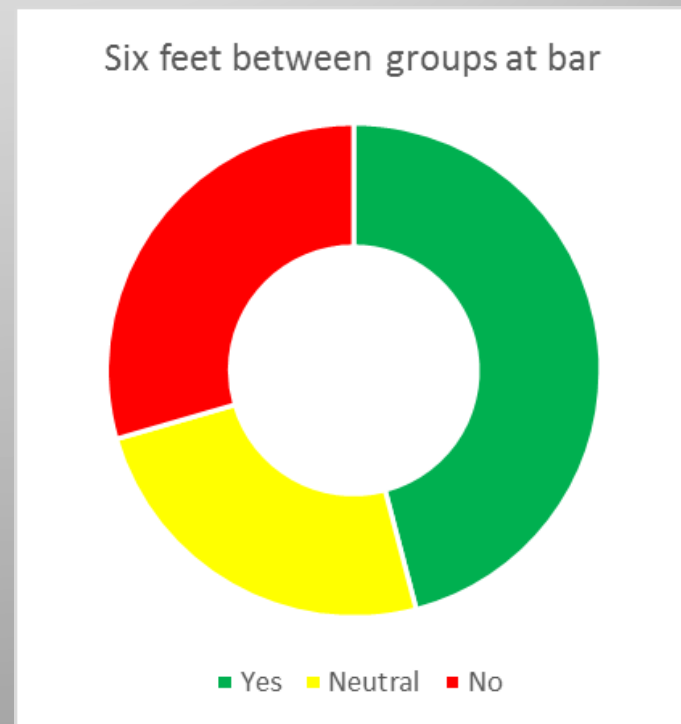
# CONTINUED MITIGATIONS

# Social distancing in restaurants' dining rooms and bars

Q19. If the reopened restaurants continue to apply social distancing, how would you feel if they required distance from other groups

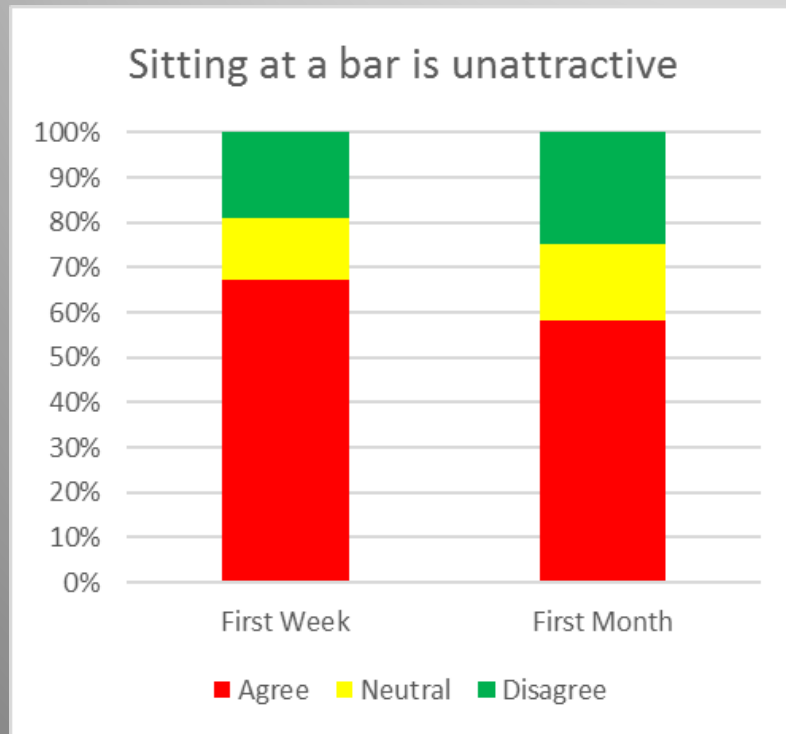


Q23. Would 6 ft between other groups at the restaurant's bar (not a nightclub) be enough to make you feel more safe?

