



# Independent restaurant operator perspectives in the wake of the COVID-19 pandemic

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## ABSTRACT

The purpose of this study was to assess the perceptions and attitudes of South Carolina independent full-service restaurant operators in relation to the operational and economic effects of the COVID-19 pandemic. The study utilized a mixed-methods approach that first partnered with local administrative and governmental bodies to disseminate a short survey. The survey was open to respondents for a 5-week period, beginning May 4th, 2020, which was when restaurants were permitted to reopen indoor dining, but with seating capacity restrictions to ensure social distancing. The second qualitative stage employed semi-structured post-survey interviews with selected independent restaurant operators from across the state. The results indicated that 25% of the restaurants polled did not survive the nearly two-month closure. Less than a quarter of respondents were unable to bring back their company's employees to pre-pandemic levels. The CARES Act financial relief programs were favored by most (81%) of the surveyed restaurant operators. Approximately 65% of the respondents did not feel they could keep their restaurants open if the pandemic restrictions remained in place until 2021. The respondents were split as to the future viability of the hospitality and tourism industry. The study offers guidance and managerial strategies for other independent full-service restaurant operators, as the COVID-19 pandemic continues to evolve.

## 1. Introduction

In the midst of a global COVID-19 pandemic (World Health Organization, 2020b), with the restaurant industry disproportionately negatively affected (Bartik et al., 2020), this study examines South Carolina independent restaurateurs' perspectives in order to provide guidance as conditions evolve. In December 2019, a cluster of pneumonia cases, caused by a newly identified  $\beta$ -coronavirus disease, occurred in Wuhan, China (Vellingiri et al., 2020). In February 2020, the World Health Organization (WHO) officially named the disease as coronavirus disease 2019 (COVID-19); and in March of the same year declared it a pandemic (Guo et al., 2020). COVID-19 is caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) (Vellingiri et al., 2020). The SARS-CoV-2 outbreak follows an earlier SARS-CoV epidemic in Guangdong, China (2002), and the Middle East respiratory syndrome (MERS-CoV) in Saudi Arabia (2012) (Baseler et al., 2016). Although not limited to these sub-populations, the elderly and

people with underlying disease, or other autoimmune deficiencies, are particularly susceptible to SARS-CoV-2 and, when contracted, tend to develop into critical conditions or mortality (Guo et al., 2020).

Studies are ongoing, but the United States (U.S.) Centers for Disease Control and Prevention (CDC) indicate that COVID-19 is thought to spread mainly through close contact (i.e. within 6-feet) from person-to-person. As such, the restaurant industry is particularly vulnerable to the COVID-19 pandemic. The results from a survey conducted in April 2020, published by the United States (U.S.) National Bureau of Economic Research (NBER), indicated that the restaurant industry is likely susceptible to a long crisis. Restaurant operators, who responded to the NBER survey believe that they have a 72% chance of survival if the crisis lasts one-month, but if the crisis lasts four-months, then they give themselves only a 30% chance of survival. If the crisis lasts for six-months, the expectations of survival shrink to 15% (Bartik et al., 2020).

The purpose of this conceptual study was to assess perceptions and perspectives of independent full-service restaurant operators in the State

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of South Carolina regarding operational and economic effects of the COVID-19 pandemic during the spring of 2020. Independent restaurants are defined by the Independent Restaurant Coalition as “privately owned restaurants that have fewer than 20 establishments and whose primary source of revenue comes from food and beverage” (Amel et al., 2020, p. 1). Full-service restaurants are characterized as typically including in-premise table-service and payment made after the meal is consumed (Canziani et al., 2016). According to the South Carolina Restaurant and Lodging Association, the state has 4760 independent full-service restaurant locations (D. O’Flaherty, personal communication, September 2, 2020). This population was targeted for this research because independent restaurants account for approximately 76% of the 658,000 total restaurants and bars in the United States (U.S. Bureau of Labor Statistics, 2019); and full-service restaurant sales have dropped more precipitously than limited-service restaurants, during the early stages of the pandemic (Grindy, 2020b). South Carolina is well-suited for this study because, in 2019, restaurants and drinking places employment, as a proportion of all employment, was the second highest in U.S. states (U.S. Bureau of Labor Statistics).

This study adds to the literature because its timely findings can help other independent restaurant operators navigate the continually evolving landscape of the COVID-19 pandemic. The study’s focus on independent restaurant operators is beneficial as they often face different challenges than their chain restaurant counterparts. Independent restaurants’ relatively smaller scale, and frequently more challenging cash flows, can limit their business options and ability to remain financially solvent.

The following research questions were explored in this study:

- R1. Has the COVID-19 pandemic affected your ability to efficiently run your independent restaurant operations?
- R2. How has the COVID-19 pandemic affected the services you are able to offer your customers given guidelines that suggest reducing seating capacity to maintain social distancing?
- R3. Do you feel governmental agencies (e.g. CDC and/or SC-DHEC), or you, the operator, are the most appropriate entity to manage health and safety practices to protect your staff and customers’ welfare?
- R4. How long do you anticipate being able to remain fiscally viable under current COVID-19 restrictions and guidelines?
- R5. What type(s) of financial assistance would be necessary for your business to remain viable under the current COVID-19 conditions?
- R6. If your operations were required to shut down a second time, what is the likelihood of your business being able to continue?
- R7. What social conditions help support or hinder your ability to be financially viable during the COVID-19 pandemic?
- R8. What are your perceptions regarding the overall financial viability of the hospitality and tourism industries, over the next 18–24 months, because of the COVID-19 pandemic?

