

CONSUMER COUNTDOWN TO REOPENING SERIES

Part 1 – Planning for reopening

Spanning across two nationally representative **samples of 5000 and 1000 GB on-premise consumers**, CGA's **CONSUMER COUNTDOWN TO REOPENING SERIES** explores consumer sentiment towards planned roadmaps to ease restrictions and how soon after hospitality venues reopen that consumers plan to return. Other topics covered include what might be preventing consumers from returning and what their initial visits to the market may look like. Results were collected between the **26th Feb – 15th March** and **2nd – 11th of March**.

The logo for CGA, consisting of the letters 'CGA' in white, bold, sans-serif font, centered within a blue circular shape that has a slight gradient and a soft shadow.

CGA

CONSUMER COUNTDOWN TO REOPENING SERIES

INTRODUCTION



PHENOMENAL DATA. EXPERT INSIGHT.

With the GB out of home market's roadmap to reopening outlined, CGA's Consumer Countdown to Reopening Series delves into consumers' plans for reopening, changing behavioural patterns & sentiment, hospitality predictions & factors for successful On-Premise visits.

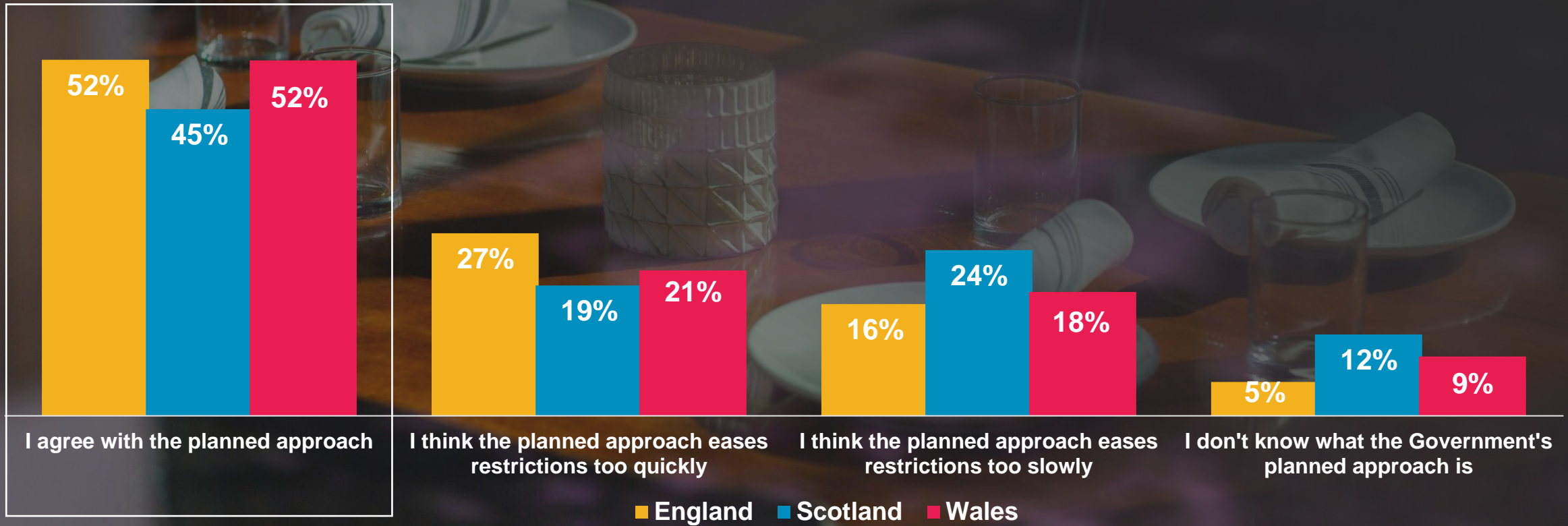
The exclusive series of reports offer insight across key topics impacting the sector, with further detail available on request.

