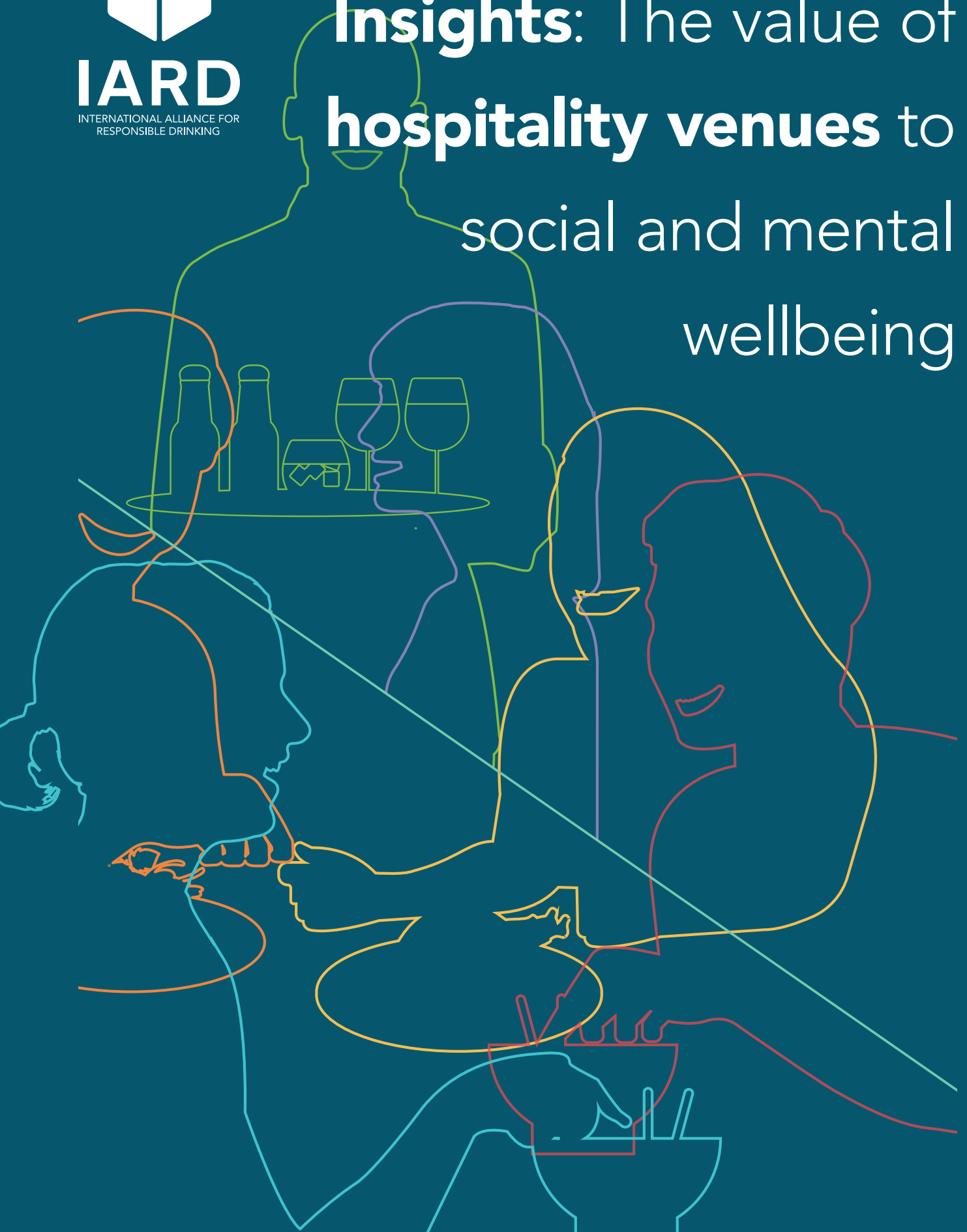




IARD
INTERNATIONAL ALLIANCE FOR
RESPONSIBLE DRINKING

Insights: The value of hospitality venues to social and mental wellbeing



This report describes the results of polling by YouGov and focus groups conducted by World Thinks between May and August 2021. These results are exploratory and the value of hospitality venues to social and mental wellbeing should be more fully explored as further research is conducted into the consequences of the pandemic.

Methodology

Focus groups and polling in countries across the world explored the views of hospitality venue patrons on the value of cafés, bars, and restaurants to social and mental wellbeing.

