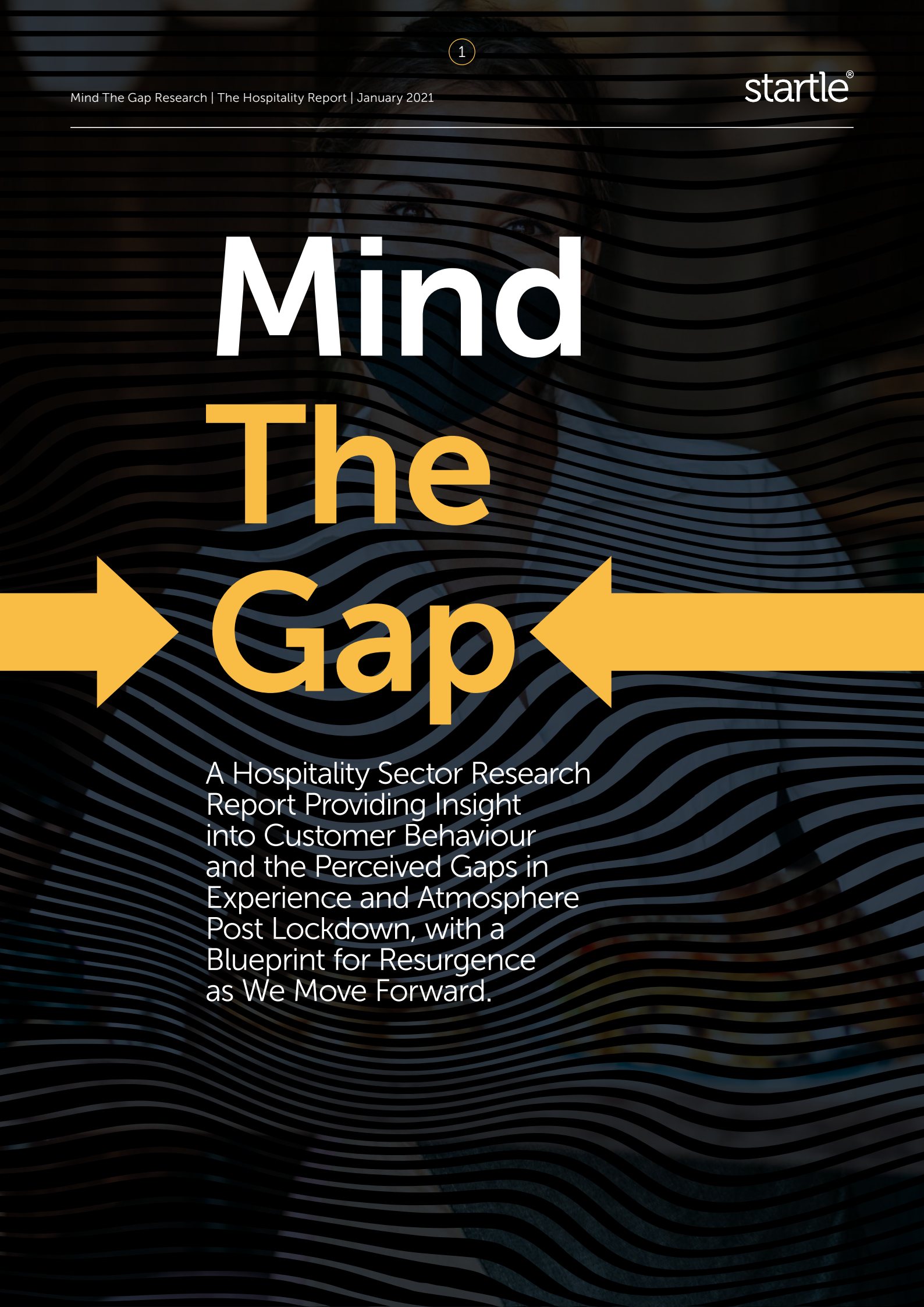


Mind The Gap

A Hospitality Sector Research Report Providing Insight into Customer Behaviour and the Perceived Gaps in Experience and Atmosphere Post Lockdown, with a Blueprint for Resurgence as We Move Forward.



