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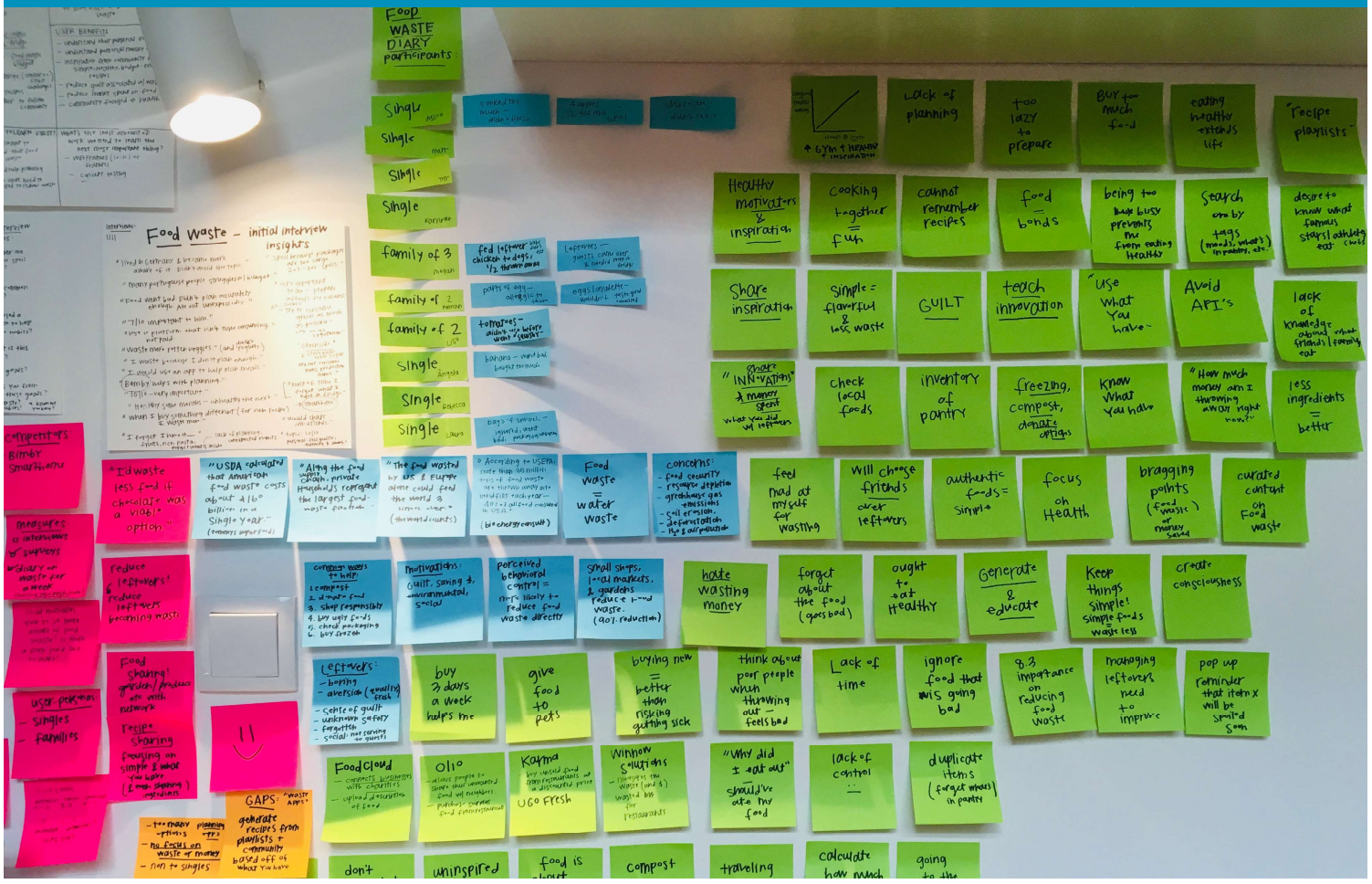


USING JOURNEY MAPS TO UNDERSTAND HOW THE CORONAVIRUS HAS CHANGED CUSTOMER BEHAVIOR

EXECUTIVE SUMMARY

The coronavirus pandemic has dramatically changed the way we work, live, and interact with each other. In this paper, we delve into what drives customer behavior now, and we show the ways that journey mapping can help organizations rethink customer experiences in light of the potentially lasting effects of this crisis. We focus particularly on the restaurant industry – which is more impacted by this crisis than almost any other part of the economy – and highlight seven examples that show how these establishments are re-imagining their customers' experiences.

