



# Insights for Re-Opening

Tuesday 16th March



# Agenda

- Context:
  - Consumer confidence is building for On Trade Re-Opening
- State of the Nation:
  - What's happened to the Beer & Cider Category?
- Key Focus Areas for Re-Opening:
  - The importance of Safety, Communication & Customer Experience
- Countdown to Re-opening:
  - 4 Week Plan
  - 7 Day Plan

# Who Are Molson Coors

## WHO WE ARE

OVER  
**300**  
SUPPORT & TECHNICAL  
STAFF SERVICE

**3<sup>RD</sup> LARGEST**  
BREWER IN THE WORLD

**5%**  
OF THE WORLD'S SOMMERLIERS  
WORK FOR MOLSON COORS  
IN THE UK & IRELAND

A NETWORK OF  
**FIVE**  
BREWERIES  
AND A  
**CIDER**  
PRESS



GB'S  
**No.1**  
LAGER BRAND\*



GB'S  
**No.1**  
ESTEEM 4%  
BRAND\*



GB'S  
**No.1**  
CASK ALE  
BRAND\*



GB'S  
**No.1**  
SUPER PREMIUM  
CIDER\*



**No.1**  
BREWER  
24.2% VOLUME SHARE\*  
&  
**No.2**  
CIDER SUPPLIER\*

Source: \*CGA OPM MAT data to 13/07/2019.



# Meet The Team



Phil Langley  
National Account  
Manager  
Regional Brewers



Maria Probert  
National Account  
Executive  
Regional Brewers



Georgina Green  
Category Manager  
Route To Market

# Consumer Confidence



PHENOMENAL DATA. EXPERT INSIGHT.

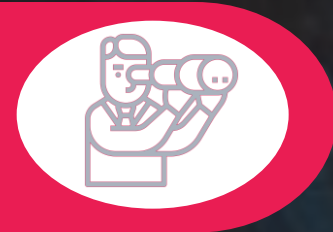


# 59%

of GB consumers agree that they  
*“can’t wait to go out again”*

*26% of GB consumers  
strongly agree with this statement  
Only 18% disagree*



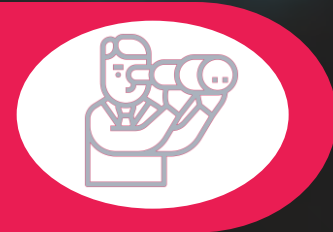


**Given the pent-up demand for out of home eating and drinking out experiences, over half the population predict they will revisit reopened venues in the first few weeks**

# 51%

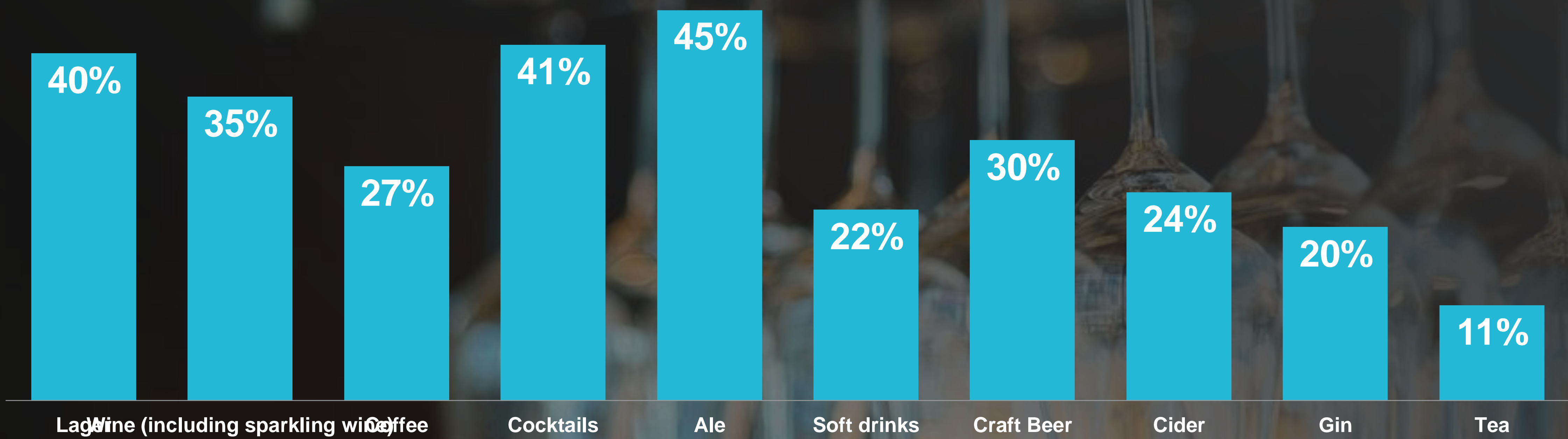
**Of GB stated they would return to a venue within the first few weeks of it reopening**





# Serves that are difficult to recreate at home, such as cocktails and ale, have been missed the most by consumers who typically drink them out

**Proportion of typical category drinkers who are most looking forward to drinking this category out again:**  
(e.g. 40% of typical OOH lager consumers are most looking forward to drinking lager out again)







**It's essential venues continue to demonstrate that they are COVID-secure, with 34% of consumers feeling comfortable to visit these venues without a vaccine**

