



RE- DESIGNING DINING

Nine ways COVID-19 will
transform restaurant design

Mit ipsum sit aliquam sit
acris amet temp.

Mit ipsum sit aliquam sit
acris amet temp.

Acnean quis est
magna affes venatis
quidquam sit

Mit ipsum sit
acris amet temp.

Neque sit aliquam sit



A white paper compiled by ROAR

SUMMARY MENU

The “big three” game-changing restaurant design trends post-COVID



1. **Layout & spacing:** restrictions will be severe but short-lived.



2. **Contactless dining:** “contact-light” is more likely than fully contactless.



3. **Food concepts:** the buffet and sharing may not survive in present form.



4. **Psychology:** introverts and germophobes will need reassurance.



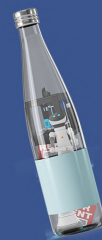
5. **Business models:** fundamental change or business as usual?

6. **Materials:** antimicrobial will be a given.



7. **Architecture history:** Modernism evolved from cholera, typhoid and Spanish flu.

8. **Original, immersive, escapist design:** differentiation through design will be even more important.



9. **Design trends:** the pandemic will accelerate many trends that were already in motion.

Overview

The coronavirus outbreak will transform restaurants – but some changes will be short-term and fleeting, with others long-term and enduring. How to know which is which? For restaurant designers (and owners picking up the tab for fit-out) spotting the difference between a short-term fad and a long-term trend is a multi-million-dollar problem.

The aim of this White Paper is to help solve that problem. Put another way, we aim to cut through the fog and shine a spotlight on the game-changing trends that will – in the real world – shape the future of restaurant design post-COVID 19.

Methodology

These are important, expensive questions. There is no room for guesswork or wild hunches. So the findings are based on robust methodology:

Qualitative : a focus group of n=9 industry experts
Quantitative : a survey of n=170 industry professionals

A word of caution. On some issues there is broad consensus, on others the industry is divided. This White Paper strives to get off the fence and offer bold, evidence-based conclusions. But forecasting has always been partly science, partly art - never more so than now. The role of this White Paper is to stimulate thought and discussion, and does not claim to be the definitive, last word.

Nine Trends

The following nine trends are, we conclude, the most likely difference-makers. Led by the “big three” game changers: layout, contactless and food concepts.

1. Layout & spacing: restrictions will be severe but short-lived.
2. Contactless dining: “contact-light” is here to stay.
3. Food concepts: the buffet and sharing may not survive in their present form.
4. Psychology: introverts and germophobes will need reassurance.
5. Business models: fundamental change or business as usual?
6. Materials: antimicrobial will be a given.
7. Architecture history: Modernism evolved from cholera, typhoid and Spanish flu.
8. Original, immersive, escapist design: differentiation through design will be even more important.
9. Design trends: the pandemic will accelerate many trends that were already in motion.

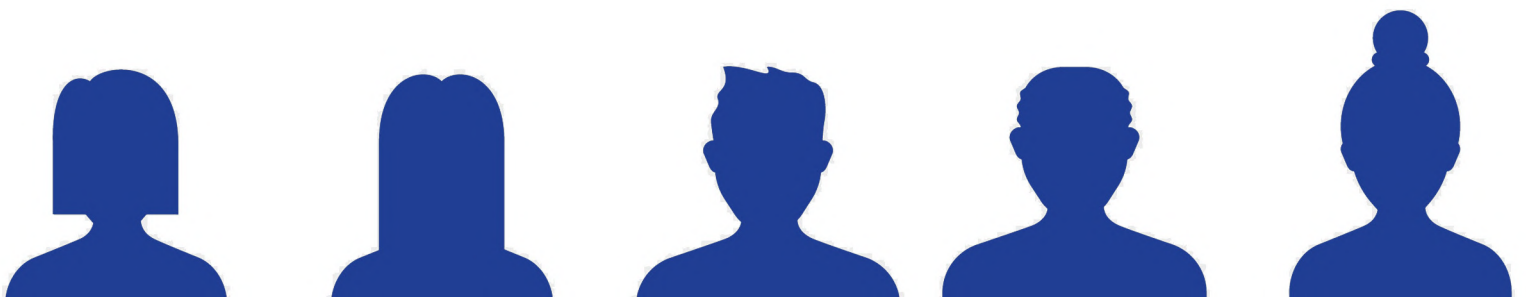
The Authors

This White Paper is a collaborative effort, based primarily on a panel discussion with nine industry experts. They are effectively the “co-authors”. It was supplemented by an online survey of 170 industry professionals. The final report was written, edited and designed by Roar.