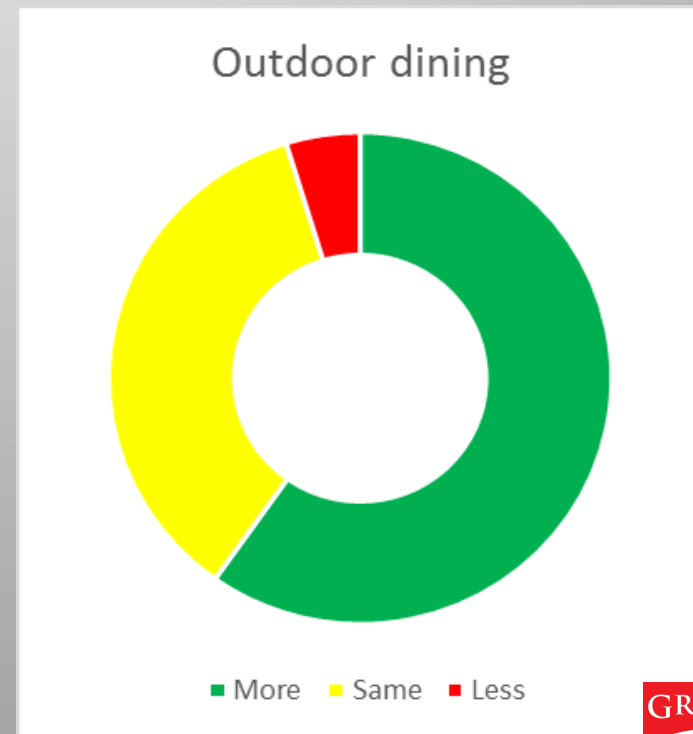


# Sitting on a restaurant's bar or patio

Q21/22. In the first Week or Month after the 'stay at home' order is lifted, I think sitting at a restaurant's bar (to eat and/or drink) will be unattractive for me.



Q20. Would dining outside on a patio or deck be more desirable to you than before?

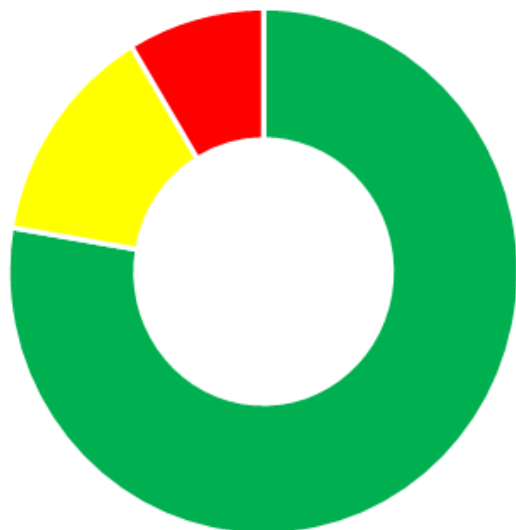




# Barriers and sanitizers in restaurants

Q27. Would you expect hand sanitizers, wipes or both to become staples like salt and pepper on the table?

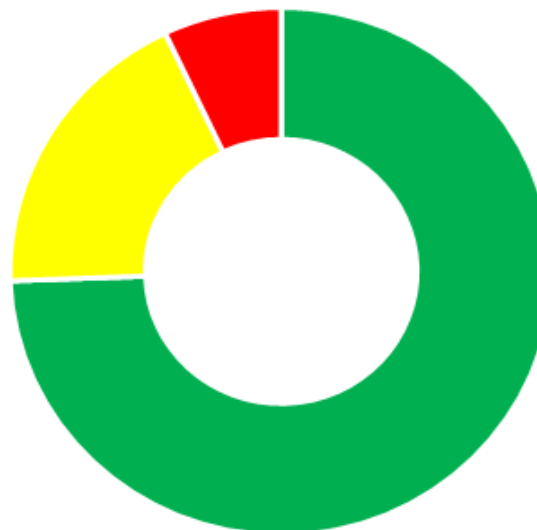
Sanitizers on the table



■ Yes ■ Neutral ■ No

Q25. If restaurant establishments have physical guidance and/or barriers to keep you safe, would you...?

