The Future of Quick Service Restaurants

Insights across the U.S.

ThoughtWorks®

Towards a New Future

COVID-19 uprooted consumers' lives in ways that have not been seen in a century. Nationwide quarantines, social distancing guidelines and constantly evolving medical guidance have left many consumers fearful, confused and even angry. What is certain is that life has changed. What is less certain is how these changes will play out over the long term and how customers will respond over time.

We were especially interested in how the COVID-19 pandemic has influenced consumer sentiment and behavior as it relates to dining and quick service restaurants. Eating outside of the home these days is fraught with uncertainty and discomfort. Despite relaxed pandemic guidelines in many states, 78 percent of consumers say that they would be uncomfortable eating at a sit-down restaurant.

We interviewed a diverse group of consumers to get their perspectives. This paper will discuss the findings of our research as major trends and provide recommendations for quick service restaurant (QSR) actions in the post-pandemic world.

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About the Research

We conducted a series of individual interviews to gain in-depth insights into attitudes and behavior as it relates to dining and quick service restaurants, concerns about COVID-19 and the impact of one on the other. We talked to people living alone, with families, and with children. We talked to people all over the US in states with strict lockdown protocols and in places that were among the first to reopen their economies. We talked to an economically, socially, and politically diverse set of consumers, all of whom have in some way eaten prepared meals from quick service restaurants (in store to-go or pick-up, via delivery, curbside pickup or drive through), or subscribed to meal kits for preparation at home.

Due to the nature of the pandemic, all interviews and surveys were conducted remotely, which limits our respondent base to those with access to high-speed internet and/or mobile data.

Findings

Customer Mindsets: The Continuum of Concern

We discovered that customers fall along a "continuum of concern" when it comes to COVID-19 (from cavalier and laissez-faire to hyper-vigilant) and this influences not only their current behaviors and expectations, but also their perceptions of how the world will change moving forward. Location did not seem to be a defining factor. In our research, people in states with looser restrictions reported similar levels of discomfort to those in states with stricter rules.

2	3	4	5	7	8	8	8	9	9	10
JOSH	MARY	LINA	TANYA	ALEX	EMILY	RICH	CHRIS	MADDY	ADAM	LAURA
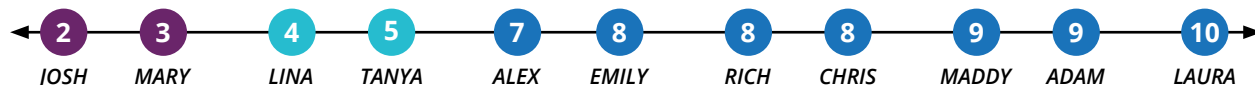
"LAISSEZ-FAIRE"	MAINSTREAM STOICS	HYPER-VIGILANT
Thinks the pandemic is over-hyped.Currently still socializing and engaging in frequent public outings. Wants things to go back to normal as soon as possible.	Listens to CDC guidelines and tries to adhere. Practices more frequent hand-washing and social distancing. Not always sure where to get info but supports current restrictions. Makes occasional outings for what they deem important.	Very anxious about the pandemic. Concerned about worst case scenarios (hospitalization/ death). Strictly maintains in-home quarantine, and practices diligent mask-wearing in rare public outings.

Findings

Laissez-Faire:

Laissez-Faire customers are pragmatic about ordering their meals during the pandemic. They are careful and respectful of others, but not overly worried about their own safety. In general, they are people-oriented and miss the social connection of eating occasions. Meals are about the experiences and the people with whom they eat. They are most likely to go right back to getting their food onsite and dining in when restrictions are lifted.

Mainstream Stoics:

Mainstream Stoics are cautious, but want to have as much a sense of normalcy as possible. They are willing to adapt to new experiences if they perceive them as safe, but will wait for others to try conditions first to see whether new conditionsresult in an increase in new cases. They may believe that restaurants are in fact 'safer' now than they were a year ago, and may even consider dining in, if there is outside seating in which they feel safe.