Focus groups

To help IARD explore the role of the hospitality sector in social and mental wellbeing, WorldThinks

conducted qualitative research in five cities and towns internationally with 74 patrons of hospitality venues, across 15 online sessions. Focus groups were held in the U.K., South Africa, Mexico, Spain, and the U.S. between May 19 and June 1, 2021.

Polling

Building on the themes that emerged in the focus groups, YouGov Plc conducted polling in the following 10 countries: U.K., U.S., Mexico, South Africa, Spain, Australia, France, Japan, Brazil, and Czech Republic. Fieldwork was undertaken between July 14 and August 23, 2021. All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 11,444 people aged 18 years and older. The survey was carried out online. The figures have been weighted and are representative of each country.

There were four or five participants per group, and each 90-minute session was conducted in the native language. Some comments have been edited for clarity.

Five groups were held in the U.K.:

- Three in London:
 - Men aged between 18 and 25 years
 - Women aged between 25 and 50 years
 - Women aged between 25 and 50 years
- Two in towns:
 - Men aged between 25 and 50 years
 - Women aged between 50 and 75 years

Two groups were held in Mexico City, Mexico:

- Men aged between 25 and 50 years
- Women aged between 25 and 50 years

Three groups were held in Cape Town, South Africa:

- Men aged between 25 and 50 years
- Women aged between 25 and 50 years
- Men aged between 40 and 60 years

Three groups were held in Barcelona, Spain:

- Women aged between 18 and 25 years
- Men aged between 25 and 50 years
- Women aged between 25 and 50 years

Two groups were held in New York City, U.S.:

- Men aged between 25 and 50 years
- Women aged between 25 and 50 years

About IARD

The International Alliance for Responsible Drinking (IARD) is a not-for-profit organization dedicated to addressing harmful drinking worldwide and promoting understanding of responsible drinking, among those who choose to drink. IARD is supported by its member companies from all sectors of the regulated alcohol industry – beer, wine, and spirits – in their common purpose of being part of the solution to reducing the harmful use of alcohol.

IARD's 13 member companies are commercially active in more than 100 countries. They contribute to sustainable growth and embrace a whole-of-society approach to improving health.

They are determined to make a real difference and acknowledge that the development and implementation of programs will be more effective as part of a multi-stakeholder approach, coordinated with the work of WHO and other UN agencies.

IARD members: AB InBev, Asahi, Bacardi, Beam Suntory, Brown-Forman, Carlsberg, Diageo, Heineken, Kirin, Moët Hennessy, Molson Coors, Pernod Ricard, William Grant & Sons

From IARD's President and CEO



Only a few years ago, meeting friends for a drink at a local bar or joining the family for a meal at a favorite restaurant was a normal part of life. So many of our best memories take place in hospitality venues and yet, until COVID-19, the role of this sector in bringing friends and family together and promoting good social wellbeing was not always appreciated.

This report reflects the insights of more than 11,000 adults across 10 countries on how they were affected by the closure of cafes, bars, and restaurants during the pandemic; it reveals how vital these spaces are to the social fabric and emotional wellbeing of communities.

During the COVID-19 pandemic, there has rightly been a huge focus on our physical health. However, as the WHO recognizes, health is much more than the absence of disease – it is the state of complete physical, mental, and social wellbeing.

As different geographies emerge from the pandemic at different speeds, it is important that we all work together to rebuild a safe and thriving café, bar, and restaurant culture that can flourish despite the uncertain times we continue to face.

IARD members are very different but share many common values. They take pride in the drinks they produce and want to help all members of the local community to enjoy these spaces, whether they choose to drink alcohol or not. To achieve this, IARD members are working alongside venues to support COVID-19 safety measures so that customers can confidently return and socialize in these spaces.

In addition, IARD members acknowledge their responsibilities, not just to the people who enjoy their brands but also to the communities they serve, by continuing to take action to support long-term declines in binge drinking, drink driving, and underage drinking.

Socializing with friends and family is central to our lives, and YouGov's polling confirms how much we have all missed it during the pandemic. With robust measures in place throughout the hospitality sector to reassure and protect customers, we look forward to reuniting and making new memories.