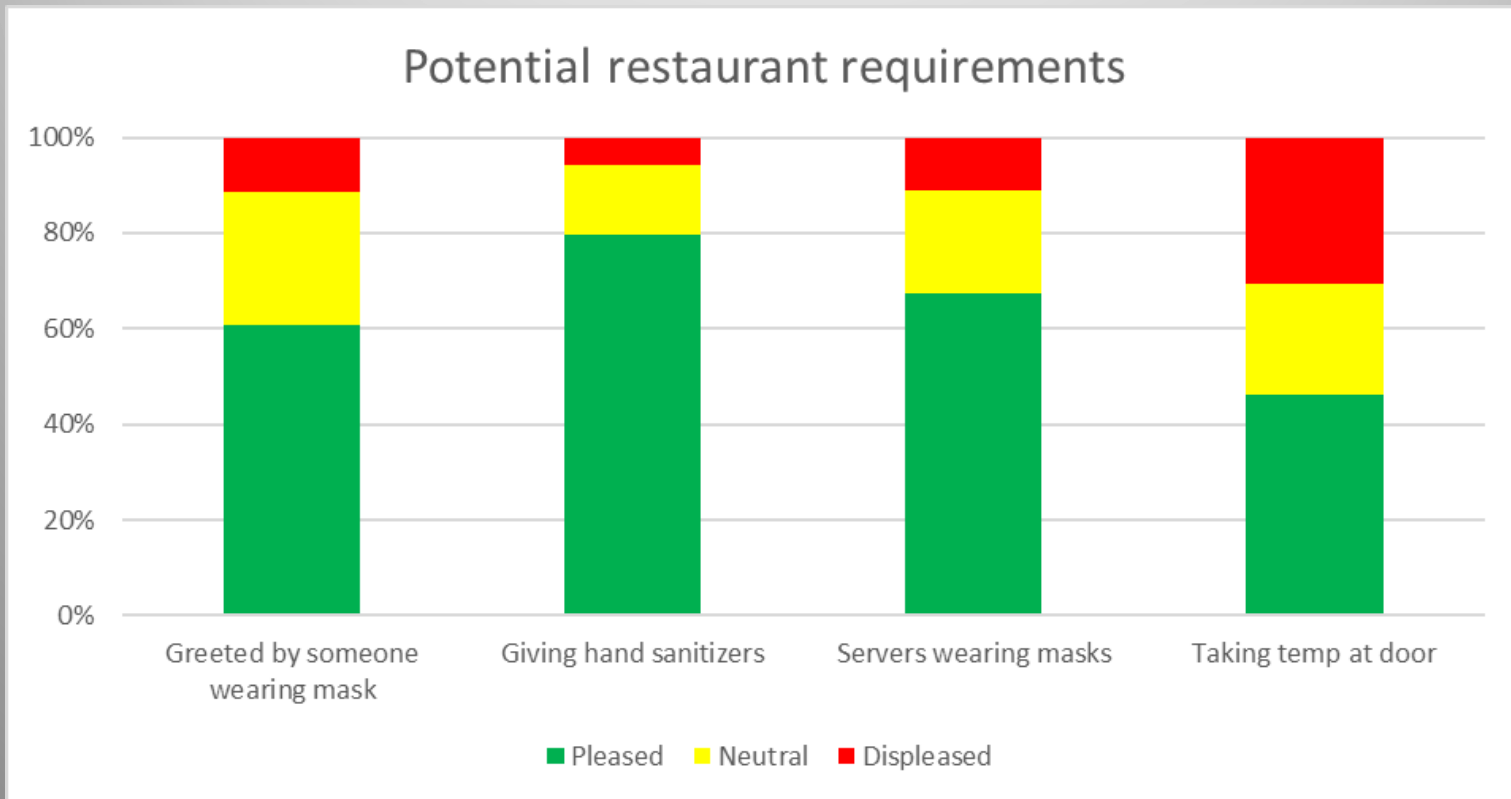
Physical barriers



■ Positive ■ Neutral ■ Negative

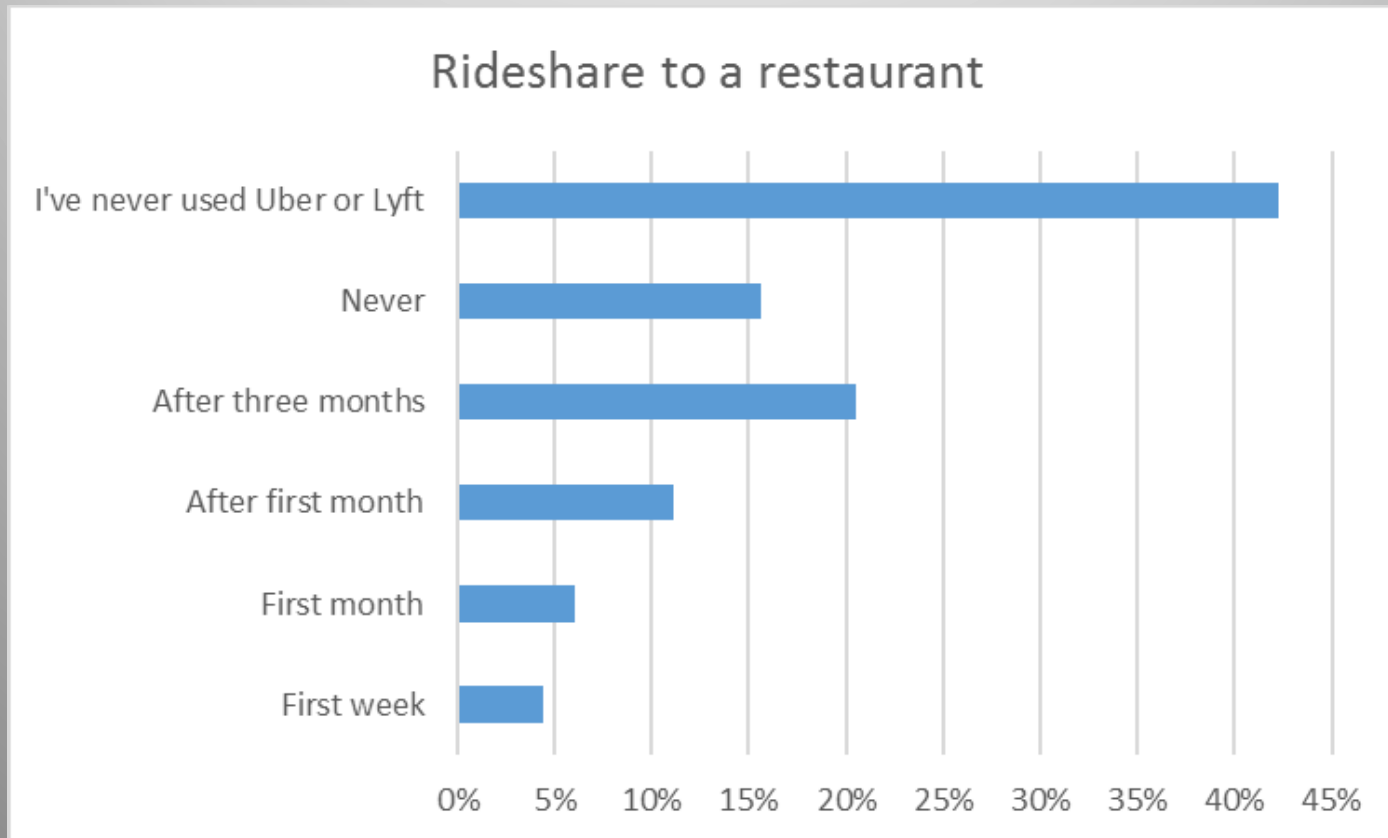
# Mitigations inside restaurants

Q24. How would you feel if restaurants required...?



# Taking a rideshare to a restaurant

Q26. How soon after the 'stay at home' order is lifted would you be likely to take an Uber or Lyft to a restaurant?

