# CONSUMER COUNTDOWN TO REOPENING SERIES

## Part 4 – Factors for success

Spanning across two nationally representative **samples of 5000 and 1000 GB On Premise consumers**, CGA's Part 4 of the **CONSUMER COUNTDOWN TO REOPENING SERIES** explores the elements consumers are looking for in hospitality venues when they reopen, including the role technology will have to play. The report reveals how increased confidence has led to bolder planned visits to the reopened market, though the majority will remain cautious. Results were collected between the 26th Feb – 15th March and 2nd– 11th of March.

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# INTRODUCTION

**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:
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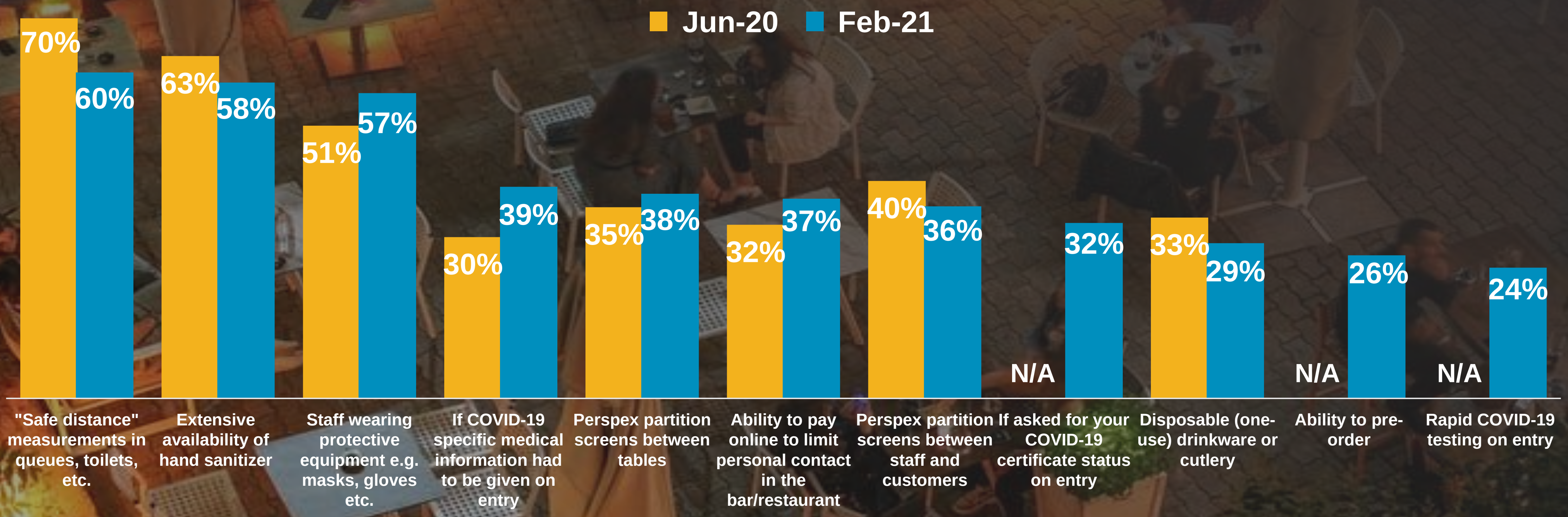
CONSUMER COUNTDOWN TO REOPENING SERIES

# Compared to the last national lockdown, consumers are just as expectant of COVID-19 safety measures when they return to outlets

Which of the following measures in pubs, bars and restaurants are essential in order for you to visit?




Sample size: Feb 2021: 2504, June 2020: 5017

# Ordering methods that limit personal contact with staff feature as the top 2 ‘nice to have’ elements consumers are looking for when they return

