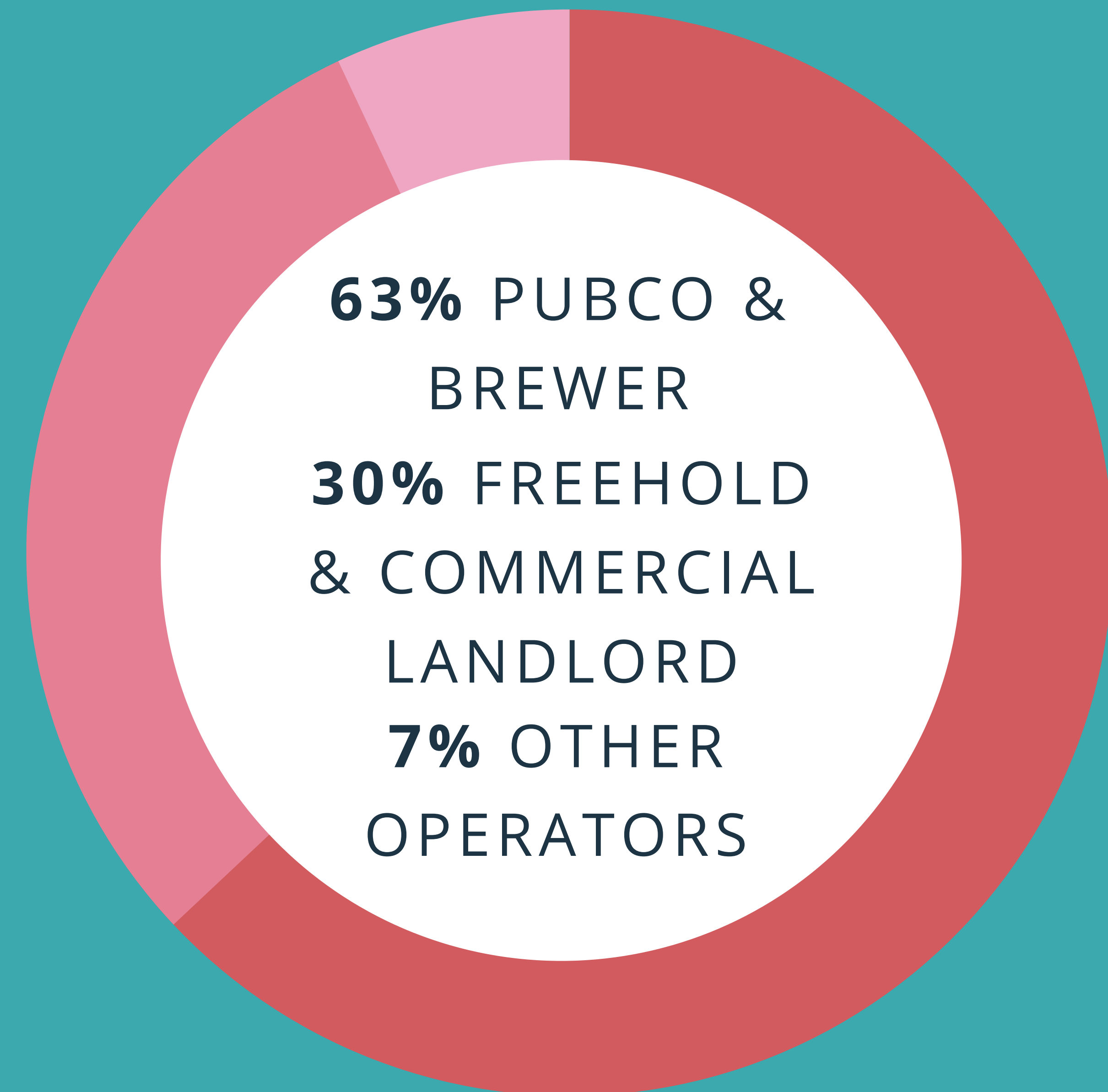
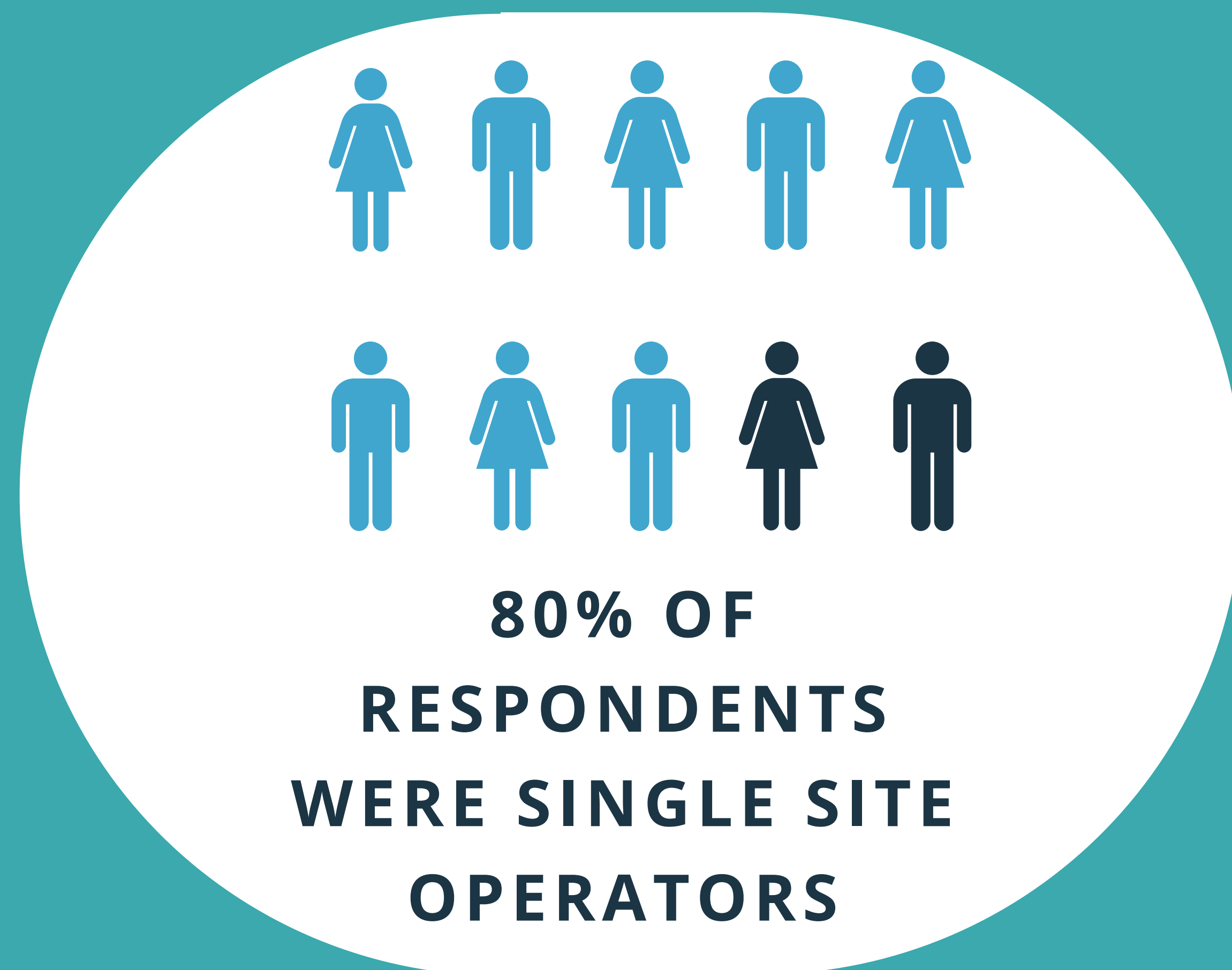