**34%**

**Of GB already feel comfortable visiting COVID-secure venues without a vaccine**

**45% amongst 18-34 year olds**  
**35% amongst 35-54 year olds**  
**23% amongst 55+ year olds**



# State of the Nation

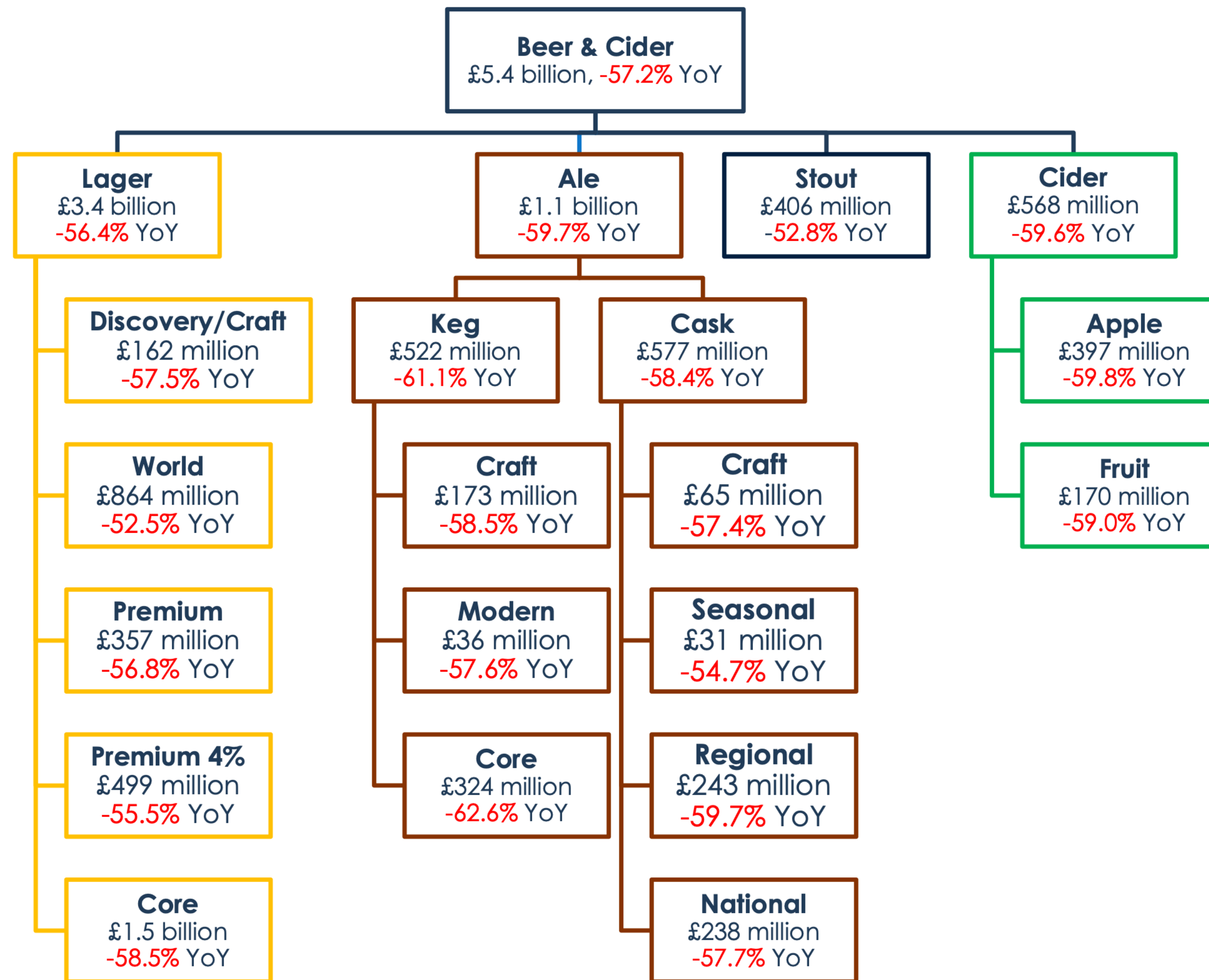


# GB On Trade Draught Beer & Cider 2020 Snapshot

Draught Beer & Cider was worth £5.4 billion in the On Trade in 2020, down 57.2% year on year. This is a decline of £7.3 billion retail sales value vs. 2019.

Getting your Lager range right is critical – it's the largest sector of the Draught Beer & Cider category with a 62% share. Its category share increased in 2020 by +1.1% pts to 61.9%.

A winning Lager range will have the right mix of brands from across the different sectors – Core delivers nearly half of all sales, whilst Premium 4% & World are the best performing sectors which offer a premiumisation opportunity.



Ale is the 2<sup>nd</sup> biggest sector of the Draught Beer & Cider category, split relatively evenly between Keg and Cask formats. Within Keg, it's the newer Modern Keg & Craft Keg sectors that have continued to be the best performers, whilst the Cask category as a whole has been relatively robust following a challenging few years.

Stout is a mainstay on the bar and has grown in importance during 2020. Its category share has increased by 0.7% pts to 7.5%.

Cider is the 3<sup>rd</sup> biggest sector of the Draught Beer & Cider category, delivering 10% of sales. Its share has dropped by 0.6% pts in 2020 to 10.4%. Apple Cider continues to be a mainstay on the bar and delivers 70% of all Draught Cider sales.

Source: CGA data for Total GB On Trade, 52 weeks ending 26/12/20 – Draught Beer & Cider Sales £ and Year on Year % Growth/Decline.



# Following "Lockdown 1" we saw Beer steal significant value share from Spirits & Soft Drinks as consumers reached for Draught formats that cannot be replicated at home



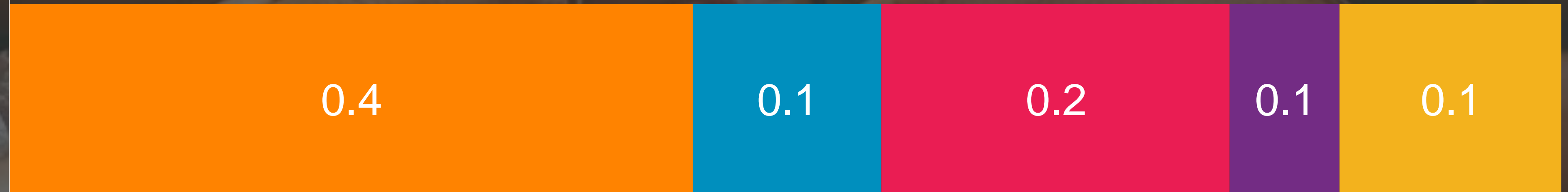
PHENOMENAL DATA. EXPERT INSIGHT.