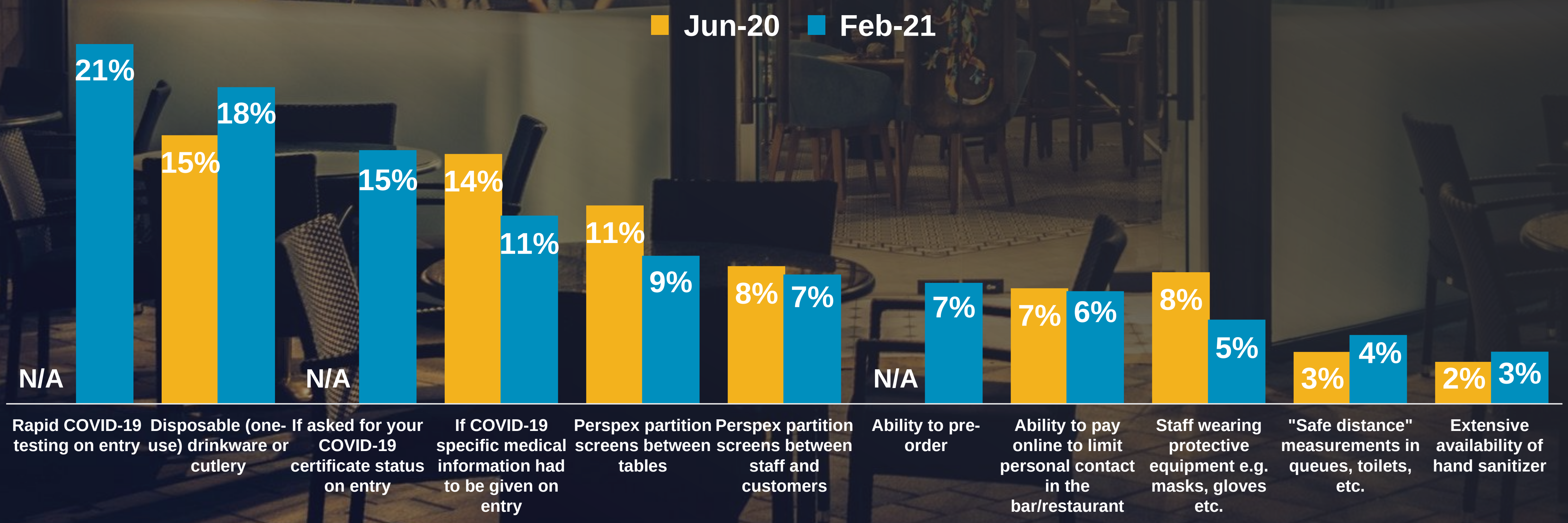
Which of the following measures in pubs, bars and restaurants are not essential but would make you feel more comfortable in visiting? (Top 6 of 11):

| | | |
|---|---|---|
| 1 | Ability to pre-order | 43% |
| 2 | Ability to pay online to limit personal contact in the bar/restaurant | 38% |
| 3 | If asked for your COVID-19 certificate status on entry (e.g. whether you've had the vaccine or a recent negative test result) | 37% |
| 4 | Perspex partition screens between staff and customers | 36% |
| 5 | Rapid COVID-19 testing on entry | 36% |
| 6 | Perspex partition screens between tables | 34% |

Sample size: Feb 2021: 2504

# Recently proposed measures such as rapid testing and COVID-19 certificates are in the top three off-putting measures, along with disposable drinkware/ cutlery

Which of the following measures in pubs, bars and restaurants would make you less likely to visit?

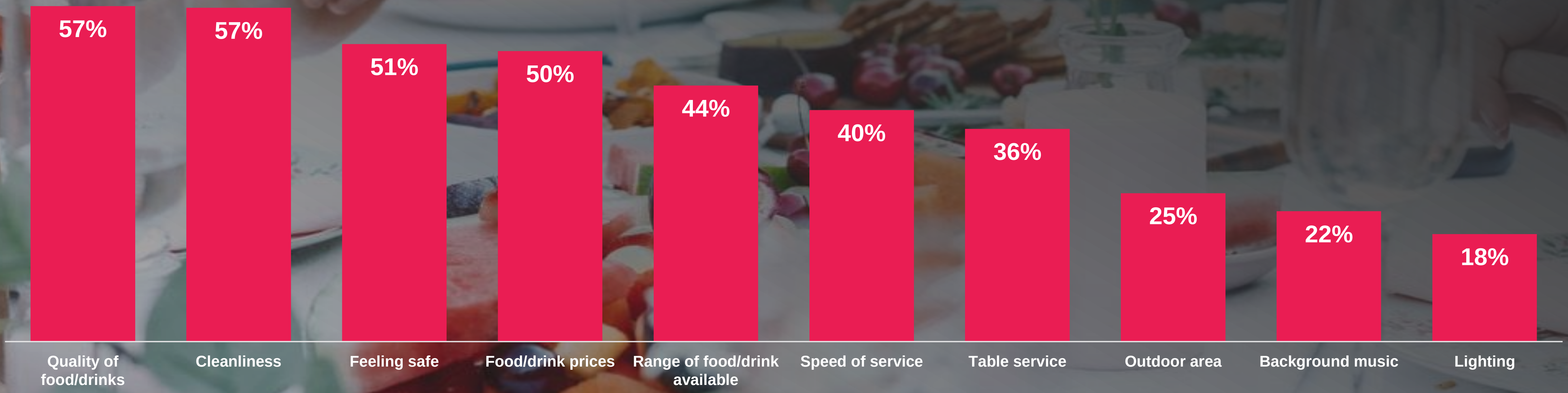



Sample size: Feb 2021: 2504, June 2020: 5017

CONSUMER COUNTDOWN TO REOPENING SERIES

# Quality and security shine through as the factors that would best create a good experience for consumers out of home

Which of the following factors would contribute towards a good experience in a pub, bar or restaurant? (Top 10 of 15)




Sample size:1004

CONSUMER COUNTDOWN TO REOPENING SERIES

# Younger consumers are more likely to seek experiential factors such as music and atmosphere when they return, whereas older age visitors prioritise the basics