HOW THE CORONAVIRUS IS CHANGING CUSTOMER BEHAVIOR

Almost everywhere, the coronavirus is re-shaping customer behavior. Weeks of extended confinement have led billions of people to a dream-like trance: long, indistinguishable days of remote working, homeschooling children, disinfecting, checking in with loved ones from afar, and worrying about the effects of recession.

These drastic lifestyle shifts have materially changed how we behave and make many decisions. In this new climate, a new set of core motivations now drive customer behavior. We call these core motivations Jobs to be Done – the functional and emotional tasks that customers are trying to get done when purchasing a product or service. Certain attitudes, behaviors, or circumstances, which we call Drivers, explain why a Job may be more or less important for a given customer. With the coronavirus in the picture, many customers have seen their priorities reshuffled as a result:

Customer Jobs to be Done in an Age of the Coronavirus

Improve my quality of life

- *Retain control over my life in the midst of uncertainty*
- *Feel healthy while in confinement*
- *Remain intellectually stimulated*
- *Feel connected to the outside world*

Provide for my family

- *Protect my loved ones and myself from the virus*
- *Feel like a good parent*
- *Support family members and friends in need*
- *Feel that my family is happy together*

Alleviate stress

- *Feel prepared for an emergency*
- *Avoid negativity*
- *Take care of myself*

Ensure a secure future

- *Maintain a stable source of income*
- *Feel in control of my overall finances*

Many of these Jobs were important before the coronavirus entered our lives, but their role in driving customer behavior is heightened now more than ever.

WHAT RESHUFFLED CUSTOMER PRIORITIES MEAN FOR BUSINESSES

As a result of these reshuffled priorities, customers are changing the way they consider and make purchases. These changes include:

- ***Different sales and service channels:*** As brick-and-mortar stores temporarily close their doors, customers are taking their spending online and demanding that items come straight to their door. The impacts extend to B2B firms, as in-person sales meetings cease and customer self-service becomes the new norm.
- ***Different selection criteria:*** Customers are looking for distinct attributes when they make purchases than they were previously. For instance, as governments restrict movement, shelf stableness has become a key selection criteria for grocery shoppers, leading to a surge in demand for boxed pasta and canned soups compared to more perishable, and hitherto highly-desired, products such as ripe heirloom tomatoes and bagged arugula.
- ***Different resources:*** Customers may have less money, mental bandwidth, time, and sources of information at their disposal to inform their purchasing decisions – leading to a new consideration process.
- ***Different stakeholders:*** As household dynamics are upended and financial stresses grow, the people who are involved in making purchases are evolving (e.g., middle-aged people now doing the grocery shopping for their elderly parents).

Some sectors, such as the hotel or restaurant industry, have traditionally relied on in-person interactions. Likewise, some brands may have focused their image on impeccable offline customer service. These strategies may have worked for a time, but faced with a global pandemic, today's executives need to re-shape the way they do business to fit their customers' new purchasing habits.

How are companies to make sense of this new world? How can organizations adapt the customer experience they offer to suit to the new reality caused by the coronavirus?

USING JOURNEY MAPPING TO MAKE SENSE OF CHANGING CUSTOMER NEEDS AND EXPERIENCES

Journey mapping, especially combined with Jobs to be Done, is a powerful tool for organizations to make sense of complex, multi-dimensional customer behavior. The aim of a journey map is to plot out the end-to-end experience that a customer might have with a company, product, or category. These maps tell the story from the customer's perspective, including a timeline of interactions and the emotional highs and lows along the way.

Journey maps are a well-used tool to identify pain points, redundancies, and opportunities for differentiation. But when customer behavior is rapidly shifting – as it is now – journey maps become essential resources for businesses to understand how their customer experience can radically change and proactively identify areas of improvement.