To access the full range of topics included within the series, or for more information, contact:

charlie.mitchell@cga.co.uk

The majority of consumers agree with the planned roadmaps, though those from Scotland are more likely to perceive their government to be easing restrictions too slowly

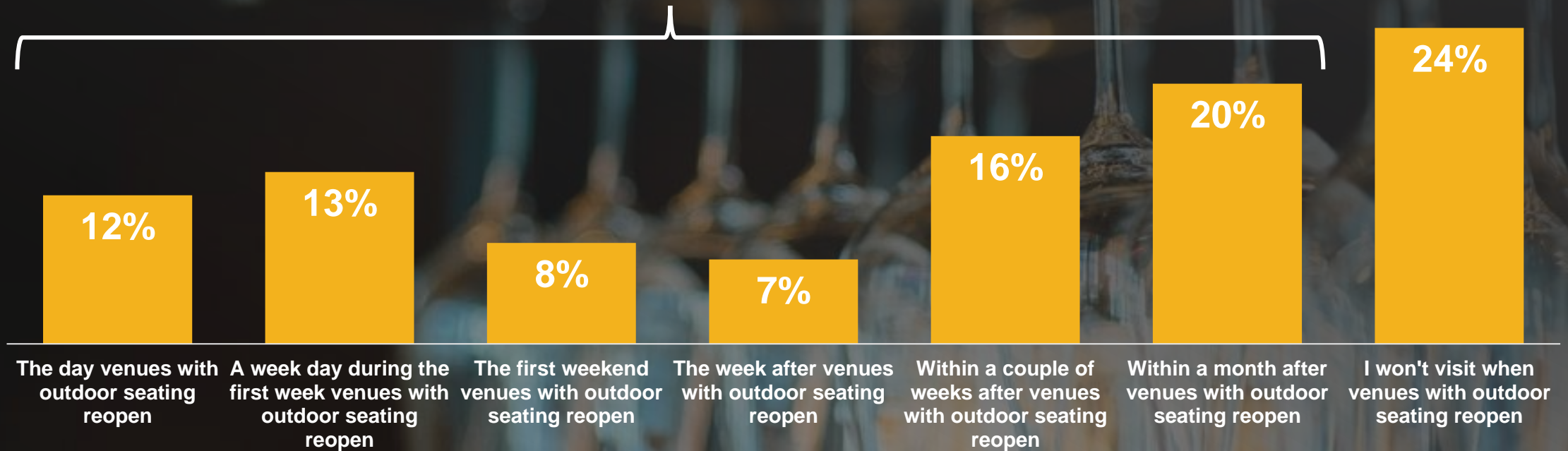
What are your thoughts on the Government's planned roadmap to ease lockdown...?



A third of consumers plan to return within the first of week of reopening

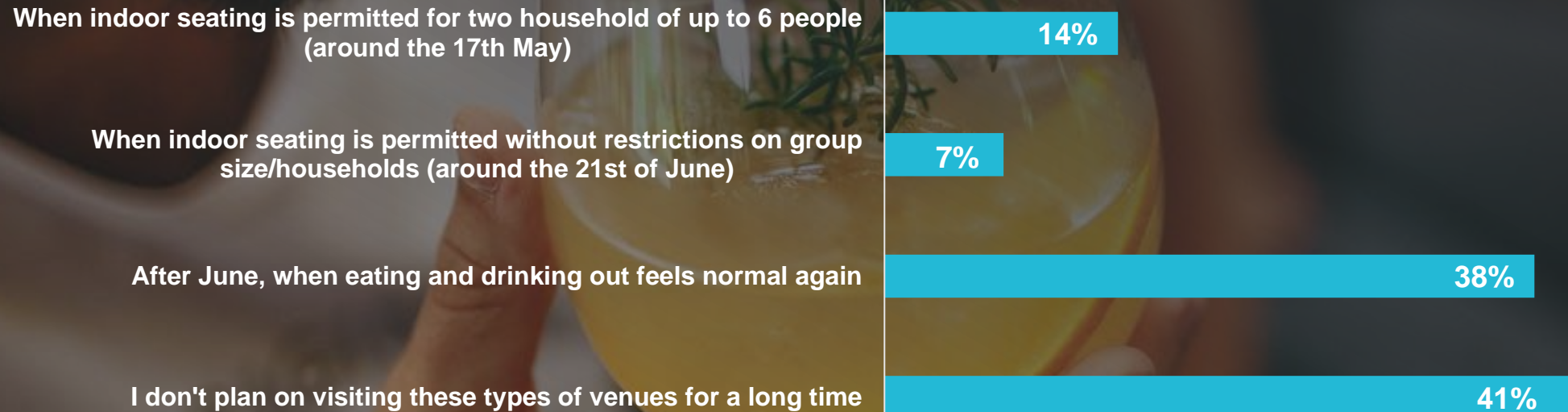
How soon after 12th of April are you most likely to visit a venue with outdoor seating?

