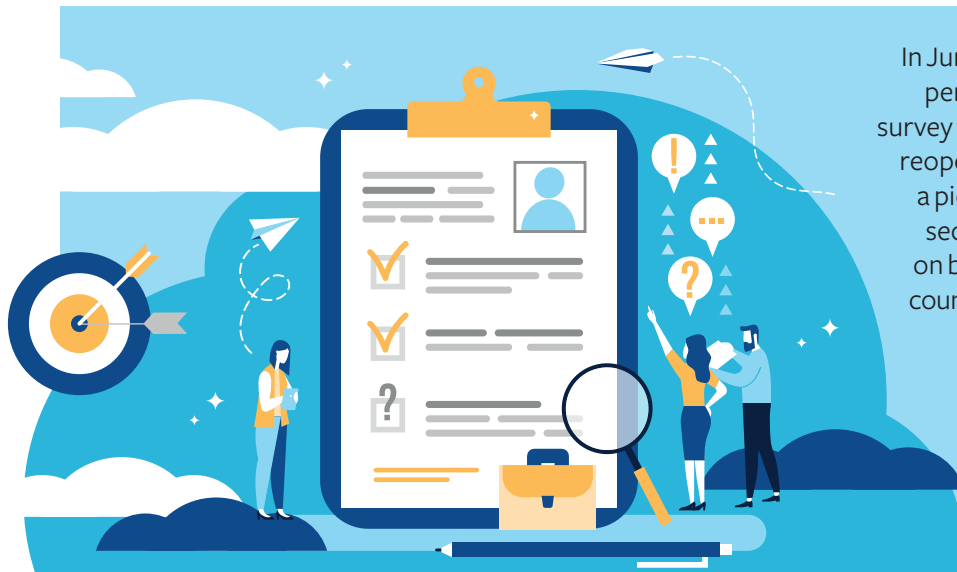


# THE BERKMANN REPORT: CONSUMER ATTITUDES TO DINING OUT POST-LOCKDOWN



In June 2020, 12 weeks into the UK's lockdown period, Berkmann Wine Cellars conducted a survey to measure people's attitude towards the reopening of pubs and restaurants. It builds up a picture of the importance of the hospitality sector in people's lives, and of their opinions on both the degree of risk and the acceptable countermeasures as the sector looks to reopen.

## 1,932 respondents

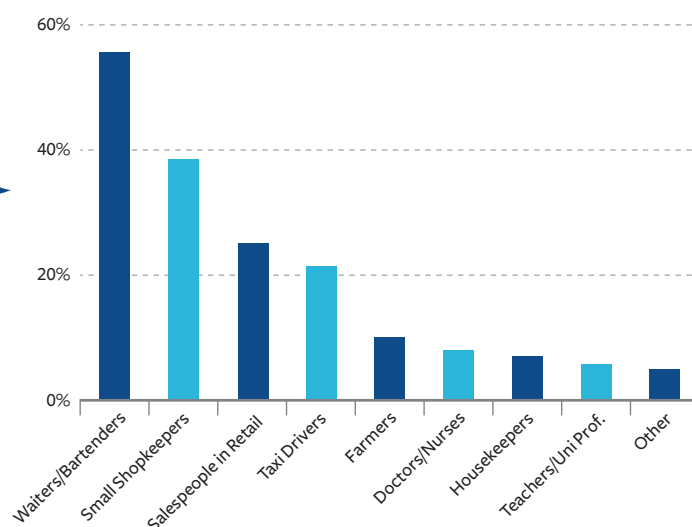
were balanced to ensure a representative sample of the UK population according to gender, age, region and NRS social grade.

## STRONG AWARENESS OF THE FINANCIAL IMPACT OF COVID-19 ON THE HOSPITALITY WORKFORCE.

# 56%

Asked which two professions suffered financially the most due to the lockdown, **56% of respondents identified waiters and bartenders among the hardest hit.** This is substantially more than the next most selected choice, small shopkeepers, on 39%.

*This empathy for the hospitality frontline was consistently high in all regions of the country and across all income brackets.*



## VISITING ON-TRADE IS THE NUMBER ONE PRIORITY POST-LOCKDOWN.

**43% said going to a pub or restaurant was one of the first things they would do when lockdown ended**, ahead of visiting the hairdresser (35%) and going on holiday (23%).