Playlist Contents

CH-CH-CH-CH-CHANGES. TURN AND FACE THE STRANGE 3

REUNITED (AND IT FEELS SO GOOD) – CUSTOMERS RETURNED POST-LOCKDOWN 1.0 4

MIND THE GAP; SERVING UP USEFUL RESEARCH ON A PLATE 5

THE MAGIC NUMBERS. WHAT CAN YOU TAKE FROM THIS RESEARCH? 6

NEW RULES - AN INTRO TO RETAIL ATMOSPHERICS 8

COME ON FEEL THE NOISE; THE IMPORTANCE OF THE RIGHT PLAYLIST 9

RELIGHT THE FIRE: SENSES THAT MAKE UP MEMORABLE EXPERIENCES 11

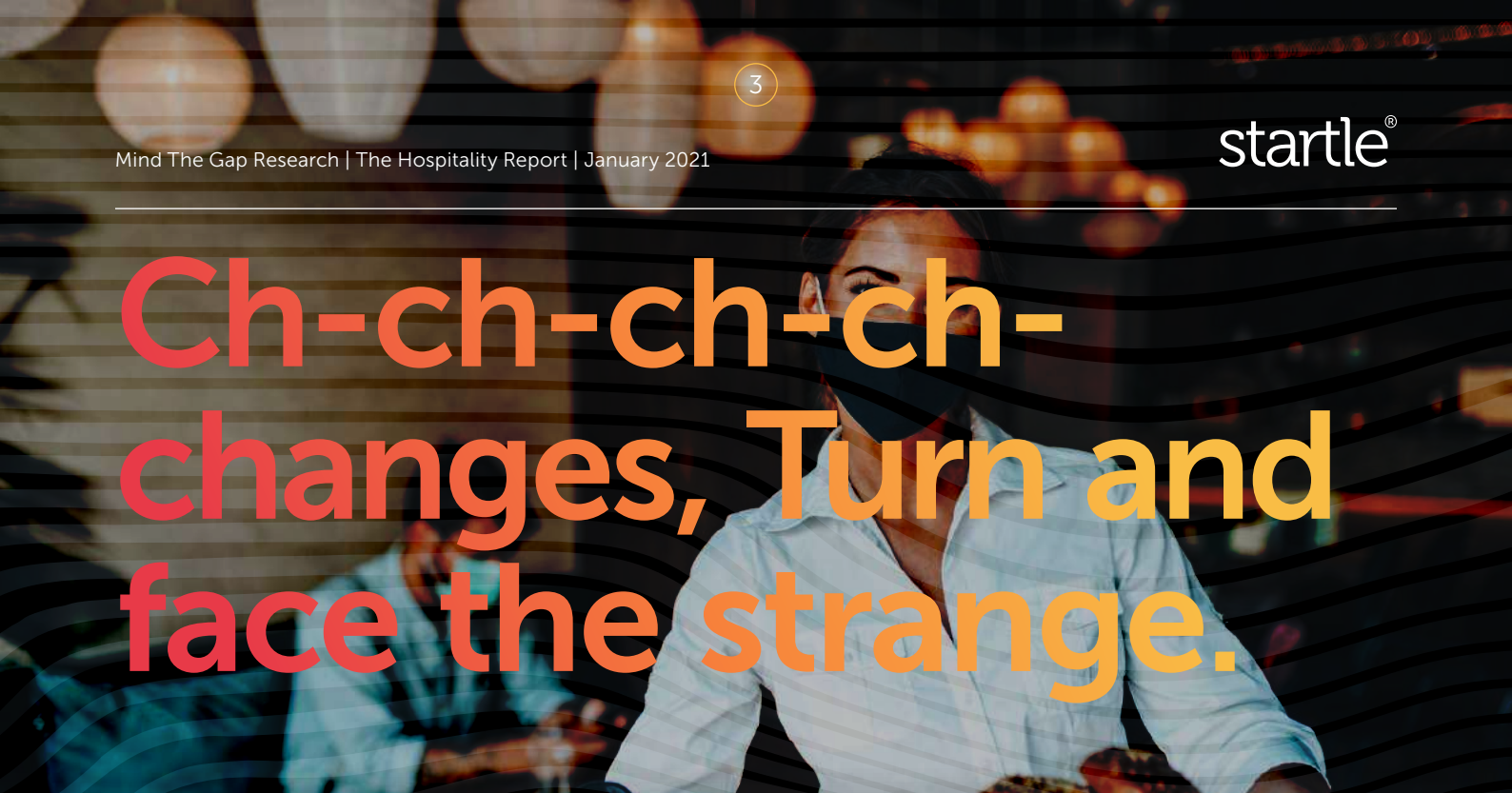
THIS IS OUR FIGHT SONG; MUSIC PROFILING 13

OK COMPUTER, WHATCHA GONNA DO FOR ME? INTEGRATED TECH TOUCH-POINTS 14

BRING IT ALL BACK TO YOU - WHERE CAN MUSIC HELP YOU TOP THE POST-LOCKDOWN CHARTS? 16

THANK U... NEXT! REFLECTION ON 2020 FROM MELANIE, HEAD OF GROWTH AT STARTLE 18

Ch-ch-ch-changes, Turn and face the strange.



At the start of 2020 hospitality trendspotters had set the scene for a strong year for the industry. Trends like communal eating and open-plan kitchens were on the rise; consumers were hungry for social dining experiences that brought them together. Pubs were also seeing a thirst from visitors for social experiences and, for the first time in a decade, the number of pubs in the UK rose[2].

As families and friends packed pubs and restaurants on New Year's Eve 2019, **no one would have predicted those same venues would be forced to close** their doors in the face of a global pandemic in just a few short months. Who would have thought that takeaways, social distancing and reduced hours would quickly become the most impactful trends of the year?

As an industry you've moved fantastically quickly to introduce **new dining experiences** despite closed doors and done amazing work to **give customers confidence in returning post-lockdown**. We know that the vast majority of you have gone above and beyond to make your venues covid-secure. This shows. Following lockdown 1.0, **over 90% of hospitality customers were happy with safety procedures, giving them confidence to return[3]**.

Of course, the challenges of social distancing will continue for many months, but **the appetite for great customer experiences won't diminish**.

*"PEOPLE THINK WE'RE IN THE FOOD AND DRINK BUSINESS BUT WE'RE NOT. WE'RE IN THE **ATMOSPHERE** BUSINESS..."[1]*

As Des Gunewardena, Chairman and CEO of D&D London, recently told CNBC, "it's the buzz of eateries that draws people..." In the face of increased safety measures his focus is simply on "how do we make these environments feel good?"[4]

We live in the experience economy, and now more than ever hospitality is as much about serving a stand-out atmosphere and experience as it is great food and drink. With this in mind, we've been keeping tabs on what you as operators, restaurateurs and landlords need to know to respond to the demands of now. Through this paper, we will provide you with the insight you need to keep hitting the high notes of customer experience using simple, actionable tactics.

We draw on our own learnings and independent research alongside insight from a **brilliant ensemble of partners and experts** to show that it is still possible to create great hospitality experiences even in a time of enormous challenge.

Let's get it started.



Adam Castleton – CEO at Startle

[1] https://www.theguardian.com/food/2020/apr/19/will-britains-restaurants-survive-coronavirus
[2] https://www.thecaterer.com/products/how-pubs-can-get-ahead-in-2020
[3] https://www.startlemusic.com/blog/over-a-third-of-diners-find-the-experience-less-relaxing-than-pre-lockdown
[4] https://www.cnbc.com/2020/05/25/how-well-start-to-go-to-restaurants-after-coronavirus-lockdowns.html



Reunited (and it feels so good).

At the end of lockdown 1.0 in July, pub and restaurant goers returned to venues, (albeit slowly at first) but by August, over a third of the UK population had returned to the pub.

Research from KAM Media's Customer Sentiment Tracker revealed that the top three factors affecting post-lockdown venue choice were if they have been there before, if the venue had a beer garden/outdoor space and if the venue has clear social distancing measures in place. Safety was, and will remain to be a key concern for visitors.

However, as our research has shown, customers are still keenly focused on the symphony of atmosphere and experience, beyond what's on the menu.