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In addition, insight was provided by a senior figure from a large multinational hospitality organization, who asked to remain anonymous.



1



LAYOUT & SPACING

Layout & spacing - restrictions will be severe but short-lived

This will be the most dramatic impact on restaurants – but according to our experts, one that is likely to be short-lived. Estimates vary on when restaurants will revert to their original density: more than a quarter think it will be later this year, but the most popular prediction (42% of respondents) is early 2021.

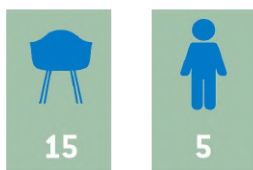
Whatever the date, there is broad consensus that restaurants will eventually revert to pre-COVID layout and spacing. Only 5% of respondents say we will never return to pre-COVID spacing.

Here are the statistics: pre-COVID the International Building Codes (IBC) recommendation was for an average of 15 square feet per seated diner. The World Health Organisation (WHO) recommends 27 square feet per diner for F&B outlets open during the coronavirus outbreak. UAE health authorities mandated 30% of normal density upon re-opening in April 2020.

Recommended space per person per sq ft in F&B outlets

I.B.C. pre-COVID guidelines

Seated dining 15sqft | Standing 5sqft



W.H.O. COVID guidelines

All F&B - 27 sqft

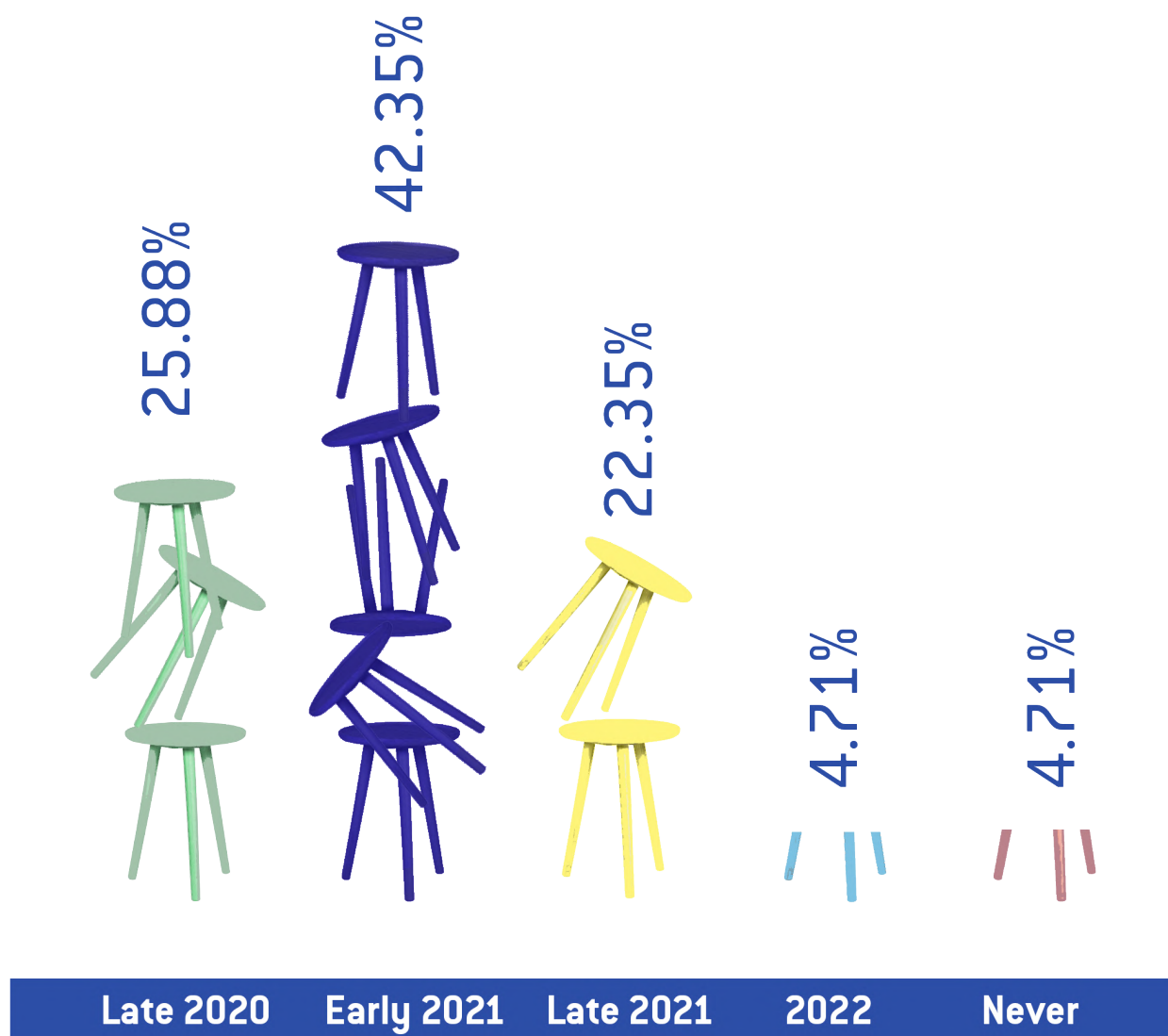


Vertical Drinking

This White Paper does not look in detail at bars, but restaurants that generate a significant portion of revenue from bar areas face specific challenges. The pre-COVID IBC guideline for so called 'vertical drinking' was 5 sq ft per person – a wide gulf from the World Health Organisation pandemic guideline for F&B of 27 sq ft per person. Informally, many panellists agreed that vertical drinking will take longer to return than seated dining, but that the innate "social animal" personality trait means that vertical drinking will ultimately prevail.

Q1 When will layout and spacing return to normal in restaurants?

(Restaurants must reduce the number of tables in the short term - e.g. 30% of pre-COVID capacity in Dubai. When, if ever, will this revert to 100% of pre-COVID levels?)



2



CONTACTLESS DINING

Contactless dining - “contact-light” is here to stay

