

# CGA AL FRESCO INSIGHT:

Consumer habits on reopening of the GB On Premise

Research undertaken 19<sup>th</sup> – 21<sup>st</sup> April 2021





**Who has been first back?**



# 44%

of English consumers have visited the on-trade since the 12th of April

+9pp vs. the first reopening in July 2020



On average, consumers who have revisited, went out

2.4

Times during the first week of trading

The first week of trading has highlighted the consumer appetite, but with only 1 in 4 outlets reopened, demand is outstripping capacity

62%

Consumers who have been out would have visited a venue **spontaneously** in the past week had they thought they would be able to get a table **without a reservation**

27% of those who have not yet been out

Sample size: Have returned: 331. Yet to return: 420

60%

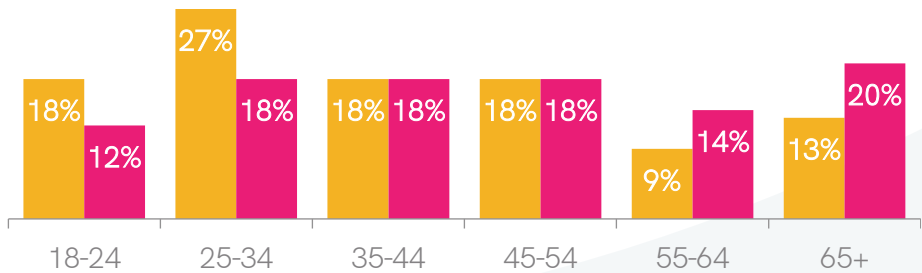
Of consumers who have been out would have gone out more, but **didn't** want the hassle of making a reservation at a venue

37% of those who have not yet been out



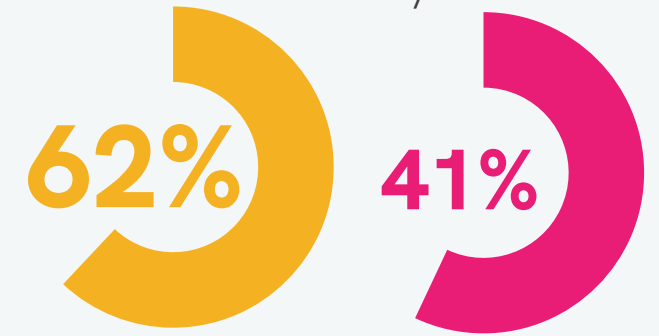
# Consumers first back to the sector were those that were previously the most engaged, with a bias towards younger consumers

Age:

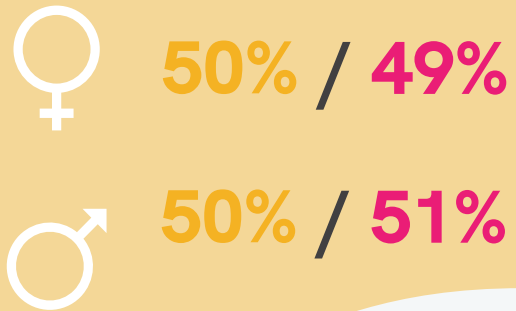


**Consumers who have returned**  
**vs.**  
**Average Consumer**

% drinking out weekly:



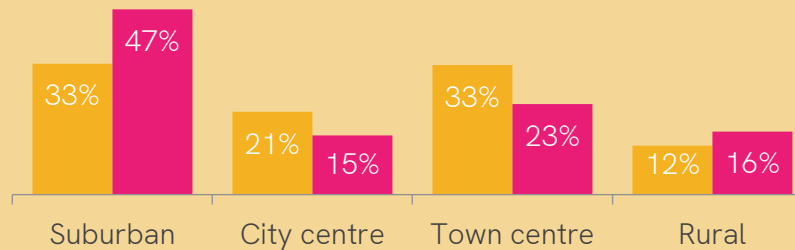
Gender:



Income:



Residence:



Average monthly spend eating/drinking out:





## Expectations were met over the last week, with consumers left satisfied with their experiences

Thinking generally about your visits to pubs, bars, or restaurants in the past week, how did you find your trip?

**45%**

of consumers said that their visit was better than expected



**52%**

Of consumers said it was as expected

**3%**

of consumers said it was worse than expected

A clear martini glass with a long stem, garnished with a slice of orange peel, sits on a silver tray. The background is a blurred bar scene with people and lights.