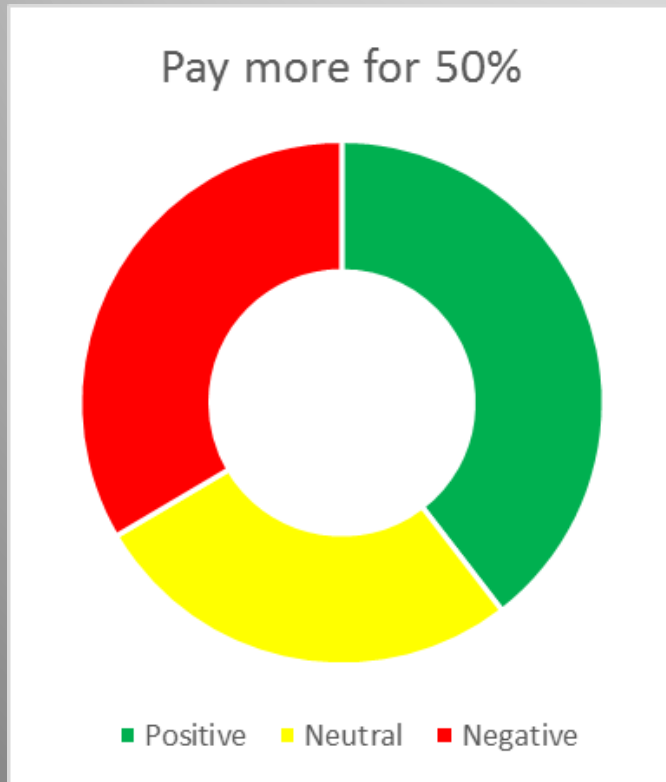


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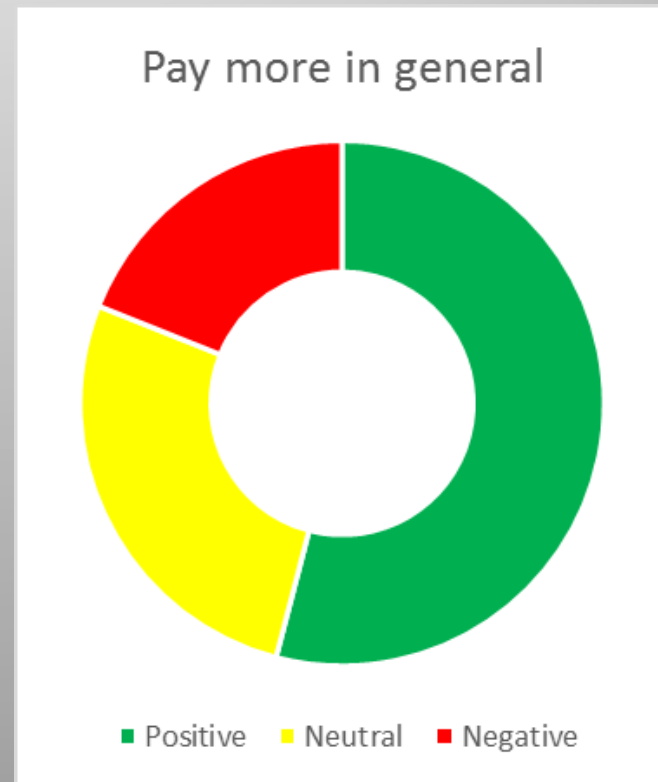
# WILLINGNESS TO PAY MORE

# Paying more at a restaurant

Q28. Would you be willing to pay higher prices in restaurants if the Government mandated (or the restaurant itself) only seated to 50% capacity to apply social distancing?