76% of English on-premise users will visit a venue with outdoor seating



Over a third are waiting for eating and drinking out to feel normal before they go out again

Consumers who don't intend to visit venues when they reopen with outdoor seating only, plan to return to the market...



57%

of GB consumers would currently feel
confident visiting venues with outdoor areas

+8pp vs June 2020

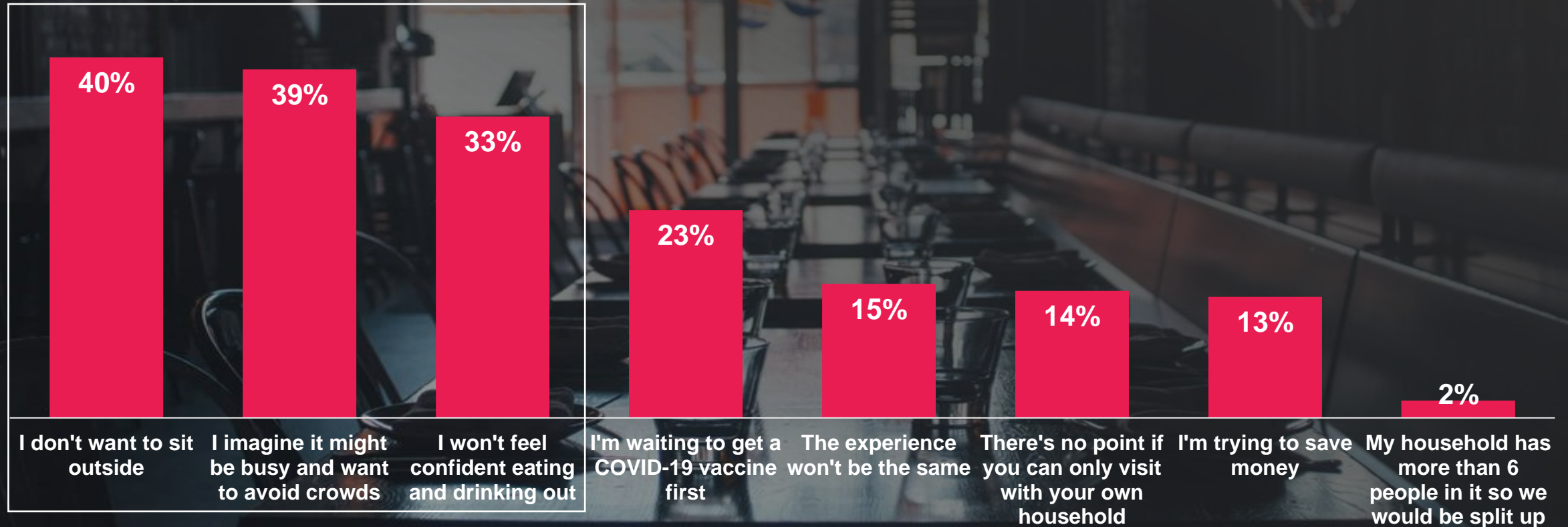
81% of English on-premise users plan to return to the market by June, when all restrictions visiting hospitality venues are due to be lifted

Proportion of consumers in England who plan to return to the market:



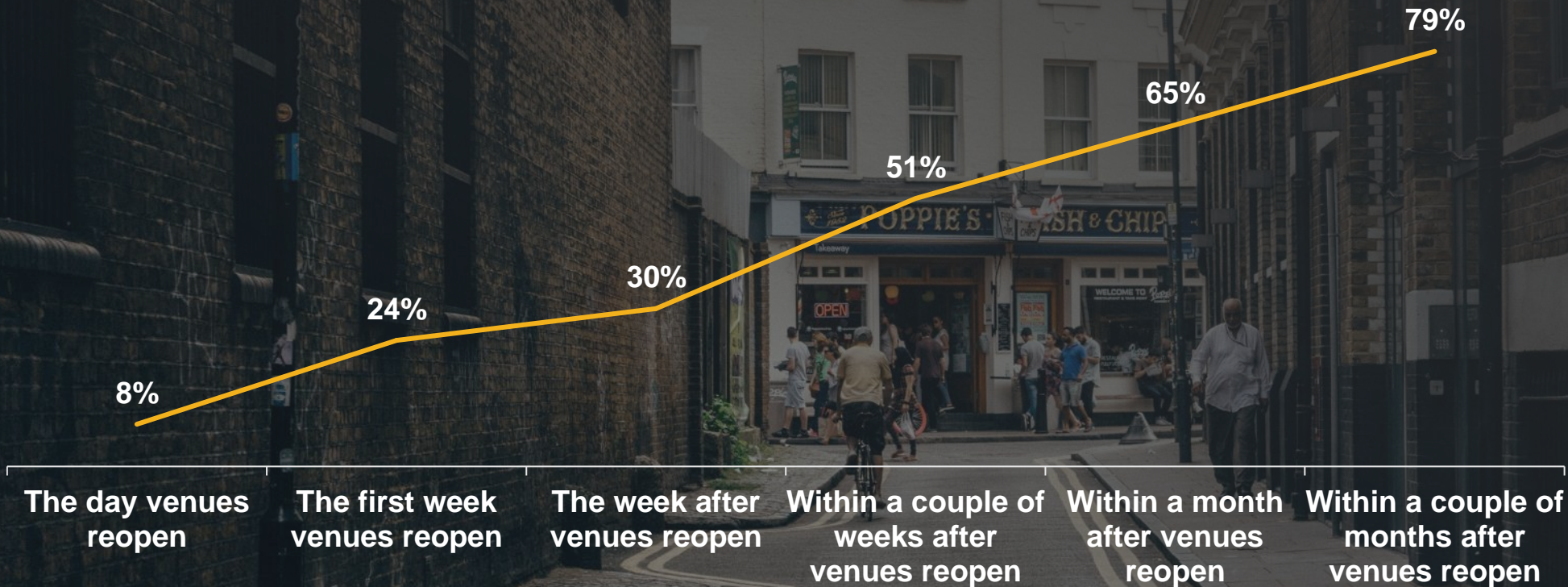
Sitting outside, busy crowds, and lack of confidence are the biggest deterrents for visiting before indoor seating is permitted

Which of the following explain why you don't plan to visit pubs, bars, restaurants or other similar venues when they are open for outdoor seating from the 12th of April? (Asked to the 24% of England who said they wouldn't visit a venue whilst they're only open for outdoor seating)



Almost half of Scottish consumers plan to visit venues within first few weeks from the day of reopening

The Government have provided the provisional date of Monday the 26th of April for pubs, bars, restaurants and other similar venues to reopen.
Proportion of consumers in Scotland who plan to have visited by the following dates:



20%
won't visit within the first 3 months of venues reopening

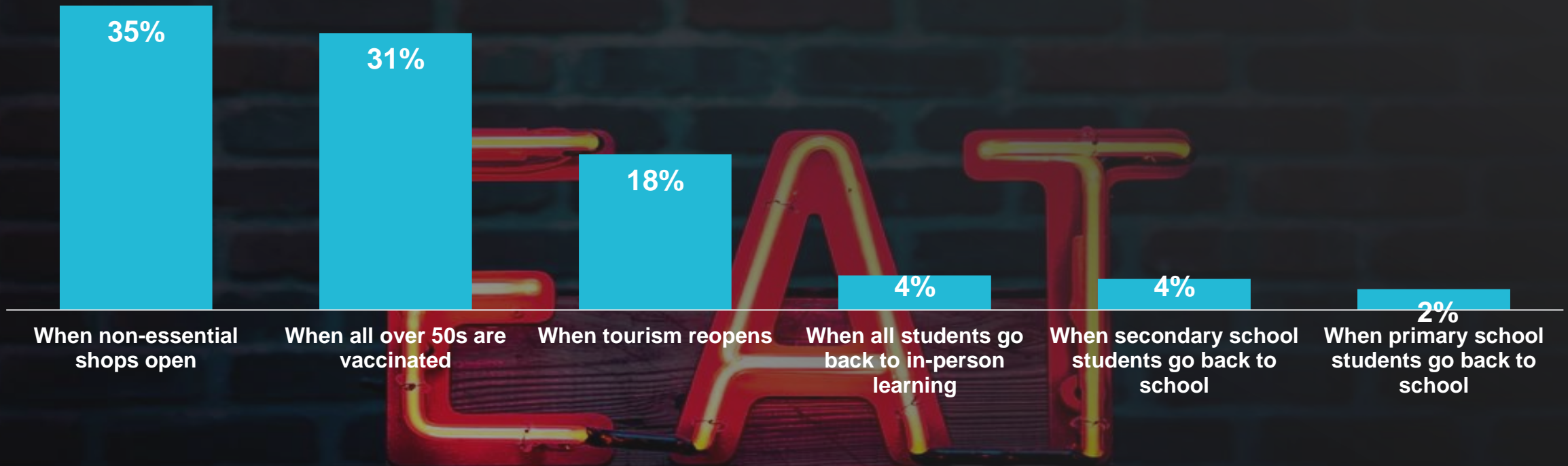
Similarly to England, Scottish consumers do not plan to go out within the first few weeks to avoid busy, crowded venues and are not feeling safe yet going back