“Contactless dining is a given,” according to one panellist in our focus group. It’s easy to think why restaurateurs and customers might jump to that conclusion. But the reality is a bit more nuanced. Indeed, 43% of respondents in the survey voted that “contactless dining is a passing fad.”

Here’s how it may play out: not quite “contactless”, but “contact-light.” For example:

Physical menus may become rare, if not extinct. The same may be true of communal salt & pepper shakers, and the grubby, three-week-old bottle of ketchup in the middle of the table. Ditto cash, as contactless payments become ubiquitous, particularly for mid-market restaurants and above.

Contactless restrooms will be a vital battleground in the war against infection. Most doors apart from private cubicles will eventually go. Doors that remain will increasingly be opened and closed by foot or wireless sensors. Japanese-style robot WCs (replacing a new piece of paper over the seat after each visit) will go from novelties to must-have, although in the interim a packet of Dettol wipes may have to suffice. Customers will rarely, if ever, touch a tap, soap dispenser or hand dryer again. All this technology already exists, it’s simply a case of using it. More than one panellist pointed out that capital expenditure budgets among restaurant owners and operators will be under pressure, especially in the short term. These changes are unlikely to happen overnight.

For areas where contact between people and surfaces is unavoidable, antimicrobial materials will be a must (see below).

The main area of disagreement in the “contactless dining” debate is the level of interaction between customers and staff. Since the dawn of restaurants, a charismatic maitre d’, waiter, chef, barman or patron has been the lifeblood of a good outlet. Particularly in the Middle East. The prevailing view among panellists is that this physical familiarity will ultimately endure, though maybe not before a vaccine.

In the interim, one panellist suggested that diners may collect their meals from a counter, rather than be served by a waiter. As of May 2020, restaurants in Dubai were mandating one-time use cutlery. One panellists observed:

“We were just beginning to win the war against single use plastics – this could set us back years.”