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Which of the following factors would contribute towards a good experience in a pub, bar or restaurant?
(Top 5 over-indexing factors vs avg GB by age group):

| 18-34 year olds | | 35-54 year olds | | 55+ year olds | |
|---|---|---|---|---|---|
| Background music | +8pp | Lighting | +1pp | Quality of food/drinks | +17pp |
| Lots of people in the venue | +6pp | Live music | +1pp | Cleanliness | +14pp |
| Live music | +5pp | None of the above | = | Range of food/drink available | +13pp |
| Lighting | +5pp | Food/drink prices | = | Feeling safe | +13pp |
| Venue decoration | +4pp | Outdoor area | -1pp | Food/drink prices | +8pp |

Sample size:18-34: 328, 35-54: 307, 55+: 369

CONSUMER COUNTDOWN TO REOPENING SERIES

# Prioritising hygiene and cleanliness when choosing where to visit, consumers are less reliant on outlets being busy and having extensive experiential elements during their visits

Top 5 factors that have **increased** in importance since COVID-*19…*

| 56% | 50% | 27% | 23% | 22% |
|---|---|---|---|---|
| Cleanliness | Feeling Safe | Quality of Food / Drinks | Table Service | Food / Drink Prices |

Top 5 factors that have **decreased** in importance since COVID-*19…*

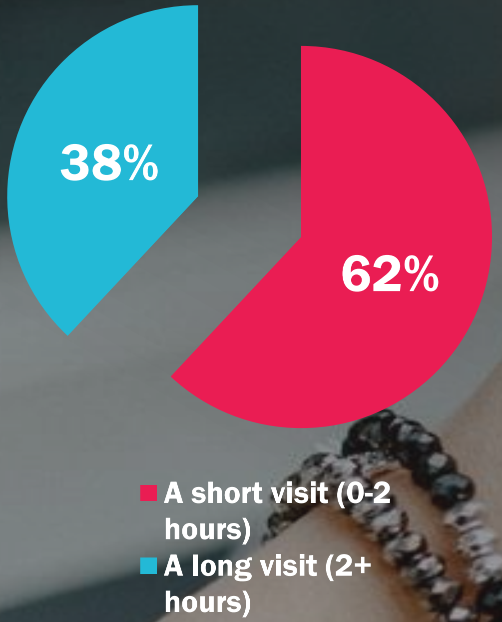
| 29% | 16% | 13% | 12% | 11% |
|---|---|---|---|---|
| Lots of people in the venue | Live Music | Venue Decoration | Background Music | Speed of Service |

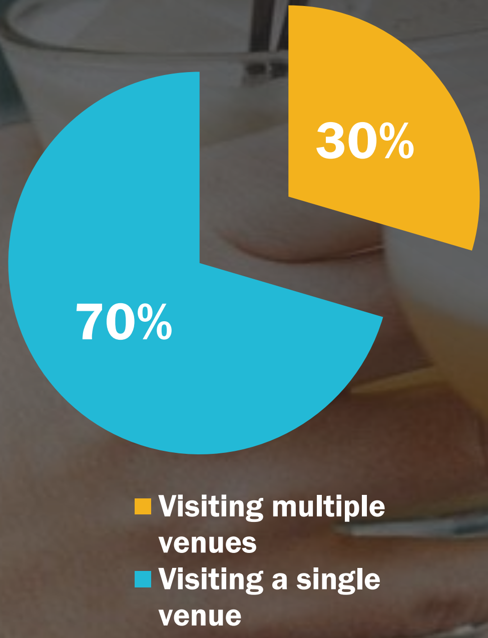
Sample size: 963

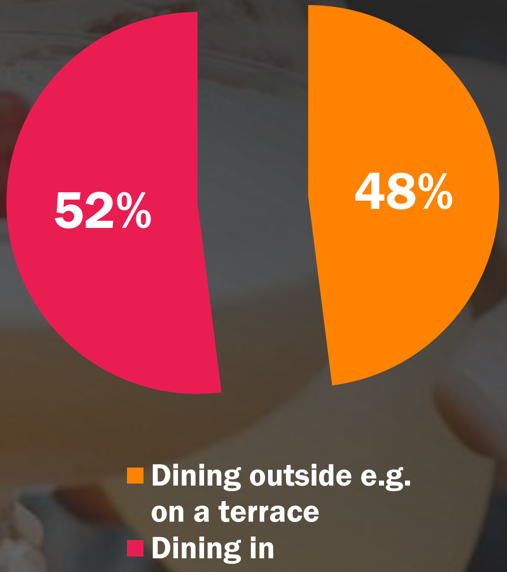
CONSUMER COUNTDOWN TO REOPENING SERIES

# Consumers are likely to be cautious when hospitality reopens, with the majority preferring short and single venue outings and nearly half preferring to sit outside

What would create a **good experience** for you when visiting pubs, bars, restaurants and other similar venues when you next visit?



