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## How global and local brands in the quick service restaurant (QSR) sector coped up with the new normal? Insights from a thematic analytical study in the times of COVID-19 in India

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### Abstract

The research paper aims to elucidate how global and local brands in the quick service restaurant (QSR) sector handled the new normal. Our research contributes to the COVID-19 literature on branding by recognizing themes through the application of thematic analysis and describing their respective narratives concerning the measures undertaken by global and local QSR brands to cope up with the COVID-19 pandemic. Themes that emerged for global QSR brands were customer and employee safety, focus on digital channels, business expansion strategies, community service, and inculcating the learning from the pandemic. For local QSR brands, the themes that emerged were customer and employee safety, vocal for local and going digital. Our research findings contribute to the marketing literature by laying out a structured and logical direction for brand managers when establishing and assessing measures to deal with pandemics like COVID-19 and other 'new normal' that may arise in near future.

**Keywords:** COVID-19, global QSR brands, local QSR brands, thematic analysis

### Introduction

The Coronavirus pandemic had caused over 46 million confirmed cases globally and about 1.19 million deaths as of 31<sup>st</sup> October 2020 [1]. The pandemic had generated uncertainties and worries of forthcoming economic contraction and decline. Social distancing, self-isolation and travel constraints had led to an abridged labour force across all economic sectors and had caused increased unemployment. COVID19, the 'new normal' has brought major shifts across areas and disciplines, affecting directly or indirectly billions of people [2].

The QSR industry had been hit particularly hard in India by the Coronavirus pandemic. India's QSR industry faced insecurity and uncertainty, with 40% restaurants not projected to endure the coronavirus pandemic. The multinational QSR segment showed promise to overcome the challenges brought by the pandemic. This is evident in the branding strategies that had been adapted by prominent global QSR giants like KFC, McDonalds, Pizza Hut, Domino's Pizza and Subway [3]. Local QSR brands too had been badly hit by the pandemic. To deal with the 'new normal', local brands in the quick-service restaurant (QSR) sector had comprehended that it was essential to innovate and be elastic about their offerings. Brands like Impresario's Smoke House Deli had introduced DIY meal kits as ready-to-cook options as they were highly in demand during these times [4].

It's not the first time the term 'new normal' has been used with context to an event. The new normal which is a predicament to which a society settles following a crisis, has been earlier used with context to the financial crisis 2007-2008 [5] and the 2008-2012 recession [6]. While literature is available on the adverse effects of the COVID-19 pandemic on brand consumption, [7, 8] there is a dearth of literature as to how brands coped up with the COVID-19 pandemic - 'The new normal'. Therefore, our study aims to address this significant yet under-researched area using a qualitative approach.

Our article contributes to the COVID-19 literature on branding by identifying themes through the application of thematic analysis as per the procedure followed by Braun and Clarke [9] and describing their respective narratives relating to the measures taken by global and local QSR brands to cope up with the Coronavirus pandemic.

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### Theoretical background

The fast food format which is commonly called QSR is a label employed for a dining process wherein the food is made and served swiftly with a limited degree of service<sup>[10]</sup>. The Indian QSR sector is expected to thrive at a CAGR of over 18% during 2021-2025 owing to rising urbanization, swift growth in food delivery services, growing young and employed population, increasing frequency of dual-income households and increasing disposable income in the nation<sup>[11]</sup>.

Fast food industry has seen immense expansion in India as can be seen through the popularity of global fast food brands such as Domino's, KFC, McDonalds, and Pizza Hut<sup>[12]</sup>. Initially these brands found it difficult to understand the Indian consumers, and their country-of-origin market frameworks did not function properly in India. However over the period of time, these brands strengthened their establishment through a finer comprehension of the Indian market and introducing Indianised menus, sit-and-eat arrangement, and positioning their outlets as stopping place for family get-together<sup>[13]</sup>.

Local brands on the other hand are those which are manufactured locally and are accessible in a particular country, and consumers who want to safeguard local connections may find association with them<sup>[14]</sup>. Also local brands may also be considered as cultural symbols<sup>[15]</sup>. Some prominent local QSR brands include Café Coffee Day, Bikanervala, Sagar Ratna, Wow! Momo. There has recently been an upsurge in local fast food chains and have been quite successful. This to a large extent can be attributed to the strategic advantages that local brands have such as responding to local needs in a better way and flexibility of pricing strategy<sup>[16]</sup>.