## 2. Literature review

### 2.1. Pre-pandemic

Prior to examining the adverse effect that the COVID-19 pandemic has had on the restaurant industry; it is useful to understand the prodigious economic and social reach restaurants have had on American life. In 2018, rounded annual U.S. restaurant sales were \$790 billion, which is more than 41% greater than the hotel (\$218 billion) and airline (\$248 billion) revenues combined (Lock, 2018; Mazareanu, 2020). In January of this year, preceding the COVID-19 lockdown, the National Restaurant Association (NRA) published their 2020 State of the Restaurant Industry report. The report was generally optimistic; it projected moderate growth across the restaurant industry throughout 2020. The NRA projected that 2020 sales would reach \$899 billion, which represents about 4% of U.S. gross domestic product (GDP) (Hinchliffe, 2020), and is an increase of \$309 billion over the last decade. In 2019, prior to the pandemic, the restaurant industry occupied 51% of the

American food dollar, compared to 25% in 1955. U.S. restaurants employed 15.6 million people. Across the restaurant industry, the number of middle-class jobs (\$45K–\$75 K) grew 84% between 2010 and 2018, which was more than three-times faster than the overall economy. At the end of 2019, there were over one million restaurants in the U.S. Most restaurants (90%) were small businesses—employing less than 50 people; and 70% were independent single-unit operations. An NRA survey indicated that an average adult purchased restaurant food—on- or off-premise—more than six times in a week. Notwithstanding the pandemic, off-premise sales (e.g. carry-out and delivery) were forecast to increase in 2020 with many restaurants expected to further invest in tools and technology to facilitate even more growth, especially among tech-savvy younger customers.

### 2.2. Post-Pandemic

By approximately the second week in March 2020, due to the COVID-19 pandemic, all U.S. states had declared a state of emergency. Restaurant and bar closures were soon to follow in every state but South Dakota and Nebraska, which issued restrictions (Mervosh et al., 2020). In South Carolina, on March 17, 2020, Governor Henry McMaster ordered restaurants and bars closed for dine-in business. This lasted until May 4th, when restaurants could serve outdoors under certain conditions that allowed for social distancing and increased protections against infections. Shortly after, beginning on May 11th, dine-in service was allowed indoors, as well, with a state suggested 50% maximum capacity, but with no formally mandated restrictions (Clarey, 2020).

The approximately 60-day forced closure of most U.S. restaurants ability to serve indoors had devastating results. An April 2020 survey (Grindy, 2020a, 2020b), conducted by the National Restaurant Association, of more than 6500 restaurant operators, indicated that average sales were down 78%. This represents a sales loss of more than \$30 billion in March and \$50 billion in April. Full-service restaurants were hit the hardest, with an 83% drop, while limited-service restaurants suffered a 61% drop. Open Table, who provides reservation services for more than 60,000 restaurants, surveyed approximately 20,000 of its clients, saying that total reservations were down 95% on May 13 from the same day last year. More strikingly, some estimate that one in every four U.S. restaurants will go out of business due to COVID-19 restrictions (Ludlow, 2020).

Restaurant sales declines have forced operators to cut staffing levels drastically. According to the U.S. Department of Labor Statistics, of the 701,000 American jobs lost in March, the majority came from restaurants and bars. Americans lost about 417,000 jobs in foodservice and drinking places, which is roughly 60% of the month’s total losses (2020). On average, restaurants cut 83% of their total staff, which equates to more than 8 million restaurant employees being laid off or furloughed since the beginning of the coronavirus outbreak (Ludlow, 2020).

Several governmental and non-governmental agencies created economic programs to provide relief economic relief to these beleaguered restaurant operators. A number of small businesses may not have opted into these programs because program requirements were convoluted, which led to differential access for larger firms (Humphries et al., 2020, p. 1). To further elucidate these programs, a summary of the requirements for these economic programs is offered in Appendix A.

### 2.3. Recovery

Two months after the lockdown, all 50 U.S. states slowly, and with some uneasiness, started to reopen businesses (Mervosh et al., 2020). The uneasiness may stem from the fact that many states did not meet the CDC gating criteria for reopening, which notably includes a downward trajectory (or near-zero incidence) of documented COVID-19 cases over a 14-day period (Centers for Disease Control and Prevention, 2020). Through the South Carolina Restaurant and Lodging Association (SCRLA), South Carolina has offered recommendations for reopening

restaurants across two phases. The two phases align with the Governor's May 4th decision that restaurants could serve outdoors, and the May 11th decision that dining services would be allowed indoors if the infection rate curve flattened. It is expected that further easing of restrictions will follow (Clarey, 2020).

A summary of the Phase Two guidelines—the actual guidelines are eight pages long—include putting a sign on the door that no one with a fever or persistent cough is permitted. Additional signage must be provided at each public entrance to inform all employees and customers that they are not allowed to enter if they feel generally unwell. Everyone is required to maintain a minimum of six-foot distance between persons, must sneeze or cough into a cloth or tissue, and not shake hands or engage in any unnecessary physical contact. Another sign must be posted on the receiving door stating that no suppliers or vendors should enter if they have a fever or persistent cough. Further suggestions for best practices include publicly noting the restaurant's commitment to food safety and training in safe practices. Through the end of May, the National Restaurant Association offered COVID-19 related food safety courses free of charge.

The guideline of a minimum of six-foot distance between persons in restaurants, to reduce the spread of infection, is not without debate. A study conducted in January 2020 in association with the Guangzhou Center for Disease Control and Prevention in Guangzhou, China, found that infected persons might have spread SARS-CoV-2 across an approximately 145 m<sup>2</sup> space in a third-floor air-conditioned restaurant. It was suggested that airwaves from the central air conditioner played a role in dispersing virus droplets farther than they might have normally traveled. An asymptomatic person was suspected of infecting nine other persons, across three families, who later tested positive for COVID-19 (Lu et al., 2020). The authors of the study recommended increasing the distance between restaurant tables and improving ventilation.

