

CGA's PULSE CONSUMER SURVEY RESULTS – 14.08.20

A look into consumer opinion, preferences and attitudes towards the hospitality sector since it re-opened its doors on the 4th July in England, 15th of July in Scotland and 3rd of August for indoor seating in Wales. Results collected between the **10th – 12th August**.

Spanning across a nationally representative **sample of 750 GB consumers**, CGA's Pulse Survey provides insight into not only who has been out, but where they went, and of course how they found the "new normal" when eating and drinking out. Report also provides insight into consumers yet to visit the market, barriers to entry and what could entice them out.



PHENOMENAL DATA. EXPERT INSIGHT.

A photograph of four women at an outdoor beer festival. They are standing in front of a colorful mural that features a large beer glass and the word 'TOST'. The women are smiling and holding various styles of beer glasses. One woman in the center is wearing sunglasses and a light blue denim shirt. Another woman to her left is wearing a black top and a teal skirt. The background shows a clear blue sky and some greenery.

**A LOOK AT THE ON TRADE
SINCE IT RE-OPENED**

The GB on trade is at a point where over half of its customers have now returned, and this figure has increased by +10pp since our last survey two weeks ago

Have you visited a pub, bar, restaurant, café or other similar venue since restrictions were lifted?

55%

of GB consumers
(who typically ate out once every 6 months pre-COVID-19)

45%

Two weeks ago

35%

(Of English consumers)
Four weeks ago



The increase in consumers returning is steepest in areas which re-opened last, with the proportion of consumers returning to Scotland and Wales increasing by +15pp versus two weeks prior

Have you visited a pub, bar, restaurant, café or other similar venue since restrictions were lifted?