The effect of the COVID-19 pandemic on the global economy however was likely to be humongous<sup>[17]</sup>. In all likelihood the Coronavirus pandemic epitomizes one of the most momentous environmental developments in the contemporary marketing history, which could possibly influence consumer behaviour and the fundamental marketing notions deeply<sup>[18]</sup>.

COVID-19 has had an adverse effect on food and beverage industry globally and this has been revealed by various researches<sup>[19, 20]</sup>. QSR brands in India both global and local which are the focus of our research have been no different and the COVID-19 had hugely impacted them. As per CRISIL's research note India's organised dine-in-restaurants were on a route for a 40-50% cut in revenue due to the commotions triggered by COVID-19. The virus spread had led to closures of outlets, job cuts and had adversely affected the food supply chain. A 90% reduction in sales in the organised sector was seen in the lockdown phase as dine-in was not operational and as online orders had declined by 50%-70% in the lockdown phase<sup>[21]</sup>.

### Research methodology

As our research aims at finding themes and narratives relating to the strategies adapted by global and local QSR's in coping up with the COVID-19 pandemic in India, thematic analysis is a suitable methodology to be applied. A

qualitative thematic analysis was performed on online articles to establish a basis of themes and narratives relating to the strategies that have been adapted by global and local brands in the QSR sector to cope up the new normal. A thematic analysis is an analytical technique centred on coding and theme development. Thematic Analysis involves systematically recognizing, shaping, and providing comprehension into patterns of meanings (themes) across a data set. TA permits the researcher to realize and make sense of the shared or collective meanings and experiences through concentrating on meaning across a data set. The six step method to conduct a credible thematic analysis includes: Familiarising oneself with the data, producing initial codes, searching for themes, reviewing probable themes, describing and naming themes, and generating the report<sup>[9]</sup>. A major advantage of using Thematic Analysis is its flexibility and permits for a range of sources and analysis of data<sup>[9]</sup>.

### Sample

Online articles relating exclusively to measures adopted by global and local QSR brands in coping up with the COVID-19 pandemic in India were accessed and those articles that gave valuable information on the area of research were chosen. Keeping in mind a shortage of articles pertaining to the global and local QSR's, and their strategies adopted to handle COVID-19 pandemic, a total of 25 articles were chosen relating to global QSR's for analysis purpose and for local QSR's it was 22.

### Data analysis

Following Braun and Clarke (2012), a six stage approach to thematic analysis was applied to achieve our research aim. The first step involves familiarising oneself with the data. Making notes as one reads the data is a part of this phase and one should read the words vigorously, analytically, and critically. The second phase involves generating initial codes which is done by semantic analysis of the data. The third phase involves searching for themes. A theme aims to capture something vital regarding the data in context to the research problem, and signifies a patterned response or significance within the data set<sup>[22]</sup>. The fourth step involves reviewing potential themes which is mainly about quality checking and herein a number of potential themes may be collapsed into one theme or a big broad theme split into more precise or comprehensible themes. The fifth phase includes defining and naming themes. The last phase includes producing the report.

This process yielded five fundamental themes that explained the measures adopted by global QSR brands in dealing with COVID-19 pandemic in India.

### Findings

This section provides findings from the qualitative analysis of online news articles relating to measures adopted by global and local QSR brands in coping up with the COVID-19 pandemic in India. The purpose of conducting a thematic analysis on the data is to identify those patterns that are significant to the research problem (Braun and Clarke, 2012).