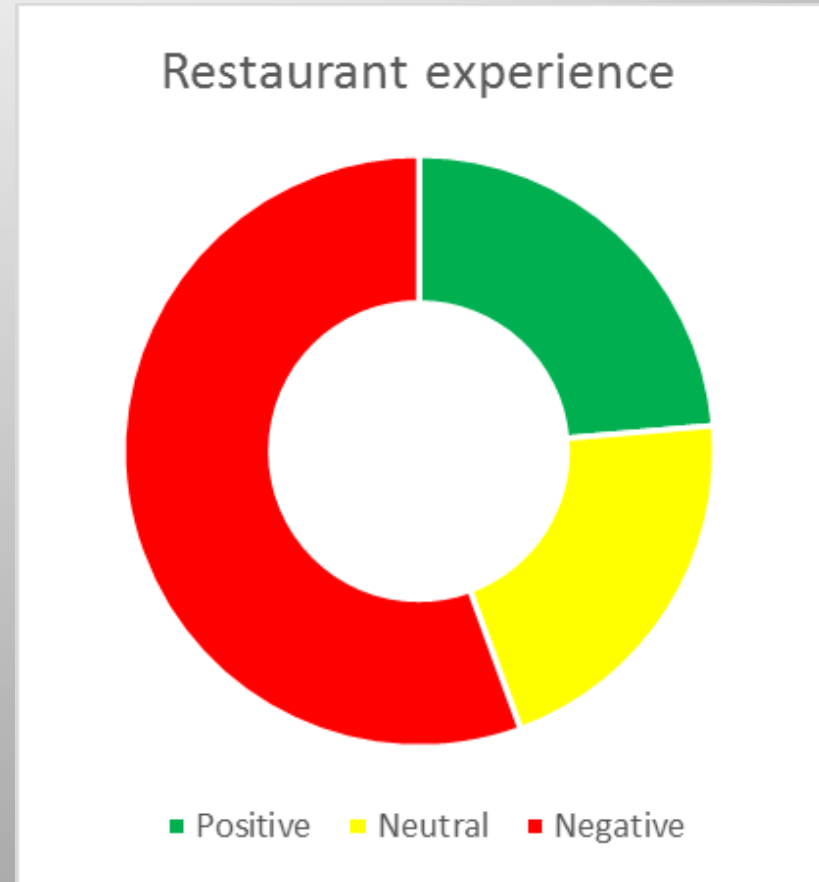


Q32. Would you be willing to pay more to help the restaurant in general knowing you're helping them get going again since you can deduct?



# Restaurant experience at home

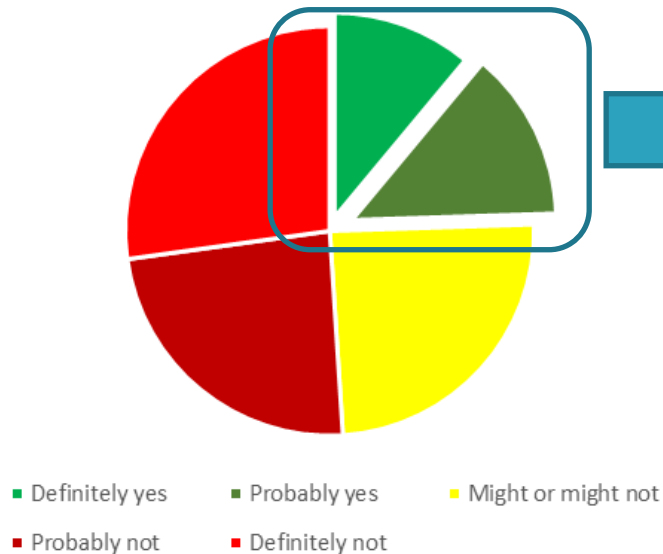
Q29 With the potential for lower capacity and other mitigation requirements, Restaurants are considering an offering called "Restaurant Experience At Home." This concept would offer items from the menu delivered to your location with a server (screened and with required PPE) at no extra cost. Your meal would be served at your table and picked up when you are finished. There may be a minimum. Would you be interested in the service while it lasted?



# Dinners to be 100% tax deductible

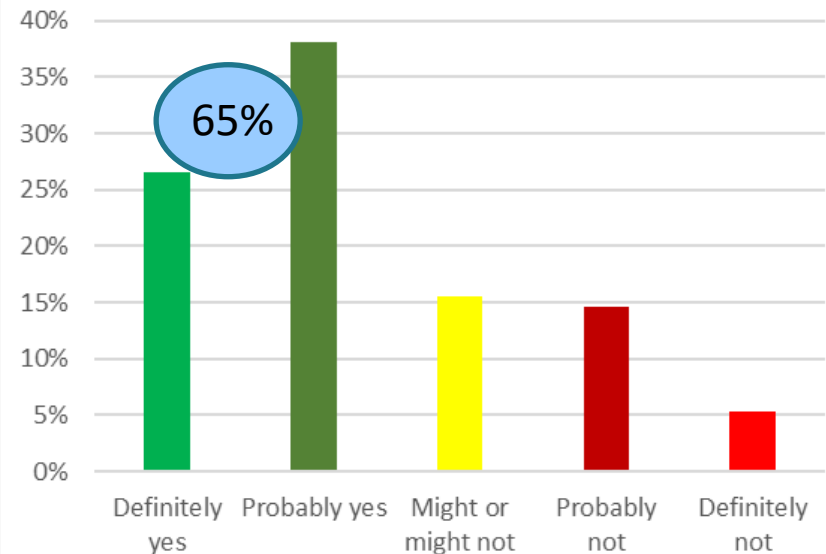
Q30. Does the potential for dinners to now be 100% tax deductible for businesses affect you in any way?