This is echoed in KAM's October findings that showed a rise in complaints about 'atmosphere' as a result of Covid procedures. As Katy Moses, KAM Media's MD explained ahead of lockdown 2.0:

"Atmosphere and hospitality experience still isn't quite as customers expect it to be. Going into this second lockdown consumers are less fearful and more stressed and frustrated. There is a huge opportunity for hospitality to be a saviour in the eyes of its customers. Let's give them something to smile about once lockdown measures lift again."[5]

Restrictions that are designed to keep customers safe have no doubt created a gap in the customer experiences. While data shows that customers are getting used to coronavirus restrictions, it is social, communal experiences and atmospheres that they are seeking from hospitality venues. If you can't deliver on these, safety and preparedness alone won't cut it.

"When lockdown 1.0 restrictions were lifted in July it was wonderful to see customers returning to pubs and restaurants, with a real desire to support businesses and meet others in social spaces designed to be safe. The summer weather, return of sport, and the Eat Out To Help Out scheme were all helpful tailwinds. The challenge for Operators will be to deliver the great experience customers expect, so that they keep coming back now the skies have opened, nights are longer and the financial stimulus has passed. We've yet to understand the impact the most recent lockdown will have on customer attitude but what we do know is that providing experiences people want to leave the house for is key."
Adam Castleton, CEO at Startle

[5] https://kam-media.co.uk/hospitality-customers-new-normal/



Mind the Gap; serving up useful research on a plate.

What is it that you need to know as operators facing your most challenging time? It's not what's going to happen in 2025 - it's what you can do right now to promote and protect your venues as not only safe, but welcoming, relaxing, fun and engaging.

Like you, we were keeping a close eye on things as pubs and restaurants reopened from lockdown 1.0. The early research seemed to indicate some challenging trends and consumer behaviour.

So, in July 2020 we launched our Mind The Gap research and discovery hub to help you navigate customer experience gaps (old and new) and help you through this unchartered territory.

Throughout the post-lockdown period we surveyed a nationally representative sample of the UK to give us a robust view of post-lockdown attitudes, with a 95% confidence level and a margin of error of +/- 5%.

Our research focussed on the customer's perception of the atmosphere and experience, giving you insight into the hearts and minds of people, aiding your strategies and activations to drive more people back through your door.

The Magic Numbers.



BABY COME BACK

To aid your coronavirus experience strategies, here are some of the key takeaways you need to know about consumer attitudes following their return to restaurants and pubs after lockdown 1.0.

A depleted atmosphere is having a big impact; the majority of pub-goers do not intend to go to the pub as often post-lockdown.

Well over a third of pub goers **miss the buzz of the crowd** in pubs, with nearly two-thirds finding the atmosphere less sociable than pre-lockdown.

It's a similar picture for restaurants, with half of people **intending to dine out less in future**.

Over half of restaurant goers think the dining experience is **less sociable than pre-lockdown**.



HI-HO SILVER LINING

There is good news though.

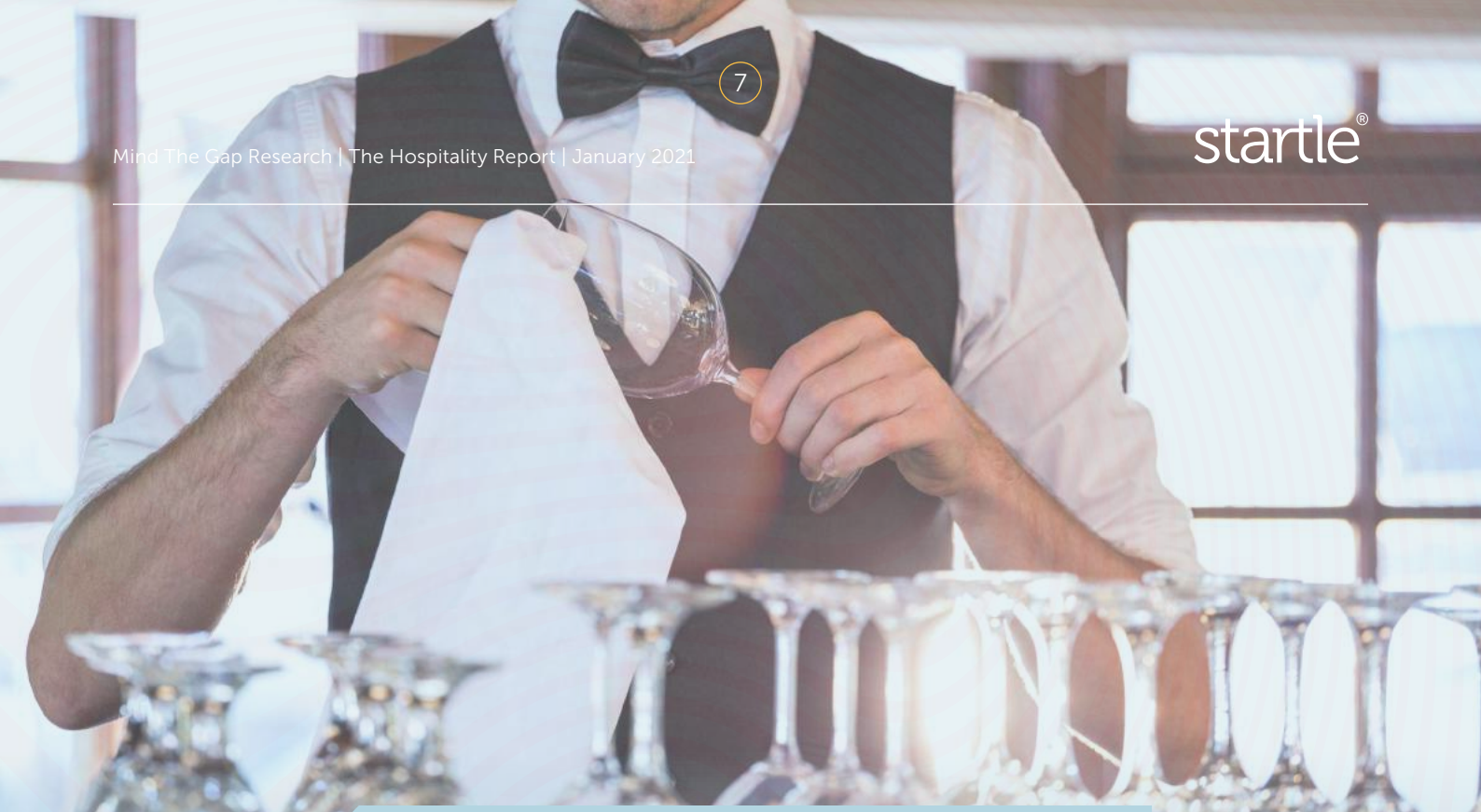
Though the majority may find it less sociable, **over half of pub-goers find the pub just as relaxing as pre-lockdown**, with a quarter thinking it's even more relaxing now.

