

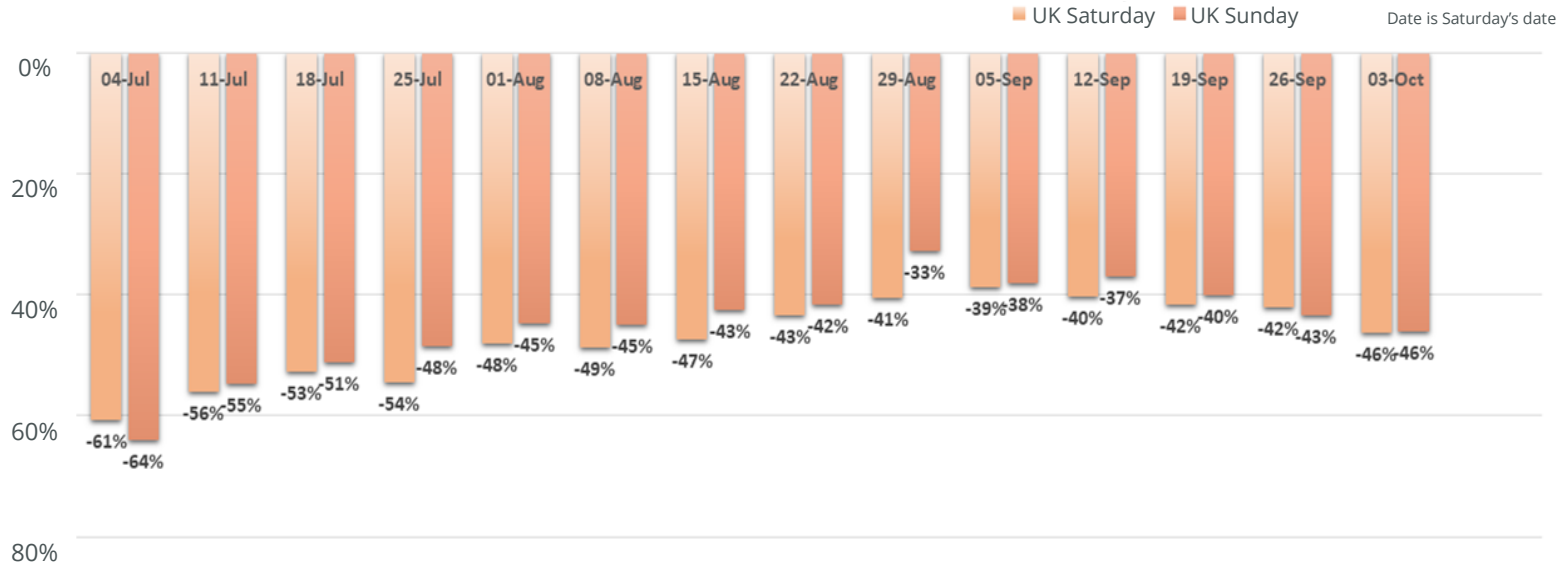


# Insights on Hospitality Recovery

Monthly Analysis Report – September 2020



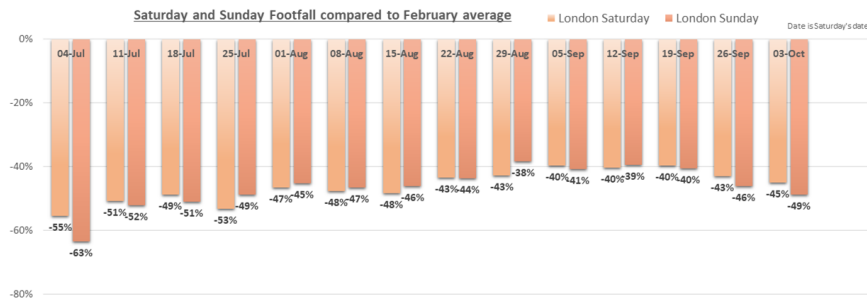
# UK Footfall



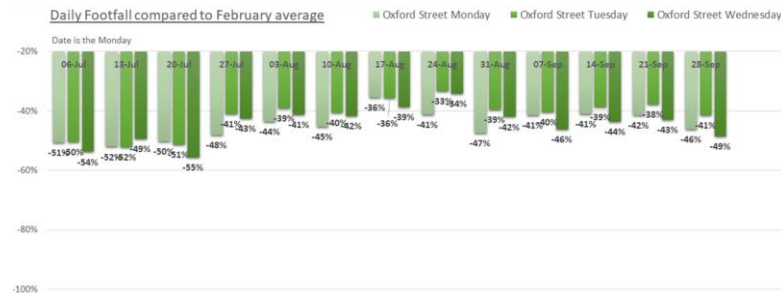
Saturday and Sunday Footfall compared to February average