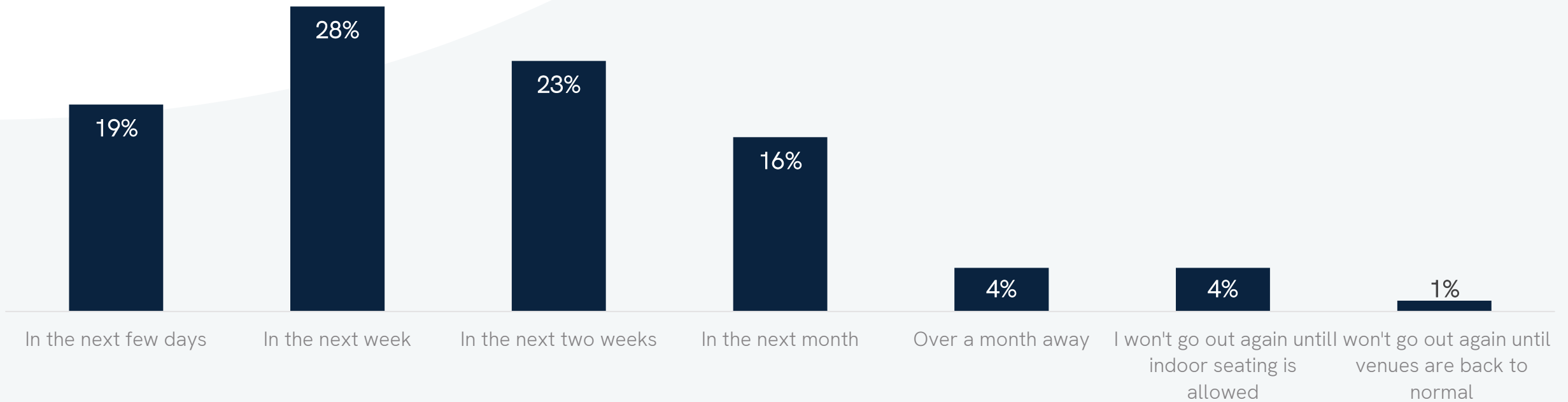
# 68%

of consumers felt safe during their visits  
to the on-trade

+5pp vs. July 2020

# Consumers plan to maintain visits, with nearly half of those who had visited the on premise in the first week planning to return in the second

When are you planning on going out again to pubs, bars, restaurants or other similar venues?



Sample size: 331





# Frequency may take a slight hit, with 2 in 5 saying they might not visit venues as often, but for the majority, visit rates will be maintained

How has this first week of visits impacted your likelihood to continue visiting pubs, bars, restaurants or other similar venues again?

# 40%

of consumers say their visit has put them off visiting at least some venues for a while

= to July 2020

# 57%

of consumers say they will continue visiting venues as normal

-1pp vs. July 2020

# To keep consumer demand up, operators now need to focus on taking as much effort from the consumer as possible, while offering experiences that can't be created at home

You have said that your previous visits have put you off visiting certain venues again, why is this?

Top 5 reasons: Indexed vs. July 2020



# Overall confidence returning to the sector is high, but operators will have to work to reassure the third of consumers who remain nervous about returning

How nervous did you feel about returning to pubs, bars, restaurants and other similar venues?

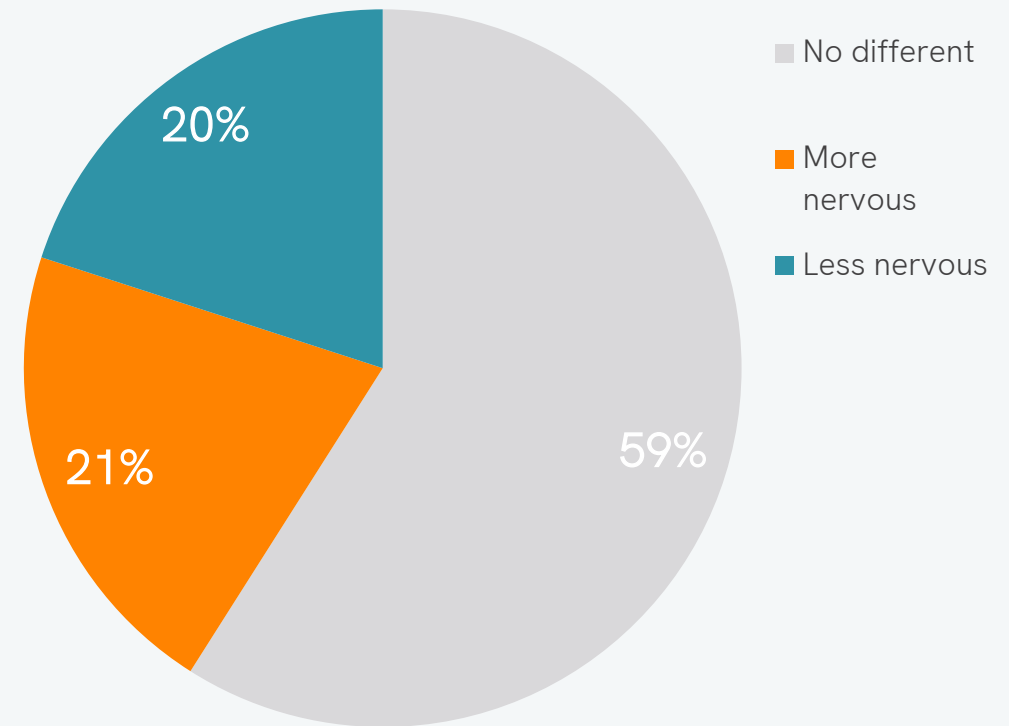
**66%**

**Not nervous**

**34%**

**Nervous**

Now that you have visited at least one venue, how do you feel about eating and drinking out?





## First week experiences in the on-trade



# Drink-led occasions have been the most popular among consumers since reopening, accounting for more than 2 in 5 visits to the on-premise

For what occasions have you visited pubs, bars, restaurants or other similar venues since the 12th April?



# Pubs remain the go-to venues for consumers returning to the on-trade, while food-led channels show to be less appealing

Which of the following types of venues have you visited since the 12th April? *Indexed vs. July 2020:*



Since the 12<sup>th</sup> of April...