Hyper-Vigilant:

The Hyper-Vigilant are very concerned about public health aspects of the crisis. They may have concerns about underlying health conditions or strongly want to avoid putting themselves or loved ones at medical risk.

They have adopted highly digital lifestyles in efforts to make as few external trips as possible. They are the most likely to use drive-thru and curbside delivery options, and are the least likely to go into a store or restaurant to order or pick up food.

The Restaurant World has Changed

Some reports suggest that 130,000 restaurant locations that were open in 2019 will be permanently shuttered by next year, as a result of the pandemic. Those that survive will do so in a vastly altered landscape.

Public Health Requirements

Strict protocols, such as having available hand sanitizer, thermometers and training employees to minimize human contact, are becoming the norm. The frequency and rigor of in-store cleanings, and sanitizing high-touch areas (such as counters, self-checkout screens, and door handles on coolers and freezers) have increased. There is a limit on the amount of people in one space at one time.

Consumer Uncertainty

Customers have been bombarded with volumes of information about the virus. They find themselves having to wade through a hodge-podge of state, local and federal regulations and guidelines, which sometimes conflict with each other. As businesses try to determine the right strategies for opening, customers struggle to keep up - are their favorite restaurants closed? Allowing take out? Doing delivery only? And all the while they have to deal with the uncertainty of how to care for themselves and their family if they get sick, and what impact a slowing economy may have on themselves and their family's finances.

Food Supply Chains

Upstream disruptions on commercial farms and at food processing plants have led to periodic shortages and threatened the certainty of supply. Restaurants need a reliable supply chain, not just for food ingredients but also for essential supplies to keep the business running: paper goods, cleaning products, etc. Customers, faced with their own shortages, may consider restaurants as alternate sources of supply.

What We Learned: The Trends

Our consumer conversations revealed eight main themes related to the restaurant experience in the Next Normal.

Earn My Trust	Contactless Everything	Comfort Food	Superior Service
Family Size it	Save the Local Store	Entertain Me	New Value Meals

1. Earn my Trust

> *"If I don't feel like their practices are safe, I won't go there. If there is a line or gathering; if I have to go inside; if there is no drive-thru, I won't go there. COVID-19 is everywhere."*

In our research, we found that customers are looking for a match between their personal hygiene standards and those of the restaurant from which they seek to get a meal. Standardized safety protocols reassure eaters. They want to be around people who practice the same standards of safety. Restaurants need to be fearless in ensuring customers of their cleanliness and how they're protecting them in the face of COVID-19.

The Next Normal:

Trust will become a critical part of shaping the customer experience . Consumers will expect behavioral and physical cues to build trust in an establishment. For many, masks in public, social distancing, and hand-washing are becoming routine personal habits that maintain safety from infection.

Personal habits are informed by a variety of sources—previous experiences with disease, official and unofficial health related websites and documents, and the social norms of peers and family. Whatever the set of rules people have defined for themselves or their family, it may influence the way they make decisions about when and where to buy meals. As quarantine restrictions lift and eateries open, customers will be vigilant about what happens to other people who eat there.

We Recommend:

For businesses, it is important to control the way the experience is perceived in the customer's eye.

- Match the customer's image of what safety looks like. Consider having employees wear gloves, masks and be socially distant. Build physical barriers to help them be protected and ensure surfaces are routinely sanitized. If customers are line averse, consider the ways in which lines are managed. Provide physical and directional cues that enable social distancing. Skip the extras like straws and cutlery. Consider ways to provide fresh air. This will convey more than just health. It conveys trustworthiness.

- Communicate what the business is doing to maintain a clean experience. Whether in the store, online on the web, via app app or in social media, communicate how the experience has been designed to keep both customers and employees safe. This can't be over-communicated right now. Consider ways to educate and guide customers to know what to do and the sequence in which they need to do it.

- Minimize contact with the food that is ordered. Consider how food packaging can emphasize that contact has been minimized. Convey freshness but also a sense of deliberate care that this has been only touched by the person who made it and the person who will eat it. For example, some restaurants in Wuhan, China go as far as including the name and temperature of the food preparer and delivery person with each order.