# London Footfall

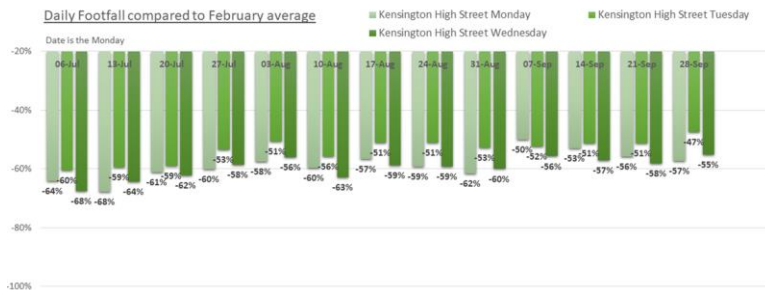
## London



## Oxford Street



## Kensington High Street

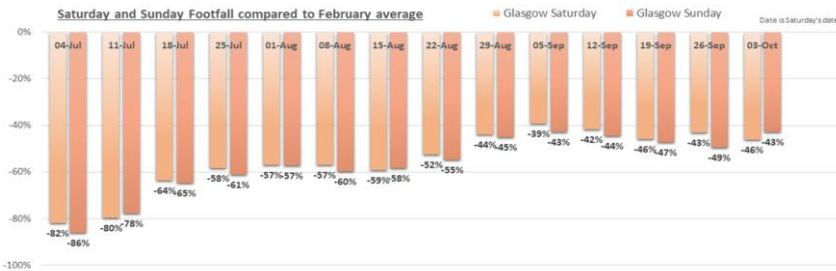
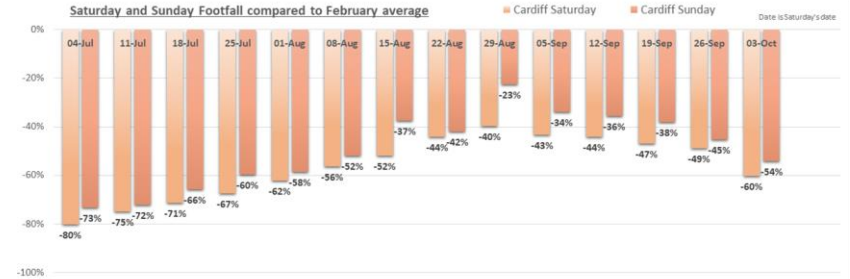
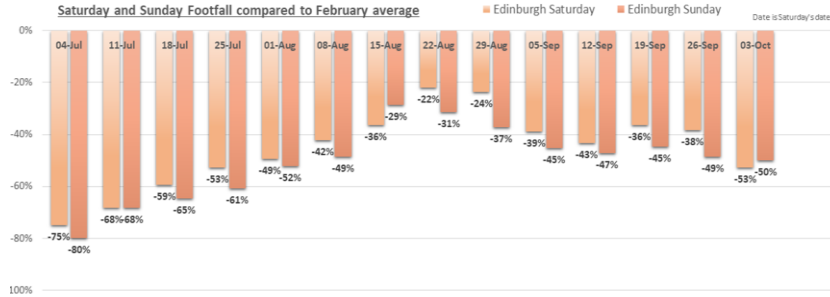