CORONAVIRUS & REOPENING

RESULTS OF OUR MEMBERS SURVEY JUNE 2020

POWERED BY THE



STAFFING

9%
HAVE ALREADY
MADE
REDUNDANCIES

91%
HAVE
FURLOUGHED
STAFF

→
**OF
THESE**

66%
HAVE
FURLOUGHED
ALL THEIR STAFF

&

32%
ARE STILL
CONSIDERING
MAKING
REDUNDANCIES



WE WOULD HAVE TO HAVE EXTRA STAFF / DOOR STAFF TO MAN THE ENTRANCES / EXITS AND TOILETS, IT WILL BE COSTLY AND WE'RE NOT CONVINCED THE TRADE WE WILL RECEIVE WILL ACTUALLY COVER THOSE COSTS.

I'D HAVE TO TAKE ON STAFF. I HAVE BEEN RUNNING THE PUB WITH MY HUSBAND FOR 18 MONTHS, WE'VE NEVER NEEDED STAFF, OR COULD AFFORD THEM BEFORE AND WE WOULDN'T BE ABLE TO AFFORD THEM WITH RESTRICTIONS AND LESS CUSTOMERS.



35%
BELIEVE STAFF
WON'T FEEL
CONFIDENT
RETURNING TO
WORK

65%
WOULD MAKE
REDUNDANCIES IF
THEY HAD TO
CONTRIBUTE TO
FURLOUGH IF THEIR
BUSINESS REMAINED
CLOSED

STAFF CONCERNS VOICED:



