



COVID-19 ON PREMISE IMPACT REPORT

CGA, July 2021



CGA



INTRODUCTION

We are continuing to track behavior and return to the On Premise, with a particular focus this month on the On Premise visitor satisfaction, comfortability in the On Premise and easing of COVID-19 restrictions and tracking takeout/delivery behavior. This allows us to reflect on how people currently feel about their visits to the On Premise now that the majority of states are fully re-open and how the On Premise can position it's offering to encourage more visits moving forward.

We offer a suite of products which can reach into different areas or research and if you have broader business questions, please reach out to speak with us for support. We are thankful for your engagement and hope to continue bringing you studies which can help you to focus your efforts.

Over the weekend (July 2-5) we surveyed 1,886 respondents from Florida, Texas, California and New York on their expectations, desires and how they plan to behave in the next two weeks.

SUMMARY: RETURNING TO THE ON PREMISE

- 67% of consumers have visited the On Premise for food led occasions in the past 2 weeks and 33% have visited for drink led occasions.
- There is a positive outlook on future visitation as over 2 in 3 consumers are planning to visit the On Premise in the next 2 weeks for food led occasions and over 1 in 3 for drink led occasions.
- The frequency of visits remains steady across the past 3 months, with a slight increase of consumers visiting 3 times or more.
- Soft drinks and beer lead the way with categories drunk in bars and restaurants since returning to the On Premise.
- In the On Premise 35% of consumers are tipping more than pre COVID-19, however 1 in 5 consumers are likely to tip less when using digital devices.
- A catch up with friends is the main occasion for consumers visiting the On Premise, with “wind down/chilled out” also popular with under 55s.
- Over half (53%) of On Premise visitors attended a restaurant and/ or bar during July 4 weekend.
- 20% of consumers have ordered alcohol through takeout/ delivery from bars and restaurants. Future intention for this remains stable as 1 in 5 are looking to do the same in the next 2 weeks.

SUMMARY: CONSUMER SATISFACTION AND COVID RESTRICTIONS EASING

- Any changes made in serving customers because of COVID-19 don't appear to have had a negative impact of consumer experience, 88% of consumers are very satisfied/satisfied with their overall visit to the On Premise since returning after re-opening.
- In addition, almost 4 in 5 are very satisfied/satisfied with the quality of service, with 75% satisfied the time it takes to place an order and the time it takes to receive an order.
- Over 4 in 5 On Premise visitors are completely/quite comfortable visiting venues with outdoor seating, falling to 7 in 10 visiting venues with indoor seating only.
- When ordering in bars and restaurants, 7 in 10 On Premise visitors are comfortable interacting with waiting/bar staff in the same way as they did pre COVID-19. Around 6 in 10 consumers are comfortable ordering at the counter in restaurants or bars.
- When comparing those who are fully vaccinated versus those waiting to be vaccinated, there are slight differences in comfort levels when in the On Premise. Almost 7 in 10 fully vaccinated visitors are comfortable to interact with staff, falling to 57% of those waiting for a vaccine.
- It may take time for visitation levels in some venue types to return to pre COVID-19 levels. Less than 2 in 5 (37%) of On Premise visitors are comfortable visiting nightclubs in the next few weeks, although this rises to 44% for concerts/festivals and sports stadiums.