## 2.4. Restaurant margins

To maintain the six-foot recommended distance in restaurants, South Carolina guidelines suggest restaurants reduce their indoor (and outdoor) seating capacity by 50%. This is challenging because of the likely reduction in sales resulting from a constrained capacity. To exemplify this, consider Table 1, which uses figures from the most recent National Restaurant Association operations report. It illustrates that median sales for most independent full-service restaurants (81%) was approximately \$500,000 with a net income before taxes of 6.1%. The median cost of sales (food and alcoholic beverage) was 34.6%, and median labor expense was 32.5%. These combined expense categories are normatively called *prime costs* and are largely variable in relation to sales. Median fixed costs include a range of operating and occupancy expenses, which when combined, total 26.8% of sales (Riehle and Cascone, 2016).

Table 1 juxtaposes median financials from the NRA's last industry report, with the impact a 10, 15, and 25% reduction in sales would have on net income (loss) before income taxes. The outcomes reported in Table 1 are validated by previous research related to the fiscal impact of pandemics (Kim and Gu, 2006), where lowered earnings were shown to jeopardize a restaurant's ability to remain solvent. The data helps to illustrate the difficulty independent restaurant operators are likely facing due to reopening social distancing capacity constraints.

## 2.5. Historical perspectives

Although the COVID-19 pandemic may feel unprecedented to restaurant operators in the U.S., other cities, such as Hong Kong faced an analogous crisis during a SARS outbreak in 2003. Tse and Leo Sin (2006) examined the outbreak through a crisis management lens, to illustrate how local restaurants then (and likely now) can deal with such situations and develop strategies for recovery. Tse and Leo Sin (2006) categorized the SARS outbreak as a physical environmental crisis. Their study suggested the appropriate strategy to deal with disasters of this type is to react quickly to minimize the damage before it escalates exponentially to threaten the survival of the business. Physical crises cause social unrest, so restaurant operators must try to calm people and negotiate with affected parties to achieve win-win resolutions. The SARS outbreak in Hong Kong caused most restaurants to face serious cash flow problems, much like the more contemporary financial scenarios forecasted in Table 1, above. This can lead to skewed management values, such as deception or unethical conduct, to ensure the survival of the business. The appropriate strategy in such situations is to enforce a strict code of conduct on business practices and even legal sanctions if management's behavior becomes criminal.

Tse and Leo Sin (2006) suggest a tiered approach to deal with this type of crisis. First, conduct damage assessment—before devising a rebuilding plan. Then try to immediately minimize operating costs, while correspondingly soliciting low cost or government sponsored forgivable loans. Revenue optimization strategies should also be implemented to increase patrons' perceived value. The most obvious tactic is to improve food quality and service. In addition, restaurants may offer discounts or other forms of promotion to entice customers to dine. Capitalizing on consumers' concerns regarding health and safety is critical. Some restaurants in Hong Kong even developed menu items that claimed to boost customers' immune system. Several restaurants also took steps to improve their public image through community philanthropy, whereby a proportion of their sales was donated to SARS-related causes.

A study of the SARS epidemic in Hong Kong (Hung, 2003, pp. 375–376) suggests utility for effectively dealing with the current COVID-19 pandemic. With regard to prevention and control, Hung (2003) suggests the following measures be taken: (1) preventive education and public relations; (2) tracing the source of infection; (3) introducing five major control processes (compulsory physical distancing and surveillance of contacts, limiting and/or modifying K-12 and college education sessions, exchange of epidemiological information between local, state, and federal agencies, temperature checking at points of entry and exit, an expansion of cleansing and sanitizing); (4) strengthening collaboration and communication between federal government health agencies and the World Health Organization (WHO); and (5) developing a quick diagnostic test/result for the virus. While some of these measures are at a macro level, they include operations-level tactics, and paths restaurant operators can take in lobbying their regional legislators. Moreover, at the time of this writing, based on Hung's (2003) suggestions, it is clear more can be done.

Chuo (2014) studied diners' self-protective behavior in restaurants longitudinally, across two health epidemics (SARS in 2003, and A (H7 N9) avian influenza in 2013). While he found that it was difficult for restaurants to assuage risk concerns for most diners, there were significant differences between patron types. For example, the study found

**Table 1**

NRA Reported Median Restaurant Consolidated Income Statement with Forecasted Impact of 10%, 15%, and 25% Sales Drops.

|                                   | NRA Reported Medians |        | 10% Sales Drop |        | 15% Sales Drop |        | 25% Sales Drop |        |
|-----------------------------------|----------------------|--------|----------------|--------|----------------|--------|----------------|--------|
| Sales                             | \$500,000            | 100.0% | \$450,000      | 100.0% | \$425,000      | 100.0% | \$375,000      | 100.0% |
| Variable Prime Cost               | \$335,500            | 67.1%  | \$301,950      | 67.1%  | \$285,175      | 67.1%  | \$251,625      | 67.1%  |
| Fixed Oper. & Occ. Cost           | \$134,000            | 26.8%  | \$134,000      | 29.8%  | \$134,000      | 31.5%  | \$134,000      | 35.7%  |
| Income (Loss) Before Income Taxes | \$30,500             | 6.1%   | \$14,050       | 3.1%   | \$5285         | 1.4%   | \$(10,625)     | −2.8%  |

that unmarried consumers tended to adopt lower levels of self-protective behavior in both epidemic crises. In addition—valued-enhanced packaging—consisting of both sales promotions, and decreased physical risk, was confirmed to be an effective means to stimulate potential consumers' willingness to patronize restaurant dining services (Chuo, 2014, pp. 81–82). Ultimately, U.S. restaurants can learn from past restaurant operators' successful crisis strategies.