2. Contactless Everything

> *"We've been doing no contact delivery which is the safest option."*

Many customers we spoke to want contactless transactions in order to reduce or eliminate touchpoints that would increase their risk of exposure to COVID-19, as much as possible. They also want to avoid the handling of cash.

Because of local laws, many restaurants must accept cash payments, but during this pandemic many consumers have moved in favor of low or no contact payment methods.With contactless delivery, applications both mobile and web, have gained an increased share of restaurant sales and customers expect the same experiences from the application as they would get in-store. For example, customers who are used to splitting the check after they order in-store, expect the same functionality when using a restaurant application. Consumers we interviewed have continued using applications to order food for pickup, even after local governments have lifted restrictions, because the applications are efficient and save them time.

The desire for contactless experiences have led to increased popularity of third party applications like DoorDash, GrubHub and UberEats. Customers we interviewed were aware of the pricing differences between these third party applications and directly ordering from the restaurant. They were increasingly aware of the controversial commissions charged by specific third party applications and this influenced a stronger desire to order directly from the restaurant.

The Next Normal:

Contactless experiences are the new normal as a result of COVID-19 and may be aided by other kinds of interactions in-store such as voice or wearables. Contactless experiences include both delivery and in-store interactions, like menu selection and payments. The expectation is that experiences in-store and with an app can be done with limited physical contact. Customers want to order from a menu using their mobile device, not a self-serve tablet or screen in-store, and pay using their phone or wearables, not cash or a card that requires physical interaction with a payment device.

Customers expect the same experience from an app as they would get in-store and vice versa. Customers must have the ability to use a brand's promotional coupons and pricing in addition to effortlessly customizing an order just as they experience in-store.

Customers evaluate a restaurant's mobile app against a third party app initially and then use that decision to order consistently. Third party apps that are perceived to charge higher commissions may be avoided even if the third party app has preferable delivery services and value pricing. The use of a third party app that does not give the brand's rewards, special pricing, or waive delivery fees may not be used if the customers are enticed by the restaurant's app instead.

We Recommend:

Close any gaps to offer a contactless experience and address all your customer's safety concerns regardless of where they are on the continuum of concern. This may include ensuring payment devices are upgraded or enabled to accept payments from mobile, wearables, contactless cards, and barcode scans like Venmo. Receipts should be provided digitally via text or email by default unless paper is requested.

Implement creative ways to maintain social distance guidelines like creating a virtual line for customers coming inside the store to order or for pickup. Shut down self-serve stations like fountain drinks and condiments to introduce single serve for your customers.

- Your customers' digital experiences must be efficient and time saving. Map your existing in-store experience to your app experience to recognize and address the differences. Enhance the experience of your customers so that they love using your brand's app when ordering.

- Manage both your app and third party apps to determine how you want to partner for the best experience and strategy to fit your brand's needs. Make an informed decision on how you will manage safety if your customers order from a third party app. Ensure your digital presence is consistent and analyze the data to get insights on your customers across all third party applications.

3. Comfort Food

> *"It's interesting how many small pleasures we lost. I miss the experience of dining with other people"*

Customers view food through a social lens. While factors like value, nutrition and convenience factor a great deal into food choices and decision-making, much of customers' experiences of food center around social interaction. And social interactions are what customers miss most about restaurant dining experiences. With most of the nation under some form of "stay at home" restriction, food became both a source of comfort and a form of entertainment.

The social aspects of food take multiple forms as customers try to navigate the new and next normal:

- For those sheltering in place at home alone, the simple act of in-store pickup is an opportunity for a brief social interaction.

- Some customers stick with old menu favorites because they create a sense of familiarity while so much else is uncertain.

- Others take the opposite approach, trying new restaurants and menu items as a form of entertainment, since so many other traditional entertainment options are closed or severely restricted.

- People have tried to find imaginative ways to recreate community during physically distant meal occasions, whether by connecting with others via Zoom or FaceTime, planning   outdoor gatherings with physically distant seating, or reimagining special events like birthdays and graduations.