Henry Ashworth, President and CEO, IARD


Impact of hospitality sector closures on social and mental wellbeing

Many hospitality venues were closed during the COVID-19 pandemic, with restrictions varying across the world. Although the impact of this on jobs and the economy has been widely reported, this report explores the social and emotional impact that the closure of cafés, bars, and restaurants had on society for the first time.

Through a combination of focus groups conducted by WorldThinks and polling of over 11,000 adults across 10 countries by YouGov, this report explores the value of hospitality venues to social and mental wellbeing, and the elements that need to be in place to support the sector to rebuild and thrive.

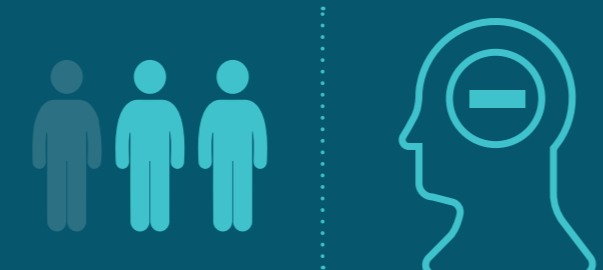
“ Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity. ”

Constitution of the World Health Organization (WHO)




45%


Nearly half of adults polled in 10 countries* agreed that their own social and mental wellbeing has been negatively affected by the closure of cafés, bars, and restaurants.



Two-thirds (66%) of adults polled agreed the social and mental wellbeing of the general population has been negatively impacted as a direct result of the closure of hospitality venues.



As a result of the COVID-19 pandemic, most (57%) people now have a better appreciation for the contribution the hospitality sector brings to their social and mental wellbeing.



71%

The majority (71%) of adults polled agreed that the measures introduced because of COVID-19 have improved their café, bar, and restaurant experience, with better cleanliness, ventilation, and hygiene being the most popular factors.