### 3. Methods

The purpose of this conceptual mixed-methods study was to explore and assess the perceptions and attitudes of South Carolina independent restaurant operators regarding the operational and economic effects of the COVID-19 pandemic on their businesses in the spring of 2020. The first quantitative stage of the research centered around the development and distribution of an anonymous online survey. The survey respondents were asked about the number of units they operated, sales volume, number of employees, and service systems—pre- and post-pandemic—as well as actions taken to remain viable under pandemic conditions and restrictions. Insights regarding the long-term sustainability of their individual businesses and the U.S. hospitality and tourism industry, at large, were also examined.

A link to the survey, and a request that respondents contact the survey authors for a follow-up interview, was disseminated to independent restaurant operators across South Carolina through the assistance of local administrative and governmental bodies (e.g. regional chambers of commerce, convention and visitor bureaus, hospitality associations, tourism boards, and small business development centers). Due to the expedited timeline for the special edition, the survey was only open to respondents for a 5-week period (May 4th – June 8th, 2020). The objective was to capture the tenor of independent restaurant operators' perceptions during a highly volatile health and political period, which corresponded with the first steps by state officials to allow reopening of certain businesses in South Carolina, following the previous stay at home orders with strict social distancing guidelines. After the specified period of data collection, the survey's data was reviewed to address the amalgam of research questions.

Following the survey distribution period, semi-structured interviews were held with survey respondents that contacted the authors (as requested during the survey's dissemination) for the purposes of reinforcing the breadth and depth of understanding of the quantitative survey data, and to ascertain if the interviews converged with survey findings to corroborate them. This qualitative stage employed 12 semi-structured post-survey interviews of respondents that contacted the authors to further explore and explain the research questions. Interviewees operated restaurants in coastal regions (Charleston, and Myrtle Beach), the midlands (Columbia), and the upstate (Greenville, and Greenwood). Interviews are suitable for generating deep insights into a topic and to gain a better understanding about attitudes and opinions of interviewees (Rowley, 2012). Semi-structured interviews employ a set of well-designed open-ended questions but do not prevent the interviewer from asking follow-up questions to clarify interviewee responses and explore mentioned themes in more detail. Moreover, semi-structured interviews allow the interviewer to account for newly emerging themes that were not considered or mentioned before (Rowley, 2012).

### 4. Results

#### 4.1. Descriptive statistics

The first stage of the research analyzed the survey results. The survey screened out any respondents that did not reply to being independent full-service restaurant operators. The resulting sample size was 55 restaurant company operators—with two incomplete surveys ( $N = 53$ ), which represented approximately 130 independent full-service

restaurants. While the sample size is modest, it captures only independent full-service restaurant companies. Also, the survey was disseminated just as restaurants were permitted to reopen, which was likely an exceedingly busy time for potential respondents.

The first section of the survey attempted to capture the operational conditions of the independent restaurant operators' businesses. All the restaurants were full-service sit-down restaurants prior to the outbreak of the pandemic. Examining Table 2, below, which summarizes these attributes, overarching conclusions reveal that approximately half (49%) of the surveyed independent operators run one restaurant and most (90.2%) are small restaurant groups, with five or less locations. The data was scrubbed to isolate single-unit restaurants, taking the middle value of the sales and number of employees' ranges, which indicated that approximate per-unit sales were \$977,500, with 28 employees each.

Next the survey queried the impact of the COVID-19 pandemic on operational conditions, which are reported in Table 3, below. An examination of Table 3 indicates that nearly 25% of the independent restaurant operators were not able to reopen after the nearly 60-day forced closure. Of the approximate 75% that survived the closure, none were back to operating at full capacity—apparently abiding by SC Department of Health and Environmental Control (SC-DHEC) guidelines—and all were offering some form of carry-out and/or delivery. It also appears that most (71.7%) were not able to rehire enough employees to meet the Paycheck Protection Program (PPP) Federal loan forgiveness terms, in which their operations needed to maintain 75% of their pre-pandemic payroll. Additionally, only 5% were seating indoors, even at a 50% reduced capacity.

The respondents were asked about their feelings regarding whether health safety protocols should be set by the CDC or the SC-DHEC, or, whether each operator should decide when and how safety protocols should be administered. Approximately 60% said they would prefer federal or state guidelines, with 40% opting to set their own safety protocol for their individual circumstances.

The survey included items querying how the independent restaurant operators felt the COVID-19 business restrictions (e.g. social distancing and constrained seating) would impact their short and long-term viability, which are summarized in Table 4. The results reported in Table 4 demonstrate that more than 60% of operators do not feel they could remain financially viable for more than six months if restrictions remain.