67%

OF CONSUMERS HAVE GONE
OUT TO EAT IN THE PAST 2
WEEKS

33%

OF CONSUMERS HAVE GONE
OUT FOR A DRINK IN THE PAST 2
WEEKS



68%

OF CONSUMERS PLAN TO GO
OUT TO EAT IN THE NEXT 2
WEEKS

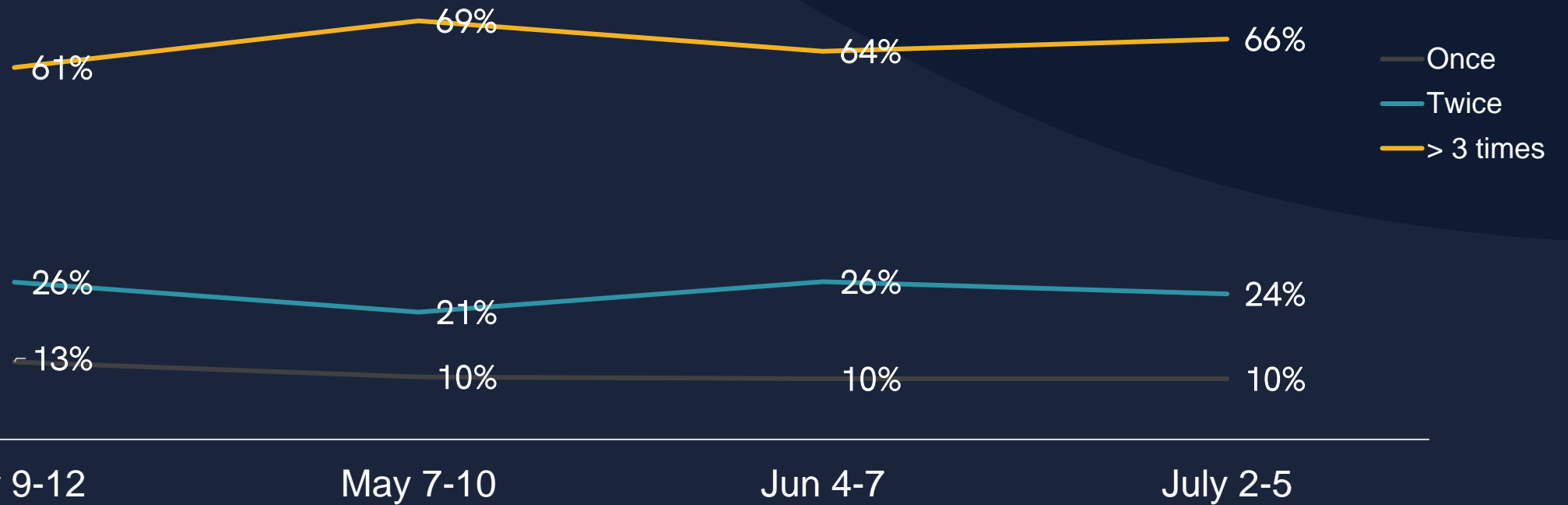
36%

OF CONSUMERS PLAN TO GO
OUT FOR A DRINK IN THE NEXT 2
WEEKS



FREQUENCY OF ON PREMISE VISITS BY THOSE WHO HAVE BEEN OUT

The changes across 4 months



*Apr, May, Jun data shows number of visits since reopening

*Jul data shows number of visits in the past 3 months

HOW DOES YOUR WEEKLY SPEND ON ALCOHOL CURRENTLY COMPARE TO PRE COVID-19?