Cooking at home has become more popular, but many customers seem to be ambivalent about it. They enjoy the act of cooking and the togetherness created by cooking and eating meals together. Yet cooking, like so much of life in lockdown has also engendered a sense of ennui and quarantine fatigue.

The Next Normal

We suspect customers will want to explore new ways to maintain community even if in socially distant ways. This might portend more entertaining at home. People will want safe physical in-person experiences because they miss people, but will want socially distant options because they are suspicious of those they don't know well. This will become even more important as different regions experience community spread.

Customers seem to have rediscovered the joys of cooking, even as they tire of it in some instances. This may make them more likely to prepare hybrid meals which include both homemade and take home options. This may mean that they are also willing to look for more creative options than their traditional takeout choices.

We Recommend:

Restaurants will have to be adaptable as different municipalities try to find the right balance between phased re-openings and dialing back, based on the prevalence of viral cases.

- To address concerns about overcrowding or contact with strangers, QSRs may want to consider letting customers book reservation windows for their expected pickup times, perhaps even combining it with real-time in-store traffic information to reassure skittish customers that social distancing guidelines are being maintained.

- As physical space becomes more of a concern and limits on store capacity stay in place, locations that may previously have been used for family or other social gatherings may be limited in the number of patrons they can accommodate at a time. This might give rise to things like being able to reserve a specific table (like reserving an airline seat) or the whole location.

- Restaurants may also want to explore new opportunities to help customers recreate the restaurant experience at home. This could include making their menus and the presentation of menu items more modular, providing ways for customers to match sides and restaurant items with home cooked items. Menus could be broken by occasion type with pairing suggestions for meals that can be mixed and matched food prepared at home.

- Restaurants may even be able to help customers recreate a sense of community and spontaneity with "matching" apps that alert people to when friends are planning a meal, so that people can plan to eat together.

4. Superior Service

"The site was slow, search was poor, things wouldn't go into your cart, so I gave up and tried to order on the phone … if it takes me more than 20 minutes to get hold of a place, I will just cook it myself."

Customers have high expectations that the food should taste good, be on time, and exactly what they ordered. They have a low tolerance for rude or inconsistent service.We found that customers' favorite dining memories deeply influence their expectations about how pandemic-era on-demand meals 'should' work. While their memories evoke an idealized experience, in the current reality, experiences can vary. Some customers are left confused, and others delighted by their pandemic-era dining experiences.

Mastering the art of pick-up, to-go, curbside, or any other version of contactless food hand-offs is challenging for businesses and often results in inconsistent service. Customers are applying a mental model that is somewhere between pick-up and table-service, prioritizing expectations of service such as accuracy and efficiency with the need for hospitality that is complicated by social distancing.

The Next Normal

Even after QSRs re-open, consumers will want a grab and go model (curbside pick-up and pre-ordered drive-thru) as they maintain distance. In addition, customers will come to expect the same kind of omni-channel experience from QSRs as they have come to demand from retailers (preferences, order history, affiliated consumers).

Eaters choose where to eat based on preference, convenience and location. The nature of convenience itself has shifted. Everything is being juggled in one place - home - and life has become scheduled down to the minute. Time is emphasized over location as priority. Pressure is on all restaurants to deliver on this idea and meet the on-demand nature of the people they serve. A 45-minute delay in food service can create not only an unpleasant experience for hungry people, but can disrupt a fragile home-life balance in which every minute counts.

We Recommend:

Restaurants have the opportunity to help customers achieve a sense of control by being the orchestrator of a stress-free prepared meal experience. This can take several forms:

- Match the customer's schedule. Consider ways to be up front about the time it takes from door-to-door. Many people will skip the third-party services and go directly to the restaurant if the service is more immediate. Consider ways to always keep customers informed about the time their food will be ready, don't make them wait in a congested area for late food.

- Guide the customer. Standard operating procedures vary widely and are confusing for customers. Customers are keen to minimize contact and want to know what they need to do when they arrive for pick-up, drive-through or curb-side. Consider giving them instructions every step of the way, whether it is popping their trunk, waiting in a specific numbered location, or listening for their name to be called.