#### Findings for global QSR brands

**Customer and employee safety:** In the challenging times of the COVID-19 pandemic, various brands followed strict

cleanliness and sanitation practices in their stores and for delivery purposes. Key global QSR brands such as Domino's Pizza, McDonald's, Subway and Pizza Hut held their customers in confidence with regards to the safety of their products amidst the Coronavirus crisis affirming that they took highest degree of safety precautions at their stores. Various QSR players restructured and reorganised layouts of their dining amenities to follow social distancing rules along with keeping utmost hygiene, while some highly focused on home delivery and take-away. One of the most reputed global QSR brands, Domino's Pizza had regularly conducted health check-ups of its employees. Also they had launched zero contact delivery service via the newest version of the Domino's app on prepaid orders wherein customers can collect their orders without direct contact with the delivery staff [23]. Pizza Hut a major global QSR player in India had introduced contactless delivery so as to prepare for the future when consumers start venturing out. Contactless dining model was made successful by providing all restaurant employees with gloves, masks, and through instalment of sanitizers in all stores. In addition, in line with the government's, WHO and FSAI regulatory protocols and guidelines, Pizza Hut upgraded its safety and hygiene procedures across all its stores in India through thermal screening of employees and customers, making face mask and gloves usage compulsory for employees, sanitizing and disinfecting all kitchen surfaces, food storing boxes, delivery bags and bikes [24]. In same lines, McDonald's India paved the system for the new dining experience in the post COVID world. To guarantee utmost hygiene and success across its dine-in, delivery and take-out services a 42 point checklist was implemented by the brand.

Training employees to cope up with the challenges had also been a major focus for global QSR giants. Pizza Hut had formed training teams that trained employees as per the advanced safety and hygiene standards. In addition, day-to-day scrutiny by store leaders and quarterly review by area coaches ensured that food safety and quality, restaurant cleanliness, and brand values and standards were comprehended and executed by all working employees [24].

### Focus on digital channels

In the times of the pandemic and beyond, going digital has been the key to the survival and growth for brands. The focus of QSR's has been exclusively on digital modes in comparison to television viewership. Since there has been a rise in cheque size on delivery orders, particularly on orders pertaining to groups residing together, global QSR's had focused on oven-to-home contactless procedures, technological up-gradation, and delivery centric value deals. Pizza Hut enriched their technological handles - Pizza Hut's official website and the Mobile app (Sharma, 2020). Domino's Pizza India too launched contactless food delivery services which the consumers can select via the newest version of the Domino's app on prepaid orders [25].

Digital channels also became the main mode of communication for global brands in reaching out to consumers with messages and campaigns. Pizza Hut had launched campaign #QualityTimeNotQuarantine with the intention that they retain 'trust in every bite' and also conveying it to their consumers the importance of staying indoors while helping them remain optimistic [24].

### Business expansion strategies

For enhanced understanding of the external forces of change and to cultivate functional responses which secure or progress their position in the future, organizations need to examine their business environment [26]. With context to COVID-19 pandemic global QSR players in India implemented various business expansion strategies, so as to turn the challenges into opportunities.

India's major and highly reliable pizza delivery brand 'Domino's Pizza' had entered into partnership with ITC and launched "Domino's Essentials". The delivery arrangement of Domino's was contacted to assist customers order daily grocery necessities offered by ITC Foods, India's most reliable packaged staple brand. This service was available to consumers in major cities in India. In a first-of-its-kind, this noteworthy partnership between a fast food chain company and a FMCG company aims to serve the public at large by making sure that there is undisturbed supply of necessary items without them having to come outdoors and risk their safety.<sup>27</sup> As demand surged for orders online by groups of people residing together, Pizza Hut introduced value deals and combos to boost sales wherein customers benefit as they enjoy special discount [24].

### Community service

The COVID-19 pandemic taught us that the entire world was collectively together to fight it, which undeniably raised people's belief of businesses being more socially responsible. Thus, it was envisaged that in the post-pandemic period those businesses shall flourish that have strong corporate social responsibility strategies and would implement them successfully [18]. Global QSR giants such as KFC, McDonald's and Pizza Hut as part of their Coronavirus relief initiatives served food to medical and frontline workers across many government hospitals in various Indian cities. McDonald's had connected itself with several NGO's and organisations across various Indian cities to reach out to considerable number of vulnerable sections of the society such as frontline workers, daily-wage labourers and slum residents [28].

To spread a very vital message i.e. maintain social distancing and to wear a mask to keep oneself protected and others around, QSR brand McDonalds had also repositioned their mascot - Ronald McDonald. In a novel mascot repositioning strategy by McDonald's, the quintessential Ronald McDonald figures wore masks across all stores to motivate people to follow safe practices to stop the escalation of the pandemic [29].