## Leicester Square



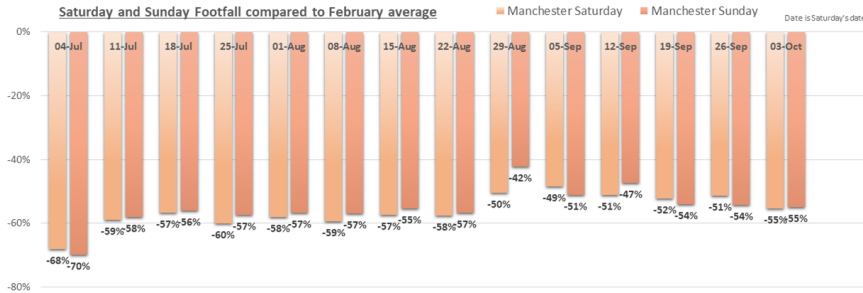
# Scotland

# Cardiff

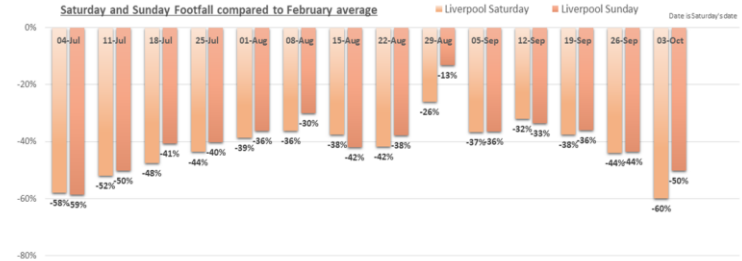


# North of England Footfall

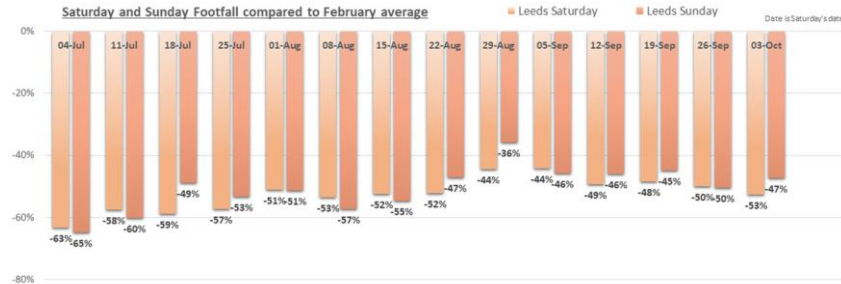
## Manchester



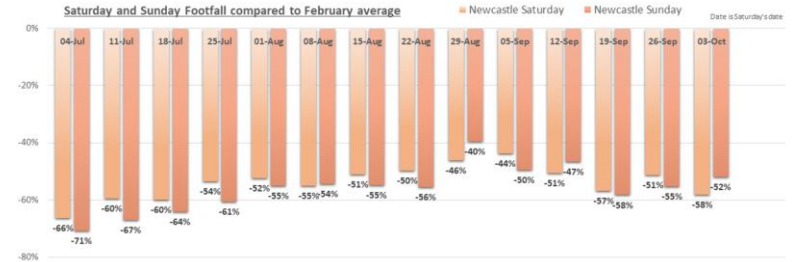
## Liverpool



## Leeds



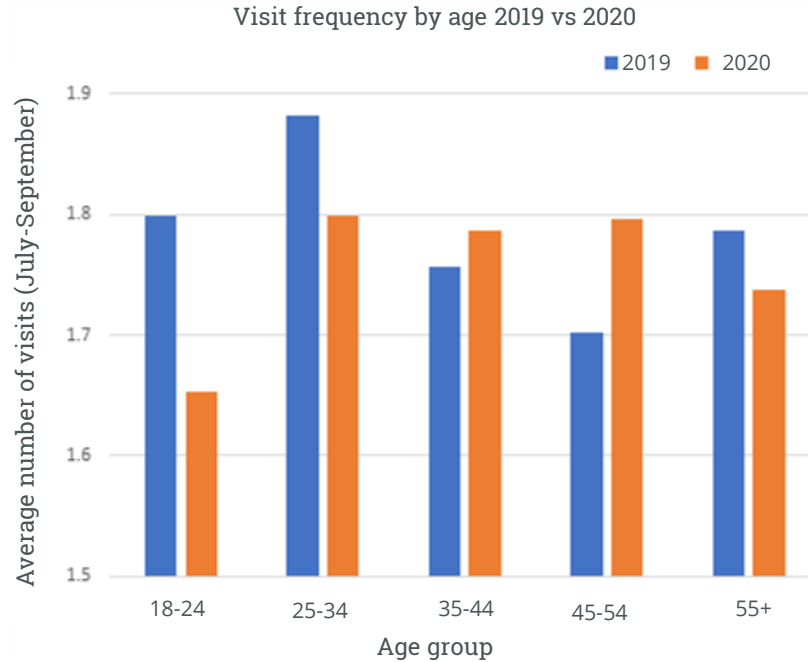
## Newcastle



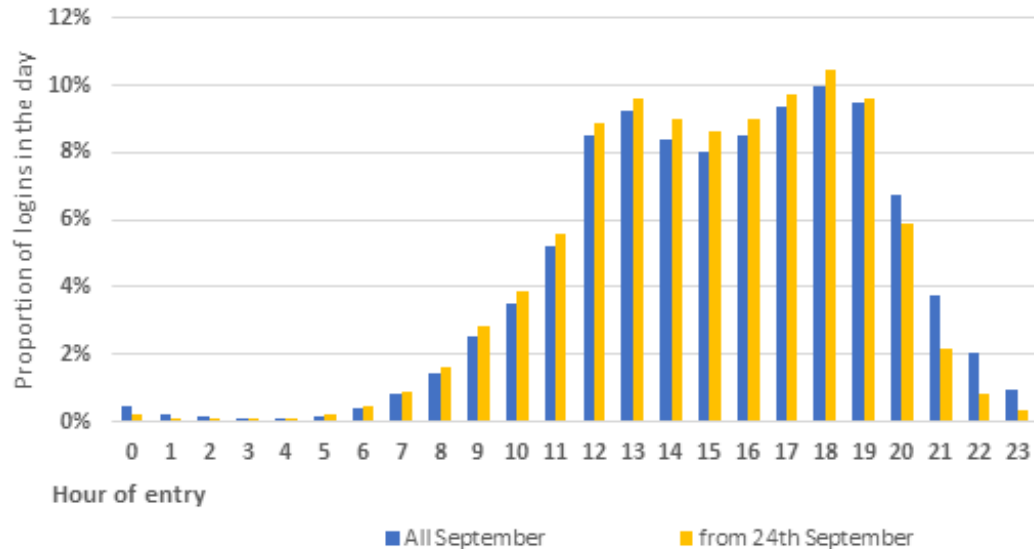
# Summary

- Data for the weekend 3<sup>rd</sup>-5<sup>th</sup> Oct suggests that footfall is dropping again.
- Across the UK, footfall is currently -46% of what it was in February.
- There are significant variations in footfall by different cities. Greater Manchester, which is subject to local lockdown restrictions, is currently at -55% of the footfall seen in February, which is 10% behind the rest of the UK.
- This can also be observed for Liverpool which was also placed under stricter lockdown conditions last week, and the Saturday footfall was at -60% of the numbers seen on the same Saturday in February, and at -50% for Sunday of February's footfall.