SAFETY FOR
THEMSELVES &
CUSTOMERS

ANXIETY
AROUND JOB
SECURITY

POLICING
SOCIAL
DISTANCING

PROPERTY CHARGES

PAYMENT CONCESSIONS

15%

NO VARIATION

29%

DEFERRED ONLY

8%

DISCOUNTED & NO DEFERRAL

20%

DISCOUNTED & DEFERRED

20%

COMMERCIAL RENT CANCELLED, DOMESTIC RENT PAYABLE

SATISFACTION WITH VARIATION

58%

ARE SOMEWHAT/VERY SATISFIED WITH THE VARIATION

42%

ARE SOMEWHAT/VERY DISSATISFIED

BUSINESS SUPPORT, GRANTS & LOANS

31%

51%

18%

ELIGIBLE FOR

£10K

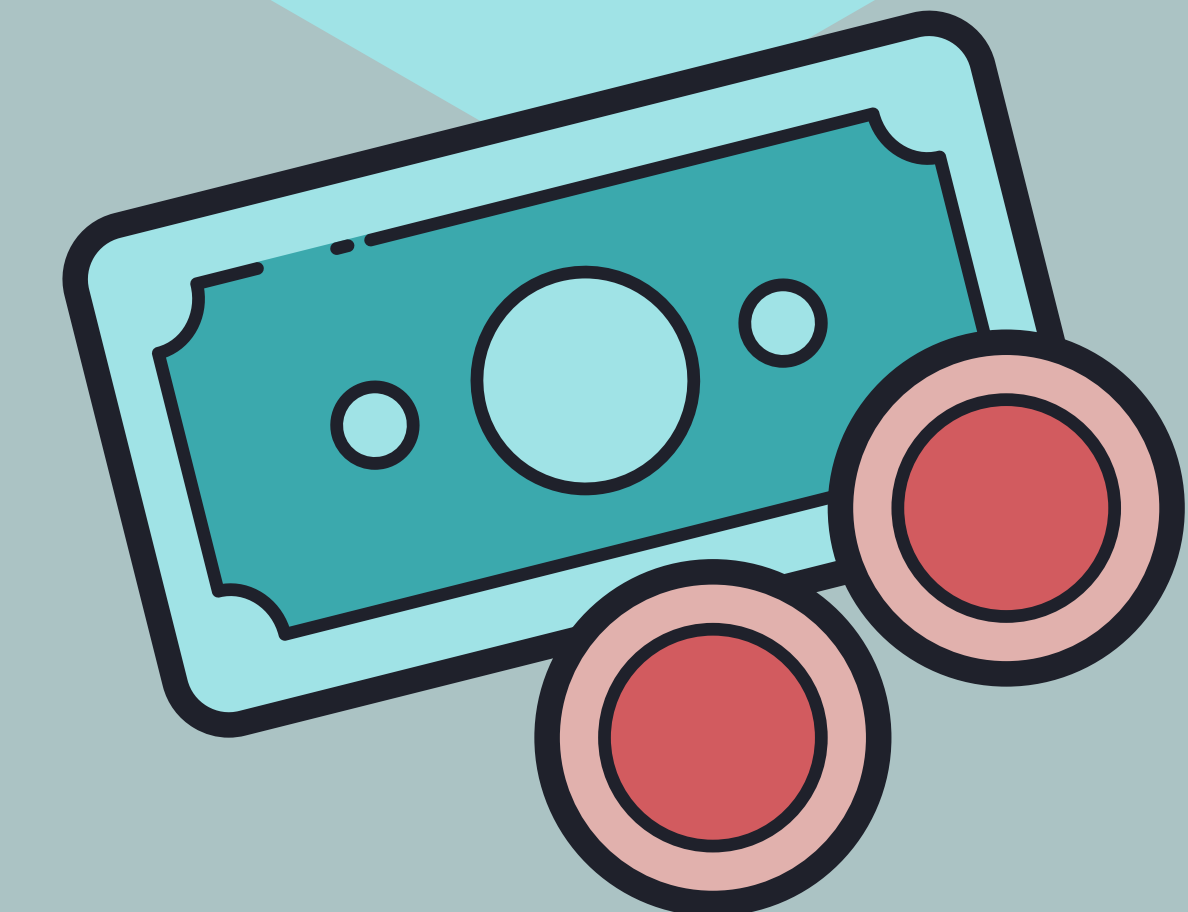
£25K

£0*

*BECAUSE RV IS OVER £51K

98%

OF THOSE ELIGIBLE HAVE NOW RECEIVED FUNDS



37%

RECEIVED A BOUNCEBACK LOAN

46%

HAVE NOT APPLIED FOR A LOAN TO AVOID MORE DEBT

7.5%

RECEIVED A CBILS LOAN

20%

HAVE APPLIED FOR THE SELF-EMPLOYMENT SUPPORT

62%

HAVE HAD ACCESS TO NO OTHER FINANCIAL SUPPORT

2M SOCIAL DISTANCING

**1 IN 4
PUBS**

COULD NOT REOPEN IF
SOCIAL DISTANCING
REMAINS AT 2 METRES

OF THOSE PUBS THAT COULD
REOPEN...