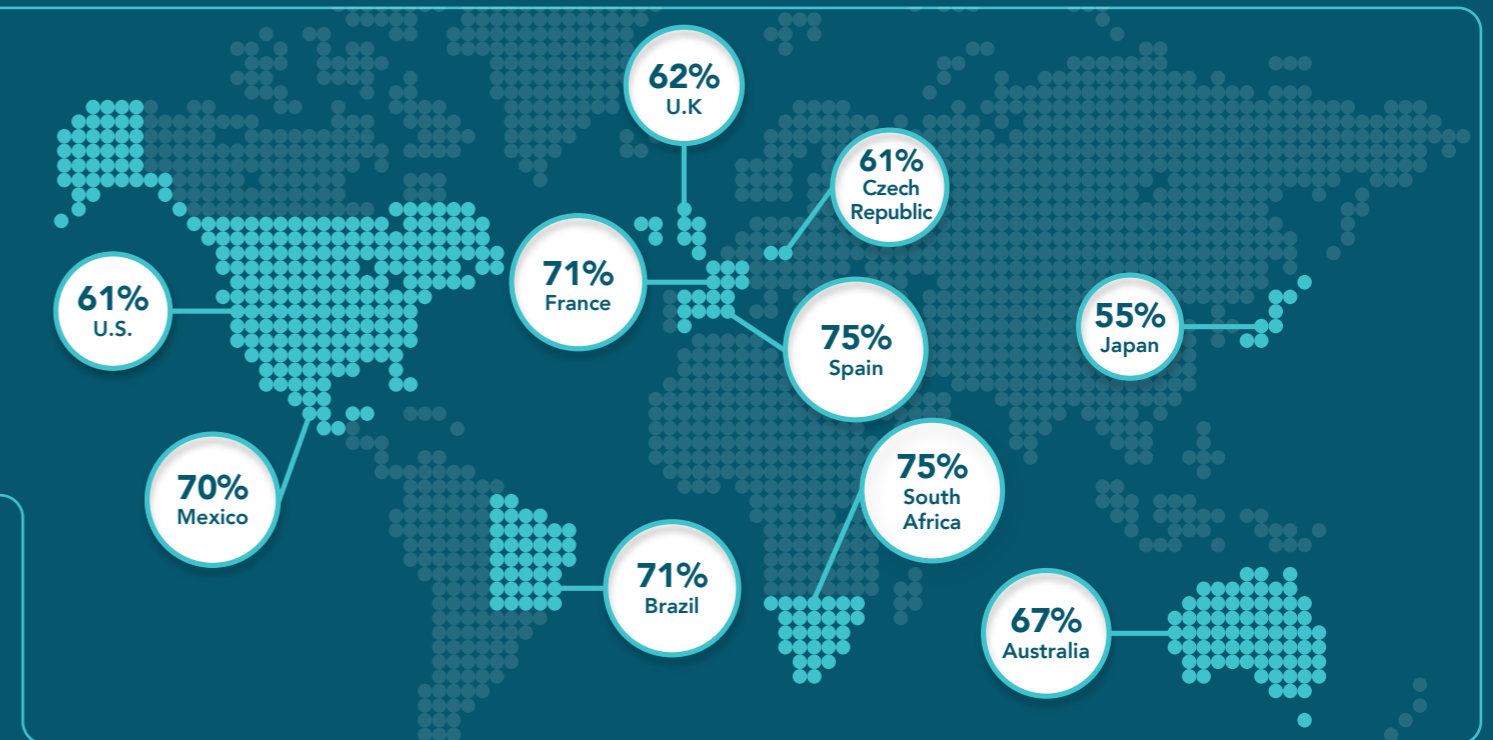
one-in-five

Over one-in-five (22%) said cafés, bars, and restaurants now have greater significance as places to avoid feelings of loneliness and 18% say they have increased in value as a place to meet new people.



45%

Where restrictions are lifting, 45% agreed that socializing with friends and family outside the home has had the biggest impact on their happiness.



According to YouGov survey results, the **TOP THREE** aspects of hospitality venues that have become more important since the pandemic are:

1. Socializing outside the home (44%)
2. Relaxing and enjoying the atmosphere outside of home or work (43%)
3. Enjoying food and drinks prepared by someone else (36%)

It is positive to see that “Drinking heavily with my friends” (6%) **RANKED LAST** in every country and among every age group. This figure is still concerning and emphasizes the importance of server training and management policies in supporting everyone to enjoy these venues responsibly, by preventing overserving and heavy drinking occasions.

IARD members have supported the reopening of the hospitality sector with measures that include:

- Providing training for bar managers in best practices in hygiene and responsible sale
- Supporting hospitality venues to offer their customers online bookings, as well as contactless menus, ordering, and payment
- Using messaging to encourage patrons to respect social distancing guidelines and be responsible when socializing

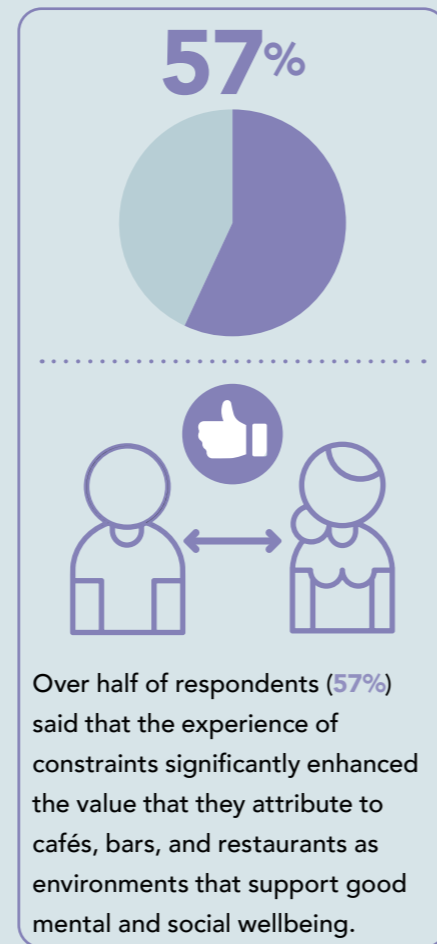
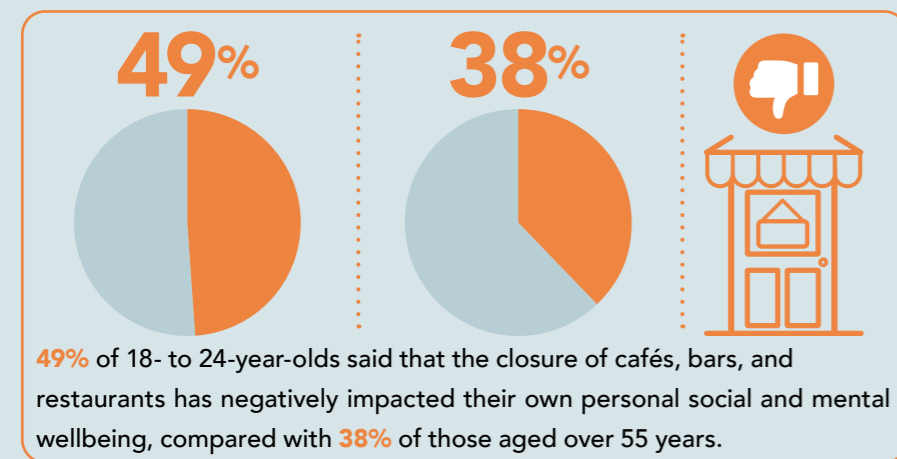
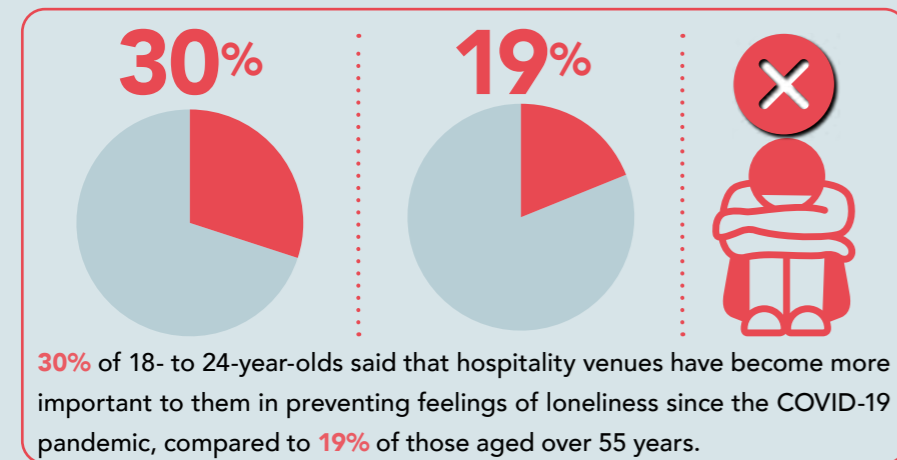
*U.K., U.S., Mexico, South Africa, Spain, Australia, France, Japan, Brazil, and Czech Republic.

