

# TWC Trends Autumn Edition 2021

## PART ONE: (Re)-emerging behaviours

Consumer attitudes to socialising in and out  
of home

November 2021



# Welcome to TWC Trends Autumn Edition 2021

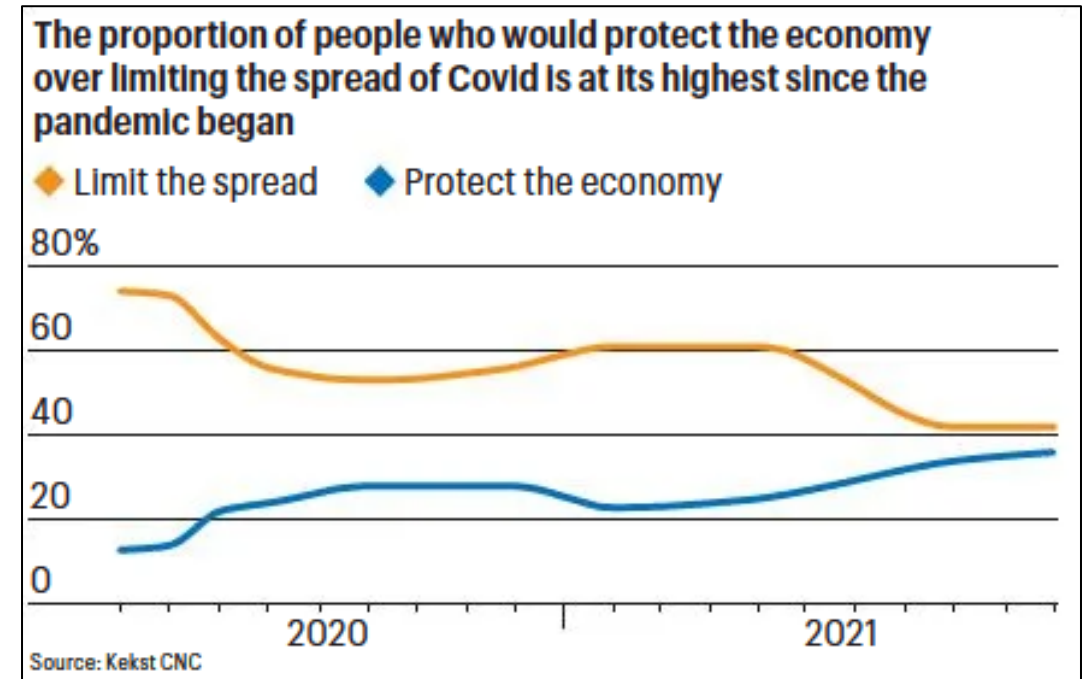
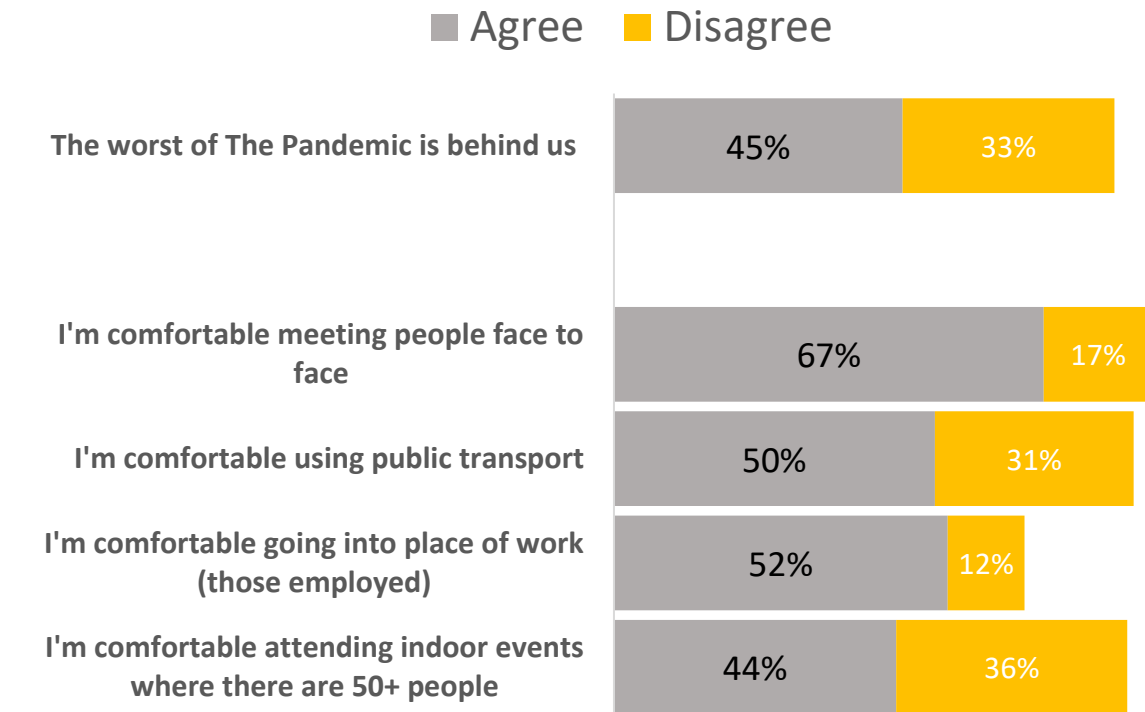
- ✔ This report is part of the TWC Trends/Autumn 2021 series, conducted by TWC – the data and insight experts for UK wholesale, convenience retail and hospitality.
- ✔ A nationally robust and representative sample of 1,000 UK consumers were interviewed online between 5<sup>th</sup> and 8<sup>th</sup> November 2021.
- ✔ This section of the study focuses on **‘(Re)-Emerging Behaviours’**
- ✔ Should you wish to receive further (free) reports from the TWC Trends/Autumn 2021 series, please contact [sandy@wsale.co.uk](mailto:sandy@wsale.co.uk)