Q2 *Is contactless/contact-light dining here to stay, or a passing fad? What's the most likely long-term future?*

(eg physical menus and cash are replaced by digital alternatives, such as apps on customers' phones using QR codes. Shared salt & pepper are removed. Contact with serving staff is minimal).

Fully contactless:

*menus removed,
digital ordering,
minimal contact with
staff*



12.94%

Contact-light:

*moderate interaction
with staff, but menus
are removed*



44.12%

**Contactless is a
passing fad:**

*physical menus, salt
shakers and
handshakes with
staff will all return!*



42.94%

3



FOOD CONCEPTS

Food concepts - the buffet and sharing concepts may not survive in their present form

“Sharing concepts will be the first to go – and I’ll be glad to see the back of them. In many cases (bar Middle Eastern/ Mediterranean concepts), they were an excuse for lazy kitchens to serve food in the middle of the table as and when chefs are ready - and they have ruined restaurant dining.” So said one panellist. Not everyone had such strident views. But the survey did offer some support to this argument: 75% of respondents agreed that “sharing concepts and buffets cannot survive in their present form.”

It’s not that tapas or mezze in the middle of a table will disappear forever. As one panellist put it:

“Of course you’re going to share when you’re out with your family. But for a group of 30 colleagues out for a work dinner – probably not.”

One panelist noted an important distinction between buffets and sharing concepts. “Sharing food and condiments is a habitual concept which I believe will remain prominent following the pandemic.”

Hotel restaurants are a particularly interesting sub-sector. All day dining and buffet concepts have been stalwarts of the hotel F&B scene for decades. One panellist observed: “Look, the buffet was on its way out anyway. Brunches have been moving towards a la carte and a la minute for some time. But you can’t expect a 1,000 room hotel in Dubai or Las Vegas to suddenly rip out the breakfast buffet. Apart from anything else, many won’t have the money for the capital expenditure.”

Q5 *Food concepts: the buffet and sharing cannot survive in their present form.*

AGREE  74.71%

DISAGREE  25.29%

4



PSYCHOLOGY

Psychology - introverts and germophobes will need reassurance

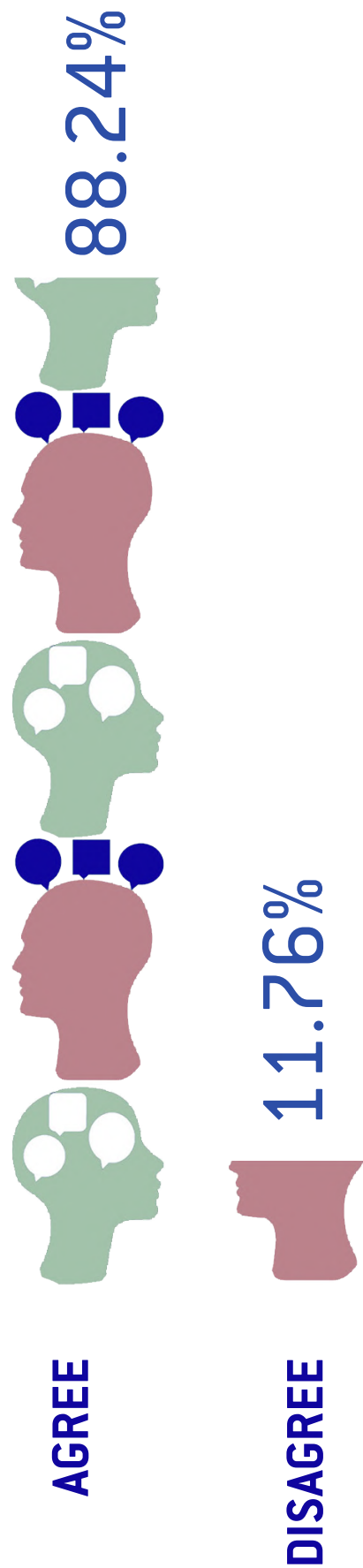
There was broad agreement among panelists and survey respondents, that psychology will play a big role in the recovery of the restaurant industry (88% agreed).