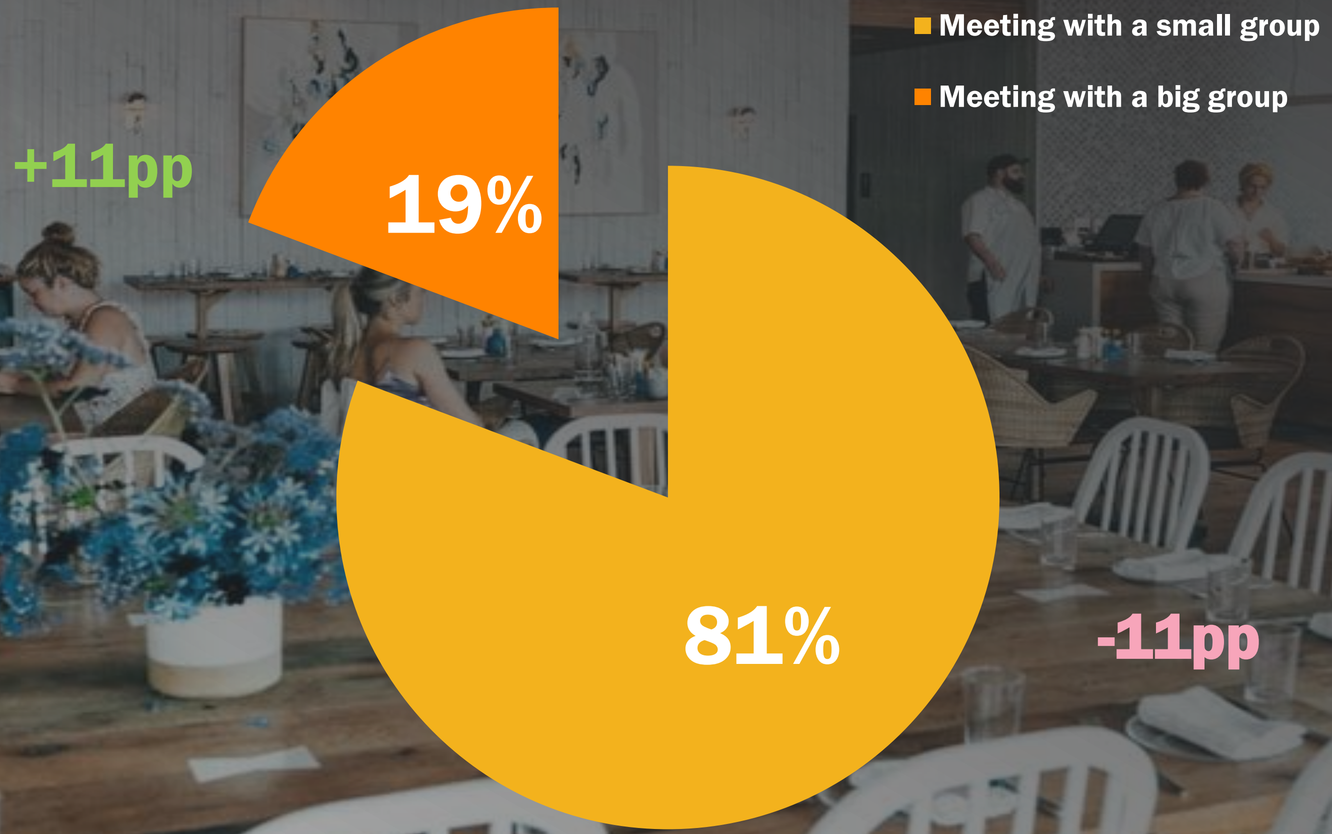




Sample size: Feb 2021: 913

CONSUMER COUNTDOWN TO REOPENING SERIES

# The majority would still prefer to meet with a small group, but the proportion who'd prefer to socialise in a big group has more than doubled since summer

What would create a good experience for you when visiting pubs, bars, restaurants and other similar venues when you next visit? (Indexed vs Aug 2020)