49%

of Scotland and Wales

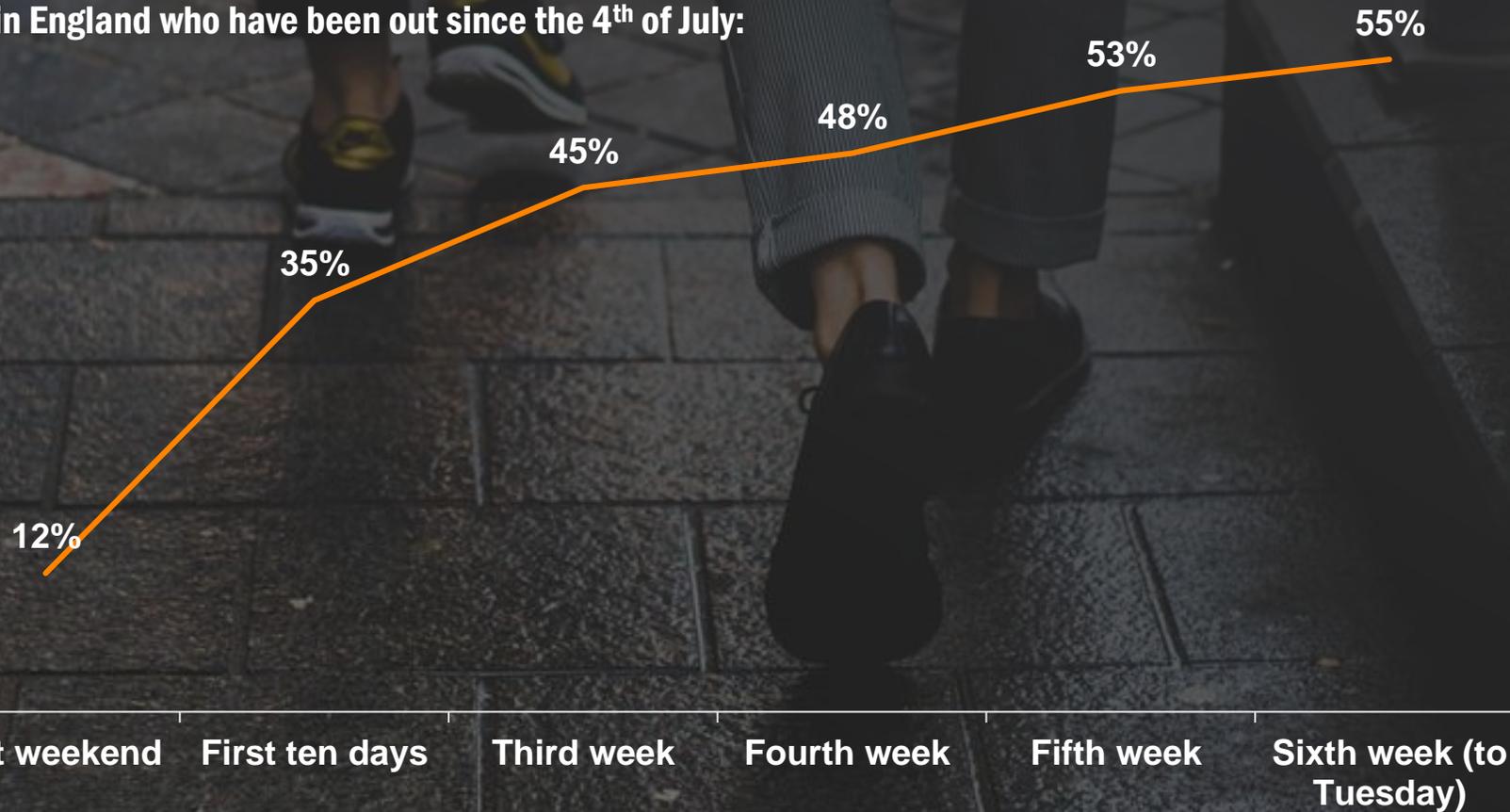


34%

Two weeks ago

The increase in consumers returning to the out-of-home market in England is gradually increasing, with a large latent population still not having returned

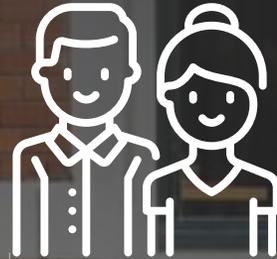
Proportion of consumers in England who have been out since the 4th of July:



The make up of returning consumers is starting to balance out in terms of age groups, although it is still biased in favour of younger consumers