# 45% of UK consumers think the worst of the pandemic is behind us and many are returning to pre-covid behaviours

- A third of the population disagree
- But very large numbers are comfortable meeting people face-to-face, using public transport again and returning to the workplace.

- Research from Ketst CNC shows that Brits are now almost equally split between wanting to 'limit the spread of the virus' compared to 'protecting the economy' – the gap has virtually closed.

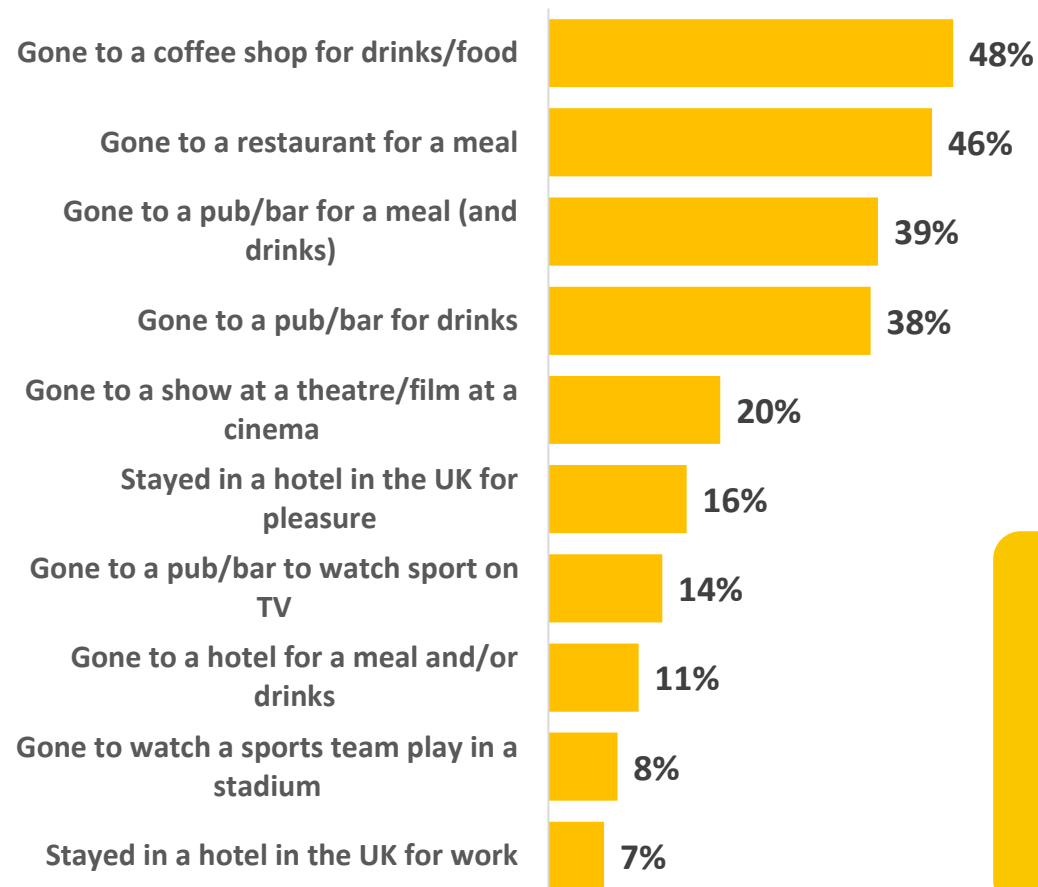


As reported in *The Sunday Times*, 21 November 2021

# 83% of the UK population say they went to a hospitality outlet in the previous month – which is more than went to a supermarket (80%)

Coffee Shops and restaurants have the highest penetration as they attract a broader demographic. Many of the other outlets are biased towards a younger consumer.

In the last month, have you...?



Brits of all ages are heading back out into hospitality outlets – 83% say they visited one in the previous month.

The age break-downs are as follows:

- 91% of 18-34 year olds
- 83% of 35-54 year olds
- 77% of 55+ year olds



## Summary:

People of all ages are returning to hospitality outlets. Turnover is calculated by **penetration x frequency x spend**. Penetration is looking good, less than 4 months after lockdown fully ended (in England/Wales) on 19 July 2021

Turnover = penetration x frequency x spend

83%

of the UK population say they visited a **hospitality outlet** in the previous month (ie early October 2021 – early November 2021)

>

80%

of the UK population say they visited a **supermarket** in the previous month (ie early October 2021 – early November 2021)

