Guest perspectives

The consumer view on returning to the hospitality sector
Methodology and sample...

Results collected between 12.06.2020 – 15.06.2020
995 consumers who visit the hospitality sector at least once a month

**Gender**

- 50% Male
- 50% Female

**Parental status**

- 39% Parents
- 61% Non-parents

**Age groups**

- 18-34: 32%
- 35-54: 35%
- 55+: 33%

**Region**

- London: 15%
- North West: 12%
- South West: 11%
- Scotland: 9%
- Yorkshire and the Humber: 9%
- South East: 9%
- West Midlands: 9%
- East of England: 9%
- East Midlands: 8%
- Wales: 5%
- North East: 5%

**Average household income**

- £39,840
The hospitality sector is clearly an important part of consumers’ lives, they visit frequently and are highly engaged with the market

**How important is the hospitality sector to you?**

- I rarely visit the hospitality sector, it is not at all important to me: 1%
- I only visit the hospitality sector when I have to: 3%
- I occasionally visit the hospitality sector, but could easily do without: 9%
- The hospitality sector is a massive part of my life and I visit frequently: 13%
- I occasionally visit the sector and enjoy these visits: 34%
- I visit quite frequently and look forward to my visits: 37%

84% of consumers are positive in their views towards the hospitality sector.

UK HOSPITALITY - CONSUMER SURVEY JUNE 2020
1 in 2 consumers are currently working from home, of which over two thirds indicate that they will do so more frequently when restrictions are lifted.

49% of consumers are currently working from home

vs 57% of city centre dwellers

Vs 48% of rural/suburban residents

Do you think you will continue working from home as COVID-19 restrictions are lifted?

- Yes, more frequently than I did before COVID-19: 68%
- Yes, but just as frequently as I did before COVID-19: 17%
- No: 15%
There may be a squeeze on spending, given the net decrease in disposable income as a result of the current pandemic.

Thinking specifically about the impact of COVID-19, has your disposable household income been affected?

- **46%** I now have less disposable income
- **15%** No impact
- **39%** I now have more disposable income

Of consumers predict that they would cut back on eating and drinking out given a decrease in disposable income.
Consumers have mixed feelings towards returning to the hospitality sector, with a similar number feeling eager to return as those feeling apprehensive.

<table>
<thead>
<tr>
<th>Feeling</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would like to go out, but don't feel comfortable in doing so</td>
<td>24%</td>
</tr>
<tr>
<td>I can't wait to return to my favourite venues</td>
<td>20%</td>
</tr>
<tr>
<td>I don't have the same desire to visit as I previously did</td>
<td>19%</td>
</tr>
<tr>
<td>I would be intrigued, but probably would only go once or twice for the novelty whilst restrictions are in place</td>
<td>17%</td>
</tr>
<tr>
<td>I don't want to return until I can have the experiences I am used to</td>
<td>8%</td>
</tr>
<tr>
<td>I don't know yet</td>
<td>13%</td>
</tr>
</tbody>
</table>
The evident nervousness from consumers looks set to have a net negative impact on frequency of visits to the sector, albeit nearly half do not anticipate a change in visits.

Do you think you will visit the hospitality sector as frequently as you did before lockdown?

- 48% I will visit more than I did before lockdown
- 36% I will visit about the same
- 6% I will visit less than I did before lockdown
- 10% I don’t know
At a more granular level, consumers expect to visit most venue types the same amount as they did before, but nightclubs will be visited less often.

Thinking about visiting different venue types, do you think you will visit the following as frequently as you did before lockdown?

- **More frequently**
- **As frequently**
- **Less frequently**

<table>
<thead>
<tr>
<th>Venue Type</th>
<th>More frequently</th>
<th>As frequently</th>
<th>Less frequently</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pubs/bars</td>
<td>50%</td>
<td>39%</td>
<td>12%</td>
</tr>
<tr>
<td>Restaurants/fast food outlets</td>
<td>53%</td>
<td>38%</td>
<td>9%</td>
</tr>
<tr>
<td>Cafes/coffee shops</td>
<td>56%</td>
<td>35%</td>
<td>9%</td>
</tr>
<tr>
<td>Late night venues/nightclubs</td>
<td>46%</td>
<td>41%</td>
<td>14%</td>
</tr>
<tr>
<td>Other leisure venues or spaces</td>
<td>48%</td>
<td>48%</td>
<td>9%</td>
</tr>
<tr>
<td>(e.g. cinema, food hall, street</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>food etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theatres/cinemas</td>
<td>43%</td>
<td>43%</td>
<td>8%</td>
</tr>
<tr>
<td>Hotels</td>
<td>53%</td>
<td>39%</td>
<td>7%</td>
</tr>
<tr>
<td>UK tourist attractions</td>
<td>51%</td>
<td>42%</td>
<td>8%</td>
</tr>
<tr>
<td>UK festivals</td>
<td>45%</td>
<td>44%</td>
<td>11%</td>
</tr>
</tbody>
</table>
There are distinct differences between consumers, with those planning to go out more being young, affluent city centre dwellers who frequented the market often.