Consumers visited an average of

**2.4**

Venues per on-trade visit

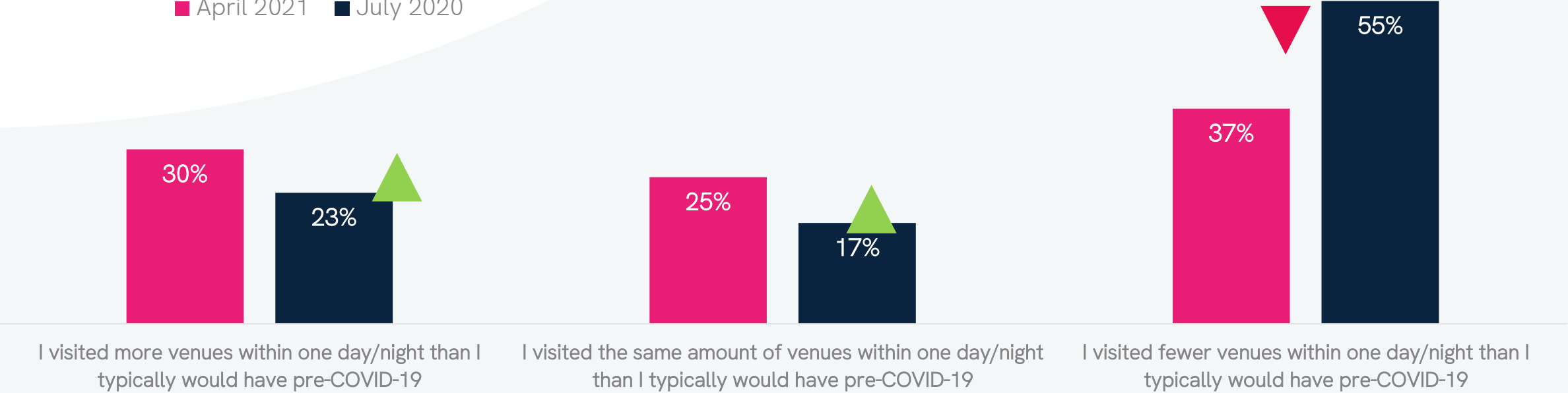
And stayed in each venue  
for an average of

**1-1.5  
hours**

# With reservations and limited time at a table more prominent this reopening, consumers are venturing to more venues within one occasion compared to July

Thinking about the number of venues you have visited since they re-opened, which of the following statements best applies to you:

■ April 2021 ■ July 2020

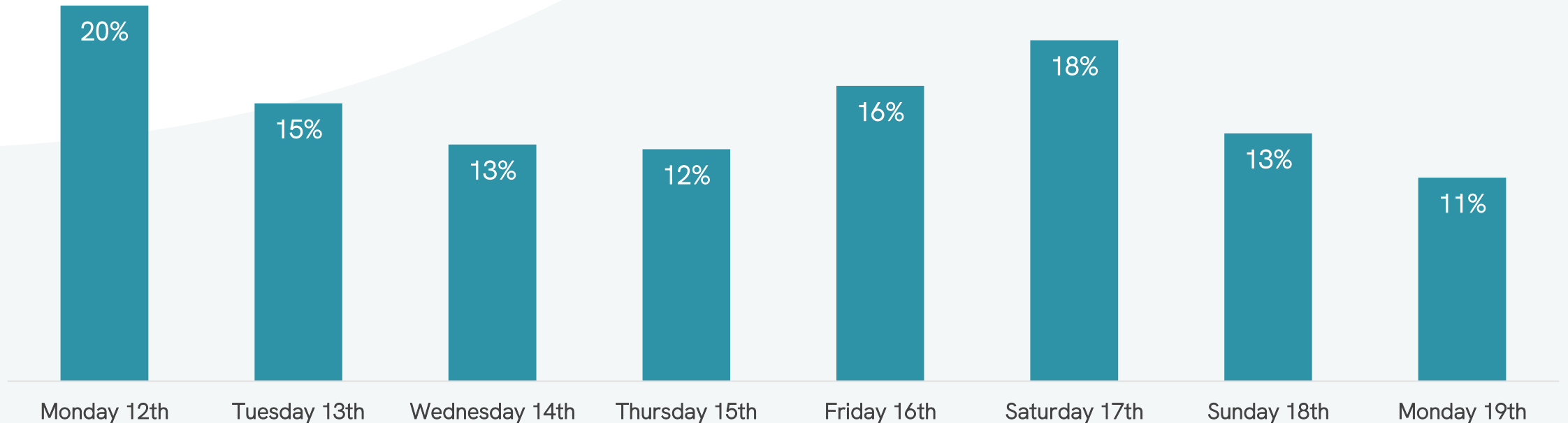


Sample size: April: 330. July: 173



# The on-trade has seen a typical weekend peak for the first weekend back, but has yet to meet the level of Monday's reopening

What day have you visited a pub, bar, restaurant or other similar venue since restrictions were lifted for outdoor hospitality? Please select all that apply



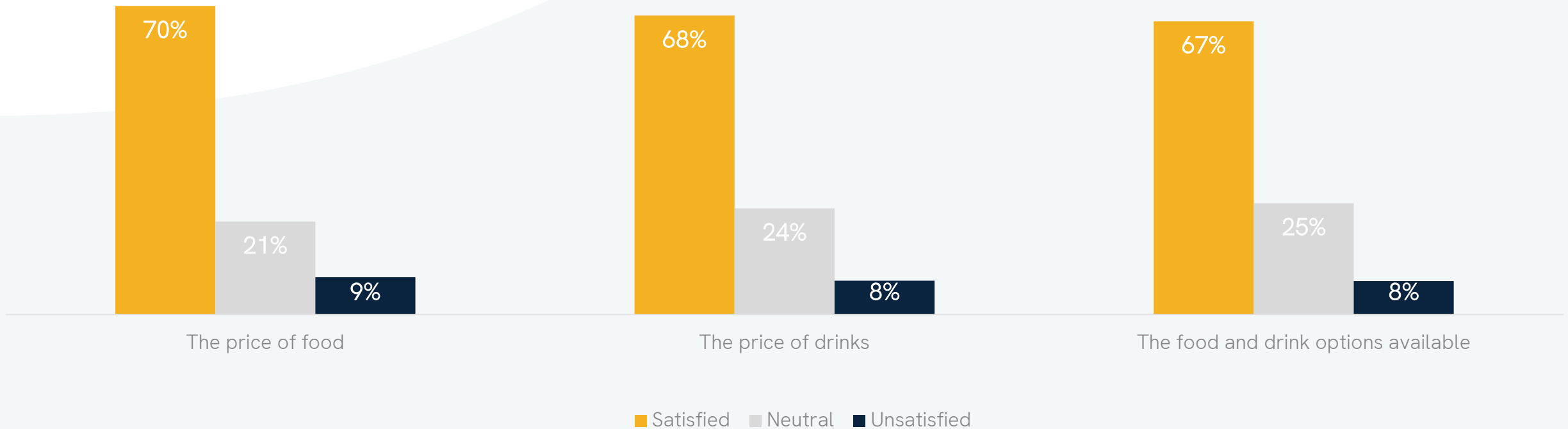
A clear martini glass with a long stem, garnished with a slice of orange peel, sits on a silver tray. The background is a blurred bar scene with warm lighting and people.

