




## Shaping Ireland's Future

### Report 2: Eating/drinking/socialising Topline report

*Time for radical re-imagining*

Prepared by B&A

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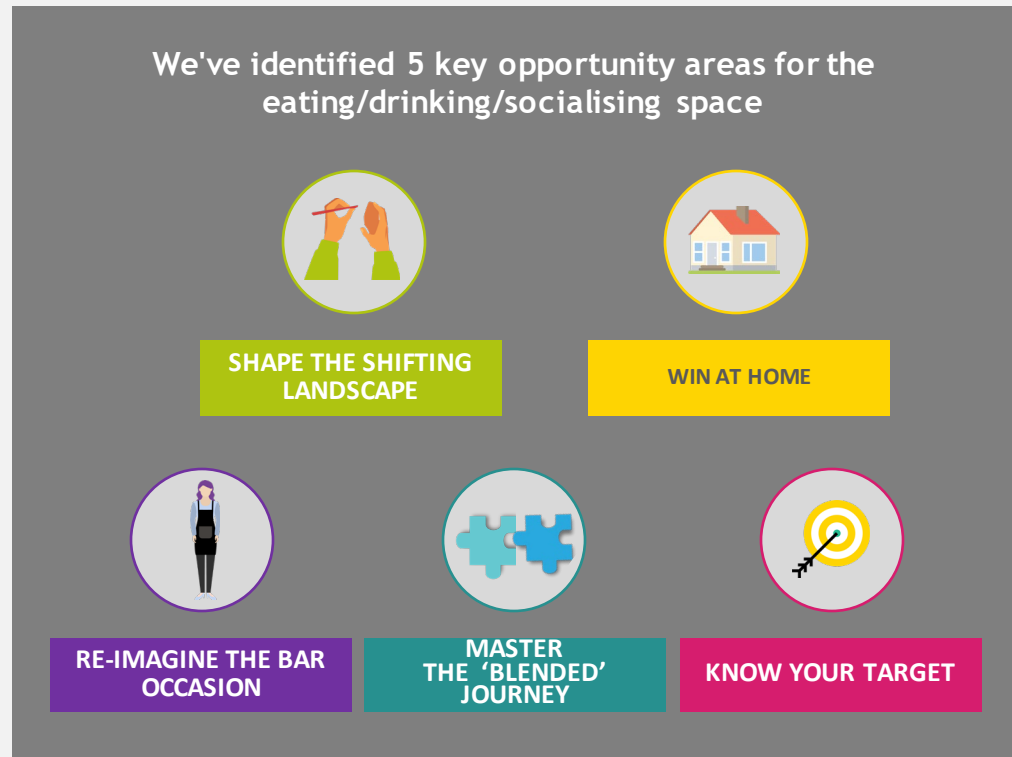
As Ireland slowly emerges from lockdown, we at B&A are looking at the challenges and opportunities faced by key sectors in the economy

## Next stop. Eating/drinking/socialising.

As pubs and restaurants open up across Ireland, we're looking at the wider context of eating, drinking and social occasions.

We're not in quite as much hurry as we might have thought to get back to the pub. **37%** have either been back or plan to go to in the next 4 weeks. For restaurants, the figure rises to **45%**. But within this rapidly changing landscape, where do the opportunities lie for restaurants, bars and food and drink brands?

Read on for more details.





## Lockdown and re-opening of bars and restaurants has radically shaken up our experience of socialising, eating and drinking

### The boundaries of what businesses are offering are blurring



- Bars becoming quasi restaurants.
- Restaurants becoming takeaways.
- Bars becoming off license/delivery services.
- Supermarkets offering significantly more 'food to go'.



*Doing the delivery service kept the wolf from the door during lockdown and demand is continuing even as we open back up again. I guess we'll keep the two streams running together. I never imagined this, but we do what works.*

Restaurateur, Cork

### New occasions are emerging



- **Gourmet takeaways** from high end restaurants.
- **Cocktail delivery**/kit making in home.
- **Meal kits** for easy assembly dinners.
- The **pub crawl**.



*You'd never have had take away from a Michelin starred place before Lockdown. It was fun. I'd certainly do it again.*

Consumer, Dublin

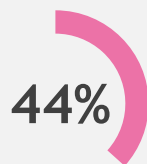
*There are significant opportunities for brands that can adapt and differentiate in this changing landscape. But what is delivered, the competitive set, the service experience may all be very different.*



WIN AT HOME

## Even as pubs and restaurants open back up, the in-home occasion for eating/drinking/socialising will continue to be significant

And we're seeing new sub-types of home occasions starting to emerge as home becomes more consequential.



Don't plan to visit a pub or restaurant in the next 4 weeks



Are planning a takeaway occasion in the next 4 weeks



Are planning to entertain friends and family at home



- **'Elevated'** home entertaining
  - ❖ With fancy value-adds you wouldn't normally expect (professional cocktails, restaurant quality meals).



- **'Blended'** home entertaining
  - ❖ Before/after the pub/restaurant to lengthen the night.



- **'Hassle-free'** home entertaining
  - ❖ With takeaway/meal box kits for ease.