82% WOULD DO SO
AT LESS THAN 50%
TURNOVER

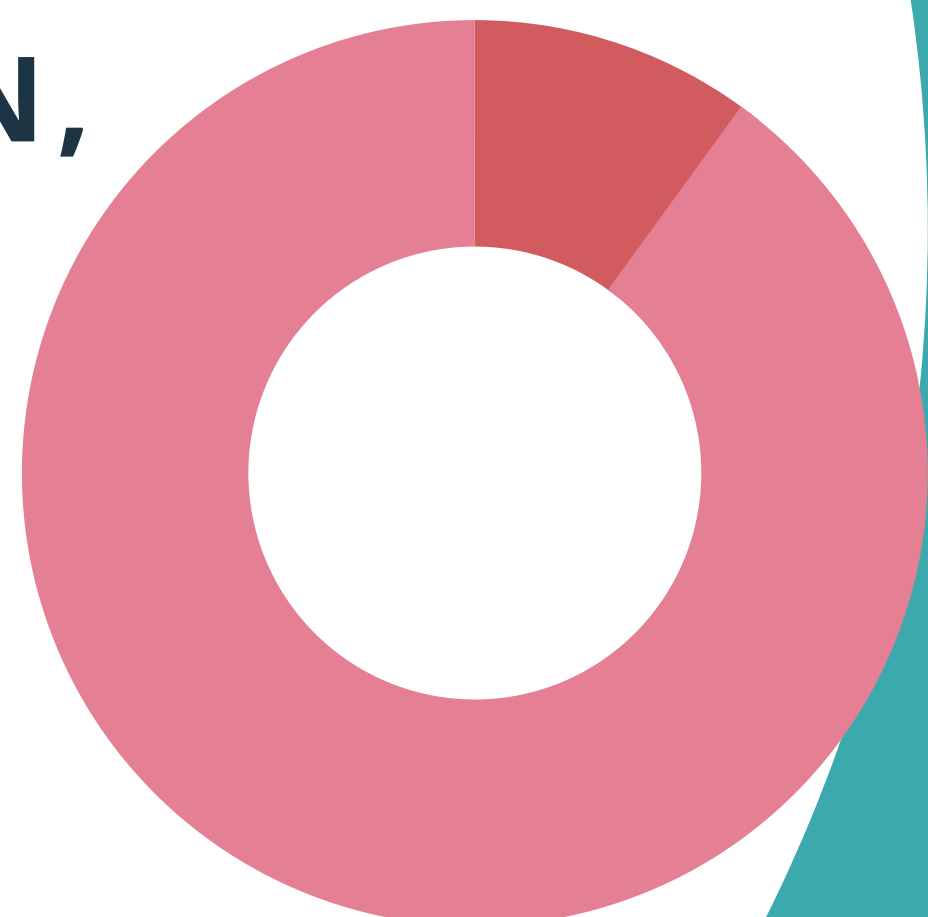
97%
WOULD BE AT
LESS THAN
75% OF
TURNOVER

IF SOCIAL DISTANCING
CHANGES TO 1M...

**1 IN 10
PUBS**

COULD NOT
REOPEN

THE REST COULD REOPEN,
BUT WITH GREATLY
REDUCED TURNOVERS &
**THE VAST MAJORITY
WOULD STILL NOT BE
PROFITABLE**



SOCIAL DISTANCING

“THE 2M RULE WOULD MEAN WE WOULD NEED TO LIMIT OUR FOOD OPERATION, ALL THREE PUBS ARE FOOD LED, WE WOULD FIND IT DIFFICULT, PROBABLY IMPOSSIBLE, TO SURVIVE ON WET TRADE ONLY.

WE WILL HAVE INCREASED COSTS DUE TO MEASURES IMPOSED. I ANTICIPATE OPENING, WITH A SKELETON STAFF IN PLACE, NO ROOM FOR MANOEUVRE, FOR STAFF HOLIDAYS OR SICK DAYS.

AS A SMALL VILLAGE PUB EVEN WITH 1M DISTANCING IT IS UNSURE IF THE BUSINESS WOULD BE VIABLE.”

65% OF RESPONDENTS ARE SOMEWHAT OR VERY CONFIDENT THAT THEY COULD PROVIDE A SAFE ENVIRONMENT FOR STAFF AND CUSTOMERS AT 1 METRE SOCIAL DISTANCE