Share of Total Drinks Value – QTR to 03/10/2020

QTR to  
05/10/19



QTR to  
03/10/20

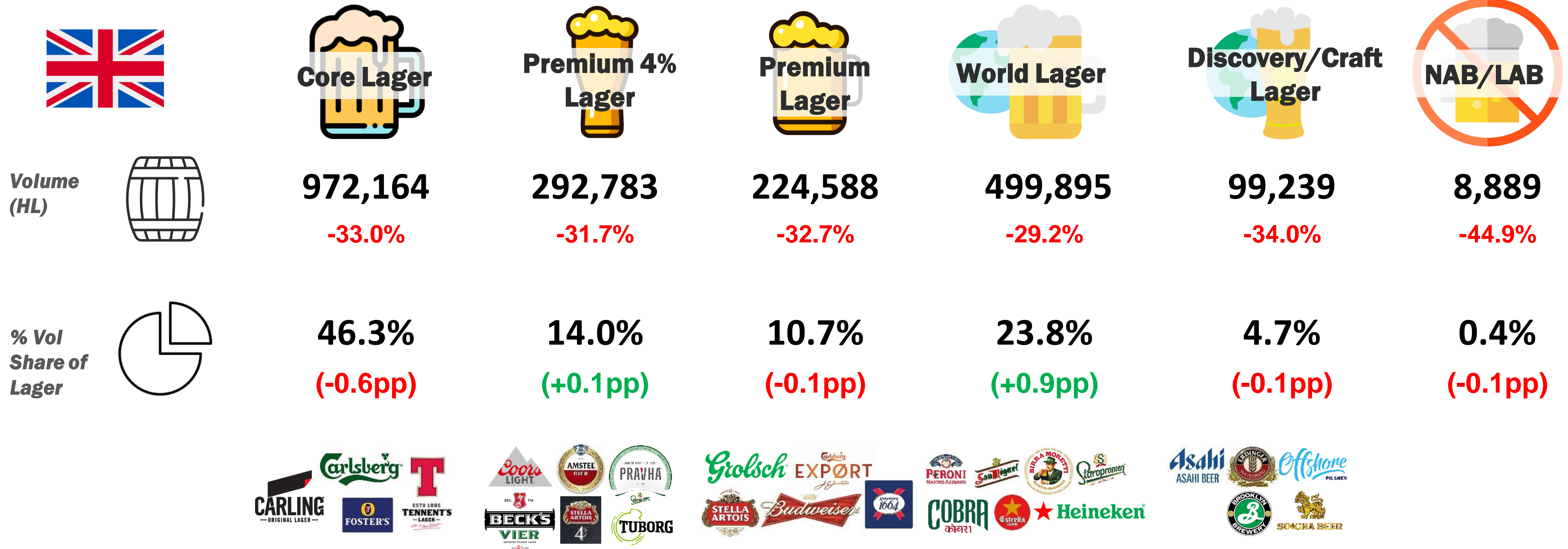




**Core Lager remained the most valuable sub category, however it did lose share as drinkers trade up into more premium categories. World lager was the biggest winner, with Premium 4% also gaining share.**



P10 2020



# Key Focus Areas For Re-Opening



# Key Focus Areas for Re-Opening:

## SAFETY FIRST



Educate your guests regarding what to expect at your outlet(s) and reassure them that their safety and wellbeing is being taken care of. Safety continues to be a key concern for consumers, so you cannot do too much to offer reassurance to existing and potential guests.

## DRIVING FOOTFALL



Give people reasons to visit and adapt your offer to unlock new occasions. Reasons to visit could include championing existing events and/or running promotions to encourage people to visit at quieter times.

## MAXIMISING SPEND



Think creatively to ensure that opportunities to allow guests to spend are maximised. Examples could include having a takeaway offer, optimising menu features, running offers which encourage trade up and/or drinks & food matching etc.

## MEMORABLE EXPERIENCES



Making the best of the new rules & restrictions and delivering exceptional service and creating a memorable experience – we've seen some great examples of this, including creative use of outdoor spaces and PPE for staff.

## ADAPTING YOUR OFFER



Adjusting to people's different working patterns and challenges around consumer confidence can enable you to unlock new opportunities – examples include opening earlier in the day to compensate for lost late-night trade and creating working spaces for those wanting a change of scenery.

## RANGING



With trade levels likely to be much lower than usual due to restrictions ranges should reflect that. Ranging appropriately from the start will deliver better quality for drinkers and reduced wastage leading to better margins for you. Customers anticipate smaller ranges given the complexity surrounding re-opening



# Safety First

Educate your guests regarding what to expect at your outlet(s) and reassure them that their safety and wellbeing is being taken care of. Safety continues to be a key concern for consumers...

## EDUCATE

**The Anvil Shifnal**  
1 d · 🌐

Just a polite reminder that you need to wear a face covering when entering and moving around the pub. Once seated it can be removed.....

We won't be able to keep supplying them to our customers so please come prepared as we don't want to have to turn you away

Also a big thank you to our customers over the past two days who have complied with the new laws and made our job a lot easier...

### REMINDER OF LOCAL GUIDELINES



### PLEASE WEAR MASKS



**Hungry Horse (Cuckoo Oak, Telford)**  
2 d · 🌐

We're asking our customers to download the NHS Covid-19 app to help with contact tracing, it's the simplest way for us all to help protect those we love. Download the app using the links below

#NHSCovid19app  
Android - <https://rb.gy/odtpyr>  
Apple - <https://rb.gy/ddxwfp>

**The Birch Tree**  
4 d · 🌐

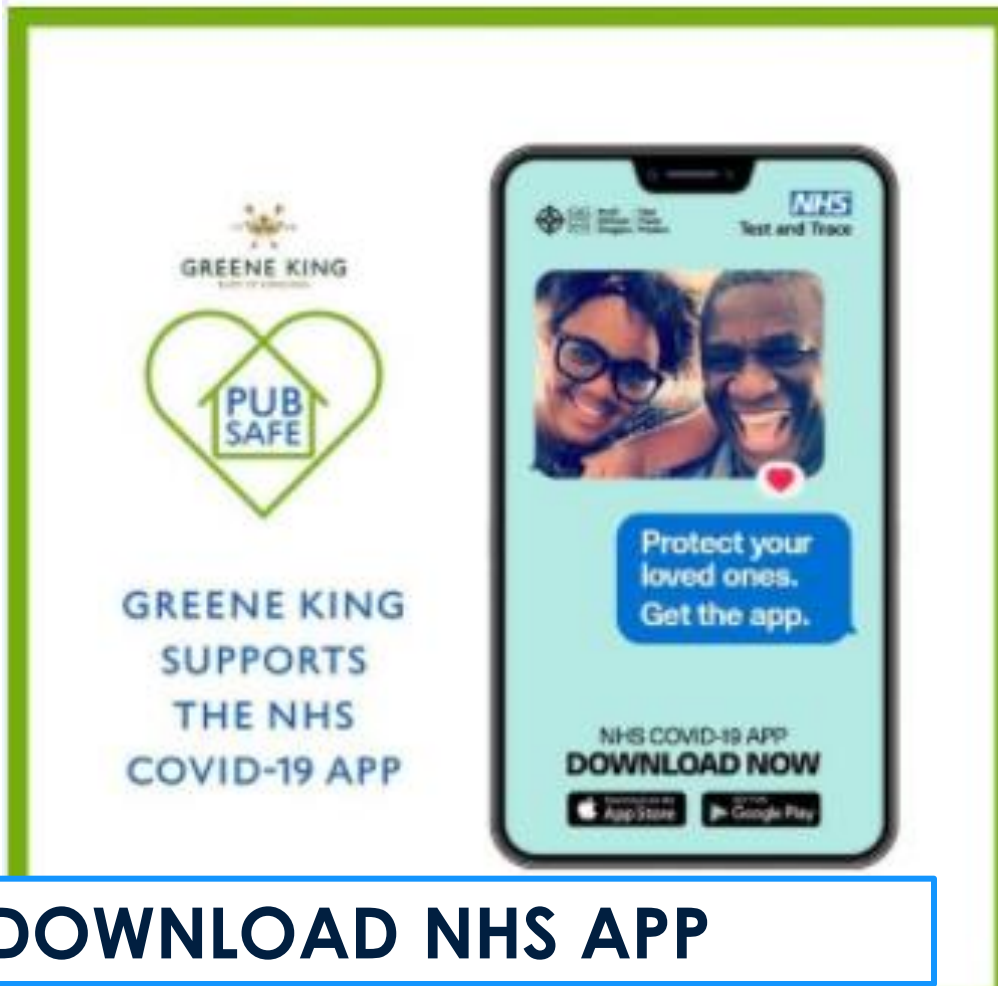
Hi Everyone we have now set up the new NHS Covid 19 App to check in with us. There is a link below on how to use the NHS track and trace app and information surrounding its privacy. If you have the technology then this is what you should please use to check in with us from now on. However, If you don't have the capabilities then you are still required to sign in with your details with us with our usual good old fashioned pen and paper when you visit us.