*Finding ways to deliver and engage 'at home' is a business opportunity for all brands.*



## Those who've been back to the pub are struggling with the socially distanced pub occasion



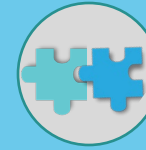
- We're **unsure of how to behave**, looking horizontally (at others) and vertically (at management) for guidance.
- We're **struggling to find the sweet spot** between relaxed enough to have fun, but not too relaxed to socially distance.
- Many of our **favourite aspects** aren't in play (the bar, the dancefloor).

For the post-Covid bar experience to work it needs to be re-imagined



*Important to focus on what can be achieved safely under the current guidelines – and building a satisfying experience around that.*

# Opportunity 4: Master the 'blended' journey

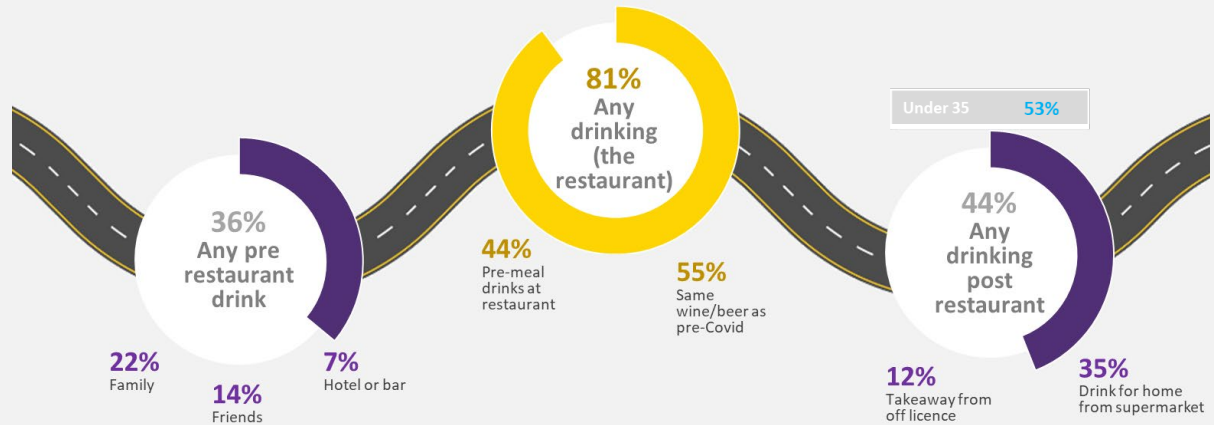


In a new world of 'time slots' for bars and restaurants, the pre and post drinks occasions will become much more important. This is how consumers see their 'journeys' unfolding



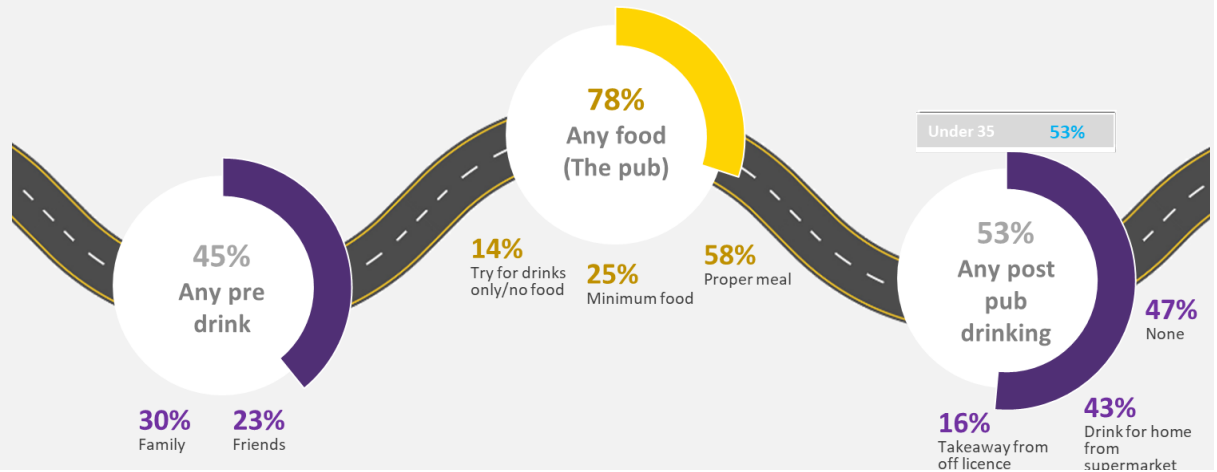
## The restaurant journey

Base: All restaurant visitors



## The pub journey

Base: All pub visitors



*How can brands join up their offering across the various stages of the journey?*



## While 30% of us are planning to visit a pub in the next 4 weeks, certain customers are more up for it than others

Desire to visit the pub skews towards



**Male**  
**38%** *Compared to 22% female*



**Under 34**  
**32%** *Compared to 16% over 35's*



**Urban**  
**35%** *Compared to 20% rural*

Bars with a core target from different demographics will have to work much harder to convince them that the bar is safe, enjoyable place to be at the moment.