### Inculcating the learning from the pandemic

The 'new normal' bought various learning for brands that needed be inculcated by them for survival in the pandemic as well as the post-pandemic period. It was important for brands to understand that irrespective of where they were positioned before the pre 'new normal' consumer perception curve, the journey to earn back consumer's had started from ground zero. Therefore, it was highly essential for brands to construct and communicate business models in such a way that the consumers felt safe, appreciated, and heard during those testing times and beyond. Thus brands needed to uphold trust of the consumers by ascertaining that they have adjusted to their new expectations and notions that would define trust of the consumers in the post pandemic era [24].

**Table 1:** Definition and labels for selected themes with regards to global QSR brands

| <b>Definitions and Labels for Selected Themes (Global QSR Brands)</b>  |
|--|
| <p><b>Theme 1.</b> Customer and Employee Safety: Maps the measures undertaken by global QSR's to ensure safe hygiene practices for dine in and deliveries. These include training of employees with regards to hygiene and sanitation, temperature checks of employees and customers in outlets, compulsory use of masks and gloves for employees, safe and touch-less delivery of food items to customers, disinfecting of all kitchen surfaces, and safe packaging practices.</p>  |
| <p><b>Theme 2.</b> Focus on Digital Channels: Maps the increasing focus of global fast chains on digital channels such as net banking and digital payment apps for payment purposes, and enriching their technological handles such as their mobile apps. Digital channels have also been trusted highly for reaching out to the customers regarding their operations and for promotion of their campaigns.</p>  |
| <p><b>Theme 3.</b> Business Expansion Strategies: Maps the strategies adapted by global QSR brands to cope up with the coronavirus pandemic with the goal of sustaining their businesses and to plan keeping the future times in mind. These include entering into partnership with other reliable brands so as to bring added advantages due to synergies, and also introduction of handy deals such as combo offers on group orders wherein both the brands and customers are to benefit, while brands increase their sales, the customers enjoy discount.</p> |
| <p><b>Theme 4.</b> Community Service: Maps the initiatives undertaken by global QSR brands to serve the community in these times of the 'new normal'. It has been noted that firms that spend a considerable amount on socially responsible activities reap many benefits from it <sup>[30]</sup>. These benefits include enhancement in brand performance <sup>[31]</sup>, brand value <sup>[32]</sup>, brand image <sup>[33]</sup>, brand loyalty <sup>[34]</sup>, reputation <sup>[35]</sup>.</p>   |
| <p><b>Theme 5.</b> Inculcating the learning from the pandemic: Maps the learning's instilled by global QSR brands that will assist them to survive and excel in the times of the pandemic as well as the times post the pandemic. These include upholding customers trust through apt communication, listening to the grievances of consumers, adapting to the new expectations of consumers and making customers feel safe.</p>   |

### Findings for local QSR brands

**Customer and employee safety:** As the 'Indian Consumer' become more conscious, local fast food chains are maintaining paramount hygiene in their outlets. Also they have been engaging in consumer awareness practices wherein the consumers are informed regarding measures and precautions adapted by them to make sure that the restaurants are safe for dining. In addition, thermal scanning of temperatures of staff and diners was practiced in order to ensure safety and to contain the virus spread. These practices were encouraged to be followed even in the post COVID era <sup>[36]</sup>. Local QSR's understood that making customers and staff safety the top precedence was the key to business success during and post COVID-19 pandemic. Local QSR's understood that consumers economic insecurities amalgamate with their safety apprehensions, therefore making them highly price sensitive, thus making them look for more reasonable menus that justified them going out to a restaurant during those uncertain times <sup>[37]</sup>.

**Vocal for local:** Indian Brands have dedicatedly been following Prime Minister Narendra Modi's 'vocal for local' vision. Stressing on self-reliance, or 'Aatmanirbhar India', the government has sought for increased manufacturing of local products, and also the promotion of local brands and supply chain. The 'vocal for local' and 'local for global' suggests that the national brands be more competitive and also has also put emphasis on the importance and implications of our national brands going global. India being one of the largest and rapidly growing markets for many product categories will receive a boost from the 'vocal for local' campaign <sup>[38]</sup>.