How hospitality venues are appreciated and valued in supporting social and mental wellbeing

The focus group discussions showed that cafés, bars, and restaurants were missed during the pandemic, and reinforced their importance to social and mental wellbeing. For generations, hospitality venues have helped cultivate important social hubs at the heart of societies, supporting community cohesion by providing opportunities for people to connect with one another. Yet it is through COVID-19 closure and restrictions that their value has become more recognized.

Participants described cafés, bars, and restaurants as spaces to interact socially with others including friends and family as well as strangers. They also discussed how hospitality venues were environments where they could relax and de-stress. Some people said that going to cafés, bars, and restaurants was an event to look forward to and an opportunity to get dressed up.

For older people, getting outside of the home was particularly crucial as it gave structure to their day and supported their ability to access their social networks.



Cafés, bars, and restaurants offer a space to connect socially with friends and families, and to meet new people:

“ Going to a bar is definitely more energizing or exciting than having a friend over for a drink at my house... I think I’m just naturally more introverted, so the quarantine didn’t really help that. ”

Man, 25–50 years old, New York City, U.S.

Hospitality venues represent an opportunity to relax and de-stress:

“ It was just comfortable. You’d just feel welcomed when you would go to somewhere local, and you’d feel more relaxed... ”

Man, 18–25 years old (above LPA), London, U.K.

Hospitality venues give older people more social opportunities:

“ Socialising was my excuse to meet up with friends or old neighbours and you couldn’t do that [in lockdown]... I was just stuck with my husband. ”

Woman, 50–75 years old, town in the U.K.

Visits to cafés, bars, and restaurants are something to look forward to and a reason to treat yourself:

“ For me, it was an excuse to get out of the house and primp up a bit. Put make up on, wear that dress you never wear. ”

Woman, 18–25 years old (above LPA), Barcelona, Spain

Enabling customers to return to hospitality venues with confidence

The focus group discussions revealed that concerns around safety and social distancing are a major barrier to patrons returning to cafés, bars, and restaurants.

Key areas for anxiety include fears about increased social contact, which was amplified in areas where the virus was less under control and vaccination roll-out slower at the time of fieldwork.