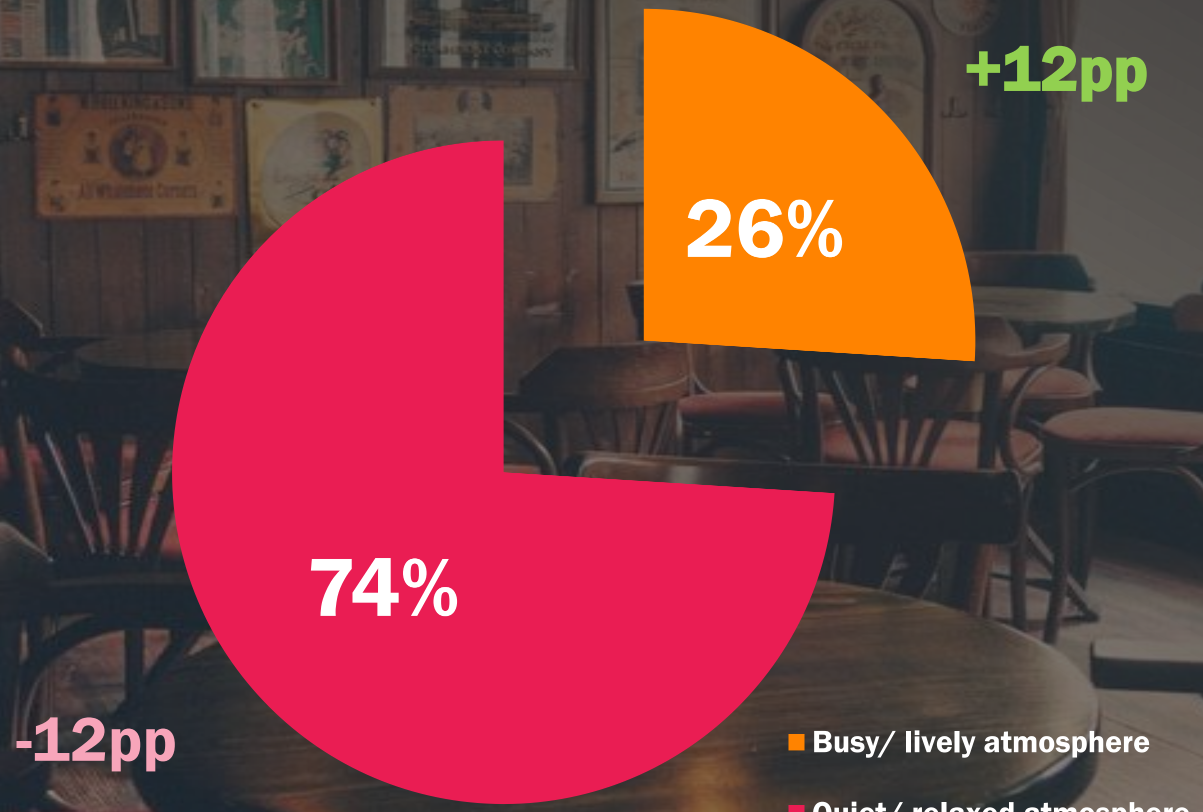



Sample size: Feb 2021: 913, Aug 2020: 4970

CONSUMER COUNTDOWN TO REOPENING SERIES

# Nearly three quarters of GB consumers are looking for a quiet atmosphere when they return, however the proportion looking for a lively one has increased considerably

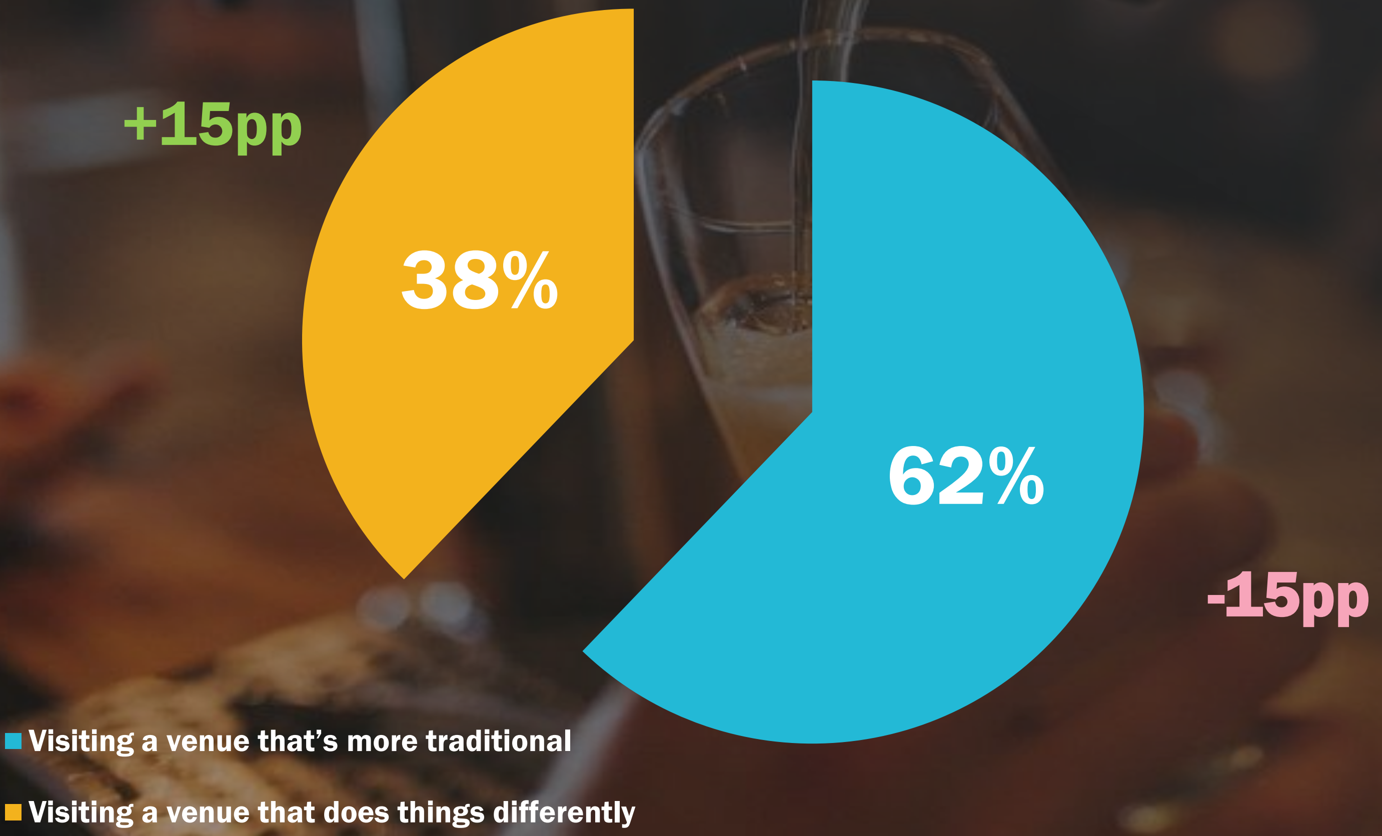
What would create a good experience for you when visiting pubs, bars, restaurants and other similar venues when you next visit? (Indexed vs Aug 2020)