We look forward to seeing you soon  
Jamie, Sara & The Team

NHS COVID-19 app - download it today  
[YOUTUBE.COM](https://www.youtube.com/watch?v=...)  
NHS COVID-19 app - download it today  
Find out more: <https://covid19.nhs.uk/>



### DOWNLOAD NHS APP



## REASSURE

**The Oast House**  
4 d · 🌐

Throwback pic 📷

🔴 COVID -19 UPDATE 🔴

As of today, there will be a slight adjustment to our opening hours. We will be closing our doors at 10pm everyday going forwards.

Other than this, nothing much else has changed!  
We are still carrying out the following steps to ensure the safest environment for you to visit:

- Track & Trace 🟢
- Socially distanced seating 🗨️
- PPE for all staff 🧤
- Hand Sanitiser at all check points 🟢

Stay safe and see you soon ❤️

### DEEP CLEANING



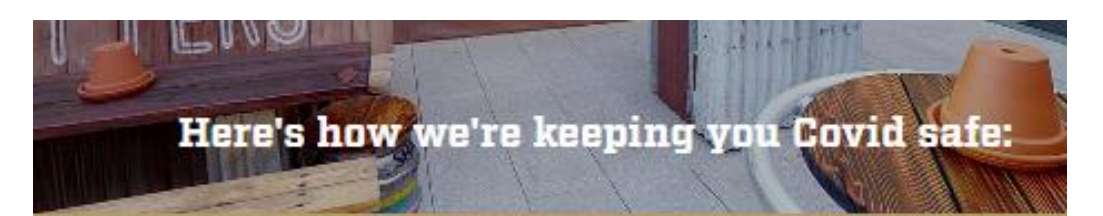
### ONLINE COMMUNICATIONS

**OUR COMPANY**

- ▶ OUR HISTORY
- ▶ UNDERSTANDING OUR BUSINESS
- ▶ OUR RESPONSE TO COVID-19

**OUR RESPONSE TO COVID-19**

Pubs across the UK closed their doors for more than 100 days in 2020, from 20 March until 4 July and overnight our business came to almost a complete standstill with the vast majority of our teams furloughed.





# Driving Footfall

Give people reasons to visit and adapt your offer to unlock new occasions...

## REASONS TO VISIT

The Anvil Shifnal  
2 d · 🌐

CASK ALE WEEK!  
As it is Cask ale week we really should showcase our ales!!!  
We probably don't share these enough as they are always on the bar yet our best sellers!!!!... See more

**CASK ALE WEEK**  
24 SEP - 4 OCT 2020

**SUPPORTING OCCASIONS – CASK ALE WEEK**

The Crown Wergs is at The Crown Wergs.  
2 d · Tetterhall · 🌐

🍷 FIZZ FRIDAY! 🍷

Friday means one thing... get down to The Crown and enjoy 20% off selected champagne and Prosecco! 🍷🍷

We are open from 12pm serving all your favourites, so why not come along and have a cocktail (or 2)? 🍹🍹

We would also like to remind guests to continue to be respectful of our new guidelines including the wearing of face masks when not at your table, and the closure at 10pm.

**DEALS – FIZZ FRIDAY 20% OFF CHAMPAGNE & PROSECCO**

**AFTER WORK DRINKS OFFERS**

Vinegar Yard  
6 d · 🌐

Starting from Monday we're welcoming you back to work with our 2-for-1 on selected cocktails & 50% off selected draught beer, available Monday-Wednesday, 5pm-7pm. 🍹🍷

You can drop by the Yard, but as always we recommend booking a table.  
[www.vinegaryard.london](http://www.vinegaryard.london)

Opening hours: Monday-Thursday: 17:00-22:00  
Friday: 15:00-00:00  
Saturday-Sunday: 11:00-00:00

## NEW OCCASIONS

Stamford Arms Groby updated their cover photo.  
29 August at 16:54 · 🌐

**EXTENDED EOTHO DEALS**

Solita Restaurants  
@SolitaNQ

We're starting the week with 25% off food & non-alcoholic drinks! 🍔🍷

|| Up to £5 per person, every Monday, Tuesday & Wednesday.

📍 #Offer available at Didsbury & NQ → [solita.co.uk](http://solita.co.uk)

**25% OFF ALL FOOD & NON-ALCOHOLIC DRINKS**

**REDWOOD**  
SPORTS PUB AND KITCHEN

LIVE SPORTS MENUS BOOK CONTACT

**NEW HAPPY HOUR/ EARLY EVENING OFFERS**

**WHEN YOU BOOK TO DINE\* WITH A START TIME BETWEEN 4PM - 6.30PM MONDAY - FRIDAY, FROM 24TH SEPTEMBER.**

[VIEW MENUS](#)