19% Spending more than pre COVID-19



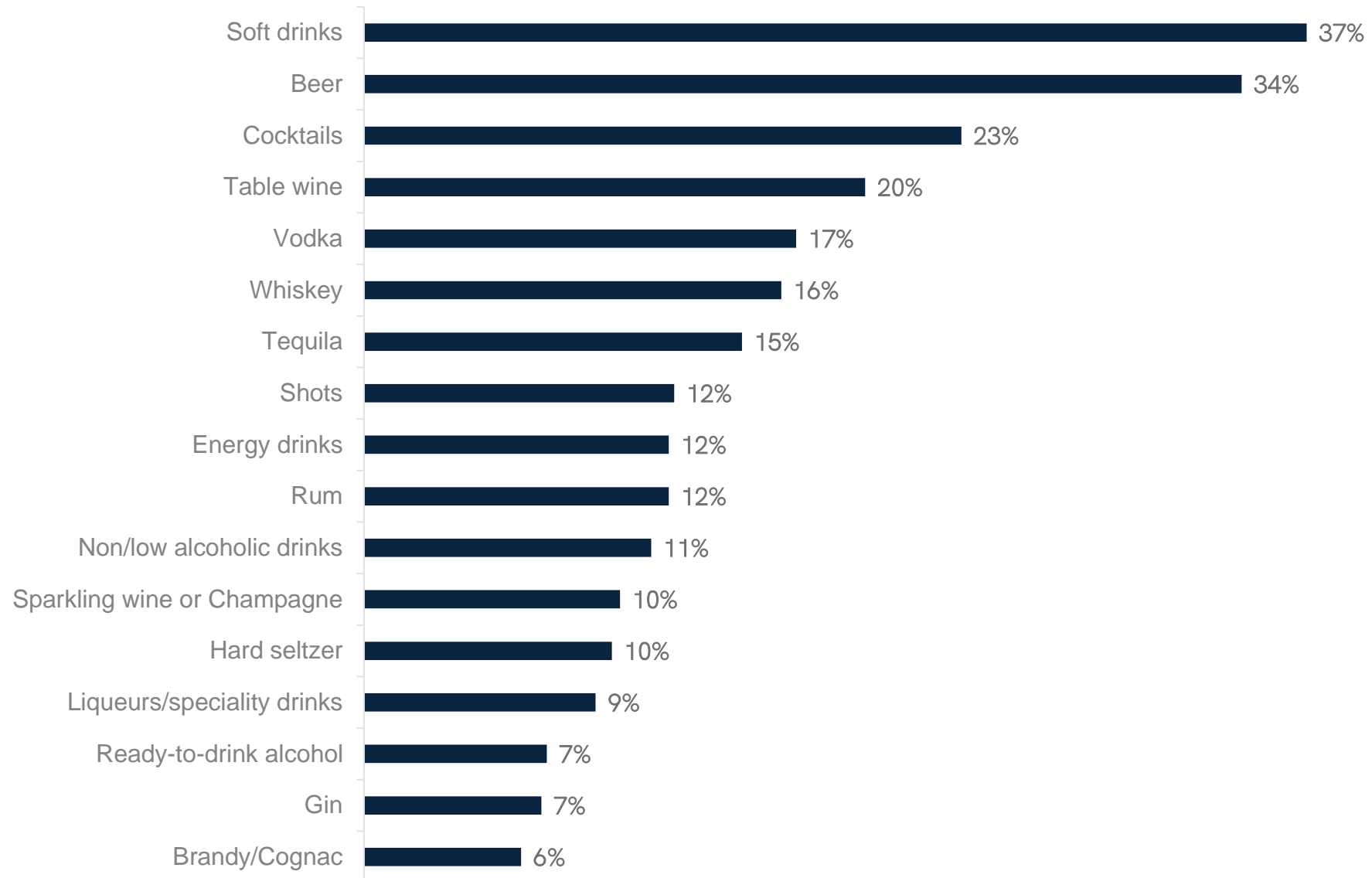
23% Spending less than pre COVID-19



58% Spending the same as pre COVID-19

WHICH OF THE FOLLOWING HAVE YOU DRANK IN BARS AND RESTAURANTS SINCE THEY REOPENED?

Drink choice of those who have visited the On Premise since reopening






How satisfied have you been about your overall experience since bars/restaurants reopened?

42%

VERY SATISFIED with overall satisfaction

46%

SATISFIED with overall satisfaction



Consumer's satisfaction in bars and restaurants since reopening

% satisfied/very satisfied ...

"The overall quality of service"

79%

"The time it takes to place an order"

75%

"The time it takes to receive an order"

75%

"The variety of drink brands available"

71%

"The price of drinks"

56%

HOW DOES TIPPING AT BARS AND RESTAURANTS CURRENTLY COMPARE TO PRE COVID-19?

5%

Tipping less than
pre COVID-19

35%

Tipping more than
pre COVID-19

60%

Tipping the same
as pre COVID-19



Consumers' tipping behavior using digital device/menu vs ordering through staff

18%

I tip more when ordering via a digital device/menu

60%

I tip the same when ordering via a digital device/menu

22%

I tip less when ordering via a digital device/menu

A photograph of an outdoor cafe seating area. In the foreground, there is a round black table with a black pedestal base and a black base. Two wicker chairs with black seats and backs are tucked under the table. The ground is wet and reflective. In the background, there are more tables and chairs, a brick wall on the left, and a wooden wall on the right. A glass door is visible on the right side of the image. The overall scene is a typical outdoor cafe setting.