Sample size: Feb 2021: 913, Aug 2020: 4970

# The proportion of consumers who'd prefer to visit traditional venues is down -15pp since summer, suggesting consumers are feeling more adventurous this time round

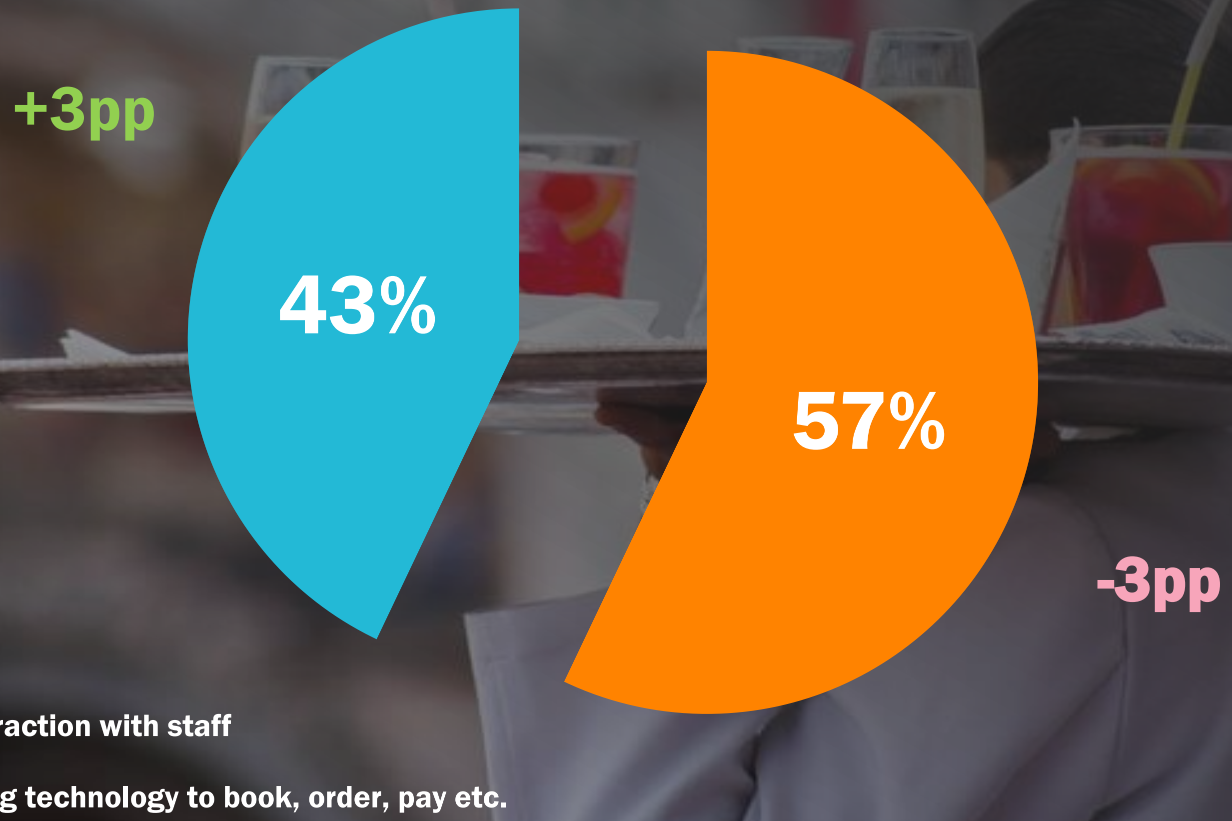
What would create a good experience for you when visiting pubs, bars, restaurants and other similar venues when you next visit? (Indexed vs Aug 2020)