18-34 year olds



35-54 year olds



55+ year old

% who have been out

67%

51%

48%

Indexed vs two weeks ago

+9pp

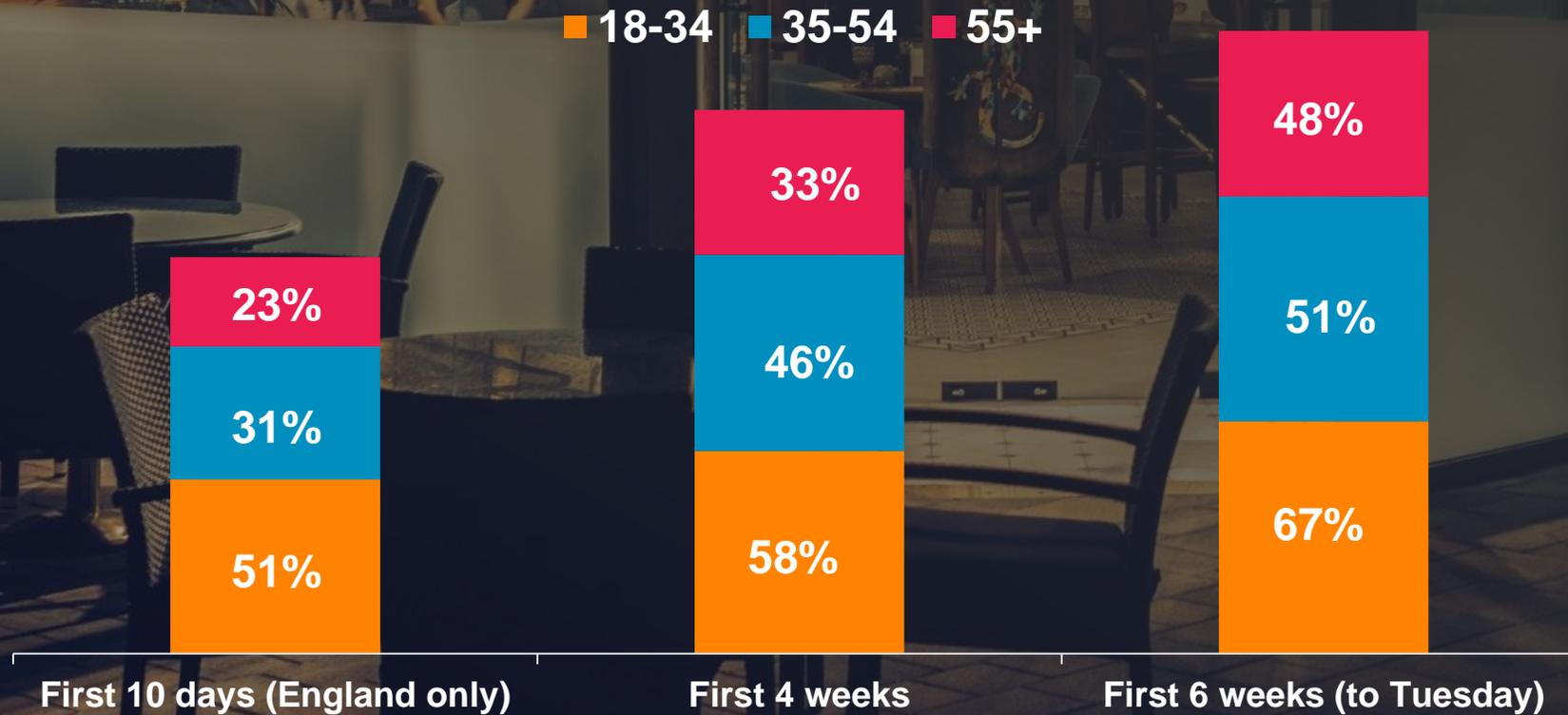
+5pp

+14pp



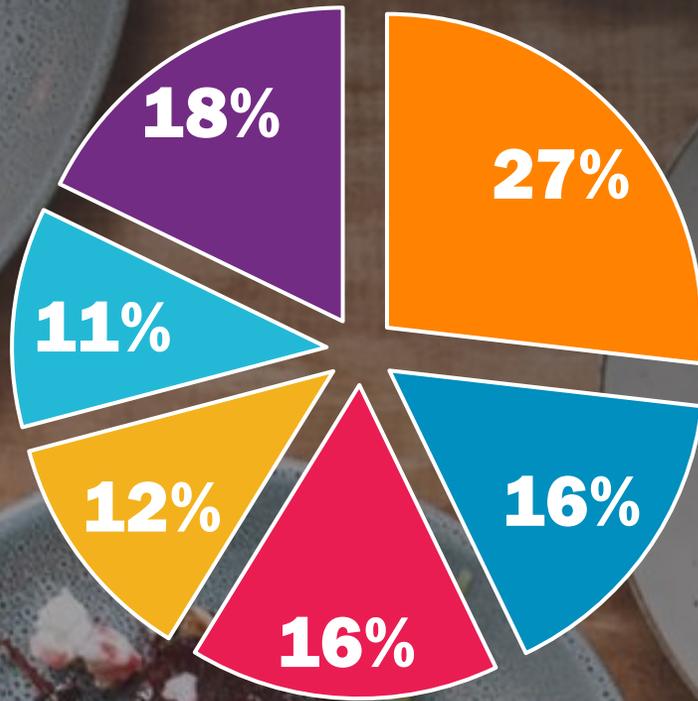
Over a half of 35-54 year olds have now returned to the market at least once, a position that younger consumers were in after just 10 days of re-opening

Proportion of consumers in who have been out since the 4th of July, split by age group:



27% of adults across GB have used the Eat Out To Help Out scheme, with a further 32% suggesting that they intend to before the end of the month

How likely are you to use the Eat Out To Help Out scheme?