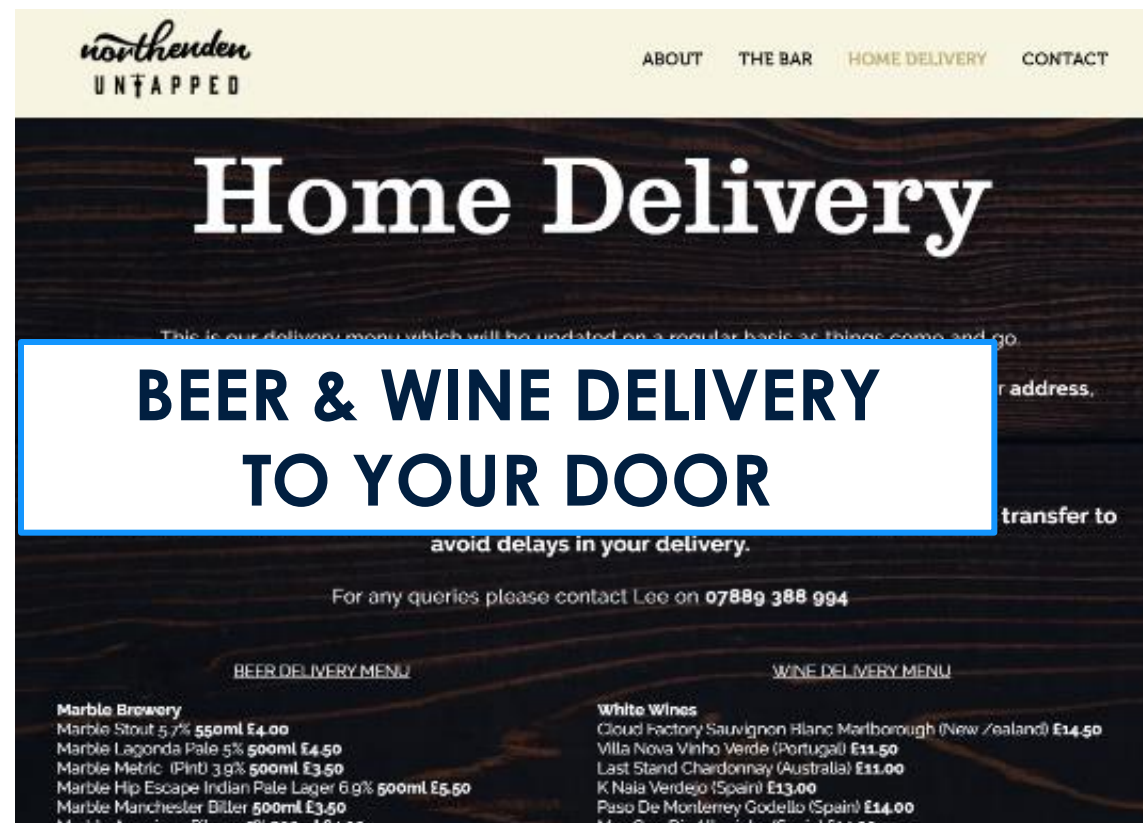
# Maximising Spend

Think creatively to ensure that opportunities to allow guests to spend are maximised. Examples could include having a takeaway offer, optimising menu features, offers to drive spend, food matching etc.