RESPONDENTS' MAIN CONCERNS



REOPENING CONCERNS

87% PROFITABILITY

78% CONSUMER CONFIDENCE

68% PHYSICAL CHANGES TO THEIR PUB

41% RESTOCKING TIMESCALES / LEVELS

38% RESTOCKING COSTS

33% STAFFING



TOILETS

10% WILL HAVE A DEDICATED STAFF MEMBER MANAGING LAVATORIES

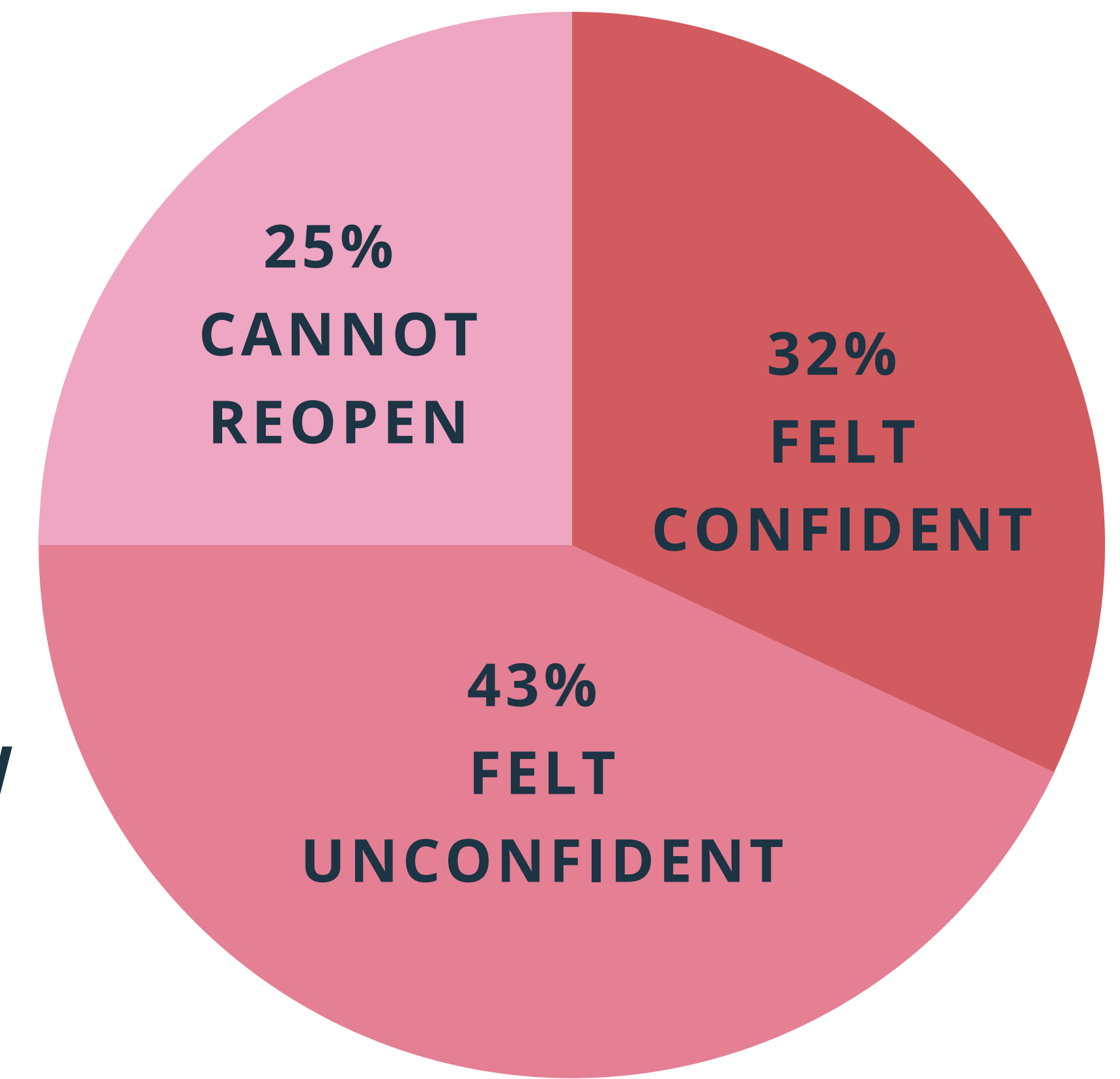
84% WILL USE SIGNAGE TO DIRECT CUSTOMER BEHAVIOUR

75% WILL MAKE HAND SANITISER AVAILABLE INSIDE & OUTSIDE TOILETS

FRONT OF HOUSE



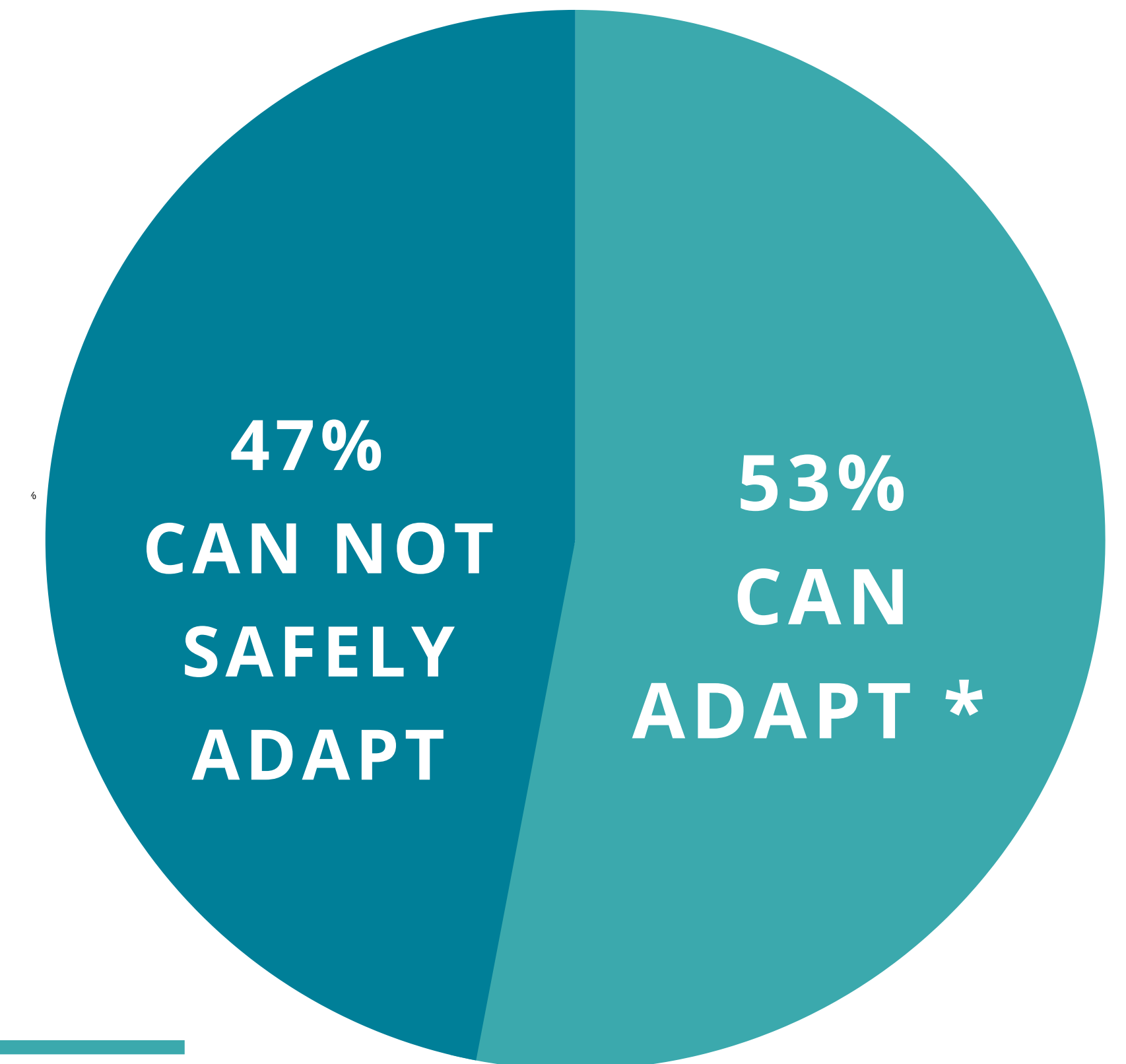
WHEN ASKED HOW CONFIDENT THEY ARE MANAGING THE FLOW OF STAFF AND CUSTOMERS WITHIN THEIR PUB



BACK OF HOUSE



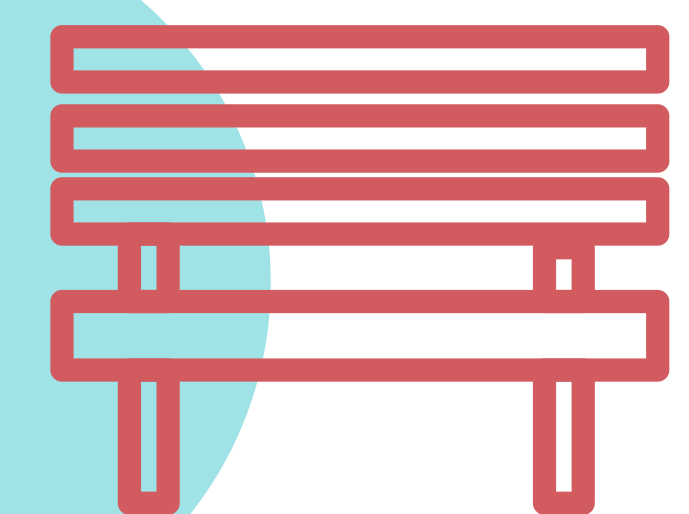
WHEN ASKED IF THEY COULD ADAPT THEIR BACK OF HOUSE AREAS TO OPERATE SAFELY BASED ON GOVT 5 STEPS TO WORKING SAFELY ADVICE



OUTDOORS

61%

FELT CONFIDENT ABOUT MANAGING THE FLOW OF STAFF AND CUSTOMERS AROUND THEIR OUTDOOR SPACES



*HOWEVER ADAPTATION WOULD FURTHER IMPACT PROFITABILITY

BUSINESS INSURANCE

97%

HAVE NOT HAD A
SUCCESSFUL CLAIM
FROM
BUSINESS
INTERRUPTION
INSURANCE

“WE HAVE CREATED AN ONLINE COMMUNITY RADIO STATION FOR ALL OUR LOCAL BANDS AND CUSTOMERS THAT GOES ON AIR EVERY DAY AND GETS OVER 200 LISTENERS PER SHOW. WE HAVE ALSO BEEN LIVE STREAMING OUR GIGS FROM LAST YEAR. THIS HAS BEEN VERY WELL RECEIVED BY OUR CUSTOMERS AND COMMUNITY BUT DOES NOT GENERATE ANY REVENUE..”