- I have already made use of this scheme
- I am very likely to make use of this scheme
- I am somewhat likely to make use of this scheme
- I am neither likely nor unlikely to make use of the scheme
- I am somewhat unlikely to make use of this scheme
- I am very unlikely to make use of this scheme



The Eat Out To Help Out scheme has also been successful in tempting consumers who had previously not visited the market back out

39%

Of consumers who took advantage of the scheme were first-time visitors to the on premise since it re-opened

While **26%** of all consumers who are yet to eat or drink out said they would be likely to make use of the scheme before it ends



Food-led channels have become more popular over the last two weeks, most likely as a result of the Eat Out To Help Out scheme

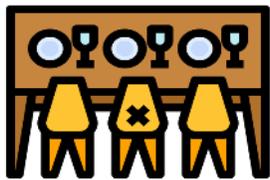
Which of the following types of venue have you visited since restrictions were lifted? (Indexed vs Pulse 2)



Pubs

55%

+2pp



Restaurants

50%

+6pp



Café/coffee shops

29%

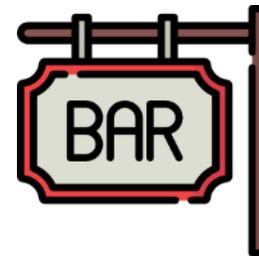
+6pp



Fast food outlets

23%

+8pp



Bars

22%

-6pp



Of consumers who typically visited venues and events that haven't been permitted to re-open yet, 2 in 5 would return but for the majority with caution

Would you feel comfortable visiting these types of venues or events?

	Leisure venues (e.g. casinos, bowling, ice rink)	Nightclubs	Gigs / Concerts	Festivals or other large-scale events
<i>% that would visit</i>	48%	41%	40%	40%
<i>% that would visit but would feel cautious or only if there were added precautions in place</i>	32%	29%	28%	28%



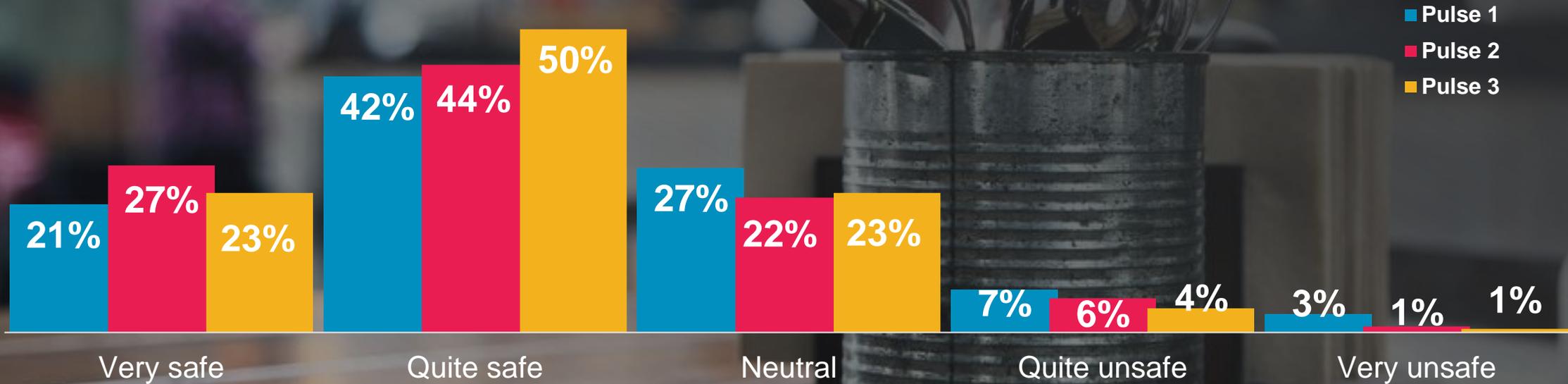
Whereas venues which are currently open but were delayed in re-opening lack consumer confidence at the moment

Of those who typically visited, the proportion who would feel comfortable visiting the following venues:



Feelings of safety whilst out remain high with 73% agreeing that they felt safe, however those who felt 'very safe' has decreased, perhaps due to a broader customer group

How safe did you feel during your visits?