*We cater to a family audience, the family carvery on a Sunday, the grannies, the kids. I know we have a harder job than most in getting people in, feeling safe. We'll be pushing out all the stops to do that. We have to.*

Restaurateur, Leinster



*I just don't think I'll be back. Or not for a long time at least. I don't know how they can make it safe and I'm not prepared to find out. My back garden is the new pub. I just bought new patio furniture for it.*

Female, 35+, Dublin



# Opportunities for all 5 key areas

## Ways to win

- As new opportunities open up, both within premises, delivery and in store, it's important for brands to **identify what they can do well and really go for it**. Feel free to **tear up the rule book**. The boundaries observed before Covid are all up for grabs now. For example, restaurant brands could now make their presence felt in-store in the form of meal kits in a way that wasn't imaginable before.
- The **home occasion will continue to be so important** and brands used to engaging with their consumers in the bar or restaurant space need to think about how they can adapt. For drinks brands, **differentiating their offering in-store and in terms of packaging and delivery** is a big opportunity area. Consumers are seeking to make their home occasions more festive and fun, and drinks merchandising could help them do that as people turn their living rooms into home bars.
- As the home occasion develops and proliferates, **there are opportunities for brands to 'own' emerging occasions** or even invent their own. Elevated home entertaining is ripe for the taking for premium brands, for example.
- **Bars need to distract us from the things we're missing**. With the bar area a 'no go', individual tables become the centre of energy, focus, fun and theatre. Working the tables need to be top of the agenda for bar staff. Getting visibility on tables should be a top ambition for drinks brands.
- As blended bar/restaurant 'journeys' develop, brands need to think about how they can play across the various stages. Joined up offers between off licenses (for pre-drinks) and bars? Restaurants sending customers home with house cocktails?
- Establishments can and should work together to **meet the emerging journey opportunities**. For example, with pub crawls returning to fashion and food a requirement, can some pubs look after savoury food and some sweet? **The three-course meal pub crawl** (with great dessert options) looks like an interesting development.
- Its never been more important to **understand your target**, how they're feeling and what would help them feel safe. Consumer research can really help you here – talk to the B&A team for more details. The Irish pub experience, once a universal and uniting experience, might end up becoming much more tailored to different demographic needs.





# About B&A

- B&A is Ireland's largest and most experienced independently owned research company.
- We pride ourselves on having the most experienced director team in Ireland.
- Established over 30 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI, CATI, online and of course qualitative.
- Specialist sectors include: Retail & Shopper, Technology & Telecoms, Media, Financial, Political & Social, Automotive, Healthcare and Public Sector & Utilities.

For more information please visit our website at:  
[www.banda.ie](http://www.banda.ie) or contact us on +353 1 2057500



*Marketing Society Research Excellence Awards  
25 time award winners, including 5 Grand Prix  
in 11 years.*



## B&A Online Omnibus Survey

A twice monthly omnibus survey amongst a representative sample of 1,000 adults aged 16 years plus. Surveys costed on a per Question Unit basis.



## Online Forums

Collaborative virtual discussion space where we interact with participants over a 3-5 day period. Respondents can be shown stimulus, asked to comment on various topics and material and probed on their answers. Respondents can comment on each other's answers and react, build, question.



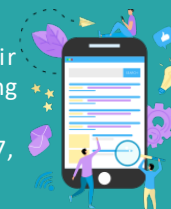
## B&A online Acumen Panel service

Access to the full breadth of ad hoc quantitative research applications, via our online panel of 30,000+ consumers. From fully representative nationwide surveys, to smaller surveys amongst niche markets and audiences.



## Online digital ethnography

Respondents use mobile devices to answer our questions and show us their world. We have our own digital ethnography app for this purpose, allowing respondents to capture answers to our questions in the form of video, photos and text responses. Our moderators are on hand to follow up 24/7, probing for more info, clarifying points and setting new challenges.



## B&A Online Client/Customer Surveys

Gauge accurate and timely feedback from your own customer base by way of carefully designed CEX, Communications, Client needs etc surveys. All conducted to the highest levels of GDPR compliance.



## Virtual depth interviews

In depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



## B&A Telephone Unit

B&A continues to provide a full suite of Consumer and Business to Business Telephone research applications through our panel of CATI-at-Home interviewers across the country.



## Online Web Journey

In-depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



## Virtual Focus groups

Focus groups conducted via an online platform that respondents log on to. Fully audio and visually enabled allowing us to moderate via camera, interact with respondents in real time, show all manner of stimulus and interactive tools and observe their responses at first hand.



## Remote Shopper Journey

B&A has a great deal of experience in 'shopper pathways' research. This uses technology to access a shopper experience in the moment. The respondent is unaccompanied but is wearing glasses that records the trip while they explain their selection. We then re-run the video with them in order to delve deeper into their thinking, reaction to display, pricing, branding and more. This provides a remote means of accessing shopper journeys which is extremely important in the current Covid environment.



For further information contact any of our senior research team: [elaine@banda.ie](mailto:elaine@banda.ie), [maggie@banda.ie](mailto:maggie@banda.ie), [niall.brennan@banda.ie](mailto:niall.brennan@banda.ie)