82%

Of consumers are completely/quite comfortable visiting On Premise venues with outdoor seating

73%

Of consumers are completely/quite comfortable visiting On Premise venues with indoor seating only

SOURCE: CGA COVID-19 IMPACT CONSUMER RESEARCH SAMPLE (1886)



WHEN ORDERING IN BARS

% Completely/Quite comfortable...

Interacting with waiting/bar staff in the same way as pre COVID-19

69%

Guests not having to wear a mask while away from their seat/table

61%

Having to go to the bar to be served

60%

WHEN ORDERING IN RESTAURANTS

% Completely/Quite comfortable...

Interacting with waiting/bar staff in the same way as pre COVID-19

69%

Having to go to the counter to be served

63%

Guests not having to wear a mask while away from their seat/table

61%

WHEN ORDERING IN RESTAURANTS, SPLIT INTO VACCINATION TYPE

% Completely/Quite comfortable...



Interacting with waiting/bar staff in the same way as pre COVID-19



Having to go to the counter to be served



Guests not having to wear a mask while away from their seat /table

Consumers who are fully vaccinated

69%

62%

60%

Consumers waiting for their first vaccination

57%

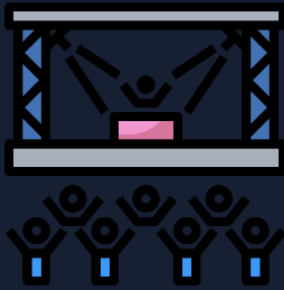
58%

53%



HOW COMFORTABLE ARE YOU TO VISIT THE FOLLOWING VENUES IN THE NEXT FEW WEEKS?

% Completely/Quite comfortable...