Sample size: Feb 2021: 913, Aug 2020: 4970

# Whilst interacting with staff is preferred by over half of consumers, the proportion who'd prefer to use technology when eating or drinking out has increased since August

What would create a good experience for you when visiting pubs, bars, restaurants and other similar venues when you next visit? (Indexed vs Aug 2020)

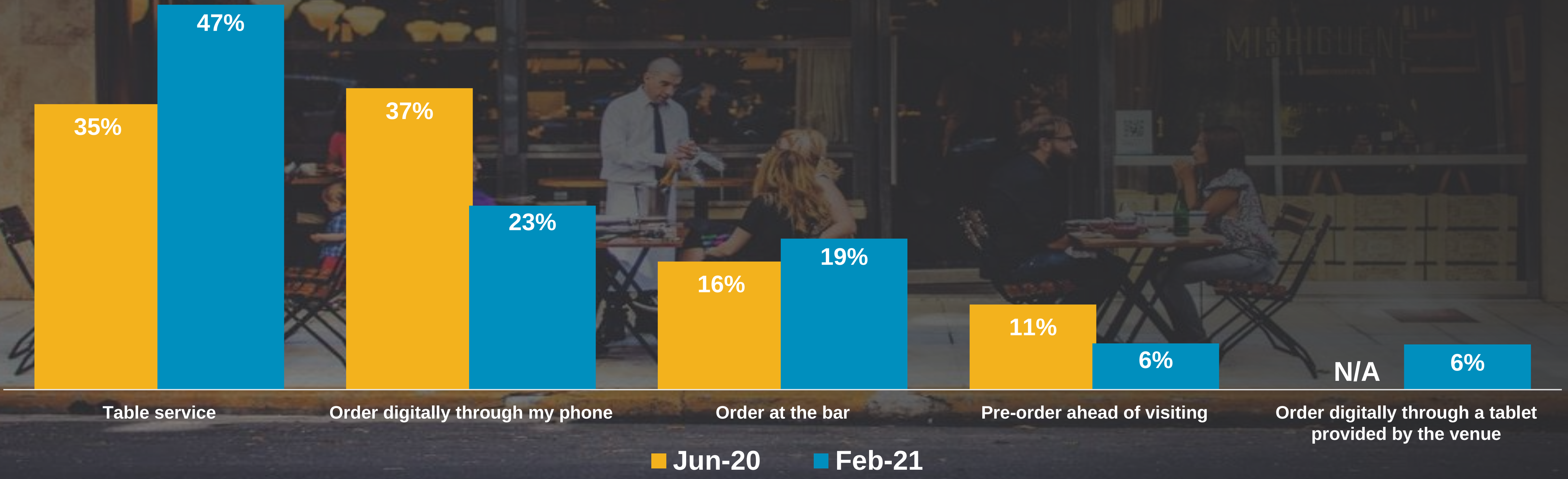



Sample size: Feb 2021: 913, Aug 2020: 4970

CONSUMER COUNTDOWN TO REOPENING SERIES

# More consumers would prefer to order via table service when venues reopen compared to how they felt during the last nation lockdown, but nearly 1 in 4 would prefer digital methods of ordering

Which of the following methods of ordering food and drinks would be your preferred method, if hospitality venues were currently open?