# 57%

Of visits have taken place  
mid afternoon to early  
evening

# General satisfaction during first visits back has been high, across both range and price

How satisfied were you with the following factors during your visits to venues since the 12th of April?



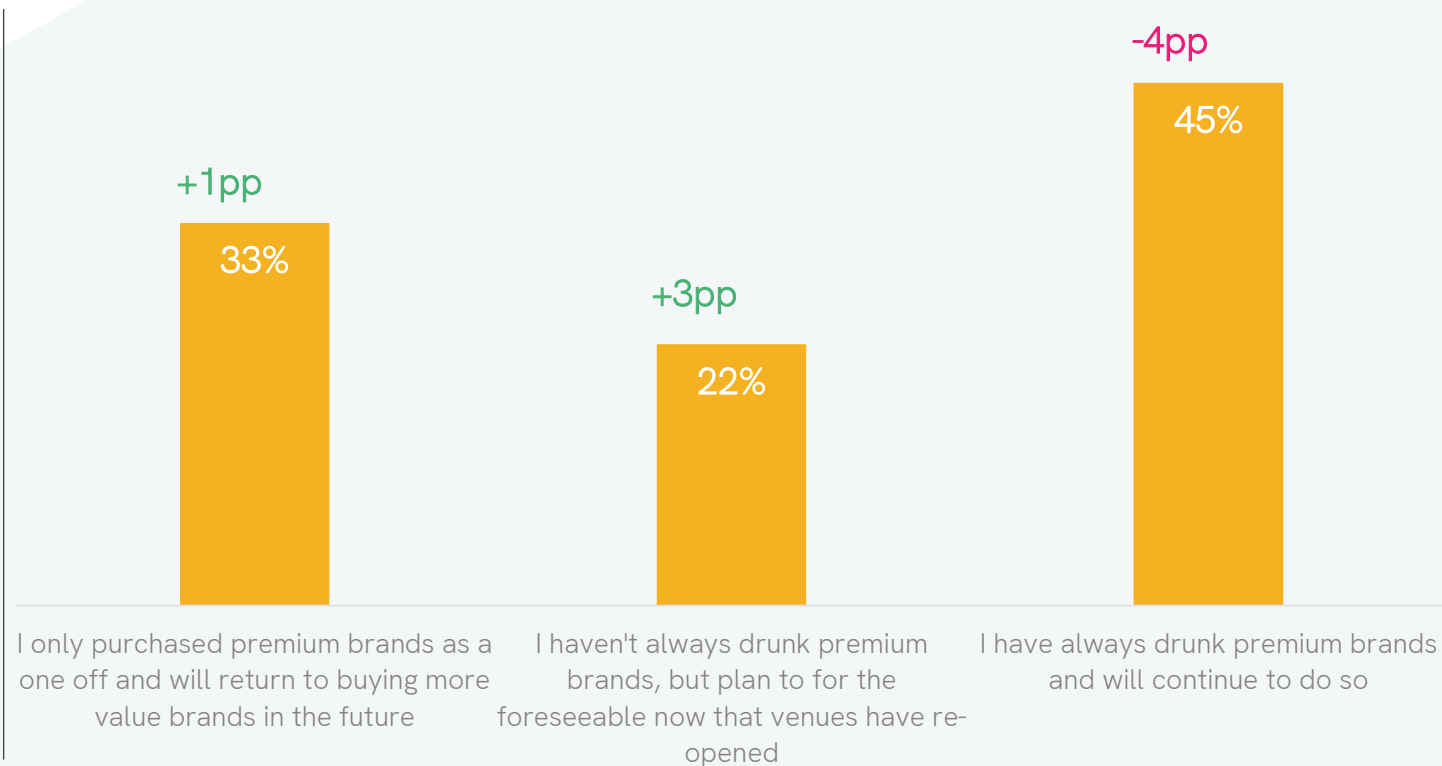
Treat mindset has been in evidence, as more consumers traded up on drinks choices compared to July, with nearly 1 in 4 planning on making it their norm

43%

of consumers drank premium / expensive drinks brands when out since 12<sup>th</sup> April

+3pp vs. July 2020

You said that you have opted for premium/expensive brands. Which of the following applies to you?