Concert/Festivals

44%



Sports stadiums

44%

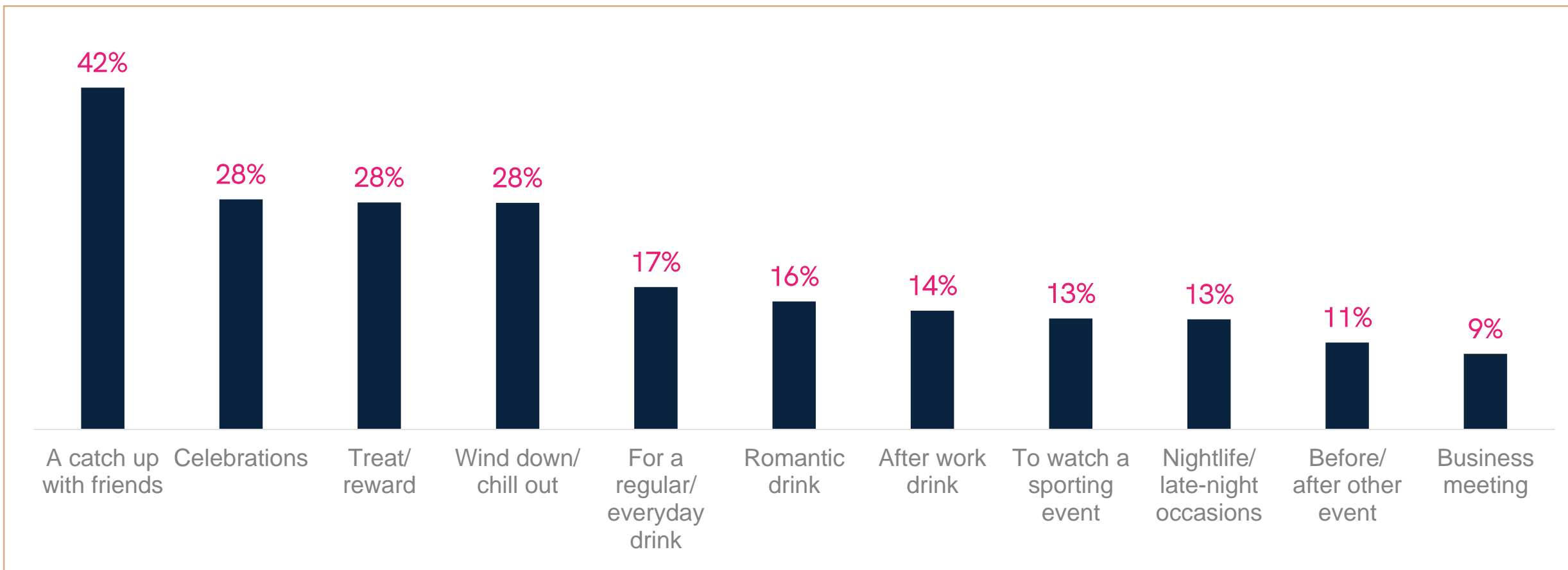


Nightclubs

37%

OCCASIONS TO VISIT THE ON PREMISE

% of main reasons to visit bars and restaurants



TOP 5 OCCASIONS TO VISIT THE ON PREMISE, SPLIT INTO DEMOGRAPHICS

21-34		35-54		55+	
A catch up with friends	38%	A catch up with friends	41%	A catch up with friends	45%
Wind down/chilled out	34%	Wind down/chilled out	36%	Celebrations	27%
Treat/ reward	30%	Treat/reward	30%	Treat/reward	24%
Celebrations	28%	Celebrations	29%	Wind down/chilled out	15%
Romantic drinks	25%	For a regular/everyday drink	22%	For a regular/everyday drink	10%

HAVE YOU VISITED/INTENDED TO VISIT BARS, RESTAURANTS OR SIMILAR OUTLETS
FOR JULY 4?



Went out to eat in
bars and/or
restaurants

24%



Went out for a drink
in bars and/or
restaurants

17%



Went out to eat and
drink in bars and/or
restaurants

12%



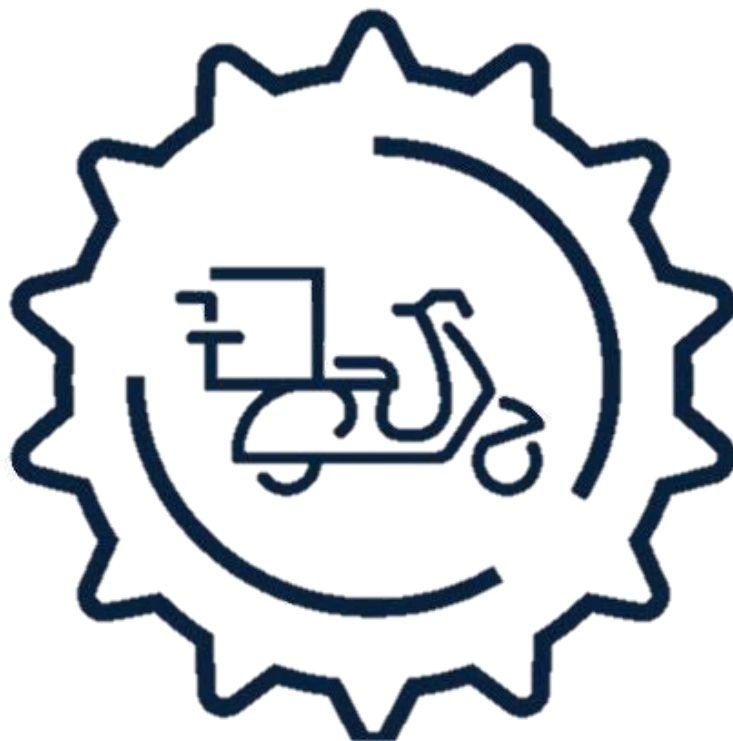
I did not go out to
eat or drink in bars
and restaurants

47%

TAKEOUT/DELIVERY

55%

Have ordered alcohol
for takeout/delivery
from venues
WITH JUST FOOD
in the last 2 weeks