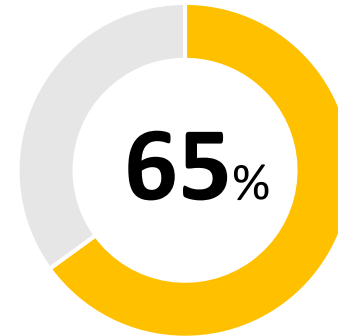
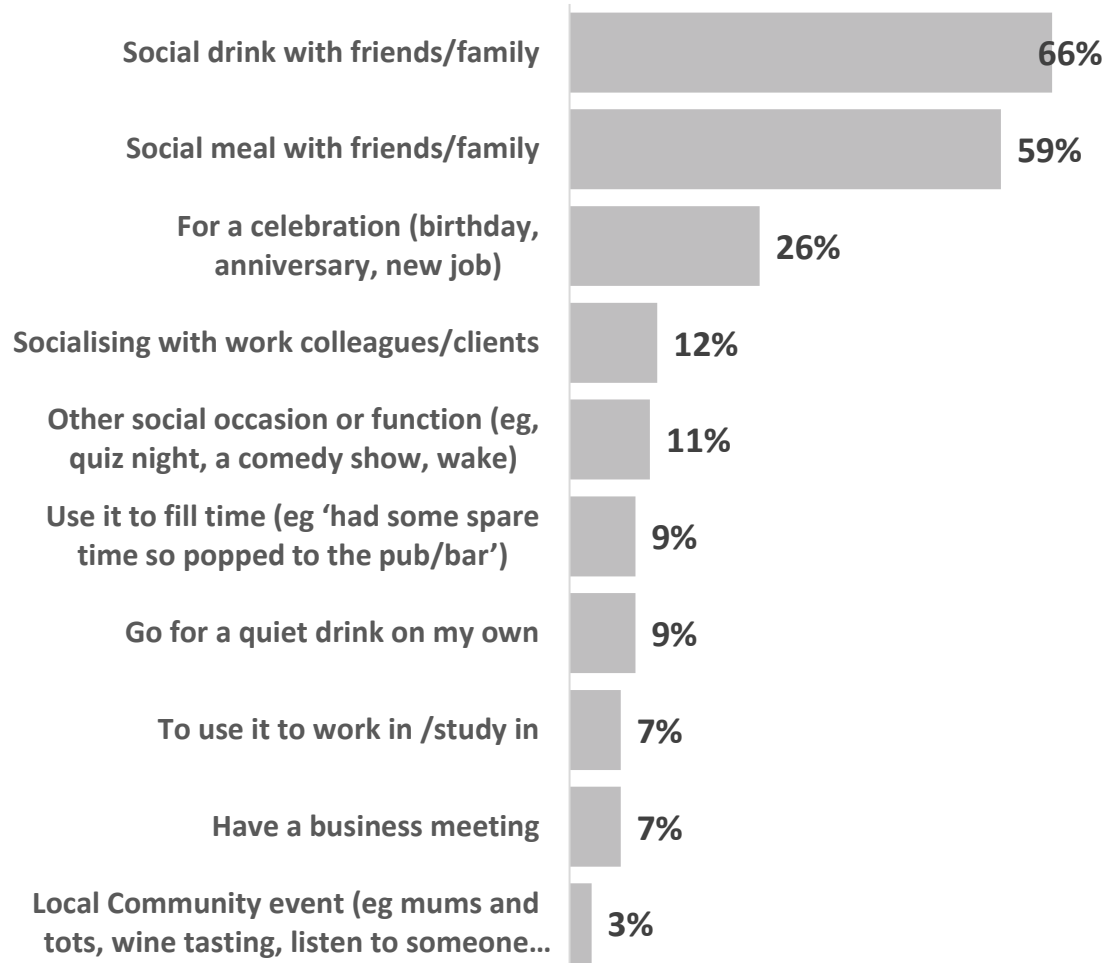
33%

**FREQUENCY**

= the % of UK adults who say they go out to a restaurant, pub or bar once a week or more (early October 2021 to early November 2021)

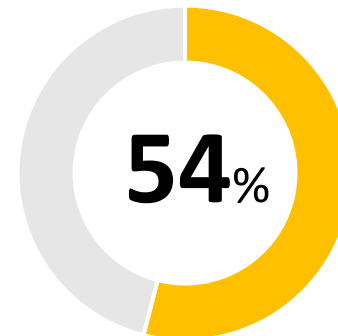
# Socialising with friends/family is the key reason for visiting hospitality

For what reasons did you visit the pub/bar/restaurant in the last month?