Sample size: Pulse 3: 354, Pulse 2: 303, Pulse 1: 172

The top three drivers to a venue have remained constant over the past six weeks, and with hygiene featuring as the most important, venues can't become complacent

Current rank position	Top 8 considerations when choosing which venue to visit post-lockdown	%	Rank position in Pulse 2	Rank position in Pulse 1
1 st	Hygiene/ cleanliness levels	41%	1 st	1 st
2 nd	The quality of food available	38%	2 nd	2 nd
3 rd	How convenient it is to visit	34%	3 rd	3 rd
4 th	Price	32%	5 th	9 th
5 th	Value for money	31%	6 th	5 th
6 th	My trust in the venue	29%	4 th	4 th
7 th	The atmosphere/ experience provided	23%	11 th	10 th
8 th	Whether it's a place I visited regularly before COVID-19	23%	7 th	6 th



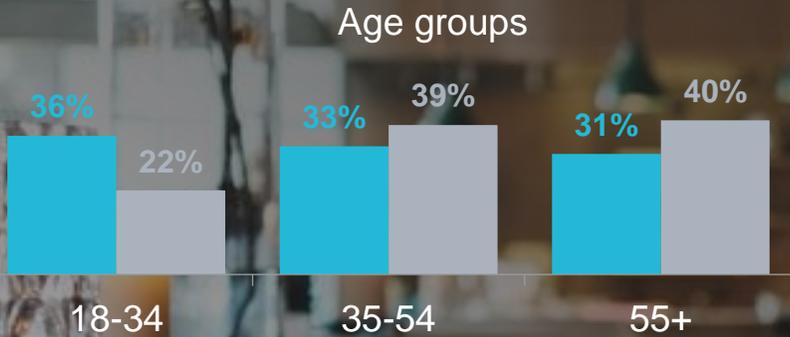


ENCOURAGING FUTURE VISITS

Despite 45% of the GB population having yet to go out, the market's most valuable consumers have already returned

Demographic profile of the following consumer sets before the outbreak of COVID-19:

Have been out | Haven't been out since restrictions were lifted



Visit licensed venues at least weekly



White collar profession



Average household income



Average monthly spend on eating and drinking out



Gender



From London



The key difference in attitude between consumers who've been out and those who haven't is concern over personal and family health, although GB as a whole remains anxious about a rise in COVID-19 cases

"I am worried about by local area going back into lockdown"

"I am worried about a second peak in COVID-19 infections"

"I am concerned about the impact of COVID-19 on the health of myself and my family"

GB Avg

68%

77%

74%

Index against those who haven't been out

+1pp

+3pp

+7pp

Index against those who have been out

-1pp

-2pp

-6pp



Localised lockdowns impacted nearly 1 in 5 of the population's plans, including those who haven't been out yet which would have been new visits to the market