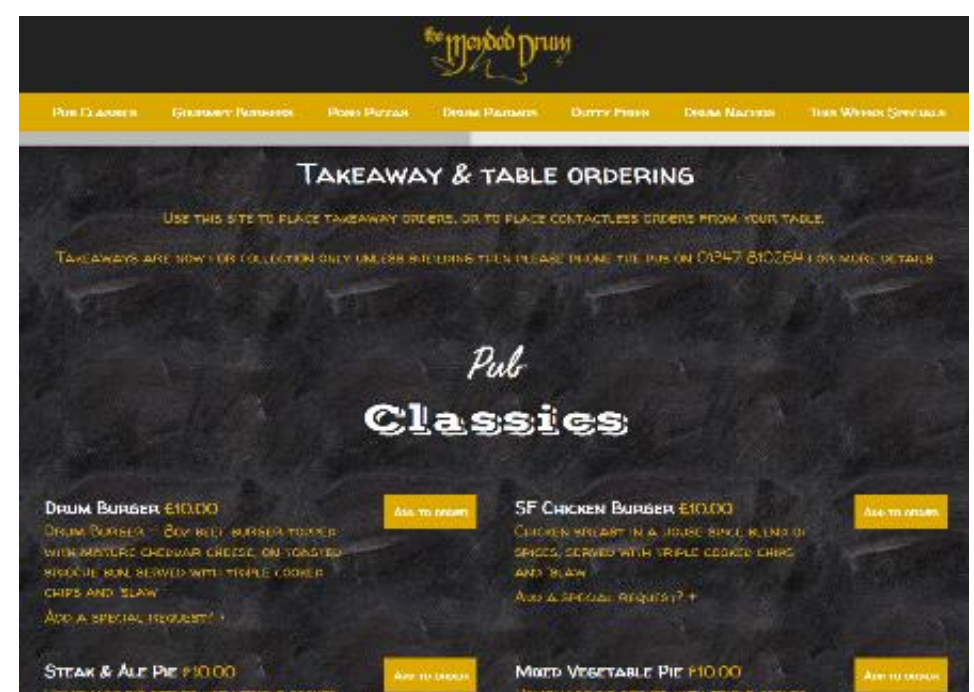
## TAKEAWAY OFFER



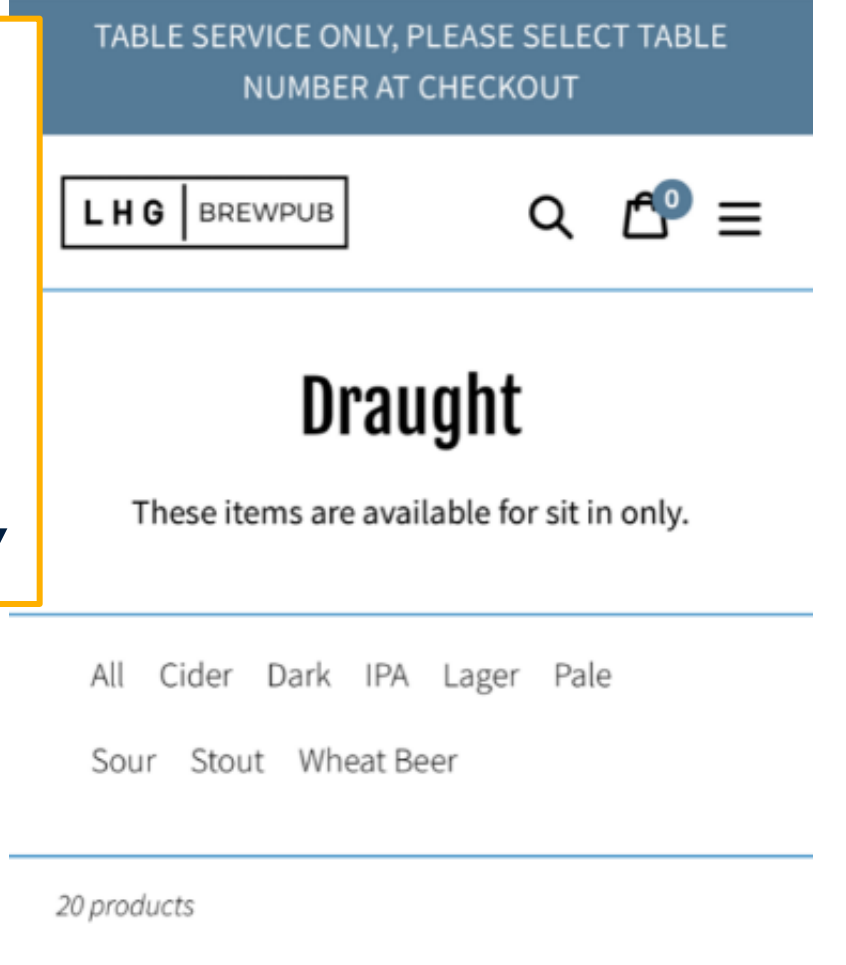
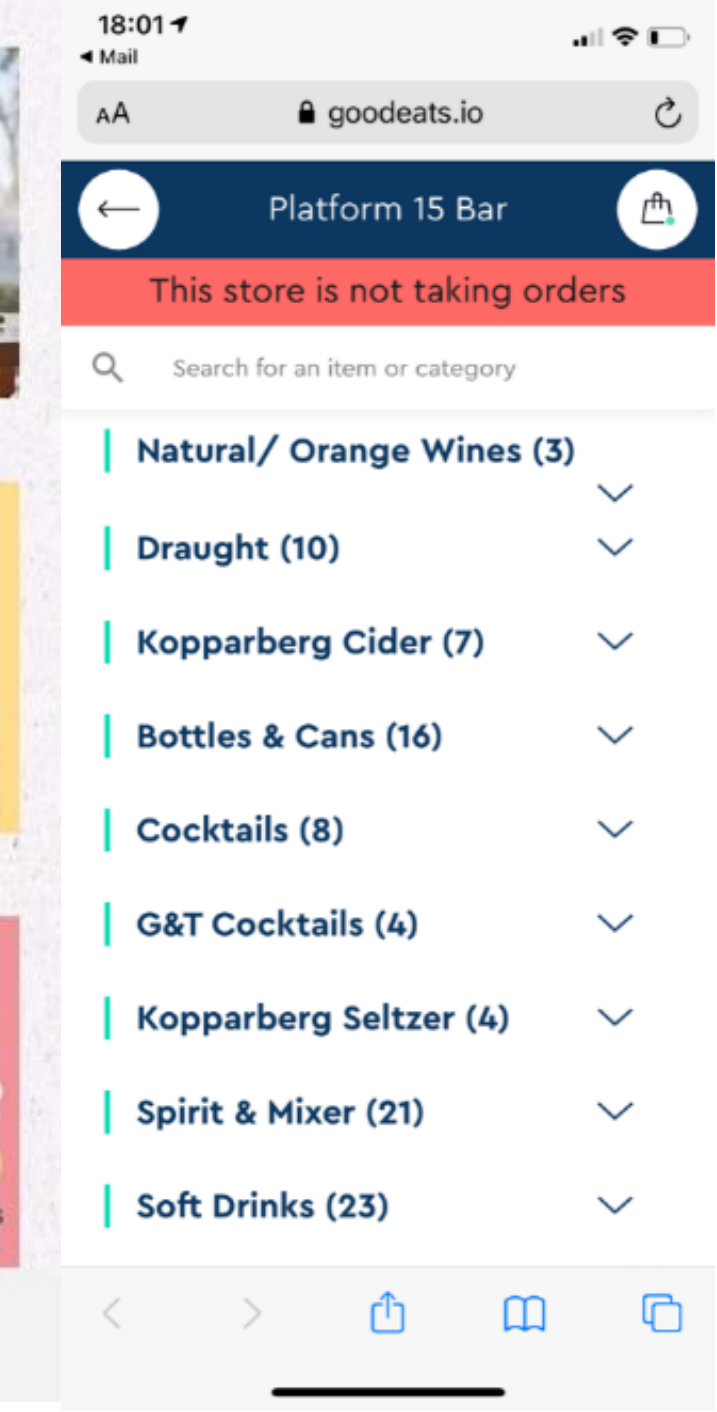
**PREMIUM COUNTRY PUBS  
CALL & COLLECT SERVICE  
STARTING MONDAY 5TH  
OCTOBER**



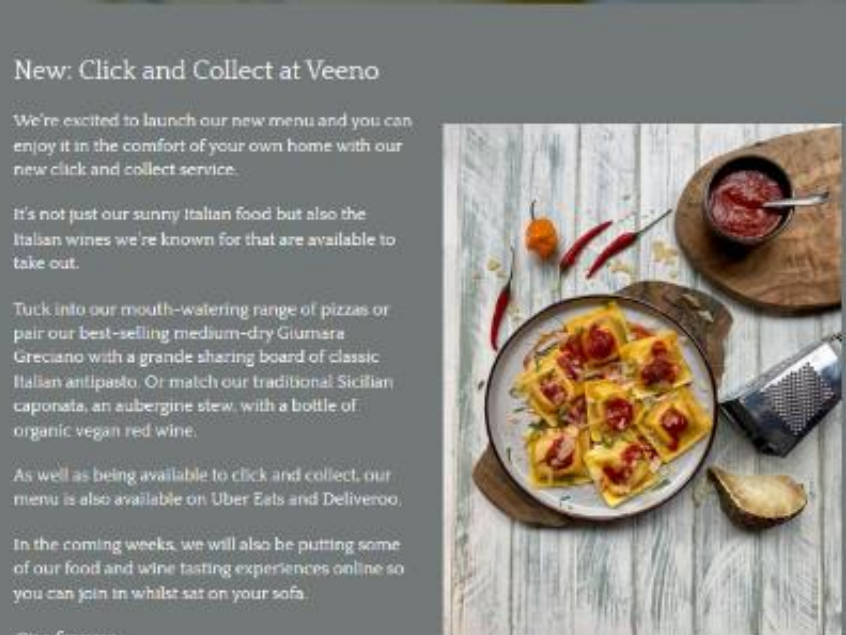
**MENU CHANGED TO FACILITATE  
TAKEAWAY - EVERYTHING MADE  
IN 20MINS. COVERS GONE  
FROM 80 PRE-COVID IN THE  
RESTAURANT TO 320 PER WEEK.**



## DRIVING SPEND THROUGH APPS



## FOOD MATCHING



**VEENO – FOOD & WINE  
PAIRING  
CLICK & COLLECT**



# Memorable Experiences

Making the best of the new rules & restrictions and delivering exceptional service – great staff can make all the difference!

## OUTDOOR SPACES



**TEEPEE –WORSLEY OLD HALL  
BRUNNING & PRICE**

**Stamford Arms Groby**  
1 d · 🌐

Fancy a nice big Sunday Roast today in one of our special outside dining pods? Just pop down, we have a few available, or call us on 01162875616  
Sunday lunches served until 5pm today, also available pizzas, tapas and our Chefs specials.