The focus groups discussions suggested a clear relationship between the amount of safety measures in place, and the level of pleasure gained from returning to hospitality venues. Anxiety around hygiene safety can deter patrons from returning to cafés, bars, and restaurants or mean their experience in these venues is not enjoyable, meaning they are unlikely to return in the near future.

Customers reported feeling unsafe and anxious in places with poor safety compliance, with some choosing to leave or not return until they feel safe to do so.

In order for hospitality venues to offer maximum social and mental wellbeing benefits, the findings from the focus groups suggest that it's crucial that they provide consistently hygienic environments.

A new standard of service has been set in this time, which contributes to the positive social experience; the focus group findings suggest these standards should also be retained.

An overwhelming majority (71%) of adults polled by YouGov agreed that measures introduced because of the COVID-19 pandemic had changed the environment of hospitality venues for the better, compared with just 8% who felt it had been negatively impacted. Support was the highest in Spain (82%) and lowest in the U.S. and Japan (both 61%).

Support for safety measures was highest among older age groups, at almost three-quarters (74%) of those

polled aged 45 years or over. Two-thirds (64%) of 18- to 24-year-olds agreed that safety measures have had a positive impact.

When asked what recent changes the participants would like retained after restrictions are lifted, the most popular measure was improved cleanliness (58%), followed by better indoor ventilation (52%), which was the most important factor among older age groups (at 59% for those aged 55 years and above). Improved outdoor facilities were important for 41%, and digital ordering and payment systems for 36%. Just over a quarter (28%) wanted to keep table service where it was not an option previously.

Anxiety can deter patrons from returning to cafés, bars, and restaurants, or can make their experience of these venues unenjoyable, meaning they are unlikely to return soon:

“ I attempted to go to a café but it was so busy. I would not have felt comfortable, the tables were too close. I know they're trying to get businesses up and running but it was just far too close for comfort... I didn't feel comfortable sitting in there. ”

Woman, 50–75 years old, town in U.K.

“ I'm vaccinated but my kids aren't, and we don't eat indoors... I've gotten so used to having space and when people are just so close to me I don't like it. I think it's going to be more of a gradual return than just like 'flip the switch'. ”

Man, 25–50 years old, New York City, U.S.

An improved experience, where patrons feel safe, is key to fully realizing the potential social and mental wellbeing benefits of hospitality venues*



*Source: WorldThinks

Anxiety tends to be higher in countries where the virus is less controlled, or the vaccination program is slower, or both:

“ Well, truthfully, I haven't been out much. I have been out with friends, but I realized I wasn't comfortable with so many people. ”

Woman, 25–50 years old, Mexico City, Mexico

IARD member actions to support safe reopening of hospitality venues

IARD members have been supporting best hygiene practices, health initiatives, and technological solutions to assist the safe reopening of cafés, bars, and restaurants

Every member of IARD has helped fight COVID-19 and the effects of the pandemic. A selection of their initiatives follows:



Support for safe reopening

- In India, **AB InBev** gave hospitality venues safety equipment, including pedal-operated sanitizer dispensers, counter shields, sneeze guards, and queue managers to help them resume operations safely. Additionally, Budweiser placed COVID-19 awareness posters in outlets to reinforce sanitation practices. And its U.K. *Save Pub Life* initiative also included reopening and regulation guides for bar managers, as well as posters and other assets to remind patrons of safe distances and important hygiene practices.
- **Diageo** provided hand sanitizer, personal protection equipment items, digital thermometers, and floor markers to 39,000 venues to support their safe opening. And its *Bar Academy* compiled resources to help bar managers stay up to date with the latest hygiene practices and with top tips for a safe reopening.
- In South Africa, the National Liquor Traders launched a COVID-19 compliance program for hospitality venues with **Heineken SA** in the Eastern Cape region, educating alcohol vendors on compliance measures and how to champion these to their patrons.
- **Kirin's** subsidiary **Lion** created a pub campaign to encourage Australians to respect the local distancing measures and to participate in the government's COVID-19 contact tracing app.
- **Molson Coors** launched its *Made Local* campaign in the U.K., with celebrities and influencers demonstrating how pubs can be safe spaces, and encouraging patrons to return to their local pubs, which are "the cornerstone of the community ... so much more than just a place to go for a drink".
- **Pernod Ricard** helped develop a training course covering all aspects of sustainability and responsibility for hospitality venues around the world as they emerged from shutdowns. The course is available in seven languages on the United Nations Institute for Training & Research's (UNITAR) EdApp platform. And Pernod Ricard built on its *Responsible Party* partnership with the Erasmus Student Network to work with HOTREC, the umbrella association of hotels, restaurants, pubs, and cafés across Europe, to help venues reopen safely and to help combat binge drinking among young adults.