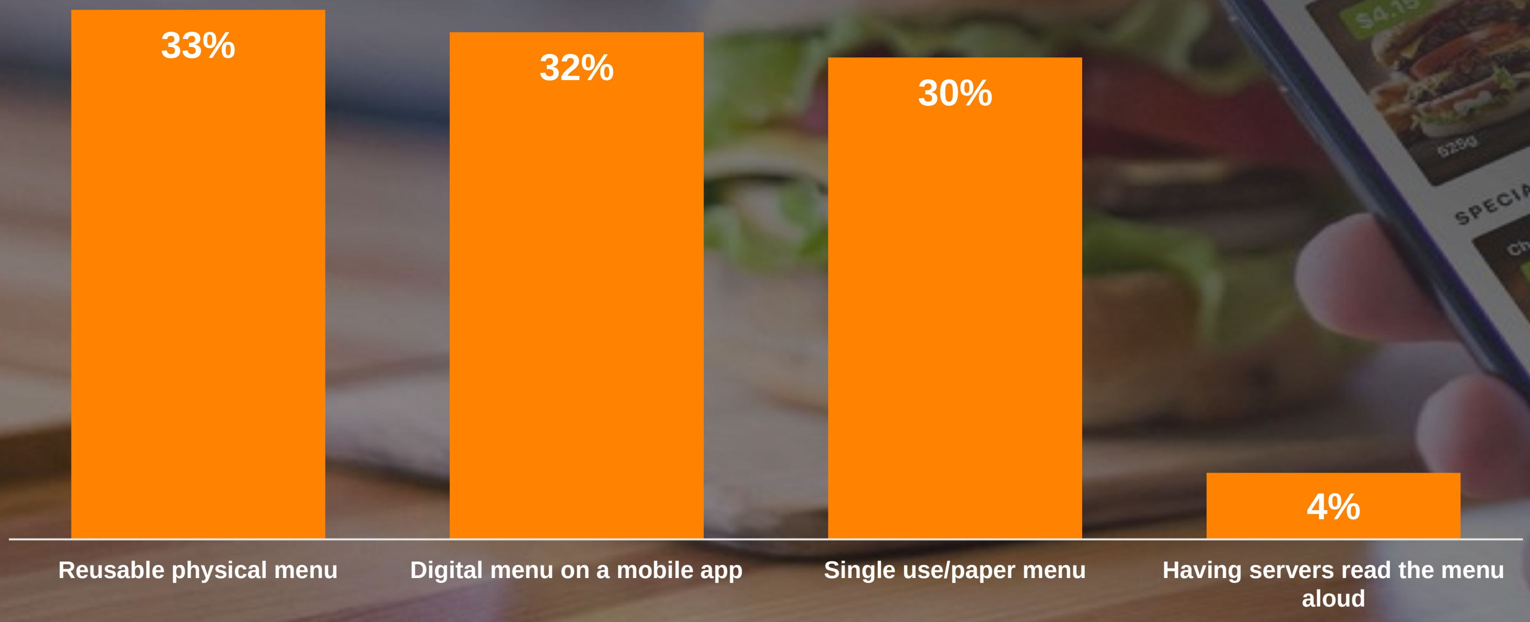



Sample size: Feb 2021: 913, June 2020: 4950

CONSUMER COUNTDOWN TO REOPENING SERIES

# Menu preferences have stayed consistent since June 2020, with 1 in 3 preferring reusable physical menus and just under a third preferring mobile apps

And which of the following menus would be your preferred choice when ordering food and drink right now? (Feb 2021)




**June 2020:**

| | |
|---|---|
| Laminated menu that is cleaned between uses | 32% |
| Digital menu on a mobile app | 30% |
| Single use/paper menu | 23% |
| Traditional menus | 11% |
| Having servers read the menu aloud | 3% |

Sample size: Feb 2021: 912, June 2020: 5011

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# 71%

Made reservations **every time, most times or occasionally** before visiting a venue pre-COVID-19

**38%** **every time** or **most times**

# 29%

**Rarely or never** made reservations before visiting a venue pre-COVID-19

Sample size:1004

CONSUMER COUNTDOWN TO REOPENING SERIES

# The proportion of consumers who plan their visits to the On Premise is only likely to increase when the market reopens

Compared to before the outbreak of COVID-*19…*

**51%**

Are more likely to **pre-book** a table **for food**

**46%**

Are likely to **plan** their visits **in more detail**

**36%**

Are more likely to **pre-book** a table **for drinks**

Sample size: 979

## Summary

- Compared to the last national lockdown consumers are just as expectant of COVID-19 measures in outlets when they return to the market. Well over half (57%) of GB consumers think it essential for staff to wear protective equipment in order for them to visit a venue, up +6pp since June 2020. Those considering COVID-specific medical information and the ability to pay online ‘essential features’ have also jumped, by +9pp and +5pp.
- Although recently proposed COVID-19 safety measures may be off-putting, such as rapid COVID-19 testing on entry or the need to provide a COVID-related certificate, hygiene and safety will remain high on consumers’ agenda when choosing where to visit. This is reflected in the fact that hygiene/cleanliness is the top consideration to have increased in importance when choosing where to visit since the outbreak of COVID-19.
- Though 18-34 year olds over-index for seeking experiential factors such as music and atmosphere when they return to the market, the fundamentals, such as quality, price, range and service, along with cleanliness and safety, will be prioritised ahead of these by the majority.
- Consumers’ visits are likely to remain cautious when the market reopens, with 62% preferring short visits, 70% preferring to only visit one venue over a circuit of venues and 48% preferring to sit outside. However, we can see a growing boldness in consumers as the proportion who’d prefer to socialise in a big group has more than doubled since summer, though the majority (81%) would still prefer to meet with a smaller group when visiting the market.
- A similar story can be seen in those preferring a quiet/ relaxed atmosphere when they return (74%), whilst those who will be looking for a lively atmosphere is up +12pp since August. Appetite for venues that can offer new and different experiences has also grown since the market was last open, suggesting consumers will be more experimental this time around.

# Summary

- Technology will still have a role to play in ensuring consumers feel safe when eating and drinking out, with 43% preferring to use it over interacting with staff. However, 47% of consumers will still prefer to order in person via table service when the market reopens, suggesting human interaction is important during this stage of the eating/drinking out experience.
- Operators should strongly consider their online presence, with nearly just as many consumers preferring to view menus on an app (32%) as on a physical menu (33%).
- With 38% of On Premise users regularly making reservations before the pandemic, and over half stating that they are more likely to pre-book for food when the market reopens, effortless booking capabilities should be advertised by venues to attract the 46% of consumers who are less likely to make spontaneous trips to the market.

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