*Say they feel comfortable going to pubs, bars and restaurants (v 19% disagree)*

**'Making up for lost time' is *still* a key driver of consumer behaviour**

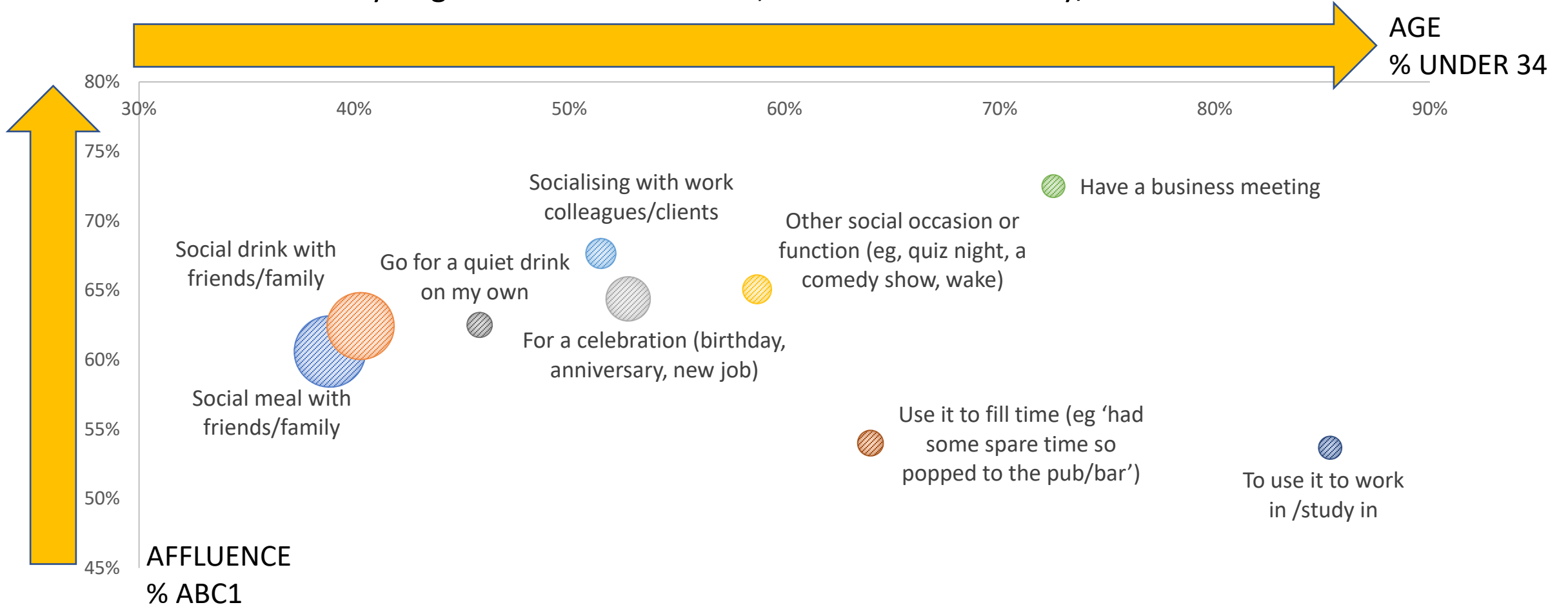


*Say they want to make up for lost time (v 19% disagree)*



## Market different occasions for different age groups

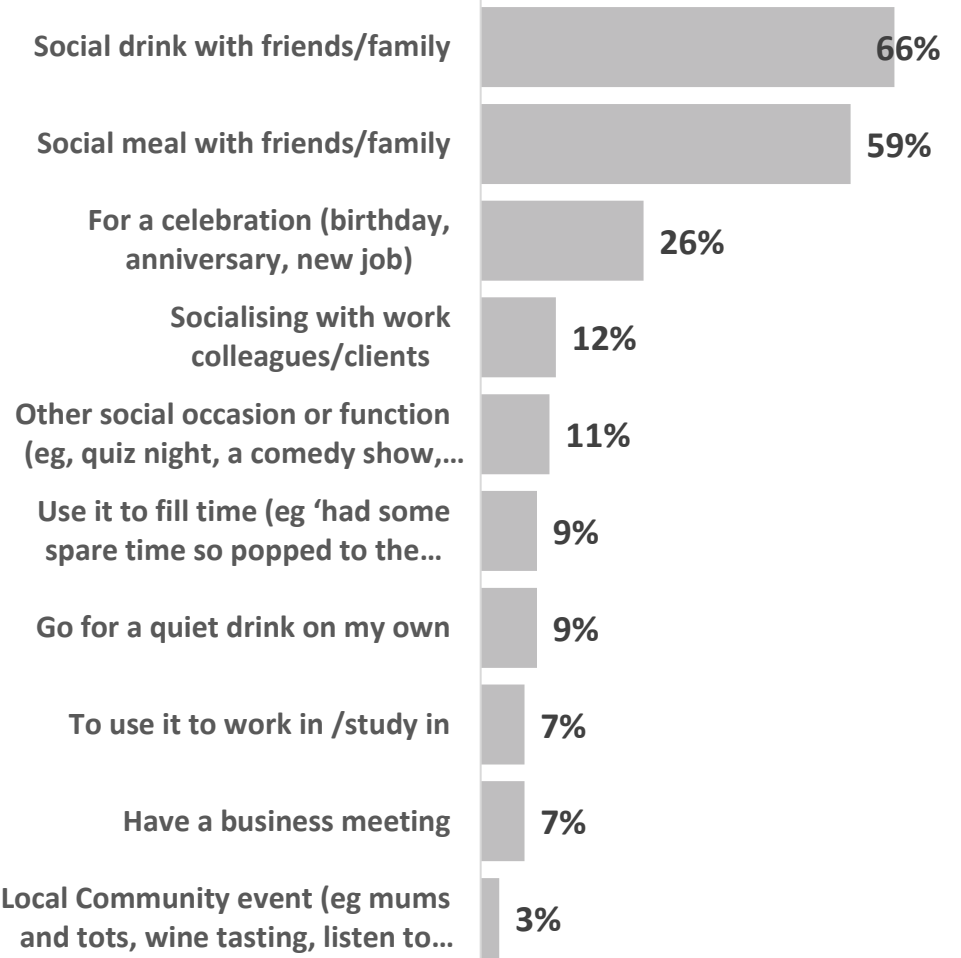
Older consumers are more likely to drink socially with friends or drink