Supporting vaccines

- **AB InBev** partnered with the United States' White House to launch a vaccination activation program, using the brewer's unique capabilities and connection to consumers to encourage Americans to get vaccinated by offering people aged 21 years and over a free drink – including beer, seltzer, and non-alcohol options – once the U.S. reaches the goal of 70% of adults being partially vaccinated.
- Brewers Association of Japan: **Asahi, Kirin, Suntory, Sapporo, and Orion Breweries** opened COVID-19 vaccination centers in Tokyo and Osaka, to inoculate 47,000 staff from bars, restaurants, and liquor stores.
- **Carlsberg** in Malaysia funded vaccinations for 600 employees and third-party vendors, 99% of whom either had appointments for vaccinations or have received their first injection as of July 2021.
- **Diageo** partnered with the National Restaurant Association of India to vaccinate 20,000 hospitality sector staff at 1,500 locations across India.
- **Heineken** was the first major company in Mexico to collaborate with the federal government's vaccination drive by vaccinating its employees, their families, and members of the public at its headquarters in Monterrey. Meanwhile in Cambodia, Heineken vaccinated 80% of its workforce and contractors, in partnership with the Ministry of Labour & Vocational Training.
- **Pernod Ricard** partnered with the National Restaurant Association of India to vaccinate more than 20,000 hospitality sector workers across major regions and cities, in addition to funding vaccinations for its own employees and their families.



Helping hospitality sector workers

- **Beam Suntory** and **Brown-Forman** have supported initiatives that help hospitality sector workers during the pandemic, including the Restaurant Workers' Community Foundation's (RWCF) COVID-19 Crisis Relief Fund and the United States Bartenders' Guild's (USBG) emergency fund.
- **William Grant & Sons** launched the #STANDFAST global campaign to support the hospitality sector community. This focuses on generating and sustaining funds for hospitality sector staff as the industry rebuilds and includes support to help bartenders get back to work.



Technological solutions for contactless ordering

- **AB InBev** partnered with e-commerce platforms to allow contactless ordering and payment, and enable click-and-collect services across many countries.
- **Carlsberg's All Eat One** (previously *Love My Local*) campaign supports pubs, bars, and restaurants in reopening safely and successfully by enabling customers to book online, order from the table and pay with no contact.

The role hospitality venues can play in promoting social and mental wellbeing beyond COVID-19

“ Effectively, to keep your mental state functioning well, you need to socialize with other people and these hospitality areas allow you to see other people after being in lockdown, especially for those people who live alone. ”

Man, 40–60 years old, Cape Town, South Africa

Focus group participants talked about the reopening of venues after lockdowns being essential in both providing a space to connect with others and for promoting social and mental wellbeing.

They also discussed how going back to cafés, bars, and restaurants helped them feel that life was finally returning to normal. They felt that being able to reconnect with the wider community and having opportunities to talk to people they would not otherwise socialize with enhanced their social wellbeing and helped avoid feelings of loneliness.

Their main motivation for visiting cafés, bars, and restaurants is to socialize and interact with others.

Based on insights from the polling and focus groups, communities want to enjoy a **safe and sociable atmosphere**; the greatest contribution that the hospitality sector can make to promoting

positive social and mental wellbeing is by providing spaces for people to reconnect with others around them. Many venues have been following **stringent hygiene and distancing measures** since reopening, and IARD members will continue to support appropriate measures and responsible service with our marketing and server training programs as other hospitality venues reopen around the world. Providing consistently high-quality service will maximize the value that the hospitality sector can bring in supporting social and mental wellbeing.

By working with a diverse range of stakeholders across the world in the public and private sectors, NGOs, and civil society, there is a huge contribution that can be made to ensure social and mental wellbeing is at the heart of the route map to recovery across the globe.

“ In this city, there is an overwhelming rhythm at work and the level of stress can be very high. Going out to these places, where you are not only going to eat, but also to listen to some music or football matches distracts you and lets you have some fun and you can feel the stress lessen. ”

Man, 25–50 years old, Mexico City, Mexico

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