Also, **two thirds of those** who find the pub just as relaxing or more so now identify as regular pub goers.

The largest group of those who strongly **believe entertainment will improve the pub** going experience are aged 18-24.

Fewer diners could actually be **strengthening the dining experience**, with the majority of restaurant goers appreciating an atmosphere with fewer guests.

Interestingly, **women are far more likely** to find the current dining out experience more relaxing.



"IT'S INTERESTING TO SEE THAT PUB AND RESTAURANT GOERS PREFER FEWER CROWDS AND A CALM, RELAXING EXPERIENCE, YET THEY APPRECIATE HOW ELEMENTS LIKE MUSIC AND ENTERTAINMENT CAN IMPACT THE OVERALL ATMOSPHERE. *WITH FEWER CROWDS, IT'S MORE IMPORTANT THAN EVER TO DRIVE MAXIMUM CUSTOMER SPEND AND PROVIDE A CUSTOMER EXPERIENCE THAT KEEPS THEM COMING BACK."*

Adam Castleton, CEO at Startle

Some of these stats don't rewrite common knowledge and **they aren't all rosy reading**. But they indicate areas where customer experience may have been falling flat, in areas that are all too often overlooked. The split in opinion highlights how factors such as a **hospitality venue's music are essential** (but not always easy) to get right, and how they can have a significant impact on a customer's visit.

Partners like us are **here to help you build back better** after the pain your businesses have suffered this year.

"It's been a really challenging winter for the country, and when we come through it **people will need their pubs and eateries** more than ever before. Operators should consider how they're using **music to put their customers at ease** and show them that their local restaurants and pubs are still a place they can have a good time. The good news is that there are **a range of technical solutions on the market that allow operators to control the atmosphere and entertain guests safely**. For example, we have been working with pub companies such as Greene King who have been investing in Covid-safe digital entertainment that can really make a mark on a great evening out."
Melanie Fulker - Head of Growth at Startle

New Rules - an intro to atmospherics

'Retail atmospherics' might not be one of the buzzwords of our 'new normal', but the term (coined way back in 1973) is perhaps now more relevant than ever. This is equally relevant in hospitality, where the same principles are applied in order to create the optimum conditions for customer experience.

Father figure of atmospherics, Kotler, described it as **the multidimensional consumer experience**; appealing to our five senses "to design buying environments to **produce specific emotional effects in the buyer** that enhance purchase probability".

Countless studies have investigated the effects of everything to the placement, hue and **power of lighting**, to subtle shifts in shades of colour, the use of **fragrance** and of course, the effect of **music** and atmospheric sound on consumer **behaviour**.

As Hefer and Nell say in their 2015 study, "More than ever, consumers respond to more than just the physical product when making a decision to purchase a product. One of the most noteworthy features of a product is the atmosphere of the place in which the product is bought. From time to time, the store atmosphere is more powerful than the product itself."





Come on feel the noise.

"Music is the most powerful form of sound we know that affects our emotional state" – Julian Treasure

The Scientist has spoken; music is extremely powerful in influencing people's behaviour and emotions. Music plays with our emotions in amazing ways. It gives us natural highs, causing the pleasure hormone dopamine to surge and spurs us to action; leading us to move at the pace of the music. We literally 'feel' the emotion of the song playing. The power this has in a pub or restaurant is significant - and has a huge impact on your customer, when used well.

Make sure the right music's on the menu.

The music played in a restaurant, its tempo, genre and volume, can directly influence your diners' buying behaviours. Striking the right note for the ambience and atmosphere is key, so much so that it can positively affect business.

Let's hear it for the noise;

Playing classical music can lead to higher spending than both no music and pop music[6].

Lunchtime Liszt or dinnertime Debussy leads to **diners willing to pay more**; an 'upmarket' atmosphere leads to 20% higher purchasing, over 18% higher than easy listening music, and 4% higher than pop music.

Consider too that restaurant diners exposed to **slow music spend an average of 11 minutes longer** at their table than those were exposed to fast music.

At quiet times, playing music with a slow tempo, can help keep people in the restaurant longer, and lead them to **spend more money**.

When a faster turnover of tables is preferable, **faster music can be played to reduce** the average amount of time that customers spend at a table[7].

And groups dining with a backdrop of sloawer music spend **40% more on drinks** than groups dining under the influence of faster tracks[8].

[6] https://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.952.6476&rep=rep1&type=pdf
[7] https://www.acrwebsite.org/volumes/11116
[8] https://www.acrwebsite.org/volumes/11116

THE VOLUME OF MUSIC ALSO HAS A DIRECT IMPACT ON CONSUMERS' FOOD CHOICES, BEING SO CLOSELY TIED TO HEART RATE AND AROUSAL[9]:

Softer music makes diners more mindful of what they order, choosing '**healthier**' options.

Turn up the volume and the increased stimulation sees diners turn to '**unhealthier**' options.

When it comes to pubs, there is also a significant difference in sales for venues with music compared to those without. On a Friday or Saturday, PRS reports the average **sales uplift for musically-minded venues is over 48%**[10].

What does this boil down to? The music you choose to play - the **harmonicity, rhythmicity and turbulence** – can directly influence your customers' sensory perception and buying behaviour. In post-coronavirus hospitality, **the right music can be the superpower** that creates atmosphere in increasingly socially-distanced environments.

"MUSIC IS VITAL IN CREATING THE RIGHT FEEL FOR A BRAND IN THE EYES OF THE CUSTOMER AND IS NOT SOMETHING TO BE LEFT TO CHANCE. AMBIANCE, ALONGSIDE FOOD, DRINK AND SERVICE STYLE, PLAYS A KEY ROLE IN BUILDING AND CREATING A BRAND."