19%

Of GB had to cancel their plans due to a local lockdown

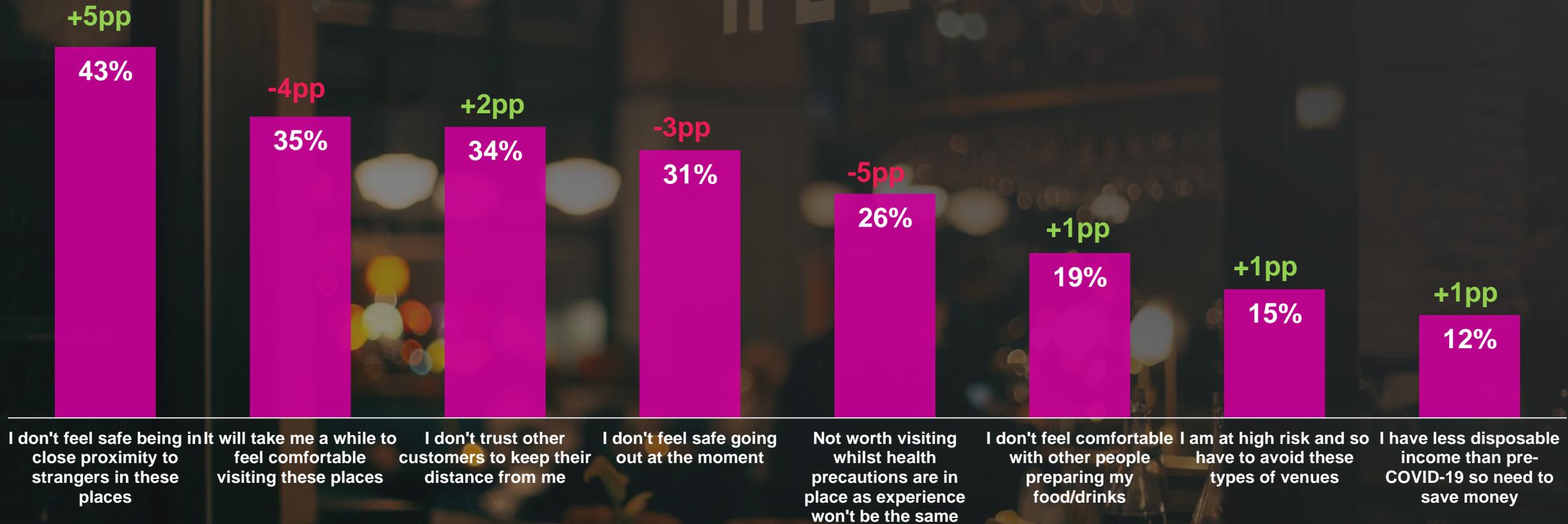
This increased to **22%** amongst consumers who had been out

And stood at **14%** amongst those who haven't been out yet



The growing concern amongst those who haven't ventured out yet appears to be other customers and not being able to trust them to keep their distance

You have said you haven't been to eat/drink out since lockdown restrictions were eased, why is that? Indexed vs Pulse 2



Consumers who've used a pick up or delivery service since lockdown started are keen to continue using them, with those who haven't been out yet favouring food services from venues

Of those who bought a food or alcohol pick up/ delivery from a pub, bar or restaurant since lockdown started...

68%

said they would continue to use **food services** when all social distancing restrictions are removed and venues are open as normal

+5pp

Amongst those who haven't been out yet

47%

said they would continue to use **alcohol services** when all social distancing restrictions are removed and venues are open as normal

+2pp

Amongst those who have been out yet



On a whole the sector has been successful in creating positive experiences, with 42% having found that their visits exceeded their expectations, up a staggering +8pp compared to two weeks ago

Thinking generally about your visit(s) to pubs, bars, or restaurants since restrictions were lifted, how did you find your trip(s)?



Key take outs for operators and suppliers

- We are now at the point where over half of the GB population who used to eat out at least once every 6 months before the outbreak of COVID-19 have been back out, which has increased by roughly +10pp every two weeks since opening
- However, the makeup of returning customers is beginning to balance in terms of age groups, to the point that now 48% of over 55s have been out, although it is still biased in favour of younger consumers, with 67% of 18-34s having been out. It is therefore beneficial for businesses to attract and retain younger consumers at the moment as these are the most engaged with the sector.
- Whilst the EOTHO scheme has been successful in attracting more visits and also new visitors to the on trade, 45% of GB remain to venture out. However, from looking at the profile of these consumers, it is evident that the sector's most valuable consumers have already returned, so strategy should involve encouraging repeat visits.
- The sector appears to be doing well in doing this with 42% of consumers reporting that their visits exceeded their expectations and 73% reporting feeling safe in venues, through the proportion who felt very safe has fallen.
- Hygiene levels, quality and convenience have remained static in their importance of driving consumer visits and venues that can reassure customers across these three areas will drive satisfaction. Interestingly venue 'trust' and prior visits have dropped in importance, perhaps suggesting that we are seeing a gradual return of experimental consumers, willing to trial new venues once more

Operators should therefore aim to continue doing what they're doing without letting their health and safety measures slip and encourage customers to also be mindful whilst in their venues in order avoid making other customers feel uncomfortable, which is a top concern for those who haven't been out yet.