*Visiting a pub or restaurant was the number one post-lockdown activity for all age groups except the over 65s, where it was relegated to second place behind going to the hairdresser.*



# 43%



# 35%



# 23%

## In the first three months of reopening, around half of people plan to spend the same or more in restaurants as they did before the lockdown.

The most regular diners pre-lockdown are the most likely to spend the same or more in the near future – **71% of those who used to visit restaurants more than once a week will maintain or increase spend.**



*This pattern holds regardless of earnings; there is the same enthusiasm about returning to restaurants across all income brackets.*

## ANXIETY LEVELS AROUND RETURNING TO RESTAURANTS ARE CURRENTLY VERY VARIED.

People are on average slightly anxious about the idea of dining out, but there is a fairly even spread of feeling.

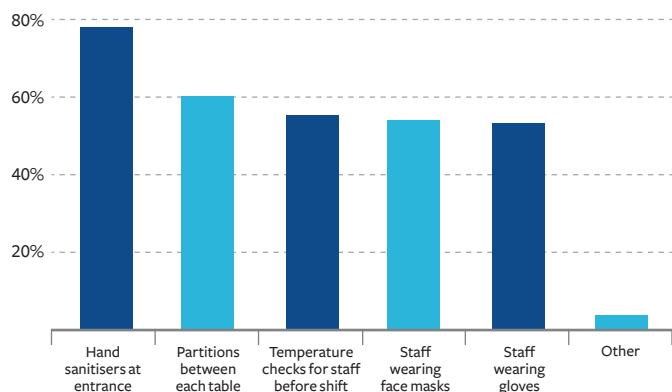
*Of those relaxed to neutral at the thought of visiting restaurants again, 67% plan to spend the same or more on eating out. Of those slightly to very anxious at the thought, only 39% plan to spend the same or more. So addressing causes of anxiety will be key as restaurants reopen.*

## The availability of hand sanitisers at the entrance is the most requested additional hygiene measure for restaurants.



**78% of people would like to see this measure in place**, though all the suggested measures gained approval ratings over 50%.

*Temperature checks for staff are far more acceptable to the over-55s. They only just scrape a 50% approval rating among under-45s.*



## WINE HAS BEEN THE MOST POPULAR ALCOHOLIC DRINK DURING LOCKDOWN.

**64% of alcohol drinkers have consumed wine in the last two months**, versus 62% for beer and 39% for cider.

*In the 35-54 age group, beer edged into first place. But wine remains the number one choice among under-35s and over-55s.*

## Frequent restaurant-goers are more reliant on social media and less on television.

63% of non-restaurant-goers would miss TV if it were taken away, versus 37% of the most frequent restaurant-goers. The opposite is true for social media, with 17% and 33% respectively.

*Among frequent restaurant-goers, Instagram is disproportionately popular.*



## Catching the virus from other guests and via the bathroom are the most acute concerns when it comes to the restaurant experience.

Travelling to and from venues is the least worrying aspect.

*The more frequently someone visited restaurants in the past, the less likely they are to be concerned by any of these factors.*

1 = very comfortable to 5 = very uncomfortable:



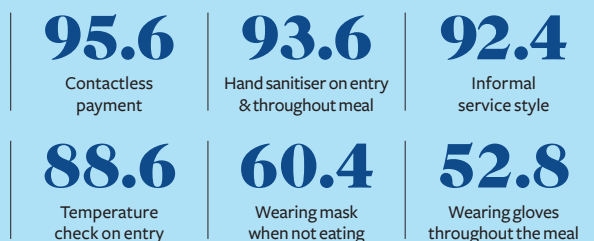
## The vast majority of diners would be happy to use contactless payment and hand sanitiser, and adapt to an informal service style.



Over 90% of people would not be uncomfortable with any of these measures.

*The pattern is consistent regardless of how much the diner typically spends on a meal out.*

% of people comfortable or neutral with each measure:



A MAJORITY OF PEOPLE SUPPORT A REDUCTION IN THE SOCIAL DISTANCE RESTRICTION FROM 2 METRES TO

◀ 1 METRE ▶



The margin is slim overall: 51.4% feel comfortable with this change.

*However, there is greater support among frequent restaurant-goers. Of those who visit restaurants more than once a week, 59% support a reduction to 1 metre.*