Panelists noted that different people have different needs and requirements. At one end of the spectrum, many “social animals” found home-isolation genuinely challenging, and were among the first to return when restaurants, cafes and bars re-opened their doors (the so-called “rubber band” effect). At the other, many customers are more anxious and cautious, and will need a lot of reassurance before returning.

While a detailed analysis of the psychology of restaurant customers is beyond the remit of this White Paper, a few points came up repeatedly:

- People are resilient and will return to restaurants. *“I’m always amazed at how quickly people adapt to the new normal,”* noted one panelist.
- Use the phrase “safe spacing” rather than “social distancing.” The term “social distancing” has a fear-factor associated with it. Designers must also be mindful not to go overboard with “buffering” between diners, which may fuel anxiety.
- Use an independent authority to verify sanitization standards, to reassure customers.
- *“I can’t see any certainty for our industry until we get a vaccine,”* wrote one respondent in the comment section, echoing the sentiments of many.
- Community restaurants may recover quicker, as people feel more comfortable dining with people from similar demographic backgrounds to themselves.
- We may see more open kitchens, as they promote transparency.

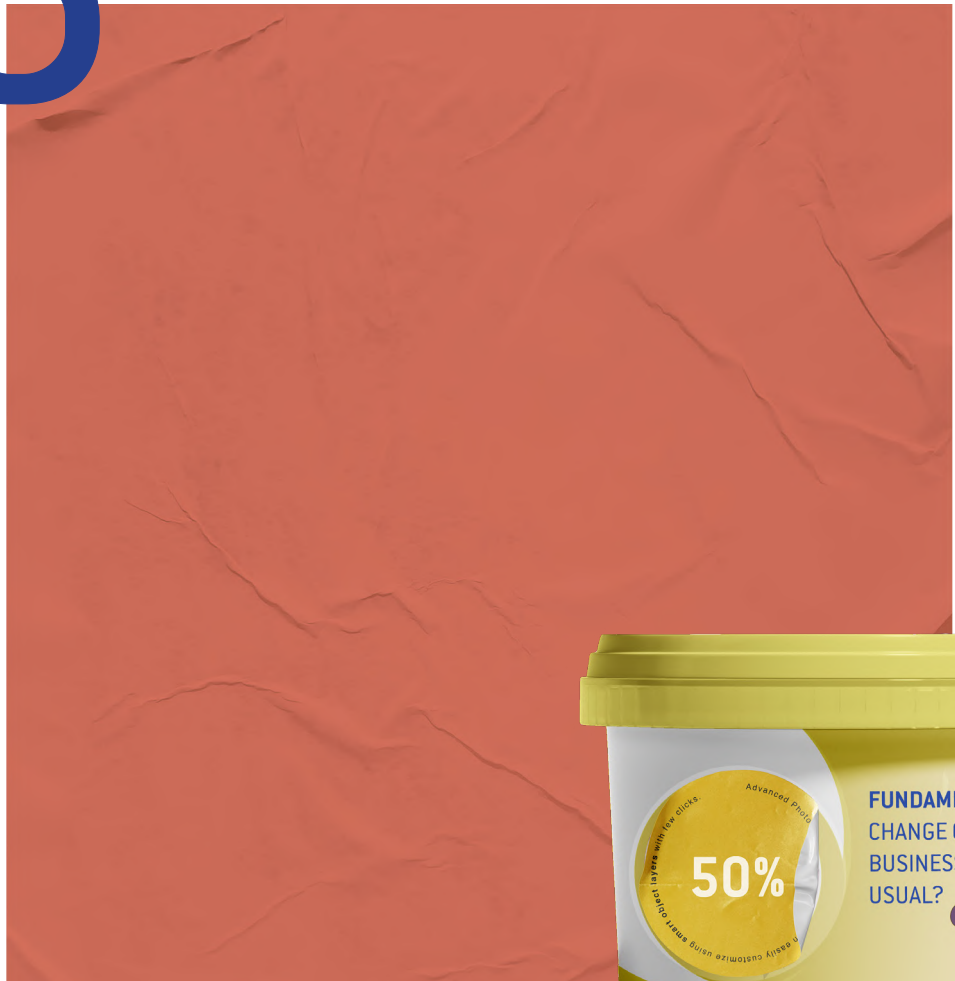
“At one end of the spectrum, many “social animals” found home-isolation genuinely challenging, and were among the first to return when restaurants, cafes and bars re-opened their doors”



Q3 *Psychologically, people are different, and restaurateurs must respond to this.*

(eg some extrovert social animals can't wait to get back in restaurants, while introvert germophobes may need reassurance.)