**WOODEN HUTS OUTDOORS  
STAMFORD ARMS, EVERARDS ▲  
FARMERS BOY, LONGHOPE ▼**

**BOWLING GREEN  
CONVERTED TO  
MARQUEES & SEATING.  
RED LION, STOCKTON  
HEATH – MARSTONS**

**PUSH BACK FROM  
BOWLERS, BUT THIS IS  
DELIVERING MORE VALUE  
THAN BOWLERS (WHO  
BROUGHT OWN DRINKS  
WITH THEM!)**

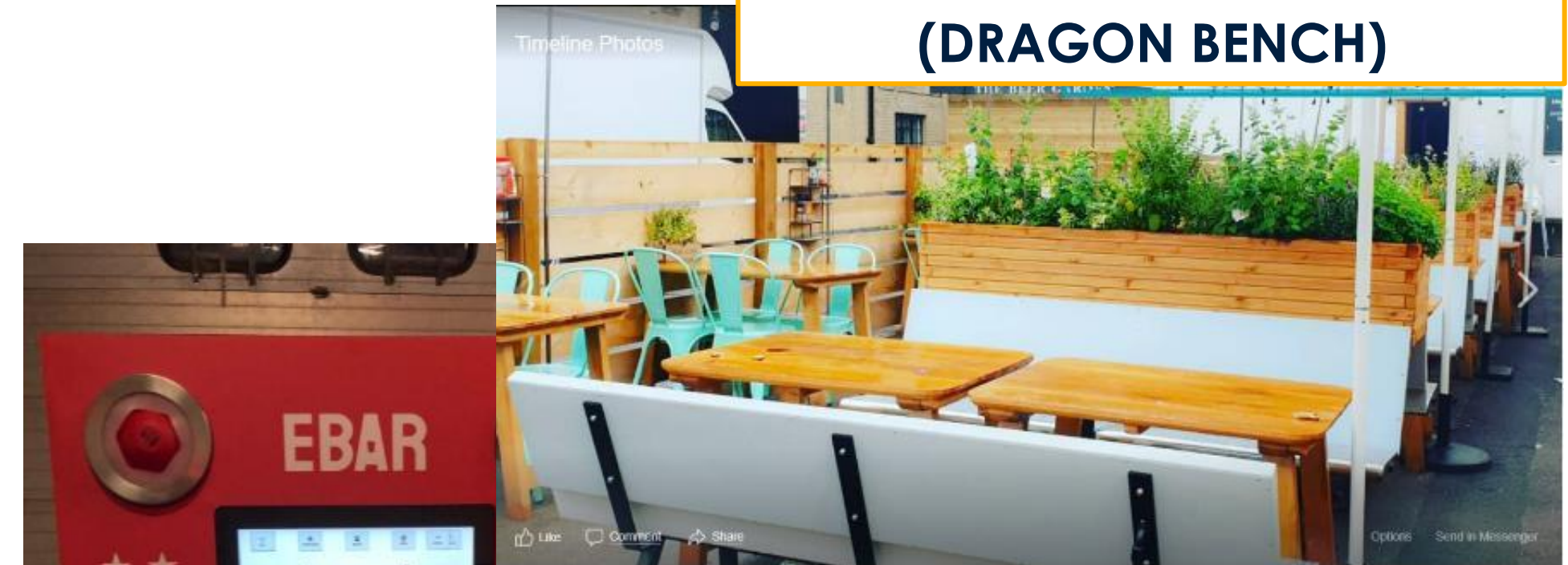


## INNOVATION



**STAFF PPE  
INCEPTION GROUP**

**HEATED OUTDOOR BENCHES  
WHITE RABBIT – OXFORD  
(DRAGON BENCH)**



**SELF DISPENSE  
EDINBURGH CORN EXCHANGE  
E BAR**



# Adapting Your Offer

Adjusting to the new trading hours, consumers working patterns and challenges around consumer confidence can enable you to unlock new opportunities...

## ADAPTED OFFERS

Back To Stories

/ BARS

### The next three restaurants lined up for Community Kitchen on the Square are...



THE CONFIDENTIALS 27 August 2020

The ever changing, alfresco pop-up restaurant is keeping us on our toes



### COMMUNITY KITCHEN ON THE SQUARE – MANCHESTER.

PROVIDES A POP-UP SPACE FOR LOCAL BUSINESSES. WEEKLY-CHANGING, 3-4 DAY TAKEOVERS ALLOWING RESTAURANTS WITH LIMITED OUTDOOR SPACE OF THEIR OWN TO POP UP AND SAFELY SERVE THEIR FANTASTIC FOOD TO THE WIDER COMMUNITY. ALL DINERS RECEIVE TABLE SERVICE TO REDUCE CLOSE CONTACT AND AID SOCIAL DISTANCING.

## WORKING SPACES



### BREWHOUSE & KITCHEN

WORKING SPACE AVAILABLE  
WFI, POWER OUTLETS & PRINTING AVAILABLE

Make Brewhouse & Kitchen your office with our new "work space" table bookings!  
We've got designated quiet spots with wifi and power sockets available to pre-book. Printing is also available and you can now place orders from your table via your mobile so you can stay focused on the task at hand.

There's a variety of great lunch options available and you are able to take advantage of unlimited hot/draught soft drinks from £9\*  
With a choice of 22 different venues, open daily until late, Brewhouse & Kitchen offers a great space for meetings or working away from the office or home!

Unlimited hot/cold drinks inc:  
Limited printing will

BOOK A

### DUCIE STREET WAREHOUSE

BOOK YOUR WORK PASS

### DUCIE STREET WAREHOUSE MANCHESTER

BOOK A WORK PASS, UPFRONT COST DEDUCATBLE FROM FOOD & DRINK IN OUTLET

WORK at Ducie Street Warehouse offers a relaxed, comfortable, co-working space, with a selection of food and drink available from Counter, and a range of options to suit all; either a freelancer or larger company looking to help ease the pressures of working from home for the team.

Day Pass - £12pp, this includes £10 credit on all items at Counter (inc wine/beer & take home items)

Weekly Pass - £50pp, this includes £10 credit per day on all items at Counter (inc wine/beer & take home items).

Anyone with a pass will have access to bottomless filter coffee/tea/water - all included.

Daily passes run: Mon - Fri: 8am-10pm  
Week passes run: Monday to Friday

Credit must be used on the day and cannot be carried over to another session.

Booking is NOT essential, just turn up!

There's no need to book unless you're looking at bringing along a group of more than 6 friends, (space is first come first served). We also have meeting and small event facilities - for all enquiries please contact:

## TRADING TIMES

NORDIE @NORDIEMCR · 16m  
Some news this week - we're open again on Wednesdays from 4pm (& now Thursdays also) this week to try and compensate for the loss in later evening trade. Hopefully we can open on Tuesdays again if there is demand mid week



1 2 5

NORDIE @NORDIEMCR · 15m  
We also planned to launch a full evening menu from Thursday-Saturday however due to the forever changing rules we're focusing on a bar plates menu to showcase some of the food we want to do if/when things get a little more stable in the future...