Tax deduction affect you?



Q31. Does the potential for dinners to now be 100% tax deductible for businesses influence the likelihood you would go out more often?

Go out more? n = 226



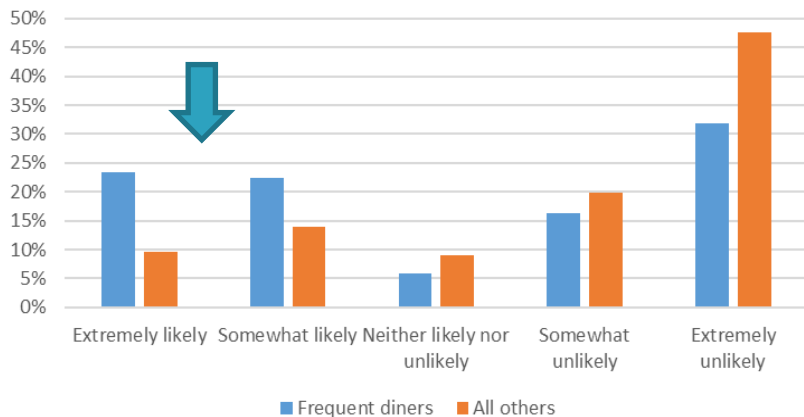


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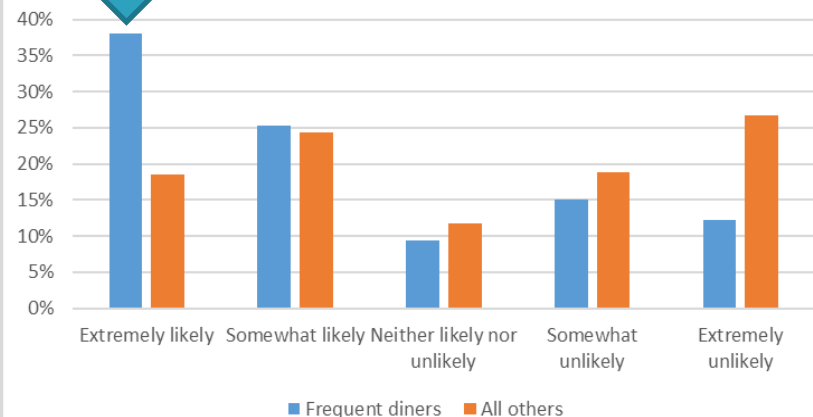
# FREQUENT DINERS

# Frequent diners (more) ready to return

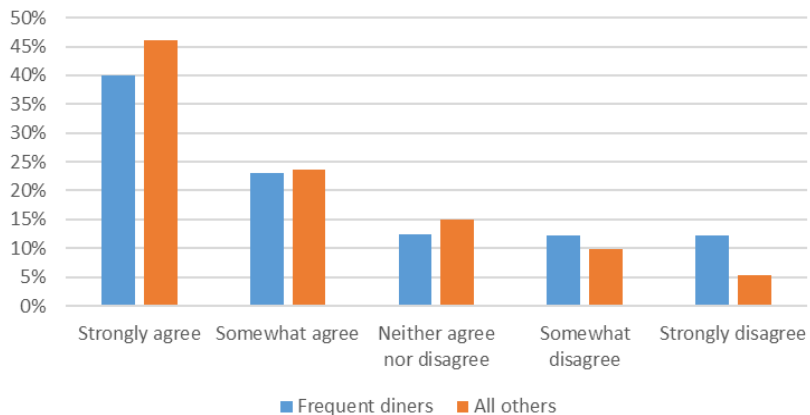
Go out to Restaurants in first WEEK



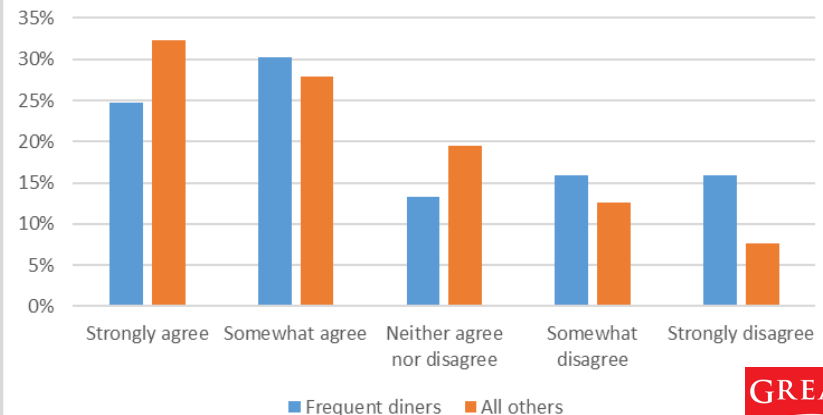
Go out to Restaurants in first MONTH



Sitting at bar first WEEK



Sitting at bar first MONTH



# Frequent diners (more) ready to return to Restaurants

Q16. When the 'stay at home' order is lifted, how likely will you be to go to a restaurant in the FIRST WEEK?