You have said that there are some venues you do not plan on visiting within the first few weeks of them opening. Why is this? Top 10 out of 15
(Asked to the 49% of Scotland who said they wouldn't visit a venue within the first couple of weeks of them reopening)



Over a third of consumers in Wales think that hospitality should reopen when non-essential shops are allowed to open

When do you think pubs, bars, restaurants and other similar venues should reopen in Wales?



46%

of GB consumers agree that they're more likely to "plan their visits to hospitality venues in more detail" than they did before the pandemic

Operators can expect to see an increase in future bookings, with over half of consumers now more likely than pre-COVID-19 to pre-book for food and over a third for drinks

51%

of GB consumers are more likely to pre-book a table for food than they did before than pandemic



36%

of GB consumers are more likely to pre-book a table for drinks than they did before than pandemic



Nearly 2 in 5 consumers have already planned their first visit back to hospitality venues, highlighting the pent up demand and excitement to return. The walk up opportunity is evident, with the majority not having made reservations

38%

of GB consumers have planned their first visit back to the on-trade

+30pp for 18-24yr olds

11%

have already made reservations for their first visit back (+10pp for 18-24yrs)

27%

have planned their first visit back, but not made any reservations (+20pp for 18-24yrs)

Early visitors to outdoor seating areas in England are likely to reserve a table for the first week of reopening

59%

Of those who plan to visit a venue with outdoor seating in the first week of reopening said they are likely to pre-book their visit for this first week

Over 60% of consumers in England who intend to visit venues with outdoor seating will be eating and drinking out more, or as often, as they usually would

17%

as much as possible,
regardless of having to sit
outside

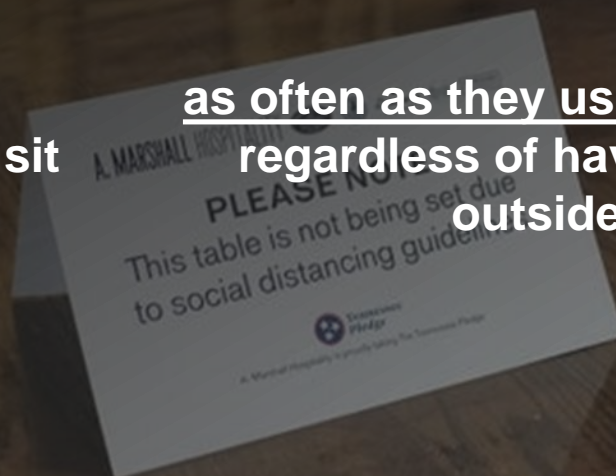
44%

will be going to eat and drink out...