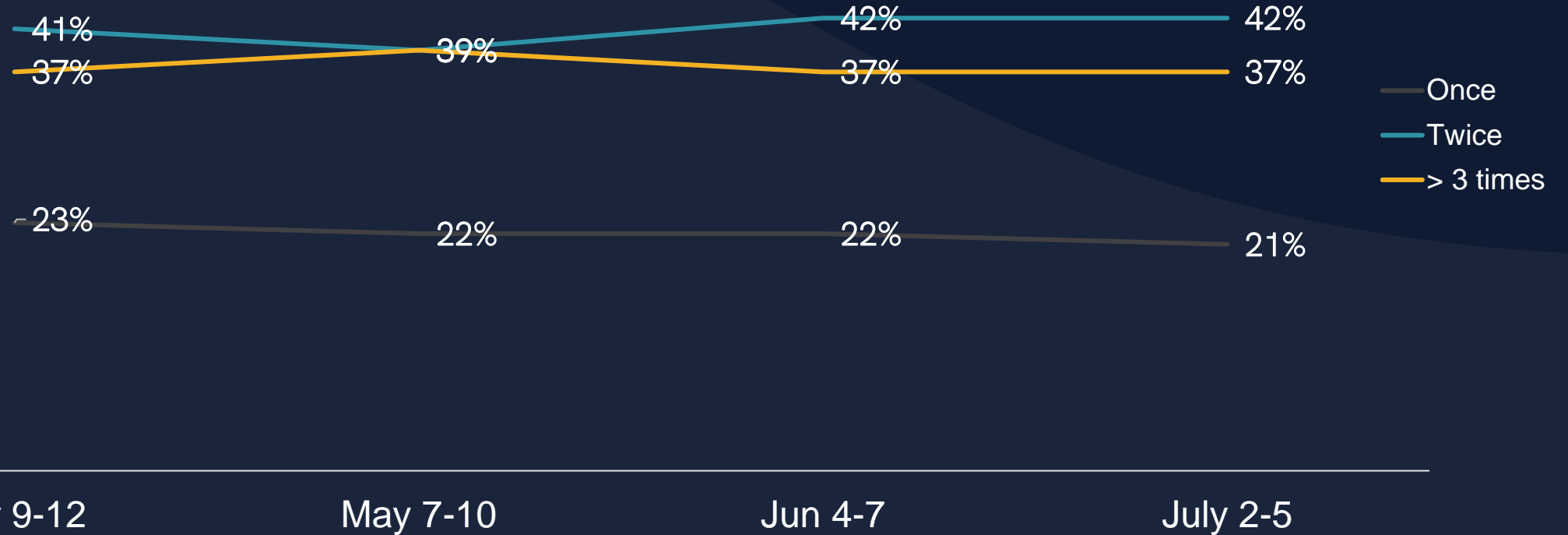


20%

Have ordered
takeout/delivery from venues
THAT INCLUDED ALCOHOL
in the last 2 weeks

FREQUENCY OF ORDERING TAKEOUT/DELIVERY

The changes across 4 month





Do you plan on ordering takeout/delivery of food and/or drinks in the next 2 weeks?

55%

Yes, a takeout/delivery of just food

20%

Yes, a takeout/delivery that includes alcohol

2021 STRATEGY

TALK TO US ABOUT YOUR 2021 STRATEGY

CGA's defining purpose is to build unique services which help our clients to offer better solutions to the trade, to sell more product and to more easily navigate a difficult and complex channel. 2021 brings many opportunities for the channel and for suppliers, retailers and distributors alike, as the market recovers from a challenging year.

To continue to deliver the most effective solutions, we want to stay aligned with your priorities and business challenges, to ensure our solutions are designed to add the most value possible to you and your teams. We'll be reaching out to you over the next month to talk through your plans and our new services to demonstrate how we can best help.



CGA SERVICES

Essential tools to help you navigate the new On Premise reality

State Performance Tracker



Track the top line performance of 40 states for just \$1k a month!

Channel Strategy



Channel Strategy is back for 2021 - how will you win in casinos, stadiums and other channels when the market fully re-opens?

International Expansion



Following the huge success of OPUS in the US and Canada - this service will now be available in Mexico and Brazil

BeverageTrak



Tracking & responding to low level, sub-market, sales performance is now crucial

PurchaseTrak



An On Premise tracking tool designed solely for regional sale teams

Retail Solutions



Did you know that CGA has an entire retail division?