Frequent diners



■ Positive ■ Neutral ■ Negative

All others



■ Positive ■ Neutral ■ Negative

Q17. When the 'stay at home' order is lifted, how likely will you be to go to a restaurant in the FIRST MONTH?

Frequent diners



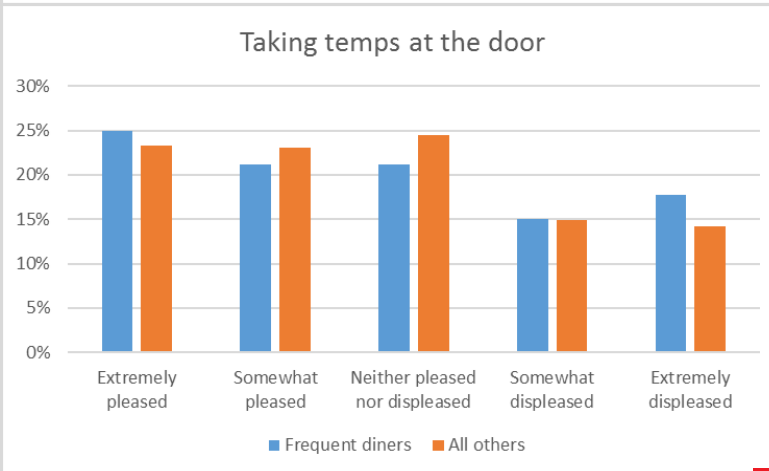
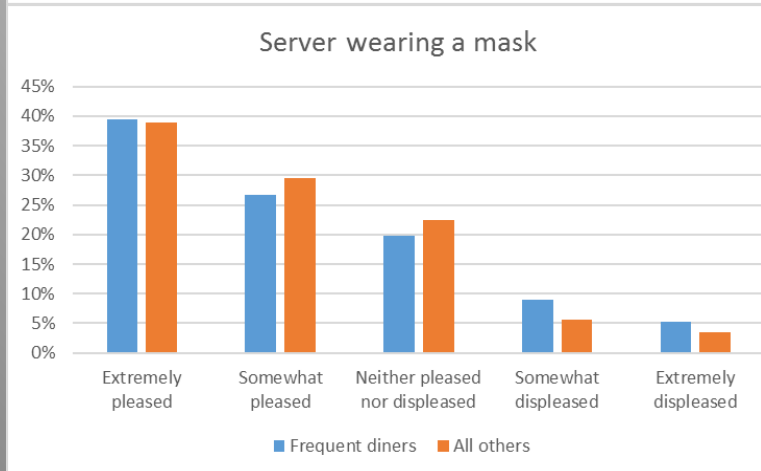
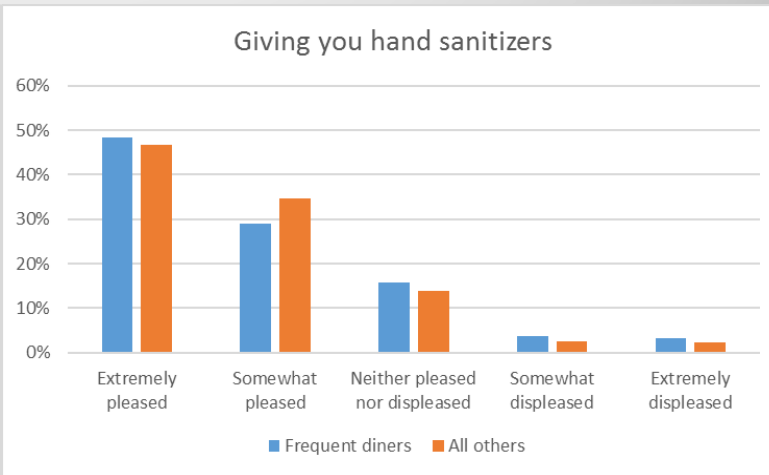
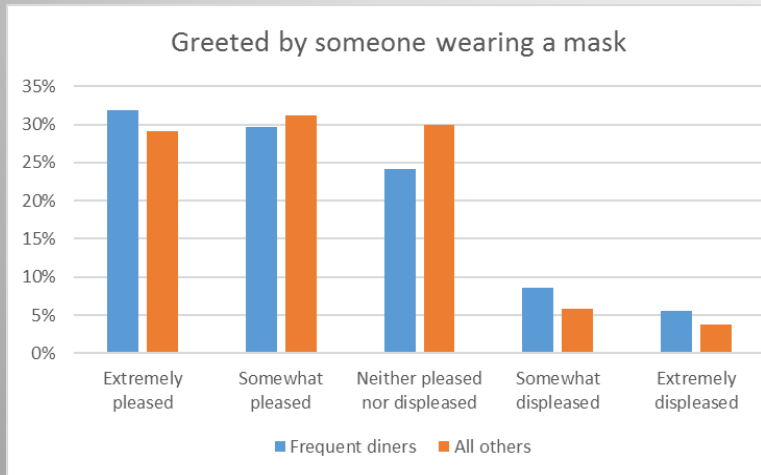
■ Positive ■ Neutral ■ Negative