Our advice is to rethink your customer journey maps. What has changed due to the current crisis? What will change as the crisis abates, and as customers inculcate new habits? What can you do proactively to make your customer experience more satisfying, lower-cost, and more flexible to accommodate what might be lasting changes in preferences and behaviors?

This graphic depicts some of the ways that people are addressing their new priorities in this time of the coronavirus. Consider how your organization can relate to customers in ways that correspond to the priorities they have which are relevant to your industry.

Current Approaches for Addressing Key Jobs to be Done During The Coronavirus

Customer Jobs to be Done During The Coronavirus		Current Approaches To Satisfying These Jobs to be Done
Improve my quality of life	Retain control over my life in the midst of uncertainty	• Establish a routine
	Feel healthy while in confinement	• Work out indoors • Prioritize home-cooked meals and healthy delivery options
	Remain intellectually stimulated	• Cultivate hobbies and interests
	Feel connected to the outside world	• Stay in touch with friends and relatives • Keep up with the news
Provide for my family	Protect my loved ones and myself from the virus	• Limit non-essential outdoor activities • Sanitize my home often
	Feel like a good parent	• Make sure my kids are taken care of during the day (e.g., remote education, entertainment)
	Support family members / friends in need	• Offer to help those who are most vulnerable
	Feel that my family is happy together	• Bond over collective activities, e.g., board games, communal meals • Respect each other's lifestyle needs
Alleviate stress	Feel prepared for an emergency	• Store enough supplies in case of shortages • Prioritize spending on necessities
	Avoid negativity	• Limit how much news I consume and which sources I consult
	Take care of myself	• Treat myself through small pleasures
Ensure a secure future	Maintain a stable source of income	• Double down on my current job performance to avoid being fired • Search for a new / additional job
	Feel in control of my overall finances	• Limit the amount of debt I accumulate • Reorder my investments • Apply for benefits I qualify for (e.g., unemployment)

To connect your journey map insights to actionable steps that your organization can take, consider how various touchpoints may be affected. Depending on which steps in the journey are impacted by changing customer priorities, a business will need to revisit its marketing strategy, operations, and even perhaps its product offerings.

INDUSTRY SPOTLIGHT: HOW RESTAURANTS ARE RESPONDING TO THE CORONAVIRUS

Restaurants are living in a different world now. Picture an establishment that relied on its dine-in service, with only limited experience in takeout or delivery. Back then, customers cared about customer service, the atmosphere, and the location, in addition to staple factors such as the food and pricing. Effectively, the business model was centered around in-person interactions with customers.

However, forced to close their sit-in areas to limit the spread of the coronavirus, many restaurants need to rethink their customer experience. What can they do to sustain their business for the duration of the crisis?

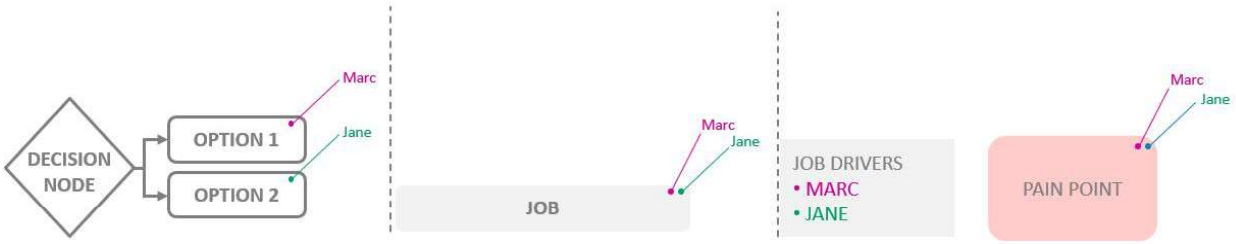
If we revisit the new customer priorities we laid out earlier, we can see that there are many ways that customers can address their Jobs to be Done through food and beverage. Consider the options listed in the graphic below:

Potential Approaches For Addressing Key Jobs... Through Food and Beverage

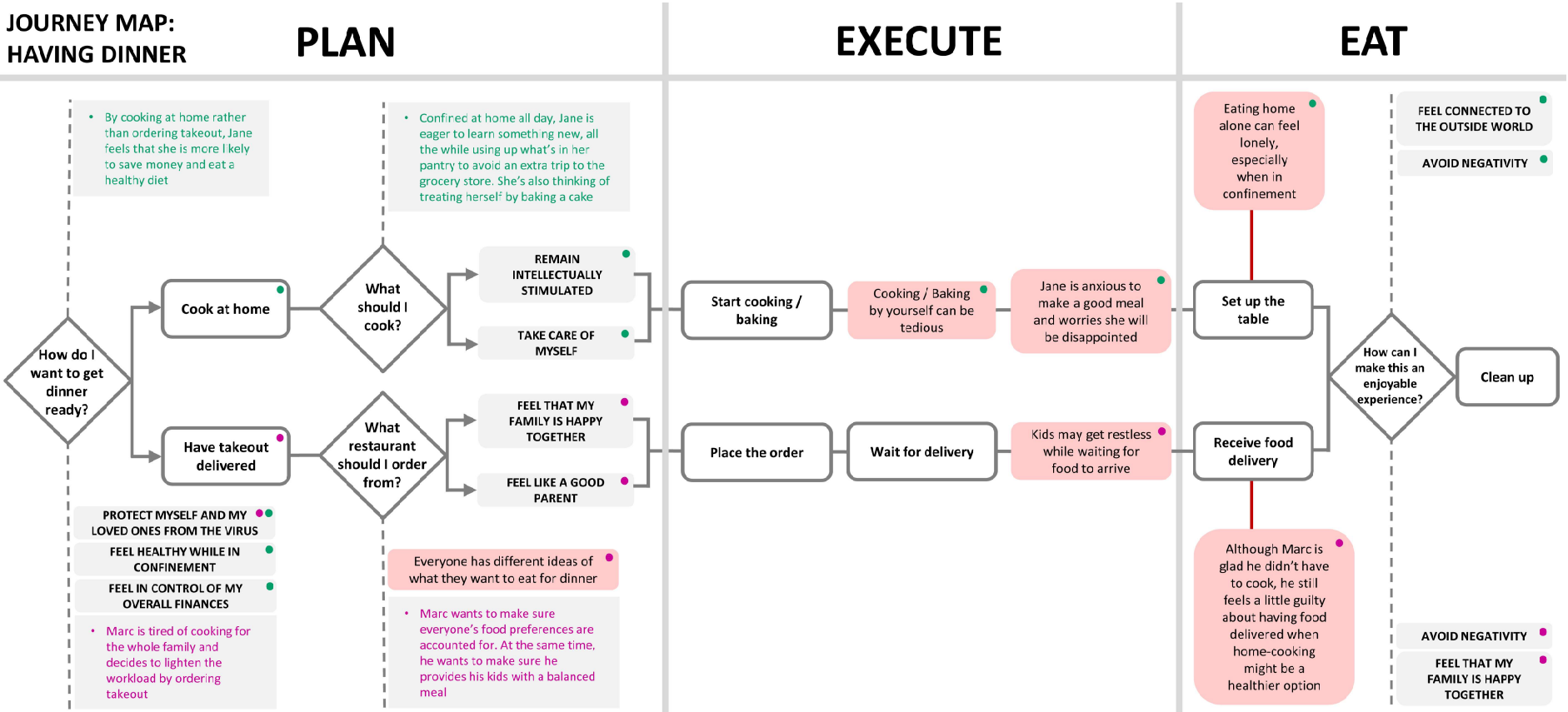
Customer Jobs to be Done During The Coronavirus		Current Approaches Through Food and Beverage
Improve my quality of life	Retain control over my life in the midst of uncertainty	• **Plan meal preparations** ahead of time
	Feel healthy while in confinement	• **Maintain a healthy diet** by prioritizing home-cooked meals and healthy delivery options
	Remain intellectually stimulated	• Continuously **try new recipes**
	Feel connected to the outside world	• Seek out **home cooking tips** through online research and advice from friends and family
Provide for my family	Protect my loved ones and myself from the virus	• **Avoid outdoor trips** to pick up takeout and interactions with delivery staff
	Feel like a good parent	• **Provide my kids with balanced meals**
	Support family members / friends in need	• **Offer to bring groceries and / or take-out to those who are most vulnerable**
	Feel that my family is happy together	• Bond over **shared meals** • **Accommodate family members' preferences** around food and beverage
Alleviate stress	Feel prepared for an emergency	• **Stock up** on necessary food and beverage
	Avoid negativity	• **Liven things up** with an exciting twist to regular mealtime habits • **Reassure myself** through comfort food
	Take care of myself	• **Reward myself** through small pleasures, e.g., an indulgent treat
Ensure a secure future	Maintain a stable source of income	
	Feel in control of my overall finances	• Prioritize **spending on necessities** and cheaper food options