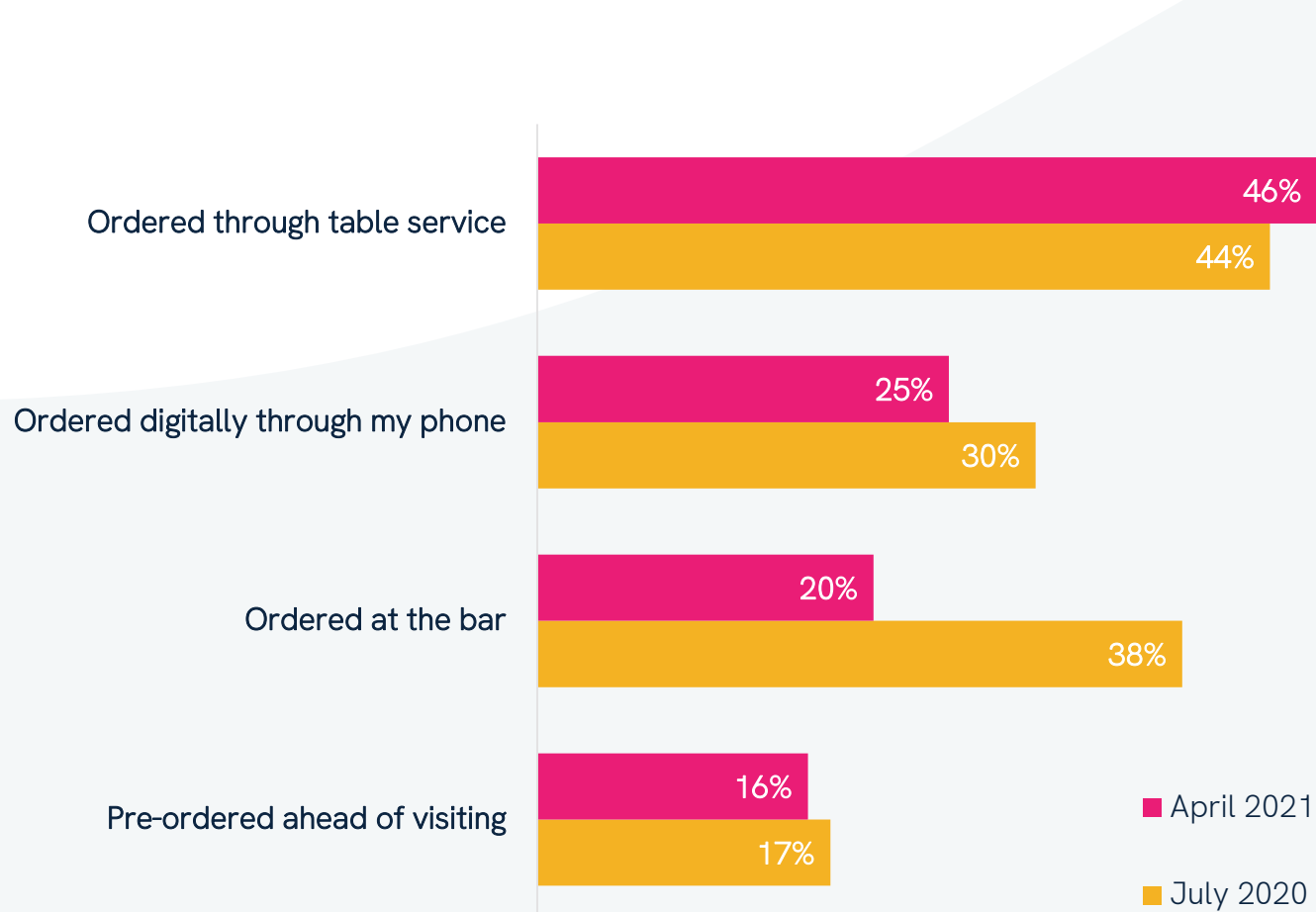
On average,  
consumers drank

**3.8**

Serves per venue since  
visiting the on-trade since  
12<sup>th</sup> April

# Consumers are enjoying a slice of normalcy, with the face-to-face interaction of table service growing in usage and satisfaction, while digital methods decline

Which of the following methods of ordering have you used in the past week?



Satisfaction with method

Vs. July 2020

87%



+3pp

76%



-8pp

73%



-10pp

74%



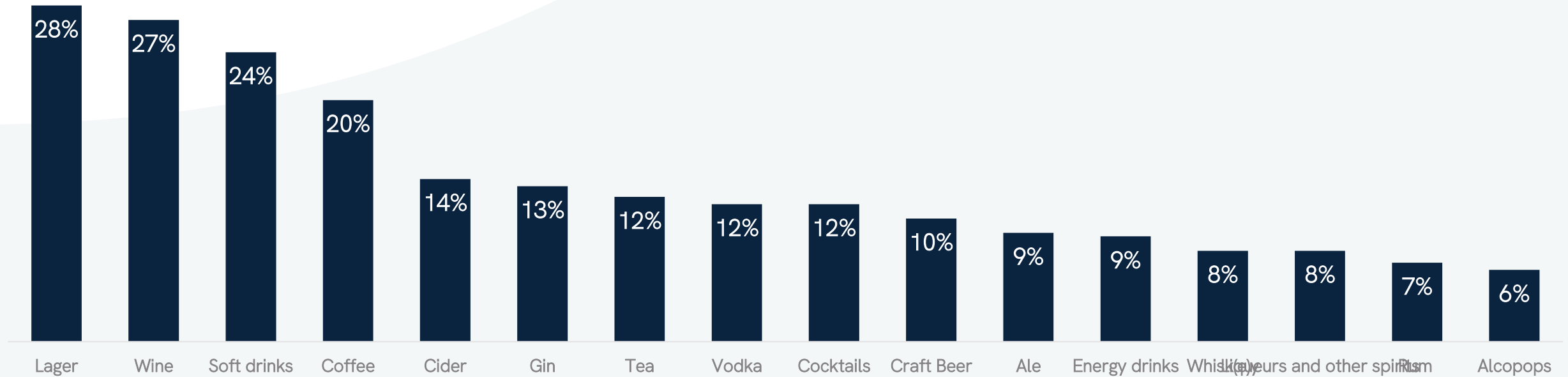
+4pp

Sample size: 330



# Lager and wine led success in the first week back, but alcohol was not an essential for many, with soft and hot drinks also doing well

Which of the following drinks have you purchased since returning to the on-trade?