OPENING STAGES: BARS

% OF STATES IN STAGE

STAGE 1: Completely Open
(Example: Florida)

92%

STAGE 2: Open but with capacity
measures in place (Example: New
Mexico)

8%

STAGE 3: Outdoor Only Open

0%

STAGE 4: Closed - Delivery Only

0%





OPENING STAGES: RESTAURANTS

% OF STATES IN STAGE

STAGE 1: Completely Open
(Example: Florida)

92%

STAGE 2: Open but with capacity
measures in place (Example: New
Mexico)

8%

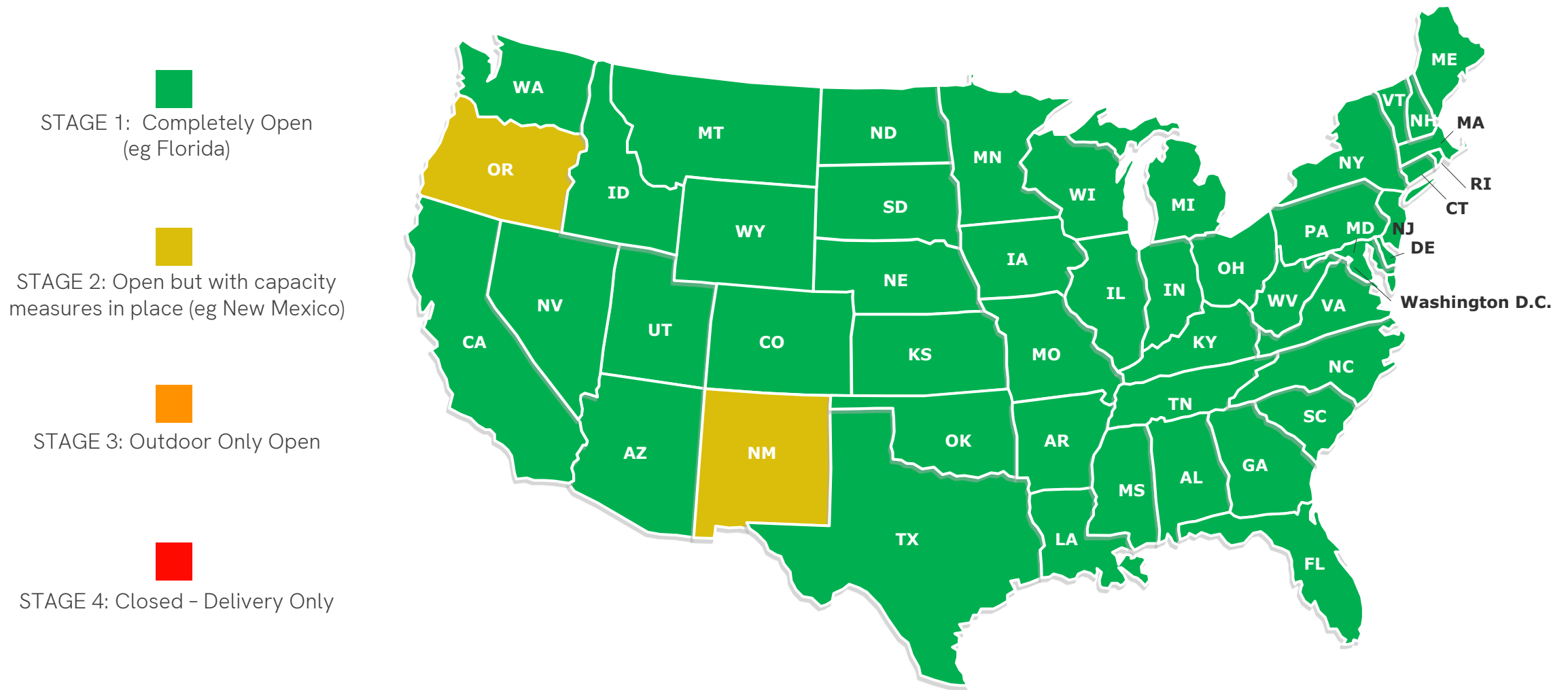
STAGE 3: Outdoor Only Open

0%





STAGE 4: Closed - Delivery Only

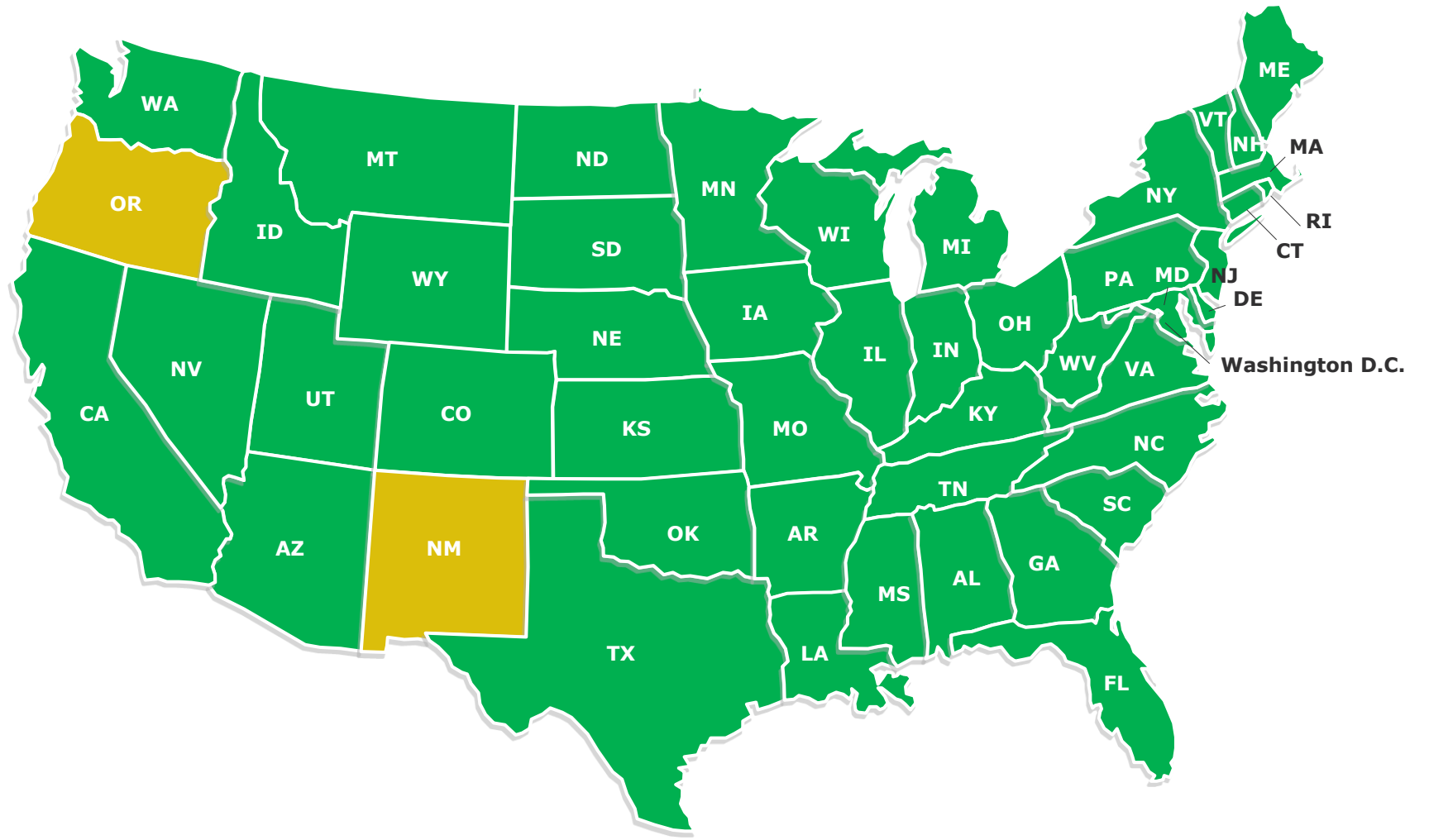
0%

OPENING STAGES: RESTAURANTS



OPENING STAGES: BARS

-  STAGE 1: Completely Open (eg Florida)
-  STAGE 2: Open but with capacity measures in place (eg New Mexico)
-  STAGE 3: Outdoor Only Open
-  STAGE 4: Closed - Delivery Only





Methodology

CONSUMER RESEARCH

CGA have surveyed 1,886 LDA On Premise consumers across four key states (Florida, Texas, New York & California). Consumers had to have returned to the On Premise since reopening.

An equal number of respondents were collected from each state, with each nationally representative on gender and age.

Fieldwork was 07/02/21 to 07/05/21

HOW CAN WE HELP?



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