alone. Meanwhile younger consumers are more likely to go out for a celebration, to fill time or to study/work in a venue.



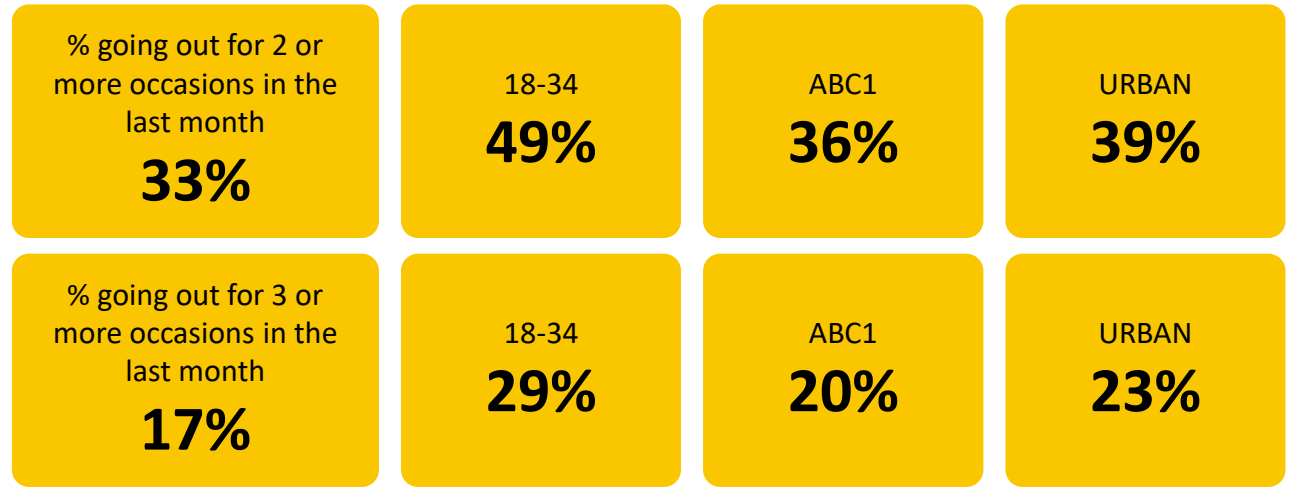
*Size of each bubble representatives the size of the occasion to hospitality outlets*

# It won't come as a surprise that younger, affluent and urban dwellers headed out for more occasions than 'the norm'

For what reasons did you visit the pub/bar/restaurant in the last month?