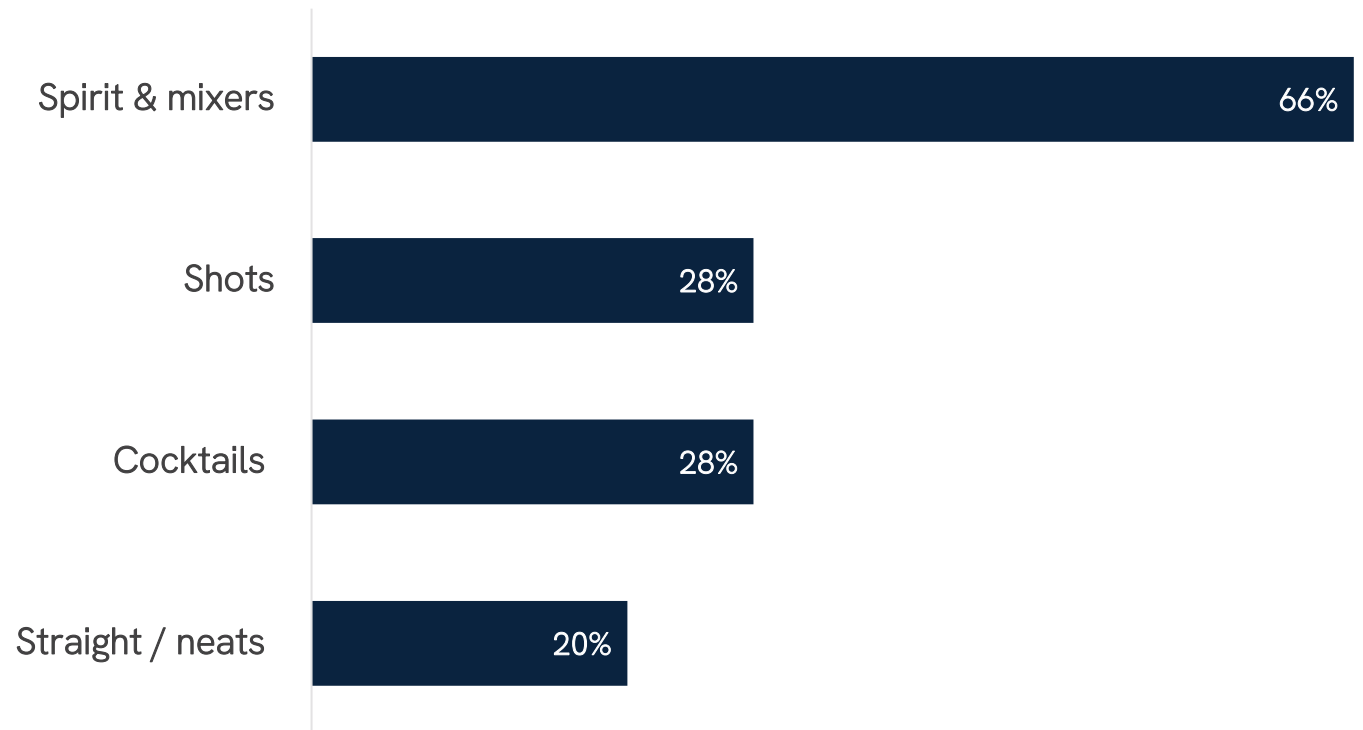
Sample size: 331





## Consumers drinking spirits haven't necessarily been searching for complex, hard to recreate serves, with two thirds drinking a simple spirit & mixer

Which of the below have you drank with spirits when out?

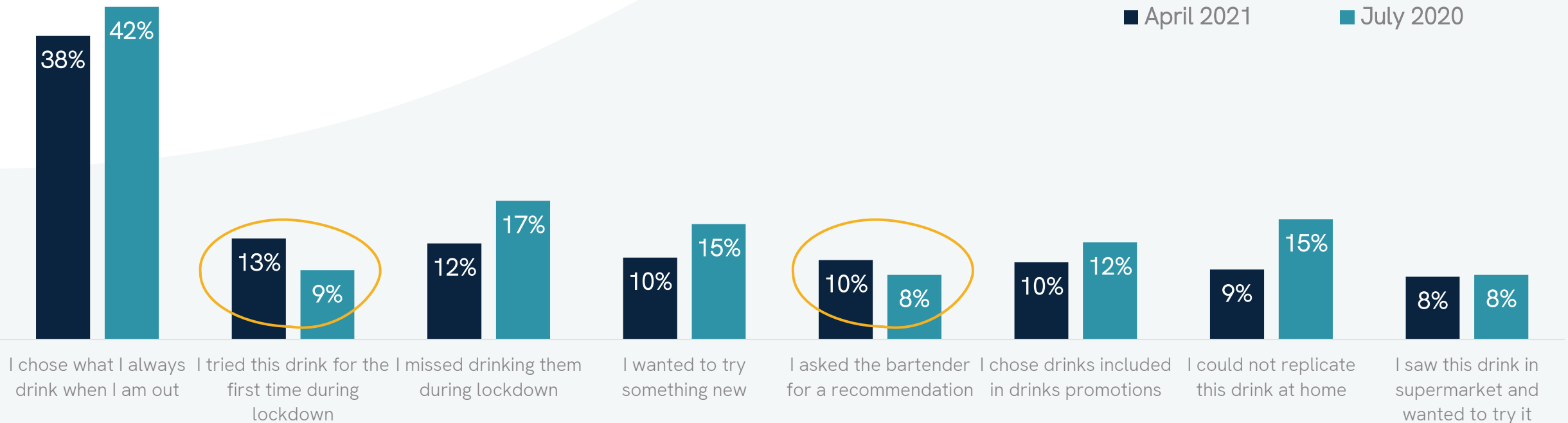


Sample size: 131



# While habit remains top driver, consumers are also drawing on their lockdown experiences when choosing what to drink while out

How did you choose which drinks you were going to purchase during your visits? Top 7:



Sample size: April: 330. July: 172





## Bookings & no-shows





With limited capacity at most venues, pre-booking has become essential to guarantee visits, while over 2 in 3 are already pre-booking their next occasion

# 73%

Of consumers pre-booked at least one of their visits to the On Trade post April 12th

# 67%

Of consumers have pre-booked future visits to the On-Trade

Sample size: 331

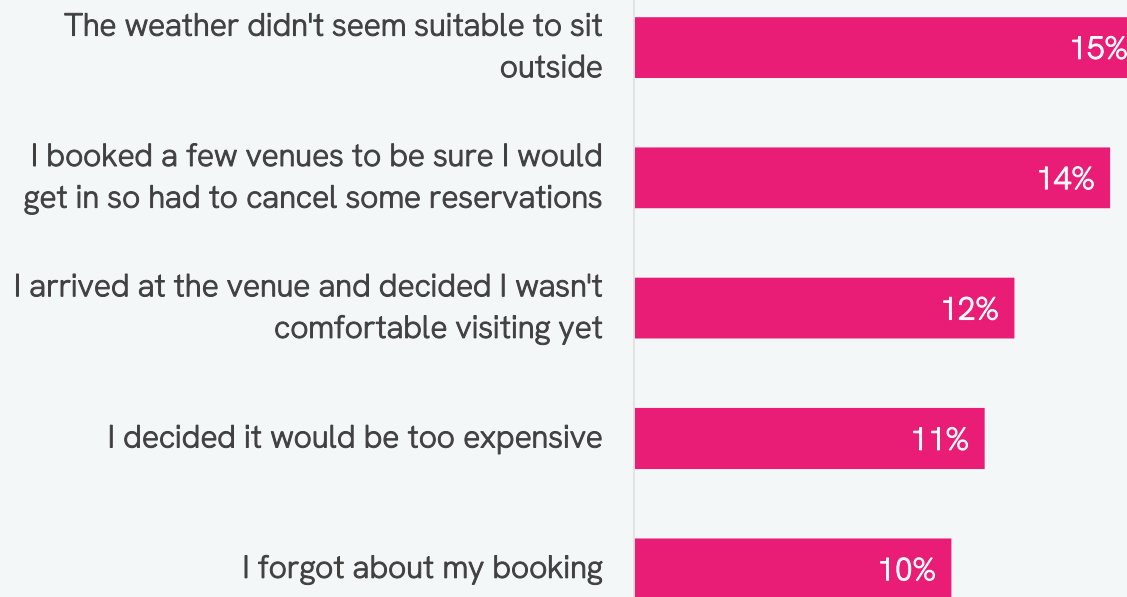
# With 1 in 7 consumers who had made a pre-booking failing to turn up to their reservations, preventing no-shows will be a priority for operators

# 14%

Of consumers who pre-booked said they either cancelled or did not turn up to their booking

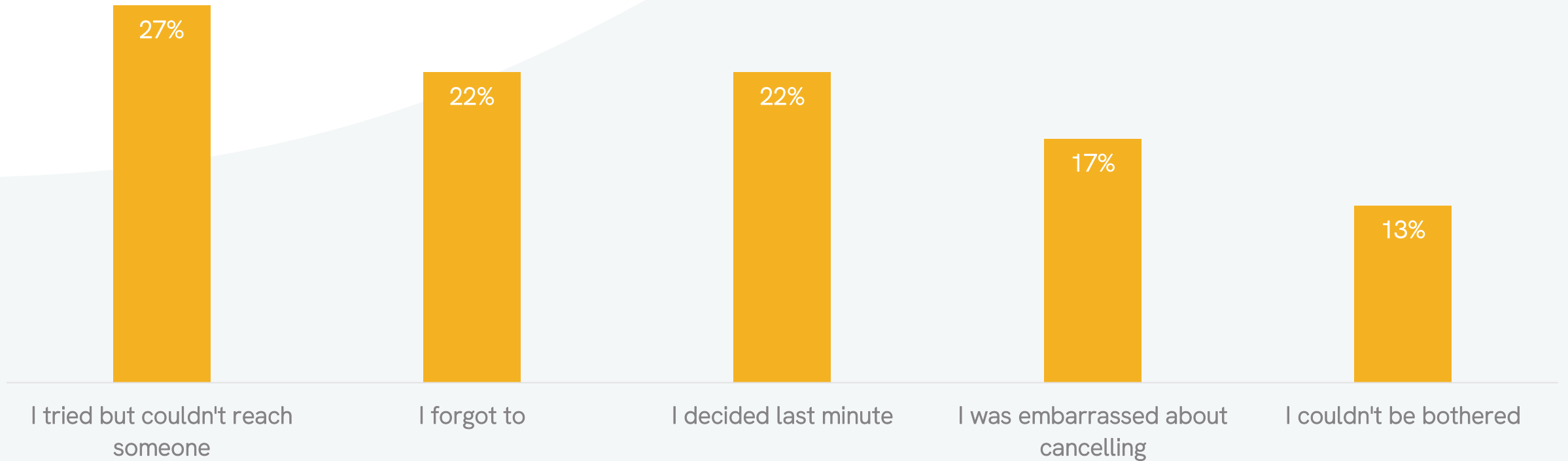
+13pp for consumers who have been out since 12<sup>th</sup> April

## Top 5 reasons for cancelling or not showing up:



# Positively for operators, reducing no-shows can be achieved if improvements are made to their booking and contact systems, with over a quarter trying to inform the venue

You've said that you didn't turn up for your reservation. Why did you not inform the venue that you wanted to cancel?