# Frequency of Visit

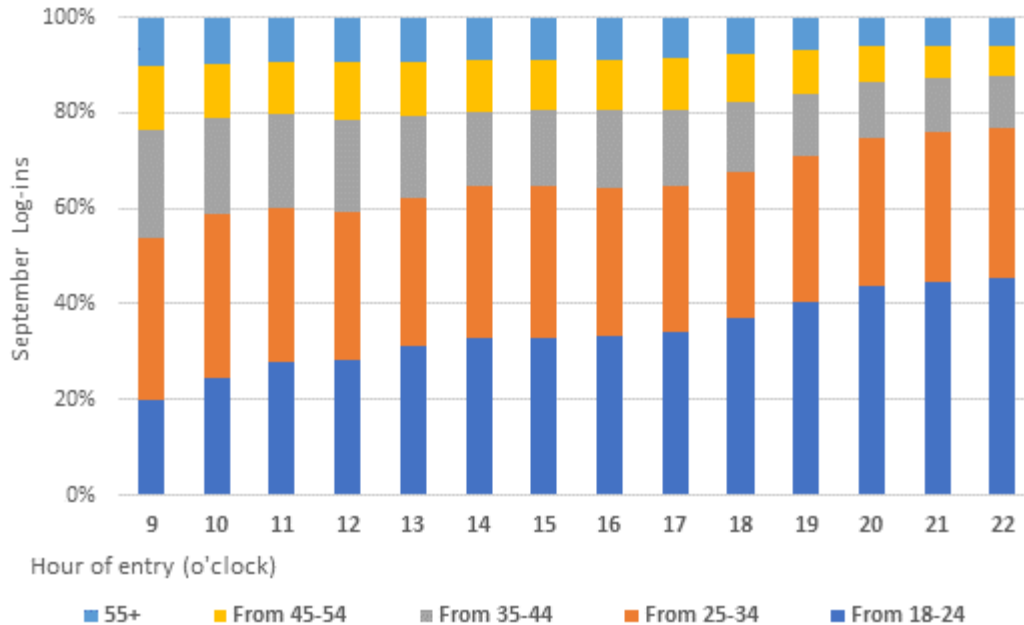


# Hours Of Entry – Pre and post 10pm curfew

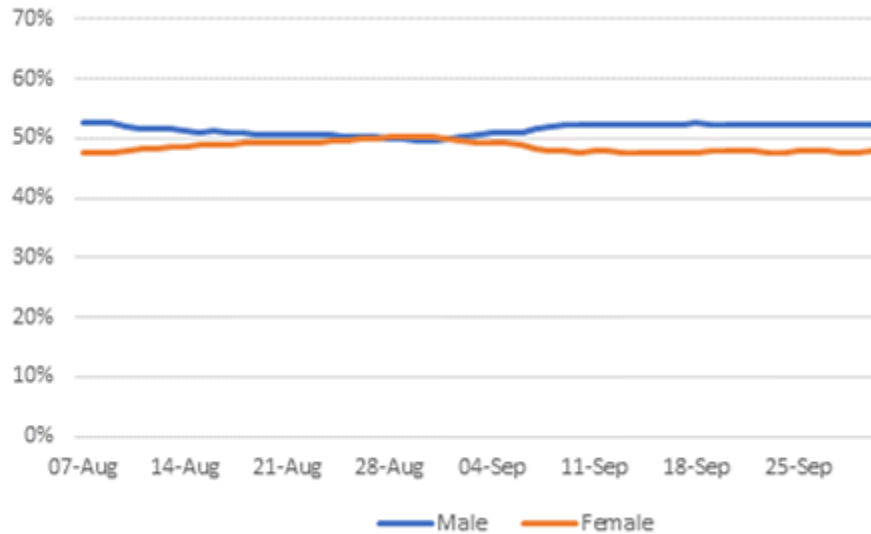




# Proportion Of Ages By Hour Of Entry - September

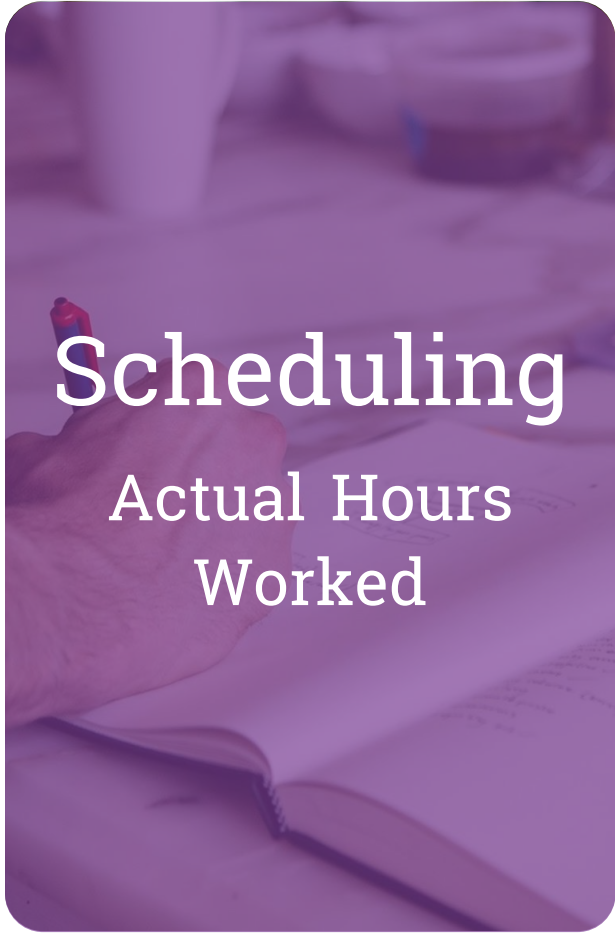


# Gender Split Since Lockdown



At the start of August as restrictions were lifted, males were more likely to eat out than females.