ANN ELLIOTT, FOUNDER AT ANN ELLIOTT HOSPITALITY CONSULTANCY



[9] https://www.independent.co.uk/life-style/music-volume-restaurants-unhealthy-junk-food-orders-customers-link-florida-study-a8368751.html
[10] https://onemusic.com.au/media/1057/cga-prs-research_pubs.pdf

Relight the fire.

While we would love to say that it is purely music that can make all the difference, we're no Mr Vain. As research shows, the right soundtrack is vital to venue atmospherics, but you can't ignore the other senses that make up a memorable experience.

Human beings depend on their senses to make decisions. We might like to think we know exactly what we want and why, but smell, sound, and sight **hugely influence our purchase decisions, especially when it comes to food and drink**.

By experimenting with your restaurant or pub's **atmospheric elements you can influence the senses** that play such a huge role in this decision making. For example, colour paints a bigger picture than something that is simply pleasing to the eye. **Diners surrounded by reds find their blood pressure and heart rate increasing** - along with increased hunger - this is why so many fast food chains embrace red; KFC, McDonalds, Coca-Cola. Orange stimulates brain activity, leading to thoughts of healthier choices. Y**ellow invokes feelings of happiness while grays, blacks, browns and blues are known appetite suppressants**.

Of course, your staff make the difference between a memorable experience and one best forgotten, but beyond good manners and attentive service, **little details matter more than ever**. Standard issue facemasks do the job, but they can also become another signal of your brand and identity. Invest in making them your own. Right now creativity and imagination is key to creating memorable experiences that are relevant to your brand and regulation-friendly right now.



"Customers are starting to miss the buzz of a busy pub. Customers miss the pre-lockdown crowds and lively entertainment. In contrast to our research into the retail and pub sector, our findings for restaurants seem to have unearthed many differing customer opinions. This illustrates the perfect balance that restaurateurs have to strike for the optimum atmosphere. This isn't always easy for busy operators, but there are things we can do to make this more achievable, such as monitoring footfall throughout service and adjusting the music volume to the perfect levels automatically."

Adam Castleton, Startle CEO

Who else thinks hastily erected hand sanitising stations need to be shown the door? London's Design Museum has reinvented the hand cleaning experience with its 'Fountain of Hygiene' competition inspiring sanitising bubble machines, sustainable seaweed capsules and colour-changing gels. Creative solutions that bring back a sense of fun and atmosphere are all around us, from the simplicity of the right sounds to the wonderfully inventive.

Some restaurants have also taken **social distancing measures to the next level**. In the US, The Inn at Little Washington took a novel approach to the empty seats that coronavirus has made necessary. **Stylishly 1940s-attired mannequins** take spots at tables, becoming a way to fill the spaces left by distancing but also filling any silences - they have become a talking point on international news! At Maison Saigon, **fluffy toy pandas** take pride of place on tables to stop overcrowding.

And in Ampersand the Eten restaurant has used **greenhouses to create romantic 'bubbles'** for couples and small groups to dine in outdoor scenic safety.

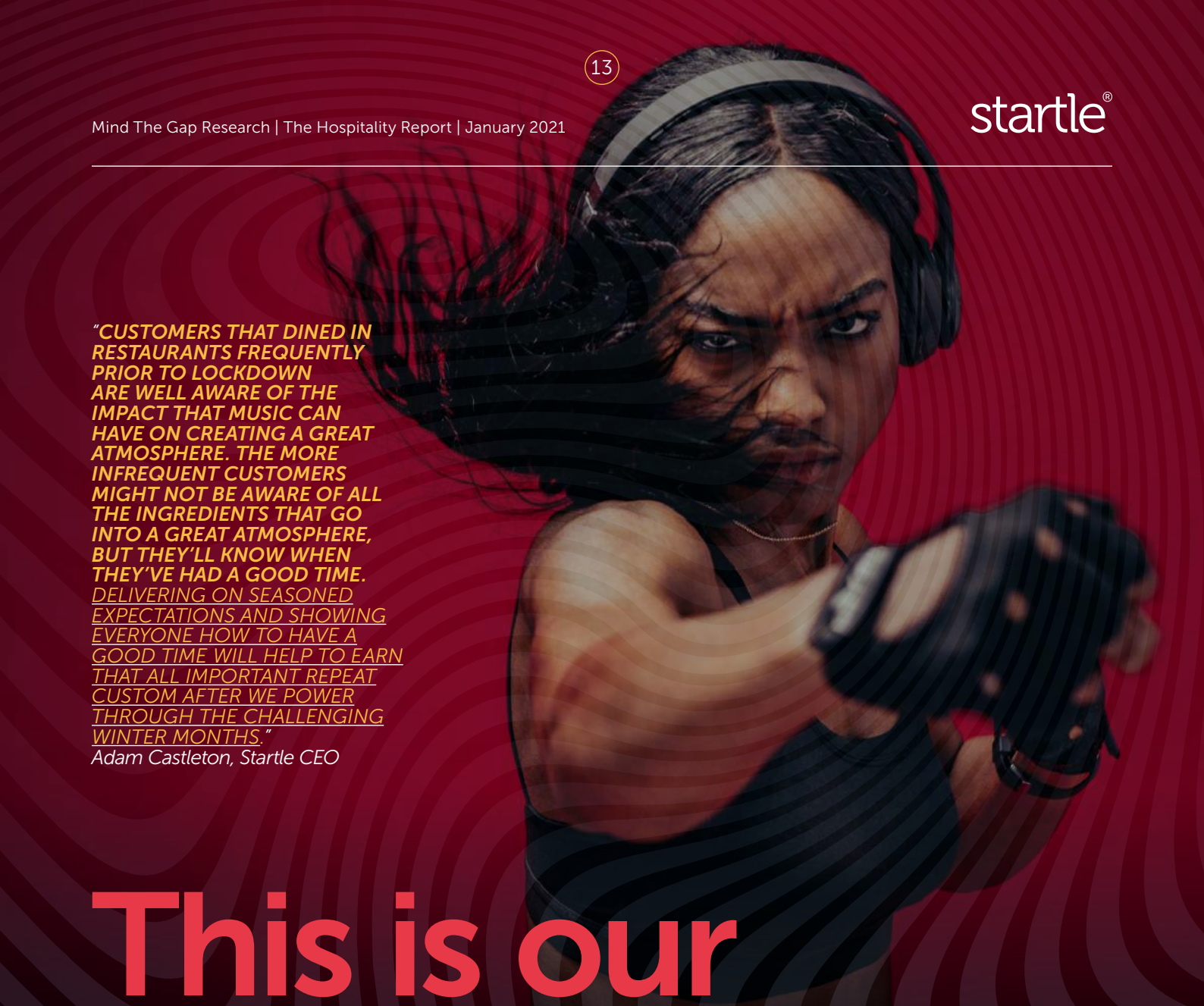
What's clear from our research, and from the stories we're hearing from pubs and restaurants across the board is that **there is no one size fits all experience strategy** for the industry during coronavirus. While customers are largely in agreement about the need for stringent safety measures, their expectations vary enormously across age groups, genders and the type of venue. So really, what's new?