as often as they usually would,
regardless of having to sit
outside

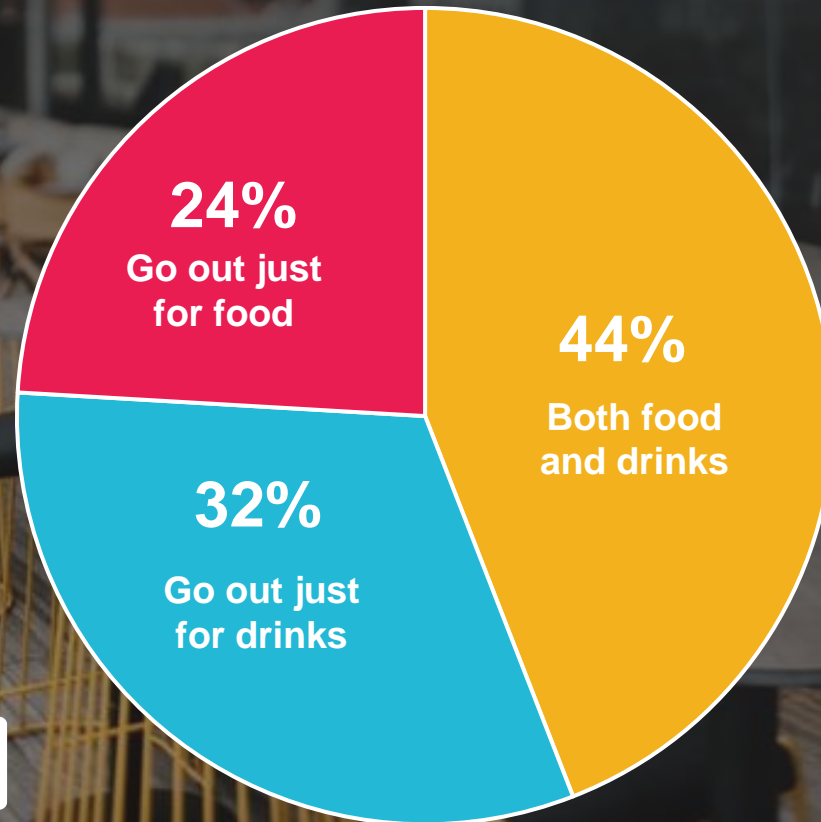
39%

less often because of the
outdoor seating rule



Nearly a third of consumers planning to visit venues with outdoor seating will be doing so for just drinks

When outdoor seating is permitted to open from the 12th April, are you more likely to go out for food, just for drinks, or for both?



LADs are the serves consumers are most looking forward to drinking out again in outdoor seating areas, with cocktails at the top of the list for the spirits category

Proportion of consumers who typically drink the below categories when out who are looking forward to having them in outdoor seating (Top 15 out of 20) E.g. 61% of typical OOH ale drinkers said ale is one of the drinks they are most looking forward to having in outdoor seating areas from 12th April



Summary

- Healthy demand for the hospitality sector is evident, with over three quarters of consumers in England stating that they are likely to sit outside hospitality venues within a month after 12th April and four in five (81%) consumers in England stating they are likely to be back in the market by June.
- Managing bookings and walk-ins will be important if venues are to persuade cautious consumers back, as 39% of those who don't plan on visiting venues within a month of reopening in England said this is because they imagine venues will be busy and want to avoid crowds and 43% of those in Scotland cite their reason as not feeling safe close to strangers.
- Initial visits to the on-trade are likely to look a little different, with consumers more prepared to plan their visits than they did before the pandemic. 59% of consumers who plan to visit a venue within the first week of reopening in England are likely to pre-book their visit. Operators should ensure they are making it easy for consumers to pre-book a table in order not to miss out on visits from those planning in advance.
- Although having to sit outside is likely to deter a proportion of consumers from visiting the on-trade as frequently, 61% intend to visit as frequently, if not more frequently, than usual.
- Consumers in England appear to be looking forward to being able to drink alcohol out without a substantial meal, as 32% of those who plan to visit venues with outdoor seating areas intending to visit just for drinks. Food-led visits are still likely to make up the majority of visits, with 68% planning to have food.
- LADs are likely to do well in England when hospitality venues are permitted to reopen, with typical LAD consumers most looking forward to drinking these serves out again in outdoor seating areas. Whilst for spirits, cocktails are top of the list, meaning the top 5 drinks are all the drink types that people may have missed whilst at home.

CONSUMER COUNTDOWN TO REOPENING SERIES

To access the full range of topics included within the series, or for more information, contact charlie.mitchell@cga.co.uk

