

## RESEARCH STUDY

# QSRs in the age of COVID-19

The 5 most interesting things we've learned from our QSR Survey Series.

## OUR RECENT FINDINGS

After nearly two months in quarantine conditions, we wanted to share an update about how consumer QSR preferences have changed. Our weekly tests provide new insights, but we think there is a lot to learn by looking at the data holistically as well. This report summarizes our findings to date.



Our teams at Bottle Rocket are starting to think about consumer behavior as “re-normalized” rather than “reactive.” Through the survey results, we have also been able to infer what the restaurant industry is doing well, and not so well, in response to changing consumer behavior.

By taking a longitudinal look at our research and providing a follow-up to our findings published in [March](#) and [April](#), we've identified five key takeaways about how consumer behavior has changed due to COVID-19. Here they are.

**“ Think about consumer behavior as “re-normalized” rather than “reactive.”**

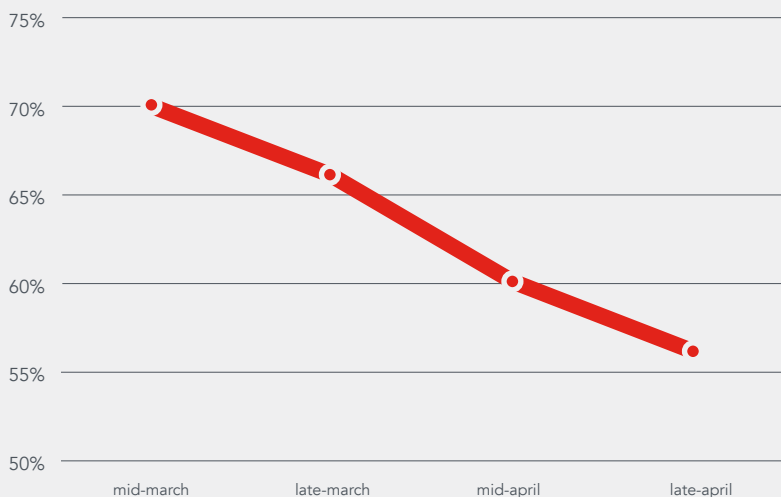
Over the course of the survey term, **drive-thru usage dropped consistently from 70% to 56%.**

## Drive-thru dominates ordering, but interest is fading

Drive-thru was the most widely-used method of interacting with QSRs throughout the course of our survey term. At least half of respondents used a drive-thru in every week of the survey—no other type of ordering topped 50% even once. While drive-thru continued its dominance, popularity did start to fade. Over the course of the survey term, drive-thru usage dropped consistently from 70% to 56%, and we believe this is due to consumers becoming more aware of the alternative forms of ordering and increased drive-thru waiting times due to the surge in demand.

### Declining Drive-Thru Usage

Percent of Survey Respondents who said they had used a drive-thru in the past week



Research conducted between March 17, 2020 and April 30, 2020. N= 2410

“ We believe this is due to consumers becoming more aware of the alternative forms of ordering and increased drive-thru waiting times.”

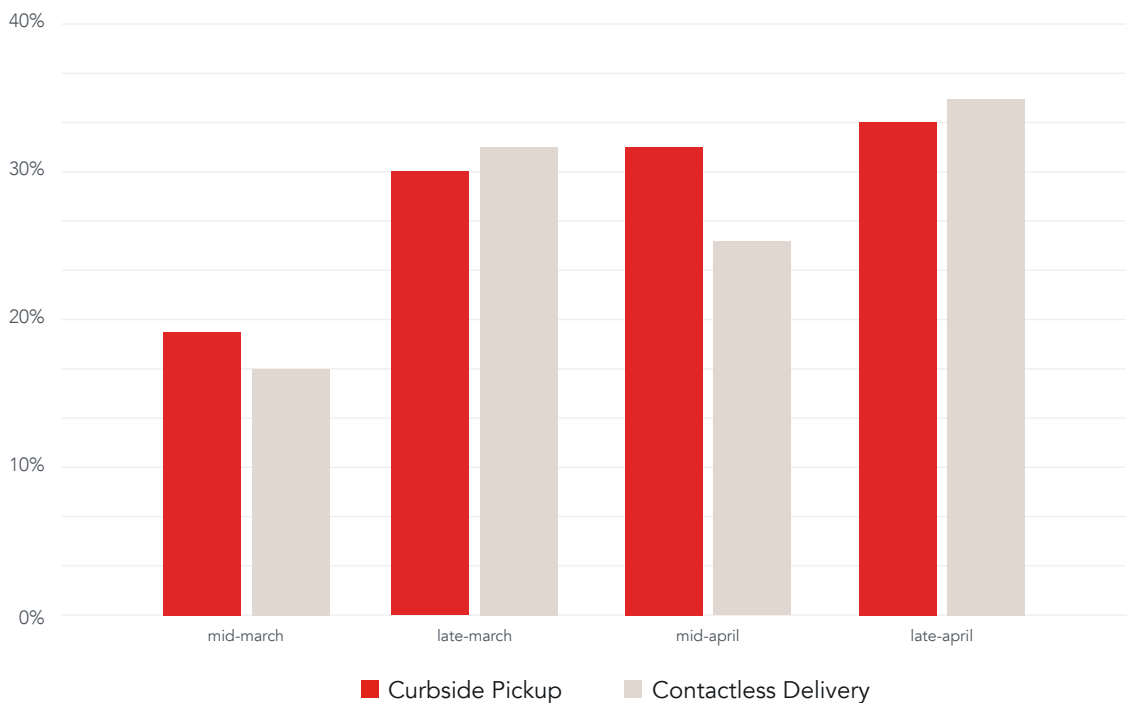
# Curbside pickup is up 50%, but contactless delivery up nearly 100%

The highest growth segment has been in contactless delivery. Part of this could be built into the survey architecture because the term “contactless delivery” was not a widely used term until early April. Another part of this jump is that “contactless” went from a previously irresponsible act of carelessness to an expected form of public-health consciousness.