Different **customer demographics have always had different expectations**. Right now it's about understanding what the absolute 'must-haves' are that will bring your target market back through the doors again and again.

"COVID-19 HAS IMPACTED US MASSIVELY, WITH SOCIAL DISTANCING, STAFF WEARING FACE MASKS, AND LOSING SEATS ON THE SHOP FLOOR. ***BUT ADAPTING AS BEST AS POSSIBLE AND ENSURING WE STAY POSITIVE IS THE BEST WAY TO DELIVER A GREAT, MEMORABLE CUSTOMER EXPERIENCE."***



DHAN TAMANG, MD AT COFFEE LAB



"CUSTOMERS THAT DINED IN RESTAURANTS FREQUENTLY PRIOR TO LOCKDOWN ARE WELL AWARE OF THE IMPACT THAT MUSIC CAN HAVE ON CREATING A GREAT ATMOSPHERE. THE MORE INFREQUENT CUSTOMERS MIGHT NOT BE AWARE OF ALL THE INGREDIENTS THAT GO INTO A GREAT ATMOSPHERE, BUT THEY'LL KNOW WHEN THEY'VE HAD A GOOD TIME. *DELIVERING ON SEASONED EXPECTATIONS AND SHOWING EVERYONE HOW TO HAVE A GOOD TIME WILL HELP TO EARN THAT ALL IMPORTANT REPEAT CUSTOM AFTER WE POWER THROUGH THE CHALLENGING WINTER MONTHS."*
Adam Castleton, Startle CEO

This is our fight song.

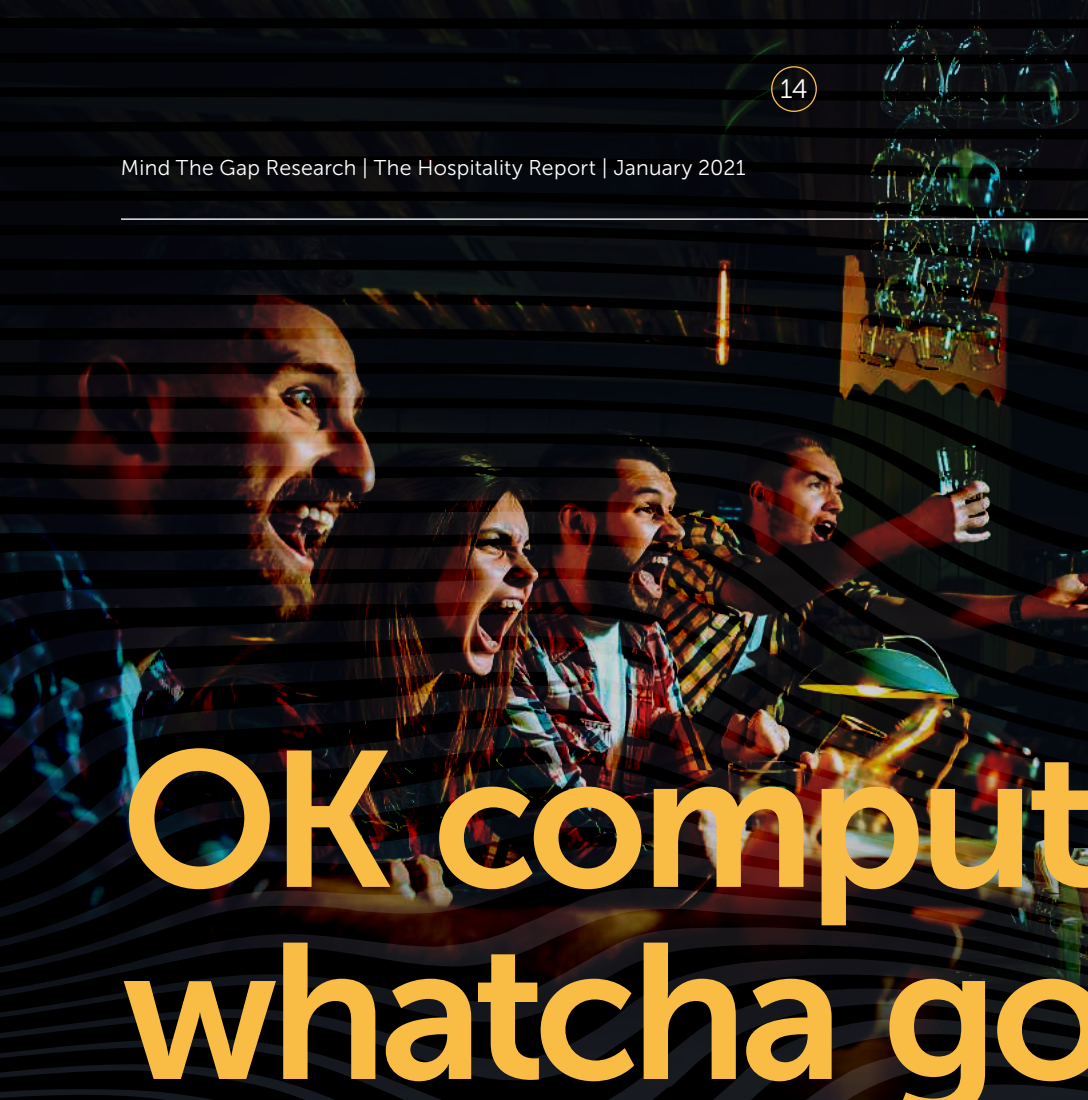
With consumers eating out less frequently, there is still opportunity for you to make the most of guests' visits, create memorable customer experiences and build brand affinity.