5



BUSINESS MODELS

Business models - fundamental change or business as usual?

This was perhaps the most divisive issue, with survey respondents split roughly down the middle on the proposal that “business models will fundamentally change.” In terms of ways that business models may change, a few points were recurring.

- Many restaurants will fail. One panellist estimated that as many as 50% of restaurant outlets in Dubai will go out of business.
- Others were less pessimistic. But there was broad consensus that consumers will have less money to spend following a spate of salary cuts and job losses. An industry that already had too many restaurants and too few customers will inevitably come under more pressure.
- Landlords will become flexible, with fixed rents declining and revenue sharing models prevailing. “It is not in landlords’ interest to have empty shopping malls,” observed one panellist.
- “Takeaway 2.0” will become central, not peripheral, to the business model of some restaurants. One restaurateur revealed that his outlets in Kuwait were selling 1,000 cook-at-home meal kits per day in April – and is looking to pivot some of his kitchens to this model.

Q4 *Business models will fundamentally change.*

(e.g. many restaurants will fail, landlords will be more co-operative, community restaurants will thrive, and delivery 2.0 will be central, not peripheral.)

AGREE  **56.80%**

things will "never be the same"

DISAGREE  **43.20%**

we'll revert to "business as usual" in a couple of years

6



MATERIALS

Materials - anti-microbial will be a given

There was overwhelming consensus that anti-microbial materials will become commonplace, with 95% of respondents agreeing. Anti-microbial surfaces are not new to the foodservice industry – but some designers observed that they are sometimes value-engineered out of the final build specification for restaurants. Panelists broadly agreed that this will no longer be the case.

In terms of retrofitting existing restaurants with anti-microbial materials, there was no clear direction about how viable this is, technically, economically or aesthetically.

Panelists broadly agreed that washrooms will be a major focus of attention in terms of hygiene and sanitization, and that anti-microbial materials will be a part of that. On a related note, some panelists observed that HVAC systems for F&B outlets may need to be reviewed.



Panelists broadly agreed that washrooms will be a major focus of attention in terms of hygiene and sanitization.

Q6 *Materials: anti-microbial materials will be a given in new builds, and often retrofitted. In washrooms as much as dining areas.*



ARCHITECTURAL HISTORY

Architecture history - Modernism evolved from cholera, typhoid and Spanish flu

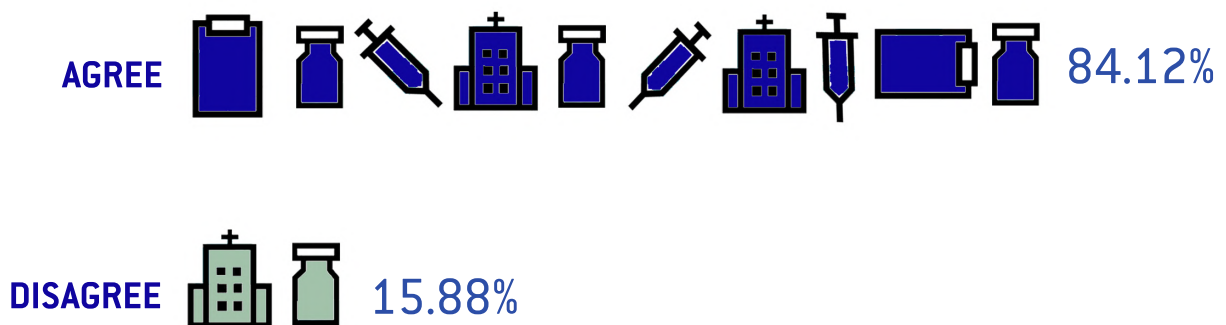
One panellist drew the parallel between the current pandemic and the cholera, typhoid and flu outbreaks of the early 20th century. Architectural modernism— a dominant mode of design from the 1920s to the 1970s—is interpreted by some architectural historians as a response to those health crises. For example, the embrace of simple lines, strict geometries and modern materials, and the rejection of ornamentation such as intricately carved wooden furniture that collected dangerous microbes.