In lines with 'vocal for local' Wow! Momo Foods a successful local QSR chain had entered into a tactical partnership with Café Coffee Day- India's largest national coffee chain, and thereby served its products in select 30 plus CCD outlets in three chief Indian cities of Kolkata, Mumbai, and Bengaluru each. This strategic alliance between two significant national QSR brands marked the

commencement of an era of strategic partnerships. Post COVID market too was expected to witness many such brands combining their synergies to sustain and expand their operations <sup>[39]</sup>.

**Going digital:** Customers were quite weary about the surfaces they touched while getting their food and also how the payment occurs. Local QSR's encouraged and promoted contactless or touch-less payment techniques such as usage of mobile wallets or UPI payments which becomes quite handy in this regard. In the same lines Bikanervala, a significant local QSR player scaled up their information and technological systems and became more swift and nimble so as to meet their customers' requirements and demands efficiently and therefore worked in this direction with full force <sup>[40]</sup>.

### Implications

Our research has substantial implications to global and local brand managers. Keeping in mind the findings of our research, the article provides a list of themes that are highly relevant to global QSR brands as well as local QSR brands in dealing with a pandemic like COVID-19 pandemic and also as the way ahead in this post-pandemic period. It is extremely vital for managers to comprehend that irrespective of how successful their businesses were before the Coronavirus pandemic shook the world, the journey to win back the consumers' trust will start from the brink and thus the application of these themes in the daily functioning of the operations is extremely vital for the success of the business. These themes will be highly valued in increasing the goodwill, sales and profitability of the global and local QSR's in India. Our research also could be of considerable value to local QSR's functioning in their respective countries as well as global fast food chains that have respectable foothold globally. In addition, our themes have a universal appeal and could be beneficial for global and local brands functioning in other sectors too such as apparel, lifestyle and furnishings.

**Table 2:** Definition and labels for selected themes with regards to local QSR brands

| <b>Definition and Labels for selected themes (Local QSR Brands)</b>  |
|--|
| <p><b>Theme 1.</b> Customer and Employee Safety: Maps the measures undertaken by local QSR brands to ensure adaptation of stringent hygiene in their outlets as well as in the delivery processes. These include thermal temperature checks of diners and staff members, engaging in consumers' awareness practices and informing them that the restaurant is following stringent hygiene measures.</p>  |
| <p><b>Theme 2.</b> Vocal for local: Maps the measures undertaken by local QSR's in strengthening the 'vocal for local' campaign. Local QSR's have thus become more competitive and strengthened their vigour to reach out to maximum customers and even go global. Certain local QSR's have entered into partnerships so as to capitalize on the combined synergies and to ramp up their productivity, capitalizing on the highly popular national campaign 'vocal for local'.</p> |
| <p><b>Theme 3.</b> Going Digital: Maps the measures undertaken by local QSR's to go digital. These include more focus on contactless payment techniques such as mobile wallets or UPI payments, and also improving their IT systems.</p>   |

### Conclusion and limitations

The Coronavirus pandemic had given fast food chains no choice but to acclimatize and renovate their offerings to make employees and customers feel safe. In this research article, we have presented some potential themes that dealt with the measures adapted by global and local QSR's to cope up with the coronavirus pandemic in India. The pandemic offered opportunities to the fast food chains to actively engage in ensuring customer and employee safety, focusing on digital channels, adapting innovative business expansion strategies, community service and thus inculcated these learning's not only during the pandemic but also post corona. Our themes provide insight to the fact that businesses need to adapt to the new expectations and notions of the consumers that will define consumers trust in the post-pandemic era.

With an extensive thematic analysis conducted to explore the themes pertaining to how the global and local QSR's brands coped up with the 'new normal', our research presents valuable strategies that global and local QSR's adapted in India during the time of pandemic. Also our themes could be extremely helpful to fast food chains in dealing with similar challenges as the COVID-19 pandemic. Our research does have certain limitations. Future researchers could conduct qualitative analysis of online articles covering other sectors too such as apparel, home furnishings, lifestyle, and uncover the themes pertaining to the strategies and measures adapted by global and local brands in coping up with the COVID-19 pandemic. Furthermore, future researchers could put more light on the themes relating to the measures adapted by fast food chains through interviews of global and local brand managers and conducting an in-depth analysis of it.

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