Startle's fight song in the current crisis is our belief in the power of music to shape human emotions and behaviour, enabling you to tap into the power of music and strike a chord with your customers - no matter the mood of the nation.

Our music profiling experts are equipped with tools to make them superhuman. Our library of songs is analysed with advanced algorithms, giving us the ability to understand neural responses to particular tracks and the sentiment of lyrics. The result is that we can curate more appropriate playlists and have greater control over the behavioural and emotional responses customers have to the music that's played.

When it comes to setting just the right mood music, we've got your back.

For multisite operators, we use a symphony of tech, machine-learning, AI and a multi-million track library to create bespoke and responsive soundtracks that drive better business.



THE ABILITY TO INTERACT WITH MATCHES IS HUGELY POPULAR WITH FANS

OK computer, whatcha gonna do for me?

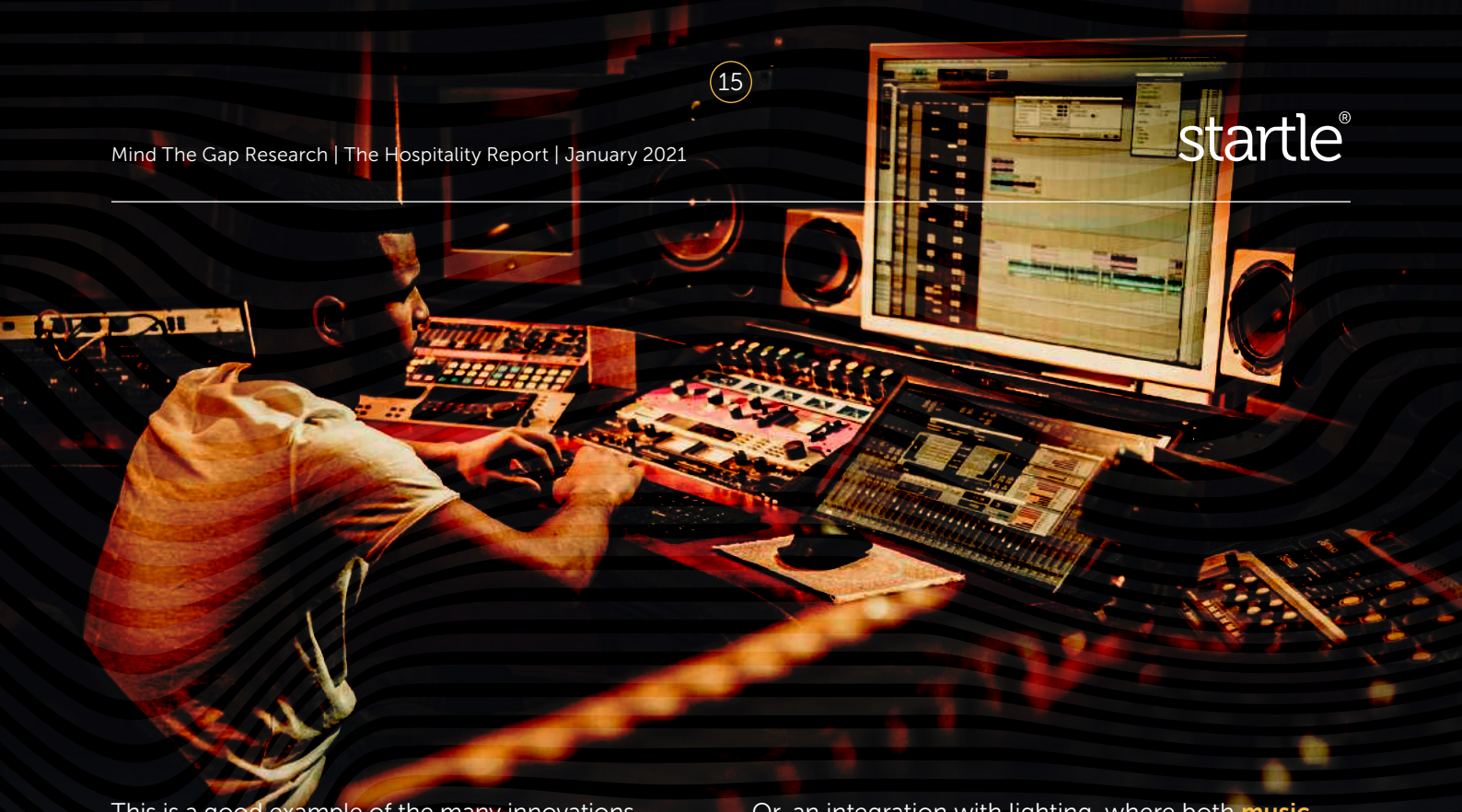
While music is one of the most powerful ways to build an atmosphere and evoke emotion, integrating it with other technology touchpoints can raise the roof on the customer experience.

The promise of a high-quality picture, immersive audio and crowd camaraderie to create an authentic match atmosphere, along with a tasty pint or three is what **tempts punters away from their homes** and into their local to watch a match.

And it can be **hugely profitable to pubs and bars if they get the experience right**. The average pub is said to enjoy sales over £30k from broadcasting live Premier League games alone. However, in a post-lockdown world, COVID-19 uncertainties and restrictions mean that many people are still wary of visiting pubs. With the sense of community and connection sports like football inspire, it's no surprise that having **the ability to interact with matches is hugely popular with fans**. A big opportunity therefore lies for pubs to give a taste of this in their venues.

An example of this interactive entertainment is **the 'Predictor' game our team of tech experts built for Greene King** this year. Integrating with Greene King's popular Season Ticket app, Predictor allows customers to engage further with the match and **compete for instantly redeemable prizes** by predicting the outcome of a series of events, such as the first player to score a goal, and how many yellow cards will be issued.

