

PHASE

1

NOW Pandemic Pandemonium

Personal safety & high risk. Mass disruption. No dine-in. Customers are scared, anxious, and stressed.

- Share of stomach has shifted back to Grocery
- Food consumption shifting to residential location & away from workplace
- Customers staying close to home
- From the "The Kardashians" to "Little House on the Prairie"
- Consumers feeling exhausted - physically & mentally
- Nostalgia and indulgence rule choices
- Plastic is in, reusable is out
- Consumers spending more time on social channels
- "Contactless" delivery, pickup

Customer Attitudes & Behaviours,
Likely Operating Environment

- Are you highlighting your offerings during this period? Can your website be easily updated or is it time to take back control of your site?
- Back-to-basic menu items that travel well in a "delivery first" model
- Find new rituals to replace missing routines, eg. end of day quarantini - can you deliver the recipe & ingredients for mixing at home?
- Encourage ordering direct, by phone to avoid ordering fees
- Add alcohol delivery and pairings to up profit margin
- Consumers getting bored with own kitchen & cooking - can you offer meal kits of your signature dishes for home assembly?
- Join your BIA as local neighbours support each other and their businesses
- Utilize supply chain to offer groceries for purchase with meal

Foodservice Opportunities

PHASE

2

NEXT Pivot & Adapt

Starting shift to this phase now. Consumers feeling more comfortable about personal safety. Gradual loosening of restrictions. Some dine-in with lower maximum occupancy and safe distancing.

- Reduced discretionary spending and a move to budget-friendly options
- Looking for new ways of entertaining at home and will continue to eat at home more
- "Contactless" delivery, pickup will continue
- New way of dining out emerges
- Limited menu as you rebuild your pantry
- Reevaluate front of house - fewer tables, more room for delivery & pick-up options
- Technology becomes a way to eliminate contact & stay safe, eg. texting when food or table is ready, advance payment
- Will feel safer with chains initially - independents should use power of "local": community credentials & a human face
- No salad bars or buffets
- Temperature checks at the door for guests & staff

- Shift to dining with friends & family rather than strangers; can you sell your seating to one larger connected group?
- How to make money serving half the diners front of house? More turns? Pre-ordering?
- Small gatherings of under 10 friends & family at home - can you curate & cater their f&b for the evening?
- Everything, including staff, needs to look spotless; time for uniforms with matching masks?
- Can you cater to a new appreciation for "family dinners" with family-style order-in meals? Frozen meals in bulk?
- How will you maintain buzz and ambience when it looks like you're going to the dentist?
- Could/Should you shift your restaurant to a food truck?
- Continue to showcase support of small farmers & vendors with customers
- Can you serve up "World On A Plate" to satisfy the pent up travel bug?

PHASE

3

BEYOND Market Revival to the "New Normal"

Begin preparations for this phase now. Rally around "Together" moment. Fully operational.

- Cautious optimism (there could be a rebound), but consumers won't take food availability for granted anymore
- Money will still be tight - look for move to value, domestic travel, local tourism
- Renewed focus on environmental impact of choices & conscious consumption
- Wellness & weight management focus as we start going back to some previous routines, eg. gyms, immunity-boosting f&b
- Continuation of some remote working, e.g. alternate days
- Boomers have new digital skills, new apps
- Pent up consumption demand & need for variety after months of monotony
- Refocus on environment & sustainability
- Possible guilt offset for increased plastic usage for safety

- Continue to localize your marketing as much as possible, even if you are a chain - put a human face on your marketing communications
- What moments of celebration can your brand own? First family reunion celebration?
- More focus on customized solutions for seniors/vulnerable
- Consider more transparency in pricing: show what portion of bill goes to rent, labour, sanitation, food costs so customers understand slim margins
- Healthier menu options to support weight management, immune system health, lower alc options
- Reduced and reconfigured front of house to support ongoing pick-up, delivery trend
- Will we see a new lower-fee delivery service enter market?
- Can robotics take the place of some human functions?
- Introduce technology to support digital menus and contactless payment
- Value meals, supersize, so consumers can have leftovers for work lunch options
- Small-sized treats will appeal during recessionary spending period