**Will go out more | Will go out the same amount | Will go out less**

<table>
<thead>
<tr>
<th>Age groups</th>
<th>Will go out more</th>
<th>Will go out the same amount</th>
<th>Will go out less</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34yrs</td>
<td>69%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>35-54yrs</td>
<td>22%</td>
<td>35%</td>
<td>37%</td>
</tr>
<tr>
<td>55+yrs</td>
<td>9%</td>
<td>35%</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Gender**

- Female: 50% | 43% | 52%
- Male: 50%  | 57% | 48%

**% financially impacted by COVID-19**

- White collar professionals: 66% | 50% | 50%
- % residing in city centres: 42% | 17% | 15%

**Average monthly spend OOH**

- £122.70 | £114.80 | £103.52
7 in 10 consumers would visit the market once they are permitted to open, although 52% of these are cautious and consumer confidence has dropped since April.

Do you feel comfortable visiting hospitality venues once they are permitted to re-open? (Results indexed vs April 2020)

- Yes, I would be comfortable doing so as soon as the restrictions are lifted: 22% (April), 18% (June)
- Yes, but I would be cautious: 31% (April), 24% (June)
- Yes, as long as there were added precautions in place: 21% (April), 28% (June)
- No: 14% (April), 25% (June)
- I don't know yet: 13% (April), 6% (June)

UKH Consumer Survey – Undertaken by CGA
Unsurprisingly, the main reasons provided for feeling reluctant to return to the hospitality industry, is the risk of catching or spreading COVID-19. 

You have said you do not plan to visit the hospitality industry within the first 3 months of it re-opening. Why is this? Please select all that apply:

- I am concerned about the risk of catching or spreading COVID-19: 62%
- It will take me a while to feel comfortable visiting these places: 51%
- I don't feel safe being in close proximity to strangers in these places: 50%
- I don't feel safe going out at the moment: 49%
- I don't feel comfortable with other people preparing my food/drinks: 35%
- My friends/family don't feel comfortable going out: 18%
- I am concerned about my financial situation and am trying to save money: 16%
- I have realised I don't need these experiences as often: 15%
- I have less disposable income than pre-COVID-19 so need to save money: 14%
62%

Of consumers who do not plan on visiting the sector state “I am concerned about the risk of catching or spreading COVID-19” as their reason.
When consumers were asked whether they want the hospitality sector to prioritise their safety or their experience, the balance is weighted towards safety.

Which of the following do you agree with more?

- I want to feel safe in a hospitality venue, no matter what COVID-19 procedures must be put in place to achieve this (68%)
- I want to have my normal hospitality experience without it being ruined by COVID-19 procedures (32%)
64%

Of consumers agree or strongly agree that “I will visit venues more if they make me feel safe during my first visit”
54% agree or strongly agree that “If my experience is ruined by COVID-19 procedures I won't return until things are back to normal”

53% Of consumers agree or strongly agree that “I am worried that my hospitality experiences won't ever be the same”
Consumers are mostly concerned about other customers in outlets, with physical distancing clearly at the forefront of consumers’ minds.

**Which, if any, of the following factors would deter you from going out within the hospitality industry?**

*Please select all that apply*

- Customers not respecting social distancing in the venue (58%)
- The venue being too busy (51%)
- Insufficient distancing between tables/customers (50%)
- Concern about the cleanliness/hygiene practices within outlets (49%)
- Germs on shared touch points in the venue (e.g., toilet door handles) (44%)
- Increased cost of food/drink (29%)
- I don’t trust that staff have been properly trained in COVID-19 procedures (28%)
- The venue not having an outdoor space (23%)
- The atmosphere won’t be as good (22%)
- I would have to use public transport to get there (16%)
A range of precautionary measures are expected by consumers, with emphasis on outlets to implement anything that can ease fears.

Which, if any, of the following health and safety/hygiene precautions would you expect venues to implement when permitted to open? Please select all that apply:

- Tables/seats moved further apart (60%)
- Extensive availability of free hand sanitiser (58%)
- The ability to pay by contactless/cashless payment options (55%)
- Enhanced cleaning protocols (55%)
- Opening at limited capacity (53%)
- Enhanced food safety and hygiene protocols (51%)
- Improved toilet facilities (50%)
- Utilising outdoor areas (e.g. beer gardens, roof terraces) (48%)
- Staff wearing personal protective equipment (e.g. face masks) (44%)
- A one-way system around the venue (44%)

UKH Consumer Survey – Undertaken by CGA
A staggering 83% of consumers believe it’s important that venues communicate their COVID-19 procedures to them. 51% of consumers said it’s ‘Very important’ that venues across the hospitality sector communicate their COVID-19 procedures to them. And 31% said it is ‘somewhat important’.
It is clear that consumers expect to be made aware of venues’ COVID-19 procedures via more than one channel

How would you like venues to communicate their COVID-19 procedures to you?
Please select all that apply

1. By posters and advertisements in the outlet - 53%
2. On the outlet website - 50%
3. Staff members talking you through procedures when you arrive - 46%
4. By email or app prior to my arrival - 38%
5. On their social media channels - 31%
6. Given a paper copy of the procedures in the outlet - 26%

UKH Consumer Survey – Undertaken by CGA
Consumer expectations aren’t unrealistic, with the majority expecting eating and drinking out establishments to sanitise their surfaces just over every half an hour.