**Table 2**  
Pre-COVID Operational Conditions.

| Attribute                          | Delineators         | Frequency | Valid % | Cumulative % |
|------------------------------------|---------------------|-----------|---------|--------------|
| Number of Restaurant Locations     | 1                   | 25        | 49.0    | 49.0         |
|                                    | 2                   | 13        | 25.5    | 74.5         |
|                                    | 3–5                 | 8         | 15.7    | 90.2         |
|                                    | 6–10                | 5         | 9.8     | 99.4         |
|                                    | < 100,000           | 1         | 1.9     | 1.9          |
| Annual Sales in U. S. Dollars      | 100,001–500,000     | 5         | 9.6     | 11.5         |
|                                    | 500,001–1,000,000   | 8         | 15.4    | 26.9         |
|                                    | 1,000,001–2,000,000 | 15        | 28.3    | 55.8         |
|                                    | > 2,000,000         | 23        | 44.2    | 100.0        |
|                                    | 10–25               | 18        | 34.0    | 34.0         |
| Number of Employees                | 26–50               | 16        | 30.2    | 61.2         |
|                                    | 51–100              | 10        | 18.9    | 83.0         |
|                                    | > 100               | 9         | 17.0    | 100.0        |
|                                    | Abbeville           | 1         | 1.9     | 1.9          |
|                                    | Berkley             | 2         | 3.8     | 5.7          |
| County of Main Operating Locations | Charleston          | 32        | 60.4    | 66.0         |
|                                    | Greenville          | 2         | 3.8     | 69.8         |
|                                    | Greenwood           | 6         | 11.3    | 81.1         |
|                                    | Horry               | 5         | 9.4     | 90.6         |
|                                    | Kershaw             | 1         | 1.9     | 92.5         |
|                                    | Richland            | 3         | 5.7     | 98.1         |
|                                    | Spartanburg         | 1         | 1.9     | 100.0        |
|                                    |                     |           |         |              |

Note. Attributes with frequencies that do not equal 53 include missing value.

**Table 3**  
Post-COVID Operational Conditions.

| Attribute                      | Delineators                | Frequency | Valid % | Cumulative % |
|--------------------------------|----------------------------|-----------|---------|--------------|
| Still Open for Business        | Yes                        | 40        | 75.5    | 75.5         |
|                                | No                         | 13        | 24.5    | 100.0        |
| Services Provided              | Outdoor Dining @ 100%      | 0         | 0.0     | N/A          |
|                                | Outdoor Dining @ 50%       | 50        | 94.3    | N/A          |
|                                | Indoor Dining @ 50%        | 3         | 5.7     | N/A          |
|                                | Carry-out / Delivery < 25% | 53        | 100.0   | N/A          |
|                                |                            | 18        | 34.0    | 34.0         |
| Number of Employees Hired Back | 26–50%                     | 11        | 20.8    | 54.7         |
|                                | 51–75%                     | 9         | 17.0    | 71.7         |
|                                | 76–100%                    | 15        | 28.3    | 100.0        |

Note. Services provided allowed the respondent to check all that applied.

**Table 4**  
Perceived Impact of COVID-19 Business Restrictions.

| Attribute                                    | Delineators | Frequency | Valid % | Cumulative % |
|----------------------------------------------|-------------|-----------|---------|--------------|
| Cause Closure if Restrictions Remain to 2021 | Yes         | 34        | 65.4    | 65.4         |
|                                              | No          | 18        | 34.6    | 100.0        |
|                                              | <1 Month    | 7         | 13.7    | 13.7         |
| Time Period to Remain Financially Viable     | 2–6 Months  | 24        | 47.6    | 60.8         |
|                                              | 6–12 Months | 7         | 13.7    | 74.5         |
|                                              | > 1 Year    | 13        | 25.5    | 100.0        |

Note. Attributes with frequencies that do not equal 53 include missing value.

Relatedly, the survey asked respondents if another surge in COVID-19 caused the government to close their restaurants' indoor seating again in the next 3–6 months, did they think they could reopen. Most (58%) said no, they would not be able to reopen and might be forced to close their restaurant permanently.

The researchers wanted to know what remedies would help the independent restaurant operators survive the pandemic. Table 5 reports what financial assistance programs the operators would likely seek out and what conditions must occur. Respondents were asked to select all that applied. The vast majority (81%) indicated that the benefits from the Federal Coronavirus Aid, Relief, and Economic Security Act (CARES Act) and the return of consumer confidence were most important.

Finally, and perhaps most importantly, independent restaurant operators were asked whether they believe their businesses, and the hospitality and tourism industry at large, would eventually recover to pre-pandemic levels within the next 18–24 months. Restaurant operators were optimistic about their businesses more than they were about a full

**Table 5**  
Financial Programs and Requisite Changes to Local Conditions.

| Attribute                    | Delineators                       | %  |
|------------------------------|-----------------------------------|----|
| Financial Assistance Options | CARES Act Programs                | 81 |
|                              | Corporate Tax Incentives          | 54 |
|                              | Private Lenders                   | 9  |
|                              | Adding Equity Partners            | 9  |
|                              | Rent or Mortgage Relief           | 41 |
|                              | Government Product Subsidies      | 32 |
|                              | Lifting of Social Distancing      | 49 |
|                              | Return of Tourism                 | 60 |
| Changes to Local Conditions  | Increased Consumer Confidence     | 81 |
|                              | Improved Unemployment Rates       | 32 |
|                              | Return of K-12 & College Students | 32 |
|                              | Lifting of Travel Restrictions    | 39 |
|                              | Extending PPP Loan Benefits       | 56 |

recovery of the hospitality and tourism industries at large. Nearly 70% said if further financial aid were available, their restaurant operations could recover. However, they were evenly divided about whether the hospitality and tourism industry would be back to normal, even after two years' time.

## 5. Analysis of research questions

The data from the respondents demonstrated mixed results in terms of the likelihood of sustaining operations under continual restrictions of social distancing suggested by governmental agencies. As the pandemic continues, challenges will likely increase in the areas of revenue generation, employability, growth, and financial solvency. Most independent restaurant operators concur that further assistance programs and financial relief programs need to be supplied by state and federal governments in order to sustain their businesses. This supports the literature from McGurran and Smith (2020; 2020) regarding government and economic relief programs such as the CARES Act, that are designed to aid small businesses in relation to their overall economic viability during the pandemic. Data indicated, that with governmental assistance, respondents were reasonably optimistic about their operations weathering the economic complexities of the pandemic. They felt the outlook for the restaurant industry will eventually brighten over an extended post-pandemic period. However, respondents suggested that if a second shutdown were to occur, in the wake of another COVID-19 surge, the likelihood of reopening or starting a new business profoundly lessens.