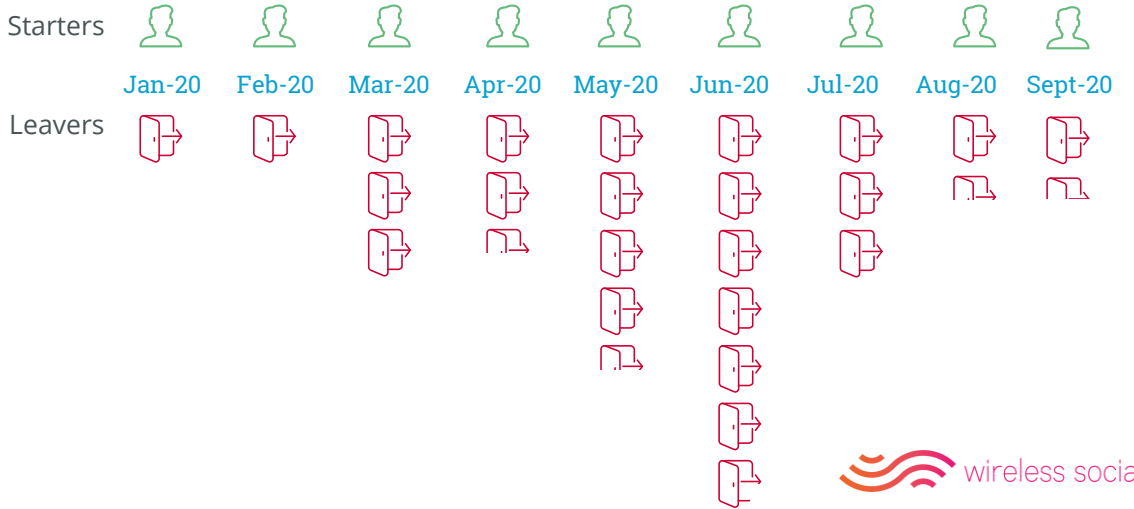
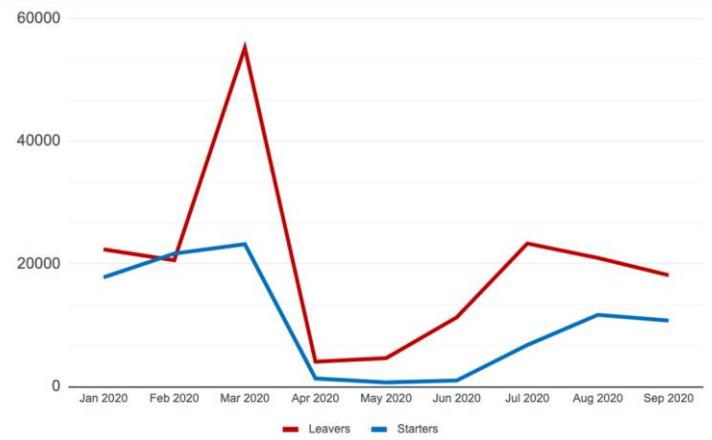
As EOTHO carried on throughout August, females started to be less cautious and ate out more, however when EOTHO ended in September, females returned to their former behaviour of eating out less than men.