Pre-COVID, if a delivery provider dropped your order at your door and failed to make some type of in-person interaction, customers typically would have filed a complaint or failed to tip for what could have been seen as “carelessness.” Now, doing the exact same process is seen as “health-savvy.” The same behavior is now rewarded, rather than frowned upon.

## Curbside & Contactless on the Rise

Percent of Survey Respondent Who Ordered Using a Specific Method in the Past Week



Research conducted between March 17, 2020 and April 30, 2020. N= 2410

## The pickup shelf is a solution designed for surges, not social distancing norms

There has been little to no change in consumers using a pickup shelf. That specific solution was designed for surge times, so it is understandable that there has been a slight drop in shelf pickup. Shelving works well when you can enter and exit freely, and some restaurants are not even allowing customers inside in the first place. Survey respondents have also noted that they feel more flexible in when they eat lunch—typically the highest traffic meal for the Pickup Shelf—and are more open to planning their trips to restaurants.

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Survey respondents have also noted that they feel more flexible in when they eat lunch.”



## Customers are more open to mixing QSR options into their future meal schedule

Our survey questions are a mix of understanding past behavior, current sentiment, and projected behavior. One of our projected behavior questions asks respondents "How often do you plan to visit a QSR or fast food restaurant in the next week?" At the outset of the quarantine, 25% of respondents told us that they planned to completely avoid QSR options in the upcoming week, but that number dwindled to only 10% by the end of the survey period. Whether that change is driven by honest reflection of past actions or customers finding new value in QSR options, we see that there may be a generally larger pool of people who will consider mixing QSR into their meal planning even once quarantine restrictions are lifted.



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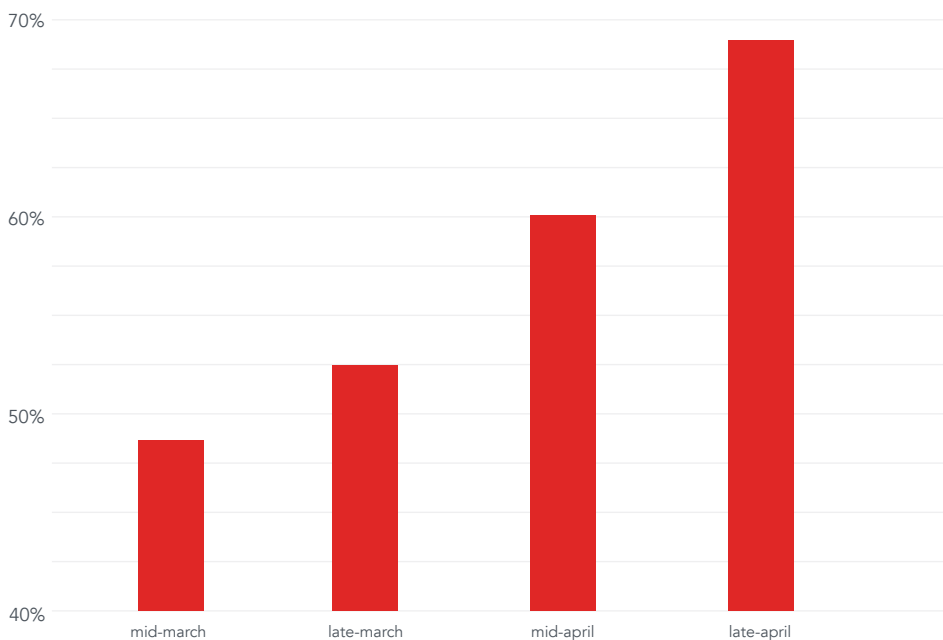
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## growing interest in text ordering

Throughout the course of our survey, interest in text-to-order grew slowly but steadily. We found this to be notable because there are very few QSR operators that offer text-to-order at all. Through survey responses, we learned that they saw value in text ordering, the ability to add specific details to their orders, and also the ability to avoid a sign-up flow that users typically see in first-time web and mobile app experiences. Based on survey feedback, we think text-to-order can be used as a conversion tool to capture loyalty information and drive app downloads, but text-based experiences should be thought of as a transitional experience that funnels new users into richer experiences.

### Interest in Text-to-Order

Percent of Survey Respondent Who Were Interested In Text-Message-Based Ordering



Survey respondents who were at least "somewhat interested" in text-to-order grew from 49% to 69% over the duration of the survey.

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We are gathering data every week, so please check back weekly for more tips and insights direct from customers.

Interested in connecting with Bottle Rocket's strategy team on this research:

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