How have these behavior changes affected the journey of restaurants' customers? By mapping out customers' reshuffled Jobs, Drivers, and Pain Points, a restaurant can pinpoint opportunities for a revamped customer experience. Picture two customers, Jane and Marc, who are about to have dinner. Jane lives by herself, while Marc lives with his family. What does their journey look like in today's pandemic, and how could a restaurant better serve their needs?

Legend: How to Read This Map



Journey Map: Having Dinner



OPPORTUNITIES

- To assist customers in their home-cooking, a restaurant could offer a "**recipe calculator**" based on the food they have
- To address the desire for novelty, a restaurant could offer **virtual cooking classes** or showcase **recipes that give an unexpected twist to conventional ingredients**
- The restaurant could boast its **tasty, "yet" healthy meals** to customers who are concerned about the trade-off, especially parents

- For those cooking alone, a restaurant can offer "**cooking playlists**" based on various filtering criteria (e.g., mood, country that the food / recipe is from). For a more social experience, a restaurant could offer virtual workshops where **customers learn how to cook with a group of friends online**
- **Online orders could be followed by a trivia question, puzzle, riddle, or fun fact** (food-related or otherwise) to help pass the time while waiting for the delivery

- A restaurant could help families have a good time by suggesting **activities / games to play during meals**
- For those who feel guilty about ordering takeout, it could include indoor fitness tips in its deliveries
- Offering a "**mystery dessert**" as part of their delivery service could spice things up during confinement
- Allowing customers to **share their recipes / photos of their meals** could make them feel more connected

EXAMPLES: HOW RESTAURANTS ARE IMPROVING CUSTOMER EXPERIENCE DURING THE CORONAVIRUS

The journey map on the previous page shows only a handful of ways to address today's customer needs. In the last few weeks, some restaurants have come up with even more strategies to improve their customer experience. Consider:

1

Job #1: How restaurants are helping customers improve their quality of life

Key needs: Retain control over my life in the midst of uncertainty • Feel healthy while in confinement • Remain intellectually stimulated • Feel connected to the outside world

Customers looking for a healthy diet would gladly welcome a balanced menu and nutritional tips from a restaurant, both on their website and as paper-based reminders in their delivery or takeout items. **EveryTable**, a Los Angeles-based café, went even further and launched a helpline to coordinate healthy meal delivery service throughout the crisis.

With confinement also comes cabin fever, which means customers will be starving for novelty. To help customers improve their quality of life, restaurants can help them cultivate a sense of learning and discovery. That was the approach chosen by **Intertribal Foodways**, a small catering business located in Saint Paul, Minnesota. Faced with innumerable cancellations, the founder now organizes virtual cooking classes and presentations on indigenous foods to sustain his business for the coming months. He also launched a YouTube channel on indigenous ingredients in North America, gaining wider attention on social media during the crisis.

2

Job #2: How restaurants are helping customers provide for their families

Key needs: Protect my loved ones and myself from the virus • Feel like a good parent • Support family members / friends in need • Feel that my family is happy together

Cooped up in their homes with their families, many customers are faced with new challenges and considerations, particularly when it comes to their relationship with food. To alleviate the burden of accommodating different food preferences and cooking large quantities, many restaurants have turned towards family-friendly menus with popular and easily shareable items. For instance, a coffee shop in Los Angeles and San Francisco called **Sightglass** recently pivoted towards offering sandwich kits, pizza, mac and cheese, and other family classics.