Played entirely through a smartphone, the game was already designed with consumer demands for technology in mind - easy access through the app, simple but entertaining format, and **the opportunity to enjoy a free pint at players' fingertips**. But with the pandemic impacting the level of freedom and movement allowed in a public space, digital games like Predictor have become an ideal, contact-free route to engagement in the post-lockdown pub.



This is a good example of the many innovations available to pubs in 2021 that still remain highly relevant, and with the additional secondary benefits of growing overall app usage, strengthening the Greene King community and building connection with the brand, **such technology has a clear business case**.

There are other ways venues can embrace technology in very practical ways; **digital signage that synchronises with audio** to create the perfect balance of communication or maximise product adverts.

Or, an integration with lighting, where both **music and lighting change and flow in sync** to create an experience that can subtly - or dramatically, if desired - heighten customer senses.

Don't worry if these ideas seem too ambitious for right now, think about how you can use your instore signage to better effect and invest in a future proof platform. Tear up those quickly printed 'one-way' signs and instead, sync screens with bespoke audio with the most relevant and eye-catching content.

"THE AMBIENCE OF THE BUSINESS IS AT THE FOREFRONT OF THE DESIGN EACH TIME ONE OF OUR PUBS IS DEVELOPED. *CREATING MULTIPLE ZONES THAT WILL DELIVER A DIFFERENT ATMOSPHERE AT KEY TRADING PERIODS SUCH AS LIVE SPORT OR AN UP-TEMPO LATE NIGHT. ZONES FOR THE PLACEMENT OF SPEAKERS, MULTIPLE LAYERS OF LED LIGHTING TO IMPROVE AMBIENCE AND HIGHLIGHT DESIGN FEATURES, AND CREATING THE RIGHT ASSETS TO ASSIST THE CUSTOMERS IN PROCURING A WIDE RANGE OF DRINKS – MENUS, ORDERING APPS AND ALSO DIGITAL MESSAGING."*



GARY ROBERTS, OPERATIONS DIRECTOR AT AMBER TAVERNS



Bring it all back to you.

Trend-hunters couldn't have foreseen a global pandemic that's shut the doors of millions of venues across the world. But, that's what happened, forcing a complete remix of the hospitality landscape.

As Trend-Hunter's respected 'Mega-trends' tracker signals, **"in a world abundant with 'stuff,' experience becomes a more important currency and life priority.[11]"**

Pre-lockdown, consumers' desire for social, meaningful and memorable experiences was clear. This has only been strengthened by lockdown and the subsequent shift in consumer attitudes.

These learnings can be used to help operators that are yet again moving out of lockdown secure their date in people's post-lockdown diaries.

[11] https://www.trendhunter.com/megatrend/experience

Where can music help you top the post-lockdown charts?

EMBRACE ATMOSPHERIC EXPERIENCES WITH THE RIGHT RHYTHMS

Use curated playlists to inject just the right atmosphere into quieter venues where customers are seeking 'buzz'.

Create bespoke radio with content that responds to your customers' needs in real-time, adjusting volume in line with lighting and other ambient factors.

INTRODUCE FUN WITH FUNCTION, SPONTANEITY AND SAFETY

Music releases dopamine - often referred to as **the pleasure hormone**. At a time when much of the hospitality experience has been stripped of its sense of fun and spontaneity, music with a positive vibe can put a smile back on diners' faces without compromising safety.

Amplify your audio announcements by making sure they are in sync with the environment as part of a balanced and dynamic experience.

Create your own entertaining **brand radio station**, increase customer engagement, and keep your messaging front of mind.

SAY 'YES' TO THE POWER OF PERSONALISED PLAYLISTS

Explore how **technology can help you create bespoke playlists** for your target consumers, and how adaptive technologies can help you respond to their needs.

By encouraging interaction with your brand's music through **digital jukeboxes or take-home playlists**, you can leave a lasting impression and embed positive associations in the hearts and minds of your customers.

Thank u... next!

2020 was a year many will be happy to see the back of. 2021 is a chance to reset but will still be fraught with challenges. With what we've learned last year, the only certain thing is a high level of uncertainty.

REFLECTING ON 2020, MELANIE FULKER - HEAD OF GROWTH AT STARTLE SHARES FINAL THOUGHTS ON HOW YOU CAN CRACK GREAT CUSTOMER EXPERIENCE IN THE UNCERTAIN YEAR AHEAD:

...What hospitality will look like in 2021 is uncertain to everyone. We've had the welcomed news of highly effective COVID-19 vaccines. But sadly, it's likely that we will still be faced with further restrictions that mean operators have to work extremely hard to adapt and function successfully - as they have done such an impressive job of in 2020.

Alongside operational challenges, it will be just as important in 2021 to make sure hospitality venues are offering a welcoming, enjoyable atmosphere for their customers. This is especially crucial when extra COVID health and safety measures are, quite rightly, so forefront.

Giving care to creating a sense of calm and welcoming - whether through the service given, the music played or the venue design - can counteract any anxiety or negativity that these important safety communications could induce. A relaxing atmosphere can ensure the experience feels as familiar as possible, giving consumers the sense of enjoyment and escapism that many crave. As we venture into the new year, getting the atmosphere just right should continue to be a priority for hospitality businesses.

2020 highlighted some incredible businesses that have pivoted and innovated to offer something new, exciting and relevant to consumers. One of our beloved customers, Pizza Pilgrims, saw outstanding success with the launch of their pizza-making kits during the first lockdown. Some businesses have rapidly expanded their delivery operations, for example, creating click and collect or drive thru offers. Others have formed new collaborations with people they didn't even know before lockdown 1.0. This has been happening on a whole new level compared to pre-COVID times.

I predict, and hope, that we'll see much more of this in 2021. Operators have had to become more agile and creative. They're thinking shorter-term, often in terms of weeks rather than months or years, to protect the immediate viability of their business. This will be important, however an eye for the long term must be kept in order to plan for recovery when trading conditions improve.

It's been an unbelievably tough ride for hospitality. But backed by an outstanding trade body, ever high consumer demand, and a level of industry collaboration and support more powerful than ever, I believe there is most certainly light at the end of the tunnel.