Semi-structured post-survey interviews were conducted regarding operators' perceptions and attitudes. A sample of 12 post-interview subjects, from several different locations throughout the state, were identified and asked a series of questions to further explain the research questions. The responses from these interviews, along with the data from the survey itself, allowed for a broader explanation and understanding of the research questions themselves.

In addressing each of the following research questions individually, one can understand and further evaluate the overall size and scope of the economic events during the pandemic, which impacted independent restaurant operators and shaped their attitudes and perceptions regarding their operations:

R1. Has the COVID-19 pandemic affected your ability to efficiently run your independent restaurant operations?

Based on the survey results, the short answer would be yes. Operators' ability to efficiently run their restaurants has diminished. Only 28% of respondents have been able to rehire more than 75% of their pre-pandemic staff. Nearly 77% of the respondents felt that their restaurants would not remain financially viable if restricted outdoor only seating remains for more than six months. Moreover, 65% said they would likely close their restaurants if COVID-19 guidelines remain through the end of 2020. Overarching responses from the semi-structured interviews echoed similar sentiments. One of interviewed restaurant operators indicated that *"their personal outlook regarding the reopening of their business would not be feasible in light of reduced operations from social distancing guidelines versus managing their overall fixed costs of the operation."* Another said, *"he discontinued his restaurant operation after one month of reopening under current guidelines."*

R2. How has the COVID-19 pandemic affected the services you are able to offer your customers given guidelines that suggest reducing seating capacity to maintain social distancing?

All of survey respondents operated full-service indoor seating operations before the pandemic. After reopening, following the nearly two-month closure, 95% reported only offering reduced outdoor dining and carry-out or delivery. Moreover, all the interviewees indicated that they have augmented or instituted new service offerings in order to meet CDC and/or SC-DHEC guidelines. This included outdoor sit-down service and increased take-out services beyond minimal or nonexistent indoor table service. One interviewee noted that *"their business acquired a food-truck and increased off-site catering services in order to augment sales*

from the decreased volume of their on-site operations due to current COVID-19 social guidelines.”

R3. Do you feel governmental agencies (e.g. CDC and/or SC-DHEC), or you, the operator, are the most appropriate entity to manage health and safety practices to protect your staff and customers' welfare?

The results from the survey were surprisingly supportive in favor of CDC or SC-DHEC guidelines and standards. Nearly 60% favored such measures in order to promote and secure health measures for the greater good of society. Post survey interviewees also favored governmental guidance. One interviewee suggested that *“this is a global health crisis that we all are subject to. Not following CDC guidelines as a citizen will only make the situation worse longer term.”*

R4. How long do you anticipate being able to remain fiscally viable under current COVID-19 restrictions and guidelines?

In addressing this research question, it was evident from the survey responses and the post interviews that a prolonging of social distancing guidelines will shorten the time that the operators' business will remain open. As mentioned, 65% of survey respondents said they would likely close their restaurants if COVID-19 guidelines remain into 2021. All interviewees concurred that a continued reduction in customer counts and sales volumes will result in inevitable financial insolvency. One interviewee stated *“I have already withdrawn from my retirement benefits to cover current monthly fixed costs for my restaurant. If conditions continue or worsen over the next three months, I will not have enough revenue coming in to cover these costs and I will be forced to close. I am simply operating under cash reserves at the moment.”*

R5. What type(s) of financial assistance would be necessary for your business to remain viable under the current COVID-19 conditions?

Of the numerous financial assistance options mentioned in the survey, 81% of the respondents indicated that they were interested in one of the CARES Act programs, which was followed by those favoring tax incentives (54%). Of the three primary CARES Act programs, several interviewees were interested in the Payroll Protection Program (PPP). However, given that many of the survey respondents were only able to rehire a fraction of their original staff, they are not likely to meet the PPP loan forgiveness requirement to maintain 75% of their pre-pandemic payroll for eight weeks at employees' normal salary levels. One interviewee responded by saying that he *“favor(s) another round of small business low-interest stimulus loan that was originally proposed by Senator Tim Scott. I am unsure however, if I could even qualify or gain access to another round of stimulus loans. I was unable to obtain any the previous round.”*

R6. If your operations were required to shut down a second time, what is the likelihood of your business being able to continue?

The survey respondents were largely pessimistic in addressing this research question. Over half of all respondents (58%) indicated that they would not be able to reopen again, if a second mandated shut down occurred. This was further supported by all interview participants, who suggested that their operations would be unable to return from a second mandated shutdown. One restaurateur from the interviews stated: *“I barely opened when restrictions were lifted in May due to the initial reopening costs associated with buying new inventory and additional supplies to meet new guidelines. This along, with paying back invoices prior to the first shut-down. I also had to pay on my rent and utility bills during the two-month shutdown even though I didn't generate any sales. If I were forced to shut down operations again due to COVID-19, I could not feasibility make it work.”*

R7. What social conditions help support or hinder your ability to be financially viable during the COVID-19 pandemic?