1 1 2

NORDIE @NORDIEMCR · 13m  
this menu should be available mid-October to compliment our drinks menu

1 2

NORDIE, LEVENSHULME OPENING EARLIER IN WEEK TO COMPENSATE FOR LOST LATE-NIGHT TRADE

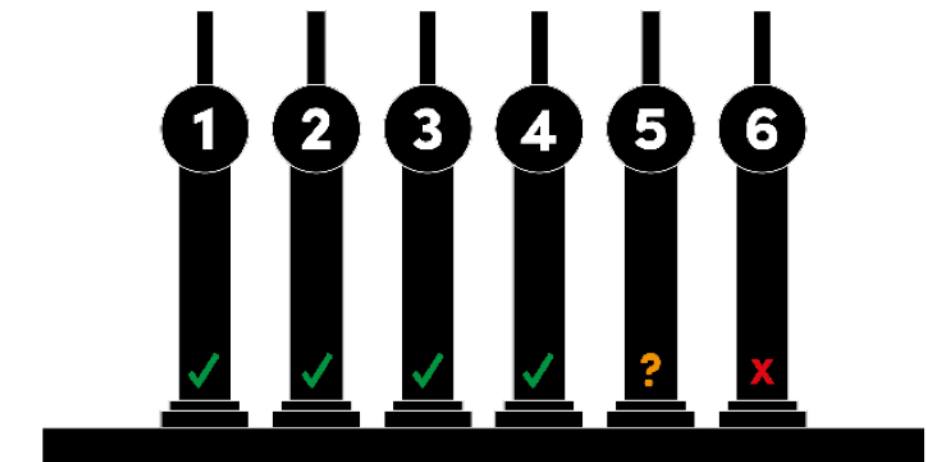


# Ranging

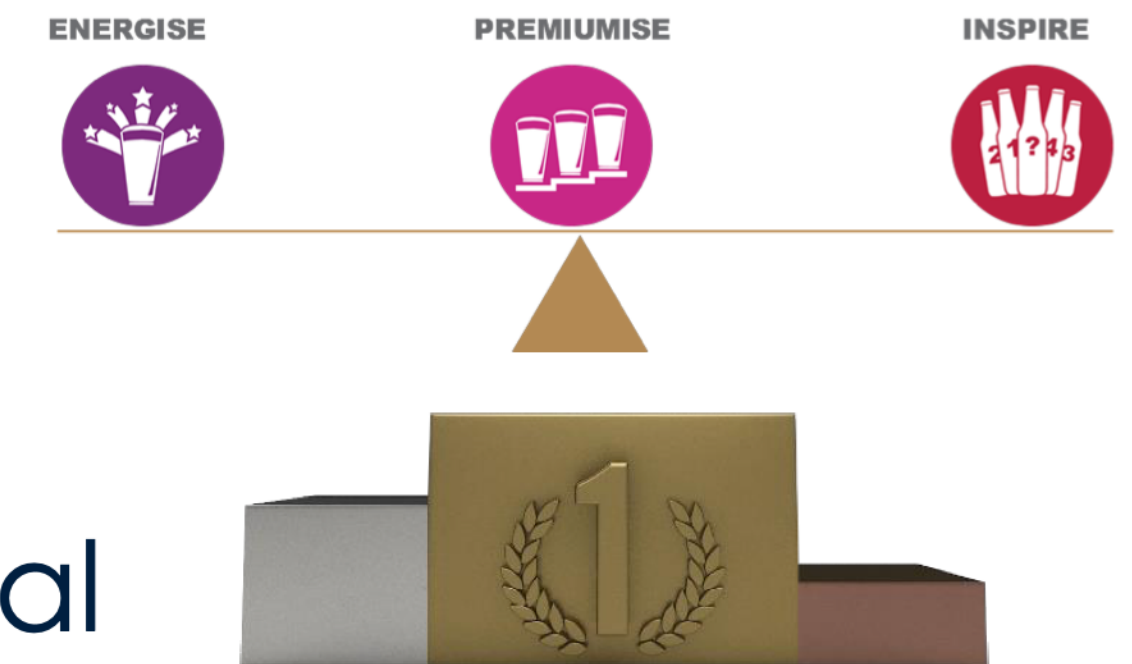
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## Top Tips for choosing a successful Draught Beer & Cider Range:

1. Match range size to available throughputs



2. Ensure you have the right balance across your range

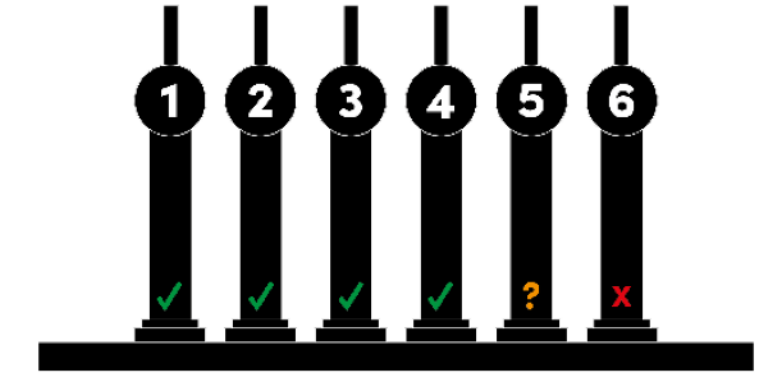


3. Back the most popular brands which have broad appeal



# 1. Match range size to available throughputs

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- Choosing the right number of draught beer & cider brands to stock is a critical part of ensuring great quality. Too many brands on the bar means beer & cider is on sale for too long, which ultimately means higher wastage, reduced margins and/or lower quality for your guests
- You should aim to be selling a **minimum of 1 x keg per week for all draught keg beers & ciders**, whilst for **Cask Ales**, the live & fresh nature of the product means that they should be on sale for a **maximum of 3 days** – if you're selling firkins, this means your rate of sale needs to be 24+ pints per day for every cask brand on the bar
- Since it's expected that **trade will be lower than normal at the point of re-opening**, you should **adjust your range size accordingly**



**MOLSON  
COORS** beverage  
company



# COMMUNICATION

UNDERPINNING ALL OF THIS IS COMMUNICATION

Communications to customers need to reassure but also encourage optimism. Consider communication across all areas – Online, Outside Outlet & Inside Outlet

## 3 Tips For Communicating With Customers

- 1. Reassure - If you are going to all the effort of putting these measures in place – tell your customers about it! Demonstrate the rules and reassure them in a simple way**
- 2. Reassess - Be clear about your offer including any recent changes e.g. takeaway & delivery options**
- 3. Reignite - Give them hope! Remind people what they love about your pub and inspire them to come back!**



# Summary



# Summary

- After a tough year people are excited to get back to pubs, with many looking to return as soon as they can!
- There is pent up demand for drinks that cannot be recreated at home - i.e. draught beer & cider
- Previous investment in safety & cleaning measures has not been wasted! Many people feel comfortable visiting covid secure venues even without a vaccine, due to the precautions put in place last year
- Safety is still the #1 priority for consumers, but should not be your only focus
- It is likely that you will have had to adapt your offer, really consider how you can maximise this to deliver the biggest returns with in restrictions... this will mean making the most of outdoor areas & new technologies
- When ranging customer experience & quality should be prioritised over an extensive range.
- Communication underpins everything, use every opportunity to keep customers informed e.g. opening times, booking processes, safety procedures & events!