- Personal, friendly service still matters. This may be the only human contact the customer has had all day. Consider providing ways for there to be an exchange between customers and service providers or between customers and customers in a safe manner. Dining might still fill the need of socializing to some extent.

- Capture customers' hearts with excellent service recovery. Customers still expect an easy way to access someone when things go wrong—an order is not what they requested, service is unresponsive, or the food is late. Consider ways to make the customer feel heard and that they matter. It's more than just recovery, it's giving the control back to the customer.

- Be thoughtful about rewards. Rewards for regular customers can have even more impact and resonance now than before, if restaurants pay attention to buyers' habits. Considering rewarding loyal customers with money they can put back into their next order or a personal add on. In a time where lives are strictly scheduled and controlled, consider the value of a surprise, introducing a bit of magic into the life of your regular customers.

5. Family Size It

"We would share what we got a lot of times, and now that's also not quite as easy to do. Or trying each other's stuff... It would be nice for large families and you know bulk ordering for us. We like to get a couple meals out of it."

With stay at home orders in place, and schools and workplaces closed, family meal times seem to have made a comeback. Families with children are doing a lot of cooking at home, but also trying to find healthy meal options from quick service restaurants. But they face multiple challenges when looking to quick serve restaurants for dining options.

Food must be as healthy and nutritious as the family can afford, while in many cases also taking into account varying health concerns or food allergies and sensitivities. Parents want variety and choices that appeal to adult palettes, but that is also palatable to children who may be picky eaters. For some, the search for suitable food choices now occupies a significant amount of social media traffic and effort, as parents rely on word of mouth and social media to learn about restaurants who are providing versatile meals and menu offerings.

Then, there is the concern for adequate portions. Parents expressed the desire for meals that provide enough food for the family at a reasonable cost. Others stressed the importance of variety. Still others, perhaps overwhelmed or simply bored by the task of preparing multiple family meals per day, expressed interest in having large enough portions that could be prepared for multiple meals in the course of the week. Family sized portions help to reduce stress of meal prep and provide leftovers for more meal flexibility. Additionally, buying food in larger volumes can help limit the amount of contact with the outside, and increases customers' feelings of safety.

While family meals have taken on increased importance, other group meals have dwindled significantly. Working team lunches are far fewer if offices are closed or open only to a few employees to maintain social distance. Sports teams, church gatherings and neighborhood social groups have to a large extent gone virtual, and extended family gatherings are fraught with concerns around physical distance and limiting contact with shared utensils.

The Next Normal

People will continue to practice social distancing even after the rules are relaxed, but will expand the circles that are considered "safe with whom to distance". As lockdowns loosen, we are seeing instances of small groups getting together across family boundaries. Social groups are beginning to reconnect, albeit more cautiously, and we expect that this will remain the trend, whether with small groups of single friends or families that establish "family social dates."

We have also seen a greater sense of community, despite the isolation of social distancing mandates. This shows up in the form of altruistic endeavors like the third-party orders of meals for essential workers and hospital staff, and community meals for laid off workers or those facing food insecurity. Multi-meal options for large groups that are physically separated may become part of the next normal.

We Recommend:

Restaurants that support family meal planning will be able capitalize on this trend. But this will be a matter of more than just providing family-sized portions.

- Consider options for family ordering that allow for individualized dietary preferences. Consider easy ways for customers to capture and save preferences that reflect individual needs as part of a larger group.

- Make it easier for friends or groups to share orders without needing to share devices. This will allow groups of friends or families to place orders in a socially distant way. This might mean enabling account or order sharing across devices and platforms, or taking advantage of voice technology to avoid having to make physical contact with a device.

- Family and group meal planning may also take into account how to support third party payment or delivery to split or alternate addresses within the same order. For example families could split an order with grandparents living in a different location, facilitated by single payment and multiple deliveries.

- Offer staple pantry and groceries items on the menu if possible. This will not only increase the order amount, but likely create return customers in the long run.