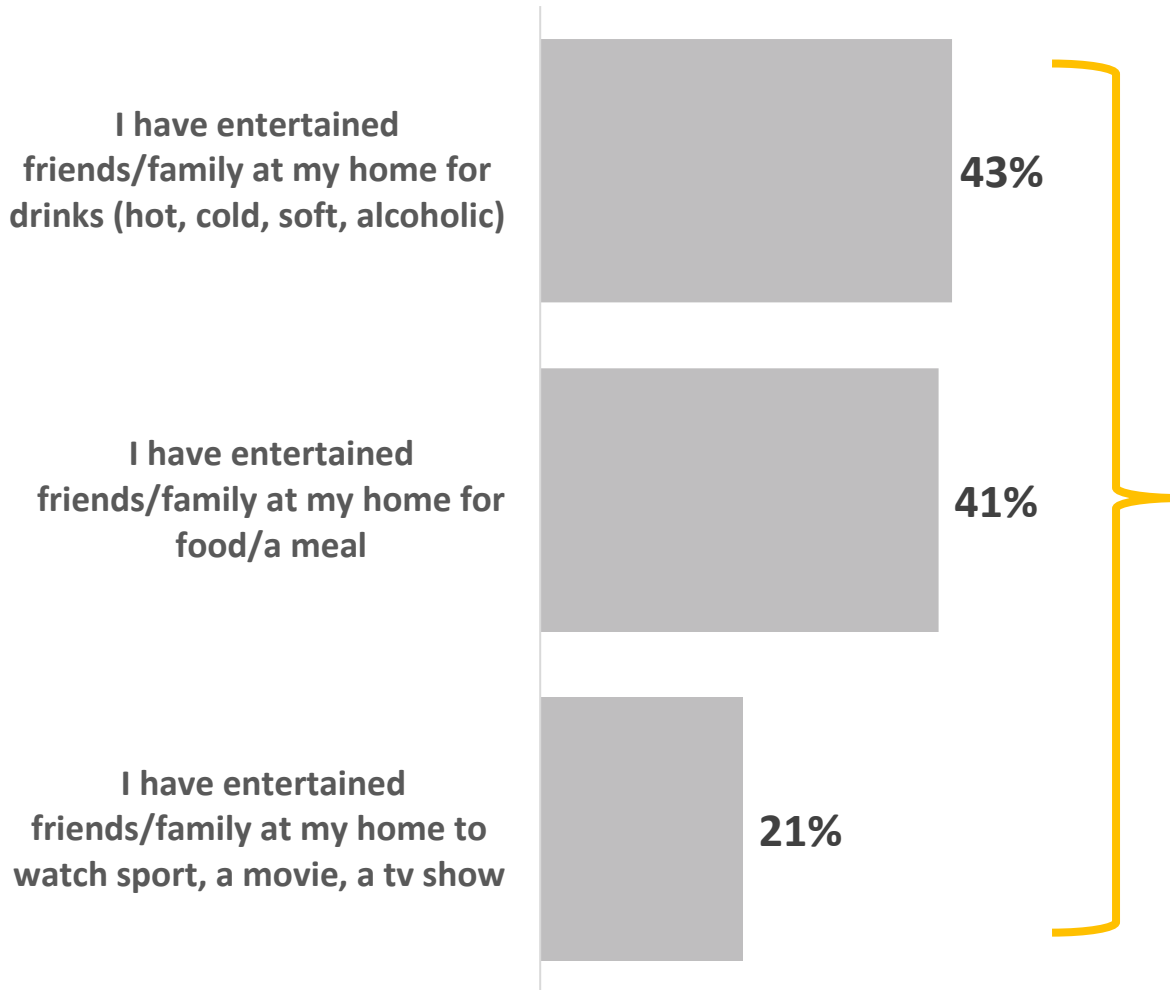
## How many different occasions (from the list on the left) did consumers go out to a pub/bar/restaurant for?