TAKEAWAYS & COMMUNITY SERVICES



28%

OF RESPONDENTS
ARE NOW OFFERING
A FOOD & DRINK
TAKEAWAY DELIVERY
/ COLLECTION
SERVICE



6%

ARE OFFERING
GROCERY
COLLECTION /
DELIVERY

68%

OF THOSE OFFERING
TAKEAWAY OR DELIVERY
SERVICES ARE SEEING LESS
THAN 10% OF THEIR
USUAL TURNOVER



MANY OF OUR MEMBERS
CANNOT JUSTIFY
BRINGING STAFF BACK
FROM FURLOUGH TO
SUPPORT THIS ACTIVITY

**JUST
16%**

WERE OFFERING
THIS IN OUR
LAST SURVEY

**A FURTHER
6%**

ARE OFFERING FREE OR
DISCOUNTED MEALS TO
VULNERABLE PEOPLE IN
THEIR COMMUNITIES

CONSUMER CONFIDENCE

OUR MEMBERS THOUGHTS & IDEAS



"IT WILL BE IMPORTANT TO MAINTAIN THE INTEGRITY OF 'PUB LIFE' WHILST ADHERING TO A SAFE ENVIRONMENT. IF IT'S LIKE A DOCTOR'S SURGERY WAITING ROOM PEOPLE MAY NOT BOTHER TO COME IN."



STAFF

- MASKS, GLOVES & VISORS FOR STAFF
- TAKE STAFF MEMBERS' TEMPERATURE UPON ARRIVAL TO WORK, SEND THEM HOME IF TEMP OVER 37.8 °C
- HAND SANITISER ON THEM AT ALL TIMES
- TAKEN PROACTIVE TRAINING ON SAFETY TO SHOW CUSTOMERS HOW SERIOUSLY VENUES ARE TAKING THIS



"WE HAVE STARTED TO HAVE ZOOM CALLS WITH STAFF TO DISCUSS CONCERNS. MY OPINION IS THAT IF BY THE TIME WE OPEN THEY ARE CONFIDENT IN WHAT IS IN PLACE THEY WILL PASS THAT ON TO THE CUSTOMERS."



TABLES

- DISPOSABLE MENUS ON EACH TABLE, TO BE REPLACED AFTER EACH SANITISATION.
- COMPLETE TABLE SERVICE & PRE-BOOKED TABLES FOR EATING AND DRINKING ONLY.
- SANITISED BUZZER COLLECTION SERVICE (SAVING STAFFING COSTS)
- HAND SANITISER ON EVERY TABLE
- CONDIMENT SACHETS & CUTLERY DELIVERED WITH FOOD
- REMOVING FURNITURE THAT CANNOT BE USED TO CREATE SPACE FOR DISTANCING

FOOD & DRINK

- JUGS OF BEER AND COCKTAILS ENCOURAGED TO MINIMISE VISITS TO BAR
- PLASTIC BEER CUPS TO MINIMISE CONTACT
- QUICK, SIMPLE FOOD WITH HIGH GP MARGINS
- REDUCED MENU
- OUTDOOR COOKING - BBQS ETC.
- EXPANDING OFFER OF COLLECTION / DELIVERY TO MANAGE RISK AND INCREASE REVENUE POSSIBILITIES