Could the current pandemic give birth to a similar transformation in building design?

84% of survey respondents agreed. However, it was more of a general observation. There was little specific insight into how this might impact restaurant design in practical terms.

Q7 *Architecture history shows that disease outbreaks cause lasting changes in building design.*

(e.g. Modernism evolved from cholera, typhoid and Spanish flu.)



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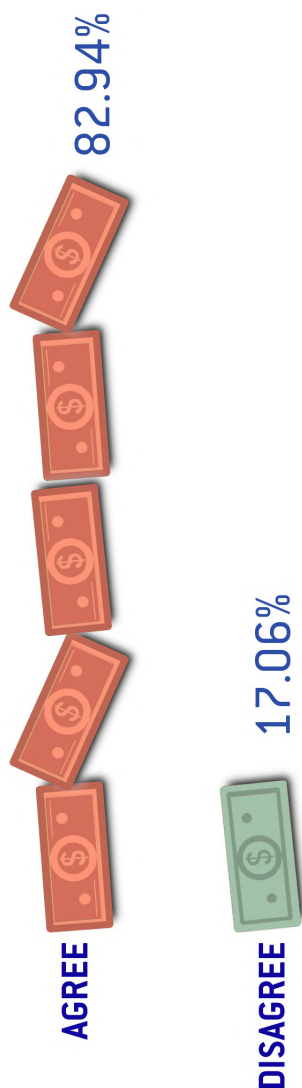


ESCAPISM

Original, immersive, escapist design - differentiation through design will be even more important

One panelist observed that this could be the lasting design legacy of the pandemic: “Restaurateurs are not really asking for new spacing – but they are pushing for more originality. They know there will be fewer people dining out, so they are asking us to challenge the briefs they have given us, and asking for more originality. Escapism will be increasingly important in restaurant design – creating worlds that have a slightly surreal or special experience is a must.”

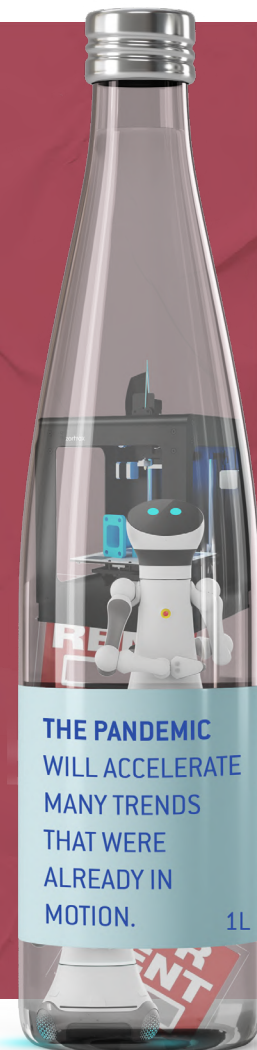
There was broad consensus with this sentiment among survey respondents, with 83% agreeing with the statement.



Q8 *Original, immersive, escapist design becomes even more important.*

[Customers will have less money and less confidence to dine out, so restaurants must be more creative with design concepts.]

9



DESIGN TRENDS

Design trends - the pandemic will accelerate many trends that were already in motion

Some panelists observed that many of the restaurant design changes mentioned in relation to COVID-19 are not knee-jerk reactions: they had been happening anyway. “We are developing restaurant and hotel concepts in China with robot waiters and staff, but this was happening before the pandemic. In many ways this just accelerates design trends that were already in play,” observed one panelist.

Trends that had begun pre-pandemic include:

- Increased automation through robots and apps
- Demand for greater originality and escapism in design concepts
- Decline of buffets and sharing concepts
- Pressure on landlords to ease rents

Q9 *Many of the design trends mentioned in questions 1-8 were happening anyway: the current crisis will simply accelerate them.*

AGREE  77.65%

DISAGREE  22.35%

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