The average expected frequency of thorough cleaning is...

Every 35 minutes across pubs, bars, restaurants, QSR, cafes, and late night venues.
However, there remains 31% of consumers who expect the average hospitality venue to be thoroughly cleaned every 15 minutes.
An increased scrutiny on cleanliness should be expected, while any messaging that can be communicated on hygiene will be greatly received.

How concerned are you about the cleanliness of venues when you start going out again?

- Very concerned: 35%
- Concerned: 39%
- Neither concerned nor unconcerned: 4%
- Unconcerned: 3%
- Not at all concerned: 19%
1.6 metres

Is the average distance consumers would need between themselves and another customer in order to feel confident visiting a hospitality venue.
From the consumer perspective, 2 metres would make visitors more comfortable, but only 1 in 3 would actually feel uncomfortable enough to leave a venue at 1 metre.

Thinking about physical distancing in hospitality venues, at what point would you feel:

- Comfortable enough to remain in the venue
- Somewhat uncomfortable, but not enough to leave
- Very uncomfortable and have to leave the venue

UK HOSPITALITY – CONSUMER SURVEY JUNE 2020

UKH Consumer Survey – Undertaken by CGA
It is not just distancing between customers, with consumers also looking for reassurances around staff, including provision of PPE.

Thinking about the physical distance between yourself and staff, compared to yourself and other customers, which of the following statements would you agree with?

- 24% I would feel safe being close to staff as long as they were wearing PPE
- 19% I won’t feel safe being close to staff or customers
- 16% I won’t know until I am in the venue
- 12% I would feel safer being closer to the staff rather than customers
- 10% I would feel safer being closer to other customers rather than staff
- 19% I’m not sure/I haven’t decided yet
Just 18% of consumers intend to return to hospitality venues within a week of opening but encouragingly, only 6% plan to avoid the sector altogether.

When outlets start to re-open, when do you plan on visiting the hospitality sector?

- 18% Within a week of opening
- 26% Within the first few weeks
- 25% 1-2 months after re-opening
- 14% 3-6 months after re-opening
- 7% 6-12 months
- 4% Over a year
- 6% I will avoid hospitality
of consumers would feel comfortable visiting venues with outdoor spaces if they were permitted to open before other hospitality venues
When asked specifically about returning on the 4th July, 29% of consumers say they are likely to return should venues open, with 1 in 8 “very likely”.

The Government have provided the provisional date of July 4th for pubs, bars and restaurants to re-open which falls on a Saturday. How likely are you to visit a venue on this day?
You have said that you are unlikely to visit pubs, bars or restaurants if they were to open on July 4th. When would your first visit be?

- 1% Sunday 5th July
- 6% Week commencing Monday 6th July
- 5% Weekend of 11th July
- 5% Week commencing Monday 13th July
- 12% Late July
- 14% August
- 8% September
- 16% After September
- 31% I don’t know yet
- 3% I don’t think I will return to hospitality
A not insignificant proportion of consumers are planning upcoming occasions they to visit the hospitality sector, with specific dates in mind.

Do you have an upcoming event or occasion that you plan on visiting pubs, bars or restaurants for in the next few months?

- Yes: 41%
- No: 59%

Of the 41% who have plans...

- I have a specific date in mind but I have not planned where I am going: 14%
- I have planned where I am going but don't have a specific date in mind: 11%
- I haven't planned where or the date: 8%
- I have a specific date in mind and have planned where I am going: 8%
In summary...

- An evident nervousness of re-visiting the hospitality sector is tempered by an eagerness to recreate the experiences that consumers know and love in the sector.

- However, on balance, consumers side more towards safety than “usual” experiences and there is an acceptance and expectation of precautionary measures:
  - Consumers expect a greater distance between themselves and other customers, but on average this is only required to be 1.6m.
  - Frequent and thorough cleaning is also expected, with half hour intervals the standard measure.

- As such, safety precautions are a non-negotiable, as are communication of them.

- 1 in 8 consumers suggest they are “very likely” to visit the sector on Saturday 4th July, if permitted, representing a jump on were this to fall on a different day – expect to be busy:
  - Longer term, pre-booking and reservation systems will be vital in facilitating demand.

- There is a genuine goodwill towards a sector that creates memorable experiences and an excitement around re-visiting.
Finally, some words of encouragement from the UK hospitality sector’s most engaged consumers…

Prepare well and greet us with a huge smile and we will be back. **Good luck**

The hospitality industry has suffered much more than most in the pandemic, and I'm only too willing to support them.

Absolutely, wishing good luck to all pubs, clubs, hotels, attractions. **We have all missed you!**

Stay with us as we will get thro' this together. I think the hospitality needs a helping hand and the **British public should actively support** and get behind it.

Really looking forward to seeing you all again.

Don't cut corners just to make a few quid, it's simply not worth it. Let's make it a good experience for all. **We all need to support the hospitality sector so let's make it work!**

UKH Consumer Survey – Undertaken by CGA