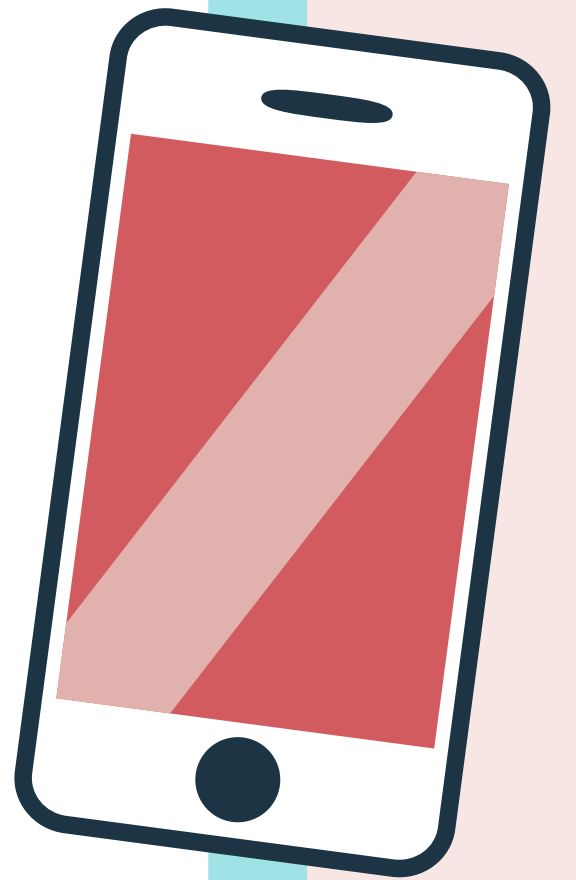


VENUES

- ONE WAY ENTRY / EXIT, ONE ROUTE TO TOILETS
- COMPLIANCE SIGNAGE SHOULD BE INFORMATIVE & ATTRACTIVE - NOT TERRIFYING - FAMILIARITY IS KEY TO REDUCING FOGO*
- MARQUEE TO COUNTERACT BAD WEATHER
- INCREASED CLEANING, HAND SANITISER AT ALL ENTRANCES / EXITS
- SCREENS AT TILL POINT / BAR TO PROTECT STAFF & CUSTOMERS FROM FACE-TO-FACE CONTACT
- EXPANDING INTO CAR PARKS TO ALLOW MORE SPACE
- DISTANCE IS BETTER THAN SCREENS - LESS CLINICAL
- FREE MASKS FOR CUSTOMERS
- PAY AND ORDER APP OR WEBSITE TO MINIMISE CONTACT

COMMUNICATION

- COMMUNICATION OF CHANGES IS VITAL - NOTICES, SOCIAL MEDIA ETC.
- GOVERNMENT COMMUNICATION TO PUBLIC ON WHAT IS EXPECTED OF CUSTOMERS, AND WHAT THE STANDARD IS THAT VENUES SHOULD ADHERE TO



"WE NEED TO ENSURE OUR WEBSITE AND BOOKING SERVICES RE-ITERATE HOW WE HAVE IMPLEMENTED SAFETY MEASURES AND LIST THEM OPENLY"

MORE IDEAS

- IN ONE VILLAGE LOCAL, THEY ARE ORGANISING TOURS WITH REGULAR CUSTOMERS, TO SHOW THE CHANGES BEING MADE AND AND HOW IT WILL WORK UPON REOPENING.
- A SUPPLY OF A RANGE OF BEERS WILL BE VITAL - CAN BREWERIES ADJUST TO OFFER SMALLER CONTAINERS TO ALLOW FOR REDUCED TURNOVER?
- VAT CONCESSIONS TO ENCOURAGE PUBLIC BACK
- CONTINUE TO OFFER / INCREASE OFFERING OF COMMUNITY HELP - COLLECTING PRESCRIPTIONS, MEALS TO THE ELDERLY ETC.
- CONFIDENCE WILL BE A SLOW GROW - IT WON'T HAPPEN OVERNIGHT, BUT IT WILL BUILD GRADUALLY



*FOGO - FEAR OF GOING OUT

OUR MEMBERS NEED CLARITY FROM GOVERNMENT TO HELP THEM PLAN EFFECTIVELY FOR REOPENING, OR KEEPING THEIR BUSINESSES IN HIBERNATION BASED ON THE GUIDELINES GIVEN

WHAT IS REQUIRED VS WHAT IS RECOMMENDED OR DESIRED?

- RISK ASSESSMENT GUIDE TEMPLATES NEED TO BE MADE AVAILABLE
- PRECISE INSTRUCTIONS AND CLARITY ON WHO IS GOING TO BE ASSESSING US
- PLENTY OF NOTICE TO RESTART THE SUPPLY CHAIN - WE CAN BE READY QUICKLY, BUT THE BEER NEEDS BREWING!
- CAN WE USE NORMAL GLASSES, CONDIMENTS, LINENS OR WILL THEY BE DISPOSABLE?
- TELL US BEFOREHAND, NOT THROUGH TV ANNOUNCEMENTS!
- FURTHER FINANCIAL HELP TO SEE US THROUGH AN INITIAL LOSS MAKING PERIOD
- NO PROSECUTIONS IF A VISITOR CATCHES COVID

CLARITY FROM GOVERNMENT

“PUBLISH THE SCIENTIFIC ADVICE IMPARTIALLY AND UNREDACTED. ONLY THEN CAN WE HAVE CONFIDENCE IN IT AND ONLY THEN CAN CUSTOMERS HAVE CONFIDENCE IN IT.”

“WILL THE POLICE AND COUNCIL WORK WITH OUR BUSINESSES OR JUMP ALL OVER US FOR EVERY MINOR INFRINGEMENT?”

- WILL THERE BE TIME LIMITS AS TO HOW LONG CUSTOMERS CAN STAY?
- WILL LIVE MUSIC STILL BE PERMITTED?
- GUIDANCE ON HOW TO MANAGE CUSTOMERS NOT COMPLYING WITH SOCIAL DISTANCING REGULATIONS
- KNOWLEDGE OF THE BACK UP PLAN IF THERE IS A SECOND WAVE - HOW WILL WE EVER REOPEN AGAIN IF THAT HAPPENS?
- ARE PPE SUPPLIES AVAILABLE IF WE NEED TO WEAR THEM?
- WILL INSURANCE COVER US IF THERE IS AN OUTBREAK IN OUR PUBS?

WE CANNOT PLAN WITHOUT A FIXED DATE FOR REOPENING