In addition to the logistics of planning large, regular meals, restaurants can target the emotional aspects of family gatherings. As we plow through these difficult times, customers are all the more eager to share enjoyable moments with their partners and families. In an effort to foster these positive connections, some restaurants like **Canlis** in Seattle launched a "family meal" delivery service that includes a bottle of wine. Others like **Lord Stanley** in San Francisco offer a delivered five-course menu, complete with cocktails.

3

Job #3: How restaurants are helping customers alleviate their stress

Key needs: Feel prepared for an emergency • Avoid negativity • Take care of myself

Restaurants today have an important role to play in alleviating customers' anxiety. They may not be able to do so through regular in-person dining, but other options are available. Take the need to avoid negativity. Burdened by concerns over the pandemic and its ramifications, customers are in dire need of reassurance – including in the form of comfort foods. In response, Tampa's **Rooster & The Till** restaurant launched a takeout business exclusively centered on fried chicken sandwiches and gnocchi with short ribs – the kind of solace today's customers are looking for.

If restaurants can sell reassurance, they can also provide indulgence and excitement. As customers try to pace their newly confined lives, they will occasionally want to break their routine with something new. Mealtimes may be fairly predictable, but restaurants have the chance to spice things up. In addition to offering a different family meal each night, **All Together Now** in Chicago launched a Wine & Cheese Hotline to provide personalized recommendations.

CONCLUSION

We have seldom seen such a rapid shift in customer experience as in these few weeks. But we don't need to be passive victims to events. By thinking through what motivations customers have, how well those are currently being satisfied, and the distinct steps of the journeys that customers take, you can find new, memorable ways to deliver great experiences even in these troubled times.

SERVICES FROM NEW MARKETS ADVISORS

DEVELOP GROWTH STRATEGIES

Build innovative approaches to compete in fast-moving markets

- Multi-year strategic plans
- Scenario planning
- Costovation opportunities
- Competitive assessments
- White space analysis
- War-gaming
- Strategy offsites

UNCOVER JOBS TO BE DONE

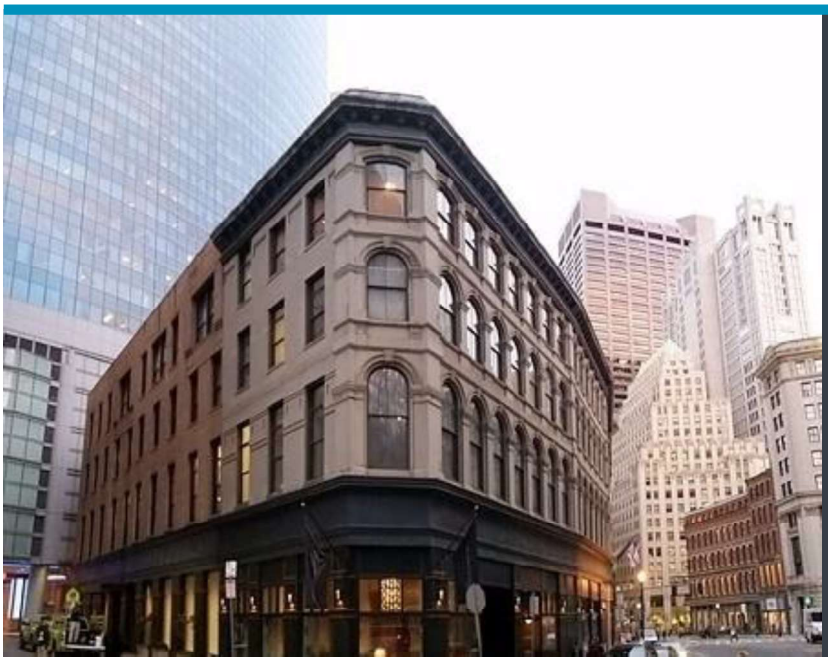
Understand your market and customers more deeply

- In-depth interviews
- Focus groups
- Home / site ethnography
- Concept testing
- Quantitative surveys
- Online boards
- Shop-alongs / intercepts
- Mobile journaling
- Journey mapping

BECOME MORE INNOVATIVE

Build teams and structures that can turn ideas into breakthrough products and services

- Incubator and innovation program development
- Innovation process development
- Jobs to be Done implementation
- Culture of innovation strengthening
- Co-creation sessions



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