6. Save the Local Store

> *"I want to support local businesses and ordered take out directly through their website."*

Many local restaurants have had to temporarily close or cut hours due to the COVID-19 pandemic, and patrons who used to order food from the neighborhood restaurant have had to look for different options. Some of the customers we spoke to fear that their neighborhood restaurants may not reopen until the end of the year, or may go out of business altogether. Residents believe local businesses are cash strapped as a result of lower sales and there is also a lot of uncertainty on how long the pandemic will last.

Customers want to help their local restaurant owner and employees with whom they have developed a relationship over time. Many customers have increased the amount of their tips during the pandemic to show appreciation to employees who have had reduced work hours and pay.

The Next Normal

Customers want to do their part to help save their local restaurants to stay open. Many customers we spoke with also differentiated between 'local' and 'corporate' based on preconceived notions. Some customers go out of their way to order from a 'local' restaurant so that they do their part in keeping the neighborhood and local community vibrant rather than ordering from a 'national chain' that is more convenient.

We Recommend:

Brands should consider ways to cultivate and communicate community ties to build loyalty. You need to emphasize and communicate this to your customers, owners, franchisees and employees who are part of the local community. This will have more resonance than trying to build the brand with a focus on the parent corporation alone.

- Communicate how the local customers and community have helped save the restaurant during the pandemic. Let the customer know and feel how sincerely the restaurant appreciates all that the locals have done for the owners and employees during these tough times. Reach out to your customers and learn how their lives have changed, to figure out how best to support them and the local community.

- Consider allocating a percentage of marketing budgets for local marketing and content to reach existing and new customers via local digital and traditional channels. An example would be advertisements in neighborhood newspapers and online news publications, local magazines (physical & digital), city radio or podcasts, and local TV channels.

7. Entertain Me

> *"God, I cannot wait so we can just go out and get something to eat… I'm not a cook, and I don't really want to be in the kitchen."*

Our research has shown that customers feel food they are ordering has taken on a particularly special meaning during COVID-19. With most other social options closed or severely restricted, food has become an important form of entertainment. They are feeling now more than ever, excitement for restaurants and prepared food. It makes them feel connected to life outside of their homes and in many cases reduces the stress of cooking and preparing meals.

Customers are seeking out restaurants that have adjusted their menus to include new items, combination meals, creative bundles, cocktails and family sized portions (see theme 4). Some customers are keen to try new cuisines during this time, while others are sticking to their tried and true favorites and continue to order from the same places. As customers cook more at home, many are trying pre-prepared meal kits (although there is some concern about the amount of packaging waste). Others with more means are exploring catering prepared by restaurants or chefs that have been furloughed due to the pandemic.

For some in metropolitan areas or with limited transportation options and those who are simply trying to limit contact, restaurants have become quasi-grocery stores or butcher shops as restaurants seek creative ways to operate within social distancing limits. When ordering from restaurants, customers feel now more than ever, this is a special experience that brings them a sense of connection to the outside world.

The Next Normal:

In order to survive during COVID-19, restaurants have been pivoting their menus and offerings to engage new and existing customers. As food insecurity increases and recession recovery happens slowly, QSRs may need creative ways to become "semi-grocers". Customers will continue to seek out restaurants that offer more variety/novelty and provide versatile menus that cater to a wide range of needs.

We Recommend:

Find engaging ways to involve the customer in the entertaining aspects of food preparation and consumption. It is important to realize customer satisfaction extends earlier in the customer journey, at the point when they are trying to make informed choices about what to order. Provide customers with upfront details for menu items to ease decision making.

- Personalization is key. For restaurants, now more than ever, it is critical to enable recommendations for customers based on their preferences and dining habits.

- Enable customers to create their own bundle meals, with creative options and pricing. It is important for restaurants to be nimble in providing customers with options and opportunities to create their own meals to increase customer delight and satisfaction.

- Create a sense of novelty and uniqueness with menus, to make customers feel that they are having a special dining experience even if it is at home.

- Develop ways to help clients create entertaining experiences and involve others in executing them. Explore ways to help customers connect with each other further reinforcing the opportunities for entertainment and community.