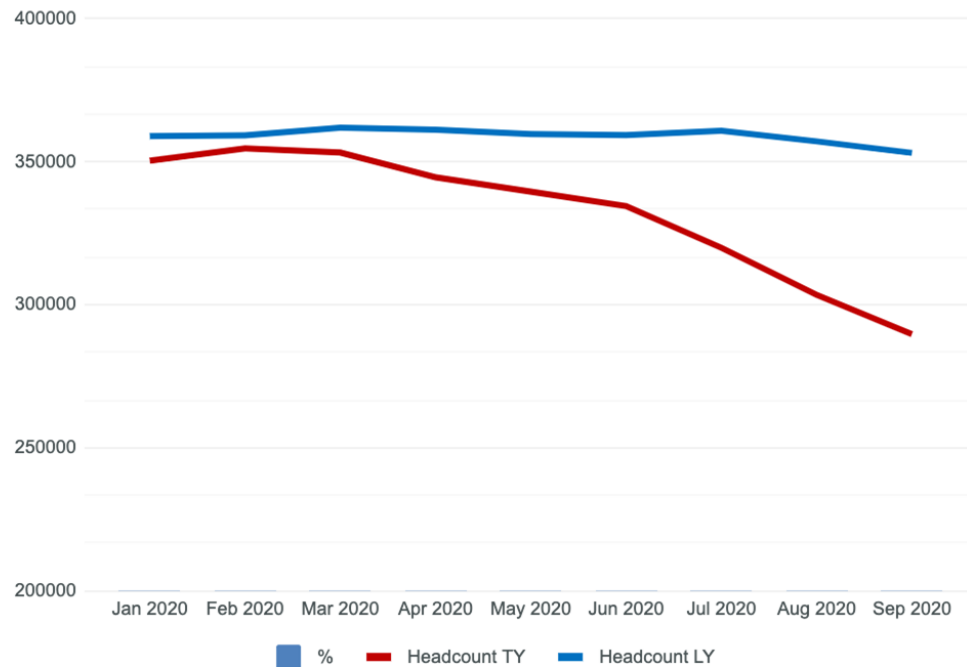
# Scheduling

## Actual Hours Worked

Starters and Leavers



# Headcount vs Last Year



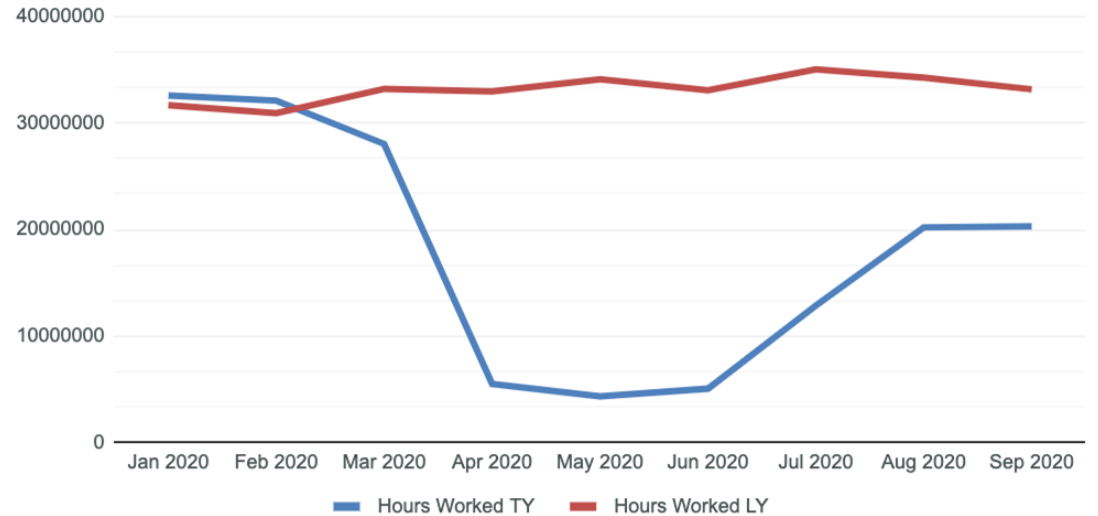
# Starters and leavers

- Within the month of September starters were around 7% lower than in August, but still up 60% vs the month of July. This accounts for 3% of the total workforce.
- 12 month rolling headcount across the sector is 18% lower vs last year, compared with 15% lower vs last year in August. This indicates at least 500,000 people have left their role since January in the hospitality sector (based on sector 3M employees).