**Returning to the on premise – those yet to revisit**



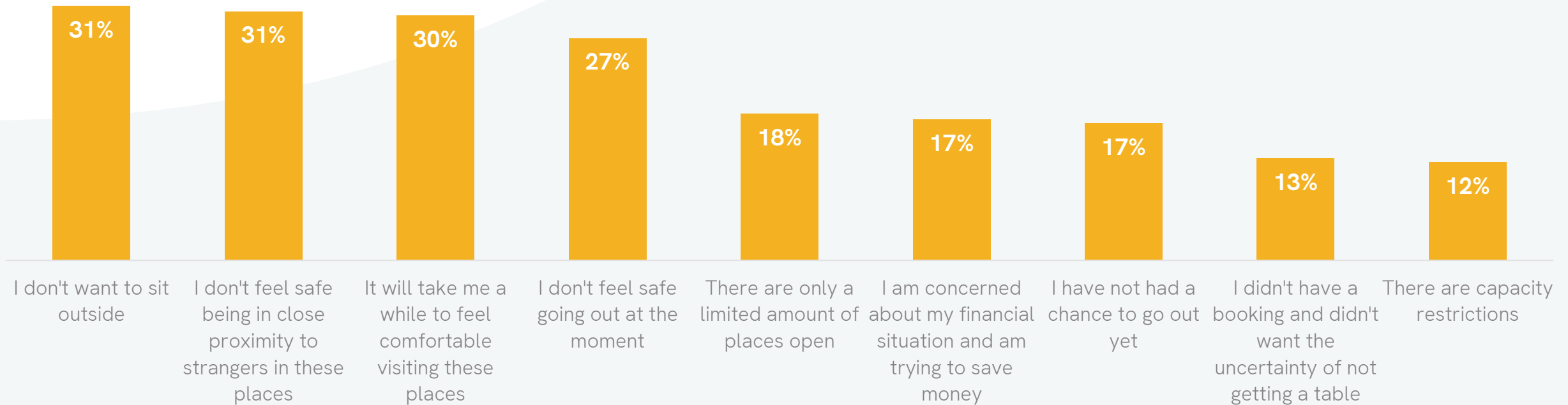
# 56%

of consumers in England  
are yet to return to the on-  
trade

-9pp vs. the first reopening  
in July 2020

# Outdoor seating only has meant weather being the main cause of consumers not returning on April 12th

You have said that you haven't been to pubs, bars, restaurants or other similar venues since lockdown restrictions were lifted, why is that?

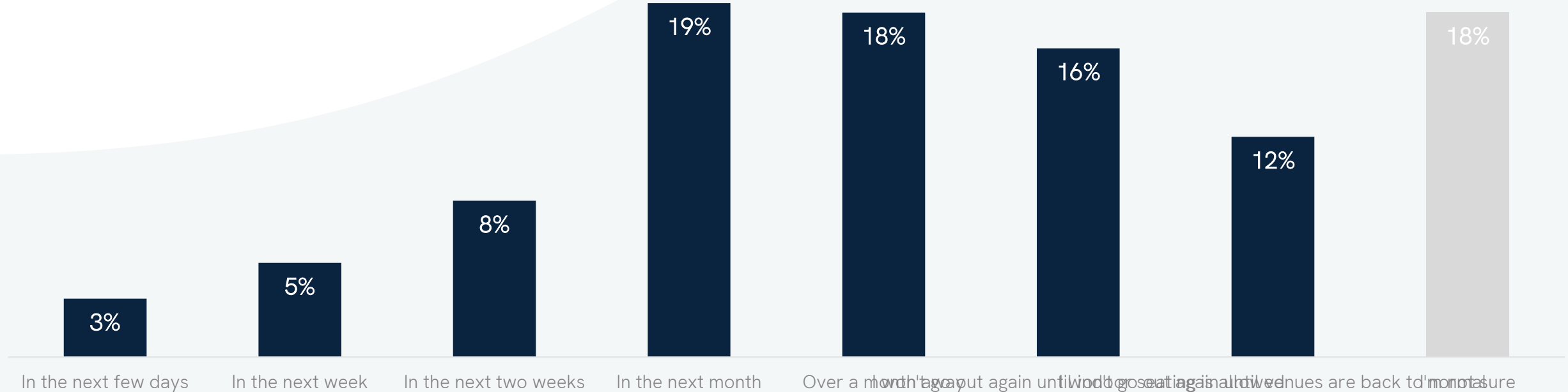


Sample size: 420



# Consumers who haven't been out yet are unlikely to return in the near future, with many waiting for further relaxations of restrictions

When are you planning on going out to pubs, bars, restaurants or other similar venues?



Sample size: 420



# Summary

- With just over 4 in 10 consumers returning to the on-trade since the 12<sup>th</sup> April, a 9pp increase compared to July last year, showing greater consumer confidence and pent-up demand in returning to the market and younger consumers who have returned first
- Overall consumers visits were in line or better than expected and most importantly most consumers felt safe during their visit, but operators will need to continue to ensure COVID19 safety measures are followed and communicated to reassure those who are more apprehensive
- Satisfaction with overall visits and safety measures has led to consumers feeling confident to return to the sector quickly after their first visit, with just under half planning on returning within a week
- The removal of the drinks with food restrictions imposed during last lockdown has seen the return of the drink led occasion with 42% of visits being predominantly drink-led
- Pre-booking within the first week posed both an opportunity and a barrier, deterring people from making spontaneous visits for fear they won't get a table or deterring people from going out more because they felt pre-booking was a hassle
- The average consumer made 2.4 visits and spent 1 to 1.5 hours in each venue, with pubs being the most popular channel. However, pre-booking and time restrictions on venues have resulted in consumers visiting to more venues when out compared to July last year
- Habit remains the core driver to choosing drinks but with growing confidence comes a slight increase in consumers desire to experiment or try brands they discovered at home during lockdown out
- For the 56% of consumers who didn't return within the first week, sitting outside is the biggest barrier, followed by concern over safety measures such as social distancing