8. New Value Meals

> *"No matter what price I pay I want it to be good quality food."*
>
> *"Quality is super important to me. I'm willing to put down extra money for places who are attentive to food allergies."*

Customers are looking for value when ordering food. Value is characterized by customers who will pay more for higher quality food from higher end restaurants, and customers who are trying to save money, but want the assurance of quality in the meals they are ordering for take out/delivery. As the impact of pandemic makes its way through the economy, people are becoming concerned about the potential impact of an economic recession. This is likely to drive concerns about how to provide meals in more cost-effective ways.

Respondents expressed concerns about the commissions being taken from restaurants by third party delivery services such as UberEats, DoorDash and Postmates, because they felt that the app services were taking unfair advantage of the restaurants they served. While customers are concerned with convenience during this time they are increasingly more concerned with value, accuracy and transparency provided by restaurants.

The Next Normal:

Customers want the best quality food they can afford. Customers who are more cost conscious, will likely be seeking more discounts even after they are able to return to on-premise dining in restaurants.

They are also likely to continue paying close attention to the fine print and details about pricing, especially with regard to third party applications.

We recommend:

Provide information to customers around ingredients, especially with regards to locally sourced and high quality ingredients. Customers are more likely to spend extra on items that they can justify in terms of relative quality, if given a choice.

- Reward customers for ordering, even if they are not part of the rewards program. Providing small discounts will appeal to those customers who are cost conscious during this time and beyond.

- Create clear paths for customers to sign up for rewards, and inform them of clear cost savings and potential future rewards upfront, and throughout the ordering process.

- Provide price transparency to customers ordering directly through your proprietary applications and alert them to the differences between ordering through yours vs. a third party app.

Navigating the New World

To succeed in this next normal, consider the whole customer journey. The relationship with the restaurant begins even before the order is placed, and continues through the end of the meal when customers reflect on the whole experience.

Rethink the Customer Journey

	CONSIDERATION	PURCHASE	PICKUP	PREPARATION	MEAL SHARING	REFLECTION
DO	Look for menu Consider choices Ask for ideas	Review option Pick from menu Place order I Pay	Collect food Check order Request changes	Unpack/ unbox Set table Gather diners	Socialize together Take pictures Post on social media	Contemplate meal Clean up Evaluate meal
THINK	What do I want to eat, Is anyone else eating, To cook or not?	So many choices This needs to be simple How much to order?	Did they get it right? Is it hot? Is it enough?	Is everything here? What else do we need? Who's eating now?	Is this good? Is everyone okay?	Was it worth it? Would I order again? What to differently next time?
FEEL	Anticipatory Hungry Bored Anxious	Excited/ Eager Overwhelmed Frustrated	Excited Relieved Anxious Annoyed	Expectant Impatient Stressed Rushed	Satisfied Happy Accomplished Wistful	Full Happy Disappointed Guilty
+	Novel options, familiar favorites	Easy process	Quick delivery, ease of pickup, touchless	Surprise extras	Company	Prompt service recovery, thanks
-	Limited choices Clunky search	Long waits	Cold food, wrong order, poor service, waiting	Excess packaging waste	Poor taste	Waste
TOUCH POINTS	App, Website, Social, ad/flyer (referrals)	App, store, phone call	Home, drive-thru, store, curbside	Packaging	In-person home, social	Social media, app, phone

We have defined five principles that we believe should influence how quick service restaurants should approach the "next normal" in the post-COVID-19 reality:

Over-deliver on the basics	Foster trust	Cultivate Community	Expand Choices	Reward Loyalty

Strategic Principle 1: Over-deliver on the Basics

Given the importance of the meal experience and the intolerance for service failures, QSRs will need to over-deliver on quality, speed and convenience.

Even after QSRs re-open, consumers will want the services that were driven by the needs for social distancing, e.g. curbside pick-up and pre-ordered drive-thru. Customers will come to expect the same kind of omni-channel experience (multiple touchpoints, anytime ordering, geolocation) and personalization (preferences, order history, affiliated consumers), from QSRs as they have come to demand from retailers.