# Scheduling

## Actual Hours Worked

Hours Worked (in millions)

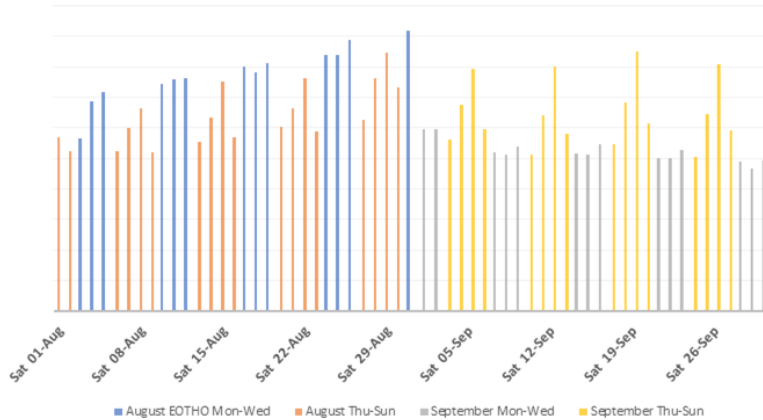


# Scheduling

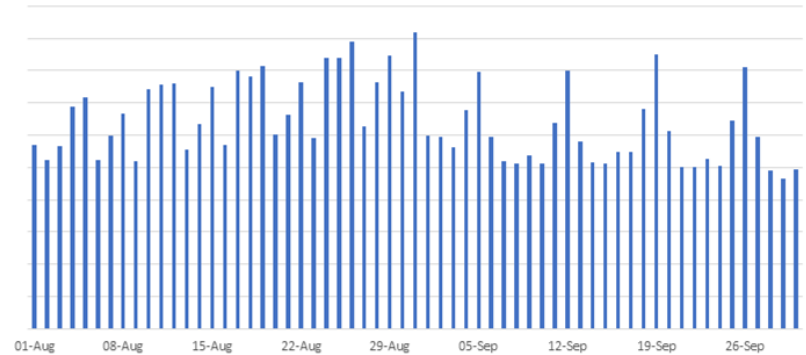
- The number of hours worked in September was similar to the level of activity recorded in the month of August for the sector as a whole, however:
  - Pubs saw a reduction in hours worked vs August of -8% (total hours worked), and -17% vs September last year.
  - Scheduled hours in restaurants were lower by 2% vs August and remain around 40% down vs last year.
  - QSR and hotel hours worked were higher compared to August by 3% and 6% respectively, albeit hotels scheduling activity is still at 50% of last year's levels.
- The data suggests that operators continued to keep the majority of staff working in September after the EOHO scheme finished, despite taking lower sales.

# EOTHO: Total Log-ins for Venues Open All of the Time

Log-ins at venues open throughout August and September



Log-ins at venues open throughout August and September



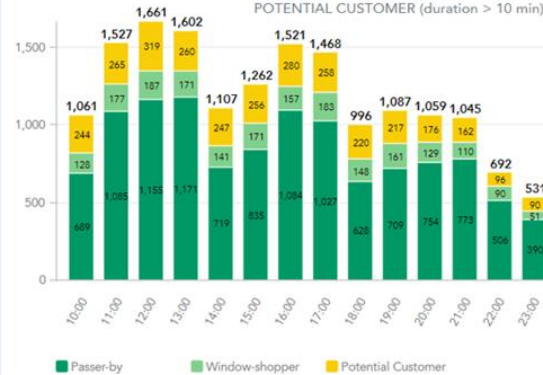


# Planning For The Future: Data Driven Decision Making

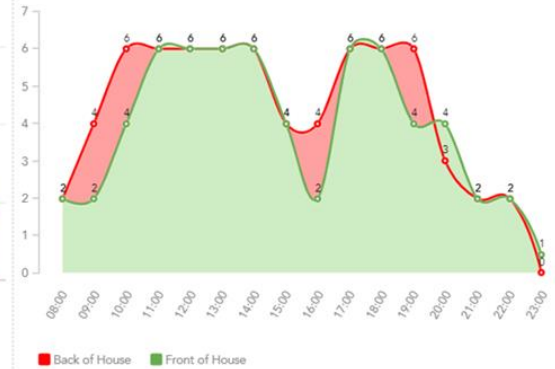
New Transactions / Staff Members



Wifi Events Histogram



Hours Scheduled by Area



Fourth Analytics is the industry's most complete data and analytics suite, giving operators the actionable insights they need to operate as efficiently and profitably as possible. Find out how the partnership of Fourth and Wireless Social gives you insight into your businesses key metrics, coupled with footfall outside of your sites so you make informed business decisions.

# Thank You

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