In addressing this research question, it is important to examine the responses from the survey that indicated which policies or social activities would be most favorable for the operators' specific region, in order to maintain viability. Results indicated that increased consumer confidence to consume meals away from home were perceived by 81% of the operators to be the most beneficial to their businesses. This was followed by 60%, who said that the return of pre-pandemic tourism

levels was important. Interview subjects that operated units in predominantly high tourism destinations with increased competition and reliance on high population density, substantiated these responses. Interviewees from these locations (e.g. Charleston or Myrtle Beach) said they will not be able to remain fiscally viable if tourism levels do not increase. One respondent from the Myrtle Beach region of South Carolina stated in their interview that *“We are 90% reliant on tourism traffic every year for our restaurants. This includes seasonal customers along with conventioners and group tours. We were able to maintain operations at one of our locations in the area during the two month closure by providing some catering services of pre-packaged lunches to local golf courses, but that is not nearly enough to sustain our business long term if tourism traffic does not significantly increase over this summer.”*

R8. What are your perceptions regarding the overall financial viability of the hospitality and tourism industries, over the next 18–24 months, because of the COVID-19 pandemic?

Overall, results from the survey and interviews were mixed regarding this research question. When examining the survey results over the roughly one-month of data collection, it was observed that pessimism and negative responses grew as the time period of survey collection continued. Initial survey responses to the question were highly affirmative regarding a positive outlook but continued a downward trend as time and additional survey responses were recorded. This was also substantiated by the latter post-survey interviews, which largely had a negative outlook for the hospitality and tourism industry in the future. One interviewee from Charleston said, *“hotel occupancy is down nearly 75% and not likely to rebound anytime soon. Even if social distancing practices go away with the advent of a vaccine, or something, consumer confidence will still be very slow to return.”*

## 6. Discussion

### 6.1. Managerial implications

This study's literature review and research findings can help other independent restaurant operators. The literature review provides a concise overview of the COVID-19 pandemic and crisis management tactics that helped restaurants to survive prior epidemics (Tse and Leo Sin, 2006). Extrapolating its quantitative and qualitative results is also instructive. For example, survey respondents indicated approximately 95% have shifted service options away from indoor dining. One interviewee discussed acquiring a food truck to expand outside off-premise sales. Given this, independent restaurant operators would be advised to further expand carry-out, curbside pickup, delivery, and outside off-premise catering, and even home meal replacement programs (e.g. ready-to-eat meals) to supplement the loss of indoor dining sales.

Another finding was nearly 75% of the operators had not rehired all their staff back, upon reopening. Unemployment rates have gone from 03.6% in January to 13.3% in May (U.S. Bureau of Labor Statistics, 2020). While restaurant operators struggled to recruit quality hires prior to the pandemic, now skilled workers are in abundance. Independent restaurant operators would be wise to employ these, now available, skilled staff.

Two of the study's findings coalesce to suggest additional pandemic business strategies. First, nearly 60% of surveyed operators said they preferred that governmental agencies (e.g. CDC and SC-DHEC) provide health and safety guidelines. Also, 81% of respondents said that increased consumer confidence was essential to their restaurants' recovery. As noted in the literature review, restaurants can take steps to improve their social image through community philanthropy. For example, they might donate a portion of their proceeds to COVID-related causes. Furthermore, independent restaurateurs could work with governmental health agencies to provide, for example, an official certificate of health safety. These certificates could be posted on restaurant doors and advertisements to further boost consumer confidence. For example, South Carolina has a voluntary program called, Palmetto

Priority, which allow restaurants that follow recommended health safety protocols, to put a designated eight-inch round decal in their window. South Carolina's Governor, Henry McMaster, was quoted as saying, "If you're going to a restaurant and it doesn't have this seal, go somewhere else..." (Adcox, 2020, p. 34).

The vast majority (81%) of surveyed operators said they planned on seeking out one or more of the CARES Act programs. However, many small businesses may have missed out on some of these programs because of low baseline awareness and differential access to information relative to larger firms (Humphries et al., 2020, p. 1). Independent restaurant operators should work with the National Restaurant Association to lobby Congress to expand CARES Act-like programs. To that end, the National Restaurant Association (NRA) recently announced a bipartisan effort to introduce the Real Economic Support that Acknowledges Unique Restaurant Assistance Needed to Survive Act of 2020 (RESTAURANTS Act). The NRA stated that the bill provides hope for U.S. independent restaurants to be able to survive. However, local and state restaurant associations should be asked to provide education and training as to how to apply and navigate this and other financial assistance programs.

Finally, this study's findings indicated that independent restaurant operators were surprisingly ambivalent about the future viability of the hospitality and tourism industry. This should be a "red flag" for restaurant operators because of the interrelated nature of businesses in the hospitality and tourism industry (Walker, 2017). Particularly in tourist regions, restaurants need hotel guests, and other drivers of tourism visitation (e.g. golf courses, tours, meetings and events, and attractions). Independent restaurant operators should work together with community leaders, convention and visitors' bureaus, and local restaurant associations to enhance the general appeal of the region. For example, restaurant operators can work with other hospitality and tourism businesses to create packages that benefit all involved.

## 6.2. Study limitations

An objective of this research was to get useful information out expeditiously, for the special issue on COVID-19, so that other independent full-service restaurant operators could benefit early on, given the fluid nature of the pandemic. As such, a limitation of this study was the curtailed data collection window, which resulted in modest sample size that mitigated inferential statistical analyses. It is worth noting, however, that responses came from operators running 53 distinct independent restaurant companies, or approximately 130 restaurant locations. This then represents a wealth of experience and knowledge about the foodservice industry. Another possible limitation was approximately 60% of the operators' companies were in the Charleston, SC area, which might bias some of the responses toward a heavier dependence on tourism. With that said, the *Washington Post* ranked Charleston as one the ten best food cities in America (Sietsema, 2015), so arguably respondents from this region were skilled operators.