Strategic Principle 2: Foster Trust

QSRs will build trust with customers by meeting and exceeding needs consistently. Once QSRs have gotten the operational basics right, differentiating with behavioral cues that reinforce the perception of safety will strengthen trust.

As quarantine restrictions lift and eateries re-open, customers will still want to know that the place they are frequenting for meals practices safety protocols. While levels of concern may vary by customer, or by levels of community spread, facilities that engender the most trust will over-index on public health requirements despite whatever set of rules customers have defined for themselves or their families.

Personal behaviors are influenced by a variety of sources, so restaurants should over-communicate public health efforts as part of trust-building.

Strategic Principle 3: Cultivate Community

Eating is often a communal activity so customers will benefit from providing customers opportunities to safely connect with each other and cultivate community ties.

Customers will want to connect and maintain a sense of community even during periods of social distancing. Restaurants that enable customers to connect with each other whether virtually or in physical space.can fulfill the human need for connection and community.

The sense of community extends beyond customers' social groups. Some customers go out of their way to order from a local restaurant, rather than ordering from a national chain, so that they do their part to keep the neighborhood and local community vibrant. Restaurants should

nurture these ties by sharing and celebrating the positive impact that customer patronage has on the restaurants, its employees and the broader community.

Strategic Principles for Navigating the New World

OVER-DELIVER ON THE BASICS	FOSTER TRUST	CULTIVATE COMMUNITY	EXPAND CHOICES	REWARD LOYALTY
Use apps for tracking meal components, not just order delivery status Use automated queuing and load management to process how lines are managed in stores and online. Map your existing in-store experience to your application experience to recognize and address the differences	Consider ways to guide customers step-by-step through your service tasks - provide visual and behavioral cues that reinforce safety messaging Provide ways to let customers define and ratchet up or down their high/ low touch preferences Consider how food packaging can communicate how contact in preparation has been minimized	Support customers in creating socially distant spaces for groups Use technology to create group orders and define preferences Create tools to allow community members to engage with each other in planning and sharing meals	Communicate and allow customers to manage dietary preference options Support menu planning based on customer preferences Use technology to help families and others to create group and gift orders Build customer profiles that transfer across all modes of interaction including mobile, web and in-store	Allow customers to choose the types of rewards that are most relevant to them Consider ad hoc moments of delight that can be engineered into the customer experience at scale Support rapid, easy reordering with customer created lists, favorites, subscriptions and push reminders

Strategic Principle 4: Expand Choices

As meals are shared in more diverse circumstances and needs become more complex, QSRs must find ways to expand customers' choices without overwhelming them.

Customers have expressed an interest in having more choices from restaurants. Restaurants can adapt to these desires by being thoughtful about the introduction of family sized portions, providing options for building hybrid meals that include both home-cooked and restaurant meals. This might even go so far as to include options to deliver grocery or pantry ingredients in addition to prepared meals.

As the restaurant provides more options and choices, it should use technology to help customers navigate among the options most relevant to them.

Strategic Principle 5: Reward Loyalty

> *The pandemic is also likely to have an economic impact. As customers cut back on discretionary spending, restaurants will need to find ways to keep loyal customers and capture a greater share of wallet.*

Loyalty is built on trust, habit and customer delight. Getting the basics right will help to establish trust. Building ongoing relationships and making repeat purchases effortless helps build habits. Maintaining consistently high standards of experience, while periodically surprising customers with inspiring moments creates delight.

Restaurants that find a way to combine these three will be positioned to increase loyalty. But this will require having the right customer data to ensure that customers' experiences are personal, relevant and impactful.

Conclusion

By some estimates, the world won't return to the pre-COVID-19 "normal" until the fall of 2021. Some industries may take even longer to bounce back. And some businesses in the restaurant industry will never bounce back. However, quick serve restaurants may be among the best placed to adapt successfully to the more socially distant, hyper-digital world. Meeting customers where they are, building digital experiences to support real-world customer needs and being agile enough to respond quickly to the changing market, public health and customer dynamics will be the key to thriving in this "next normal."

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