All others



■ Positive ■ Neutral ■ Negative

# Frequent diners don't differ from others



# Frequent diners' stronger interest

**Q28. Would you be willing to pay higher prices in restaurants if the Government mandated (or the restaurant itself) only seated to 50% capacity to apply social distancing?**

Frequent diners



■ Positive ■ Neutral ■ Negative

All others



■ Positive ■ Neutral ■ Negative

**Q29. Would you be interested in using this new [Restaurant Experience at Home] service while it lasted?**

Frequent diners



■ Positive ■ Neutral ■ Negative

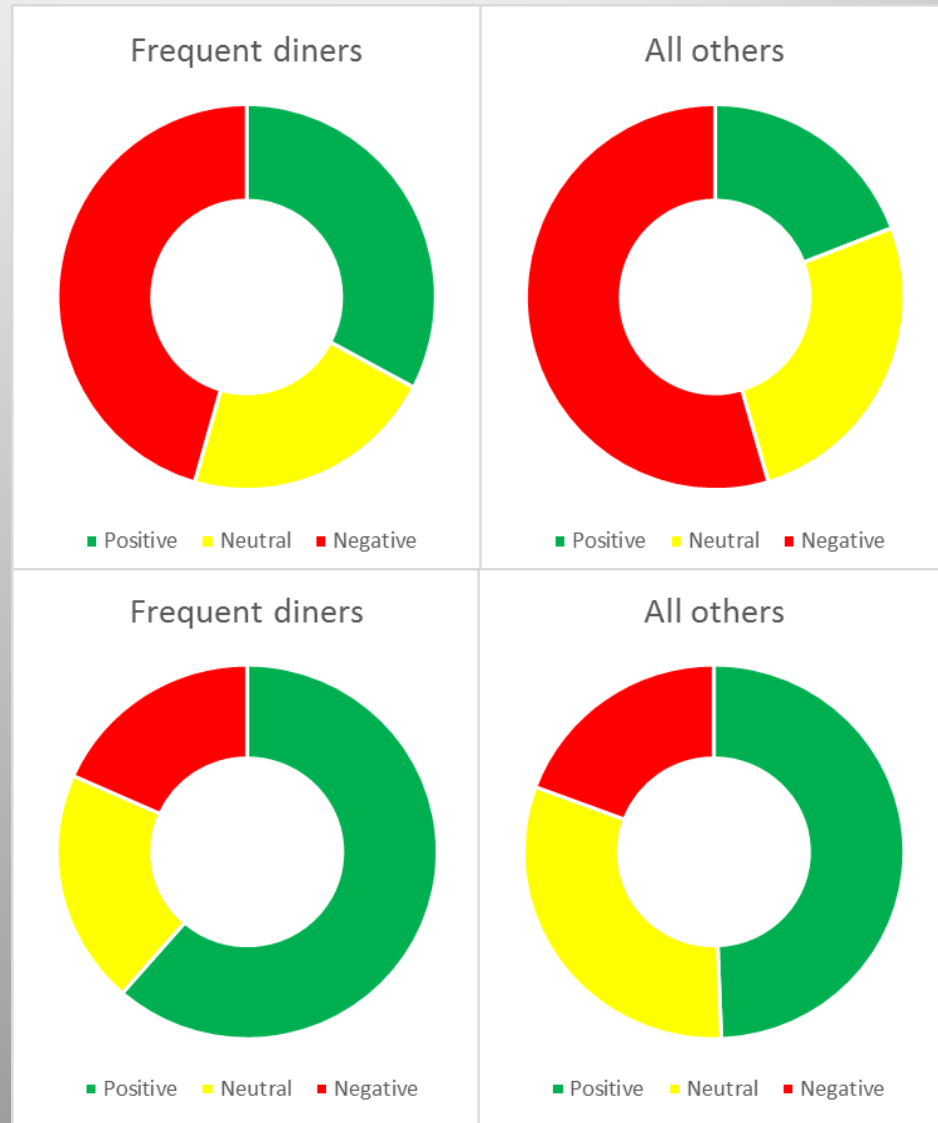
All others



■ Positive ■ Neutral ■ Negative

# Frequent diners' stronger interest

**Q30. Does the potential for dinners to now be 100% tax deductible for businesses affect you in any way?**



**Q32. Would you be willing to pay more to help the restaurant in general knowing you're helping them get going again since you can deduct?**