## 6.3. A new normal

An article in *Modern Restaurant Management* suggests ways that restaurants can prepare for a "new normal" (Ginty, 2020). Their research suggests that restaurants create a dedicated takeout area for staging. Restaurant operators should consider complete makeovers of their dining areas to facilitate social distancing. William Duff, an architect in New York City spoke to adaptability being key to achieving this successfully. He suggested transformable spaces using movable partitions and adaptably technology. For example, the bar area in a restaurant can be separated with a physical barrier and become its own separate take-out space. New dining room designs should also consider the human need for social interaction, which might bring people back to the public realm. Designers should be cognizant that when diners return, they will be looking for safe and comfortable environments. An aesthetic

articulated with restraint and simplicity is likely to feel cleaner and safer.

As noted in the section above, restaurant chefs can further engage with their customers through online cooking demonstrations, in combination with meal-kits delivered to their homes. If new commercial kitchen environments are created, attention should be given to staging areas that would best facilitate such cooking demonstrations and the preparation of home meal-kits.

New food preparation materials might also be a factor. A study conducted by the American Society of Microbiology found that seasonal flu particles were dramatically less likely to survive on copper when tested against stainless steel (Noyce et al., 2007). An increased use of copper in restaurants may not only make diners feel safer but also evoke a warm and sensuous ambiance. Antimicrobial materials and coatings such as treatments by Microban or Wilsonart, typical for surfaces in healthcare environments, could also become more common in restaurant settings. These new surfaces will likely be combined with increasingly more automation—for example: dedicated order lanes or receptacles for dirty plates.

## 6.4. Future research and conclusion

Future research is needed as the COVID-19 pandemic continues to evolve and as independent restaurateurs move their operations into a new-normal. For example, time-series analyses, similar to Chuo's (2014) longitudinal research, is suggested. Also, because restaurant operations are so disparate and difficult to categorize (Canziani et al., 2016), qualitative research approaches may yield more meaningful and utilitarian results. With an uncertain forecast for an end of the COVID-19 pandemic (World Health Organization, 2020a), it paradoxically appears there will be time for more scholarly contributions.

This study examined perceptions of South Carolina independent full-service restaurant operators regarding the operational and economic effects of the COVID-19 pandemic. Its findings should help other restaurant operators navigate through the maze of issues to survive and, perhaps, even prosper moving forward. In closing, one restaurant operator's interview comments seem particularly relevant. He said, "*hey, I know a lot of my competitors will be forced to close before this is all over. I am motivated to work as many hours as it takes to see my way through this, and come out on the other side, because opportunities to increase my market share will abound!*"

## Appendix A. COVID-19 Economic Relief Programs

Governmental and non-governmental agencies created economic programs to provide relief from the negative impact of the COVID-19 pandemic. The U.S. Federal Government created the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) (H.R. 748 / S.3548) was signed into law on March 27, 2020. It was intended to address the impacts of, and otherwise respond to, the COVID-19 outbreak. With regard to small businesses, it provides funding for forgivable bridge loans, and additional funding for grants and technical assistance (Congress.gov, 2020). Through the U.S. Small Business Administration (SBA) it sets out the following programs (McGurran and Smith, 2020):

Through the Paycheck Protection Program (PPP), the SBA will guarantee loans of up to \$10 million to eligible businesses, and the loans will be provided by lenders including banks and credit unions. PPP loans can be forgiven if businesses maintain 75% of their pre-pandemic payroll for eight weeks at employees' normal salary levels and use the loan proceeds for qualifying expenses.

With Economic Injury Disaster Loans (EIDL), the SBA provides working capital of up to \$2 million to small businesses and nonprofits affected by the coronavirus. These loans carry an interest rate of 3.75% for small businesses and 2.75% for nonprofits. Loan repayment terms vary by applicant, up to a maximum of 30 years. The stimulus updated the program so that sole proprietors and businesses with fewer than 500

employees qualify, and applicants do not need to provide a personal guarantee on loans under \$200,000. Payments can also be deferred for up to four years. Even if the business is denied a loan, EIDL applicants can still access an emergency grant of \$10,000, which can be used to provide employee sick leave, maintain payroll or meet other needs, like paying rent.

The Express Bridge Loan Pilot Program allows small businesses who have a business relationship with an SBA Express Lender to access up to \$25,000 quickly. These loans can provide vital economic support to small businesses to help overcome the temporary loss of revenue they are experiencing and can be a term loan or used to bridge the gap while applying for a direct EIDL. If a small business has an urgent need for cash while waiting for a decision and disbursement on an EIDL, they may qualify for this program.

SBA Debt Relief will distribute six-months of principal, interest, and any associated fees that borrowers owe for all 7(a), 504, and Microloans in regular servicing status as well as new 7(a), 504, and Microloans disbursed prior to September 27, 2020. This relief is not available for Paycheck Protection Program loans or Economic Injury Disaster Loans.

Some restaurant operators are working with Congress to further the Treasury's Exchange Stabilization Fund (ESF), which is a part of the CARES Act (M. Shemtov, personal communication, May 19, 2020). It appropriates \$500 billion of the ESF to support loans, loan guarantees, and investments for businesses affected by COVID-19. In addition, the Act temporarily permits the use of the ESF to guarantee money markets, as occurred in the 2008 financial crisis. ESF assets have already been pledged in 2020 to backstop several emergency lending facilities created by the Federal Reserve (Fed) in response to COVID-19 (Congressional Research Service, 2020).

There were also other non-governmental restaurant relief programs, such as the James Beard Foundation Food and Beverage Industry Relief Fund and the Support Restaurants Dining Bonds Program. Some of these programs, for example, encouraged consumers to purchase gift cards for their favorite restaurants and not use them, as a type of microloan.

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