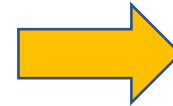
# But people have also entertained at home in large numbers.

In the last month...



**63%** of the population (= c.35 million people) said they have **entertained friends/family at their home** 'in the last month' for at least one of these reasons:

- Drinks
- Food/Meal
- Sport/Movie/TV show



**69%** of the population said that they have entertained friends at home for food, drinks/ sports or movie in the last month **AND/OR plan to do in the next month.**



### Key fact:

More people were entertaining at home ('in the previous month') than the percentage who met friends/family in a pub

# High future intent to entertain at home offers opportunity for retail and foodservice

I plan to entertain friends/family at my home in the next month (for drinks, a meal or both)

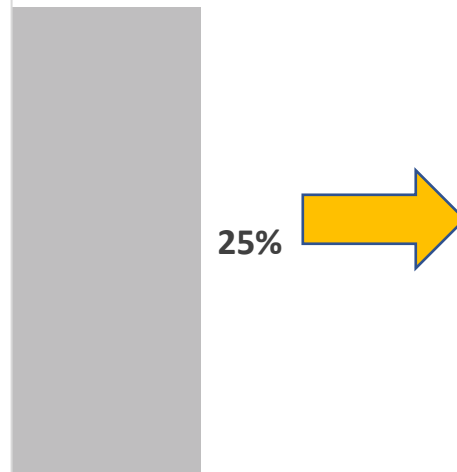


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I would consider ordering food from a restaurant to have at my home when I entertain friends/family



At home entertaining with food from restaurants appeals to all age groups:

- 26% GenZ
- 27% Millennials
- Gen X 27%
- Boomers 23%

At home entertaining provides opportunities for foodservice operators and retailers (online, physical, local).  
Who will win?

# Businesses who know their customers better/best are likely to win.

## *Consumers views on data collection*

**53%**

= the % of UK adults who say they are **happy for businesses to collect data about their spending habits if they personalise their offer better in return**

**48%**

= the % of UK adults who say **pubs** should collect and **use customer data to offer personalised products and promotions\***

**46%**

= the % of UK adults who say **pubs** should launch some kind of **membership/club/loyalty programme\***  
= the % of UK adults who say **convenience stores** should launch some kind of **membership/club/loyalty programme\***

**40%**

= the % of UK adults who say **convenience stores** should collect and **use customer data to offer personalised products and promotions\***

- ✔ 83% of the population say that they have visited a hospitality outlet in the last month – that’s more than say they have visited a supermarket (80%)
- ✔ So even though there is still some caution amongst the older generation, penetration has returned. Many old habits are returning
- ✔ What may not have returned is the same level of frequency and the same level of spend (per customer over a period of time, not just transaction spend) – as more consumers opt to entertain at home
- ✔ Outlets need to think about marketing new occasions through deals and promotions and driving loyalty with customers
- ✔ Knowing your customer better than your competitors (know their customers) will help the winners, win. Data plays a pivotal role in this.
- ✔ 53% of the population are happy for businesses to collect data. Those businesses that aren’t close to their customers will be the ones that lose out. You can be sure that if you aren’t targeting your customers with personalised offers, the outlet down down the road or Deliveroo will be. (This applies to B2B/RTM too, not just B2C)

Coming soon.....



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- ✓ Online consumer behaviour
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We also offer reporting solutions for wholesalers, operators and suppliers. Visit our easy-to-use reporting platforms to understand the sales impact of changing consumer behaviour through the supply chain.

# Get in touch!



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