

NCCBG Consumer Confidence Survey: COVID-19

*"Help #NCBeer: Taproom & Brewpub
Consumer Survey"*

May 2020



Survey Composition and Data Collection

The “Help #NCBeer: Taproom & Brewpub Consumer Survey” consisted of 5 quick questions, designed for craft beer consumers, aged 21 and over, who, prior to the COVID-19 outbreak, enjoyed visiting craft brewery taprooms and brewpubs.

The survey link was distributed via the NC Craft Brewers Guild social media channels, as well as sent in a targeted email to our mailing list of 2,006 NC craft beer enthusiasts. Additionally, we asked our North Carolina breweries to share the survey link on their social media channels.

The survey was released on Friday, May 8, 2020 and closed on Tuesday, May 12, 2020. During that time, we received a total of 4,383 survey entries submitted, of which...

- 4383 entries were completed through question 1.
- 4251 entries were completed through question 2.
- 4217 entries were completed through question 3.
- 4030 entries were completed through question 4.
- 4005 entries were completed through question 5.

Of the completed survey entries, 6 were submitted by persons under 21 years of age, and were thus excluded from the reporting for questions 2-5.

Help #NCBeer: Taproom & Brewpub Consumer Survey

By participating in this survey, you are helping the breweries of North Carolina determine how to best serve you, the craft beer consumer, once taprooms and restaurants are allowed to reopen for onsite consumption.

This survey is intended for craft beer consumers aged 21 and over, who, prior to the COVID-19 outbreak, enjoyed visiting craft brewery taprooms. It is composed of 5 multiple choice questions, and takes less than 1 minute to complete.

#NCBeer thanks you for your time and assistance!

1. Are you 21 years of age or older? Y/N

Only responses from survey respondents who indicated “Yes” they are 21 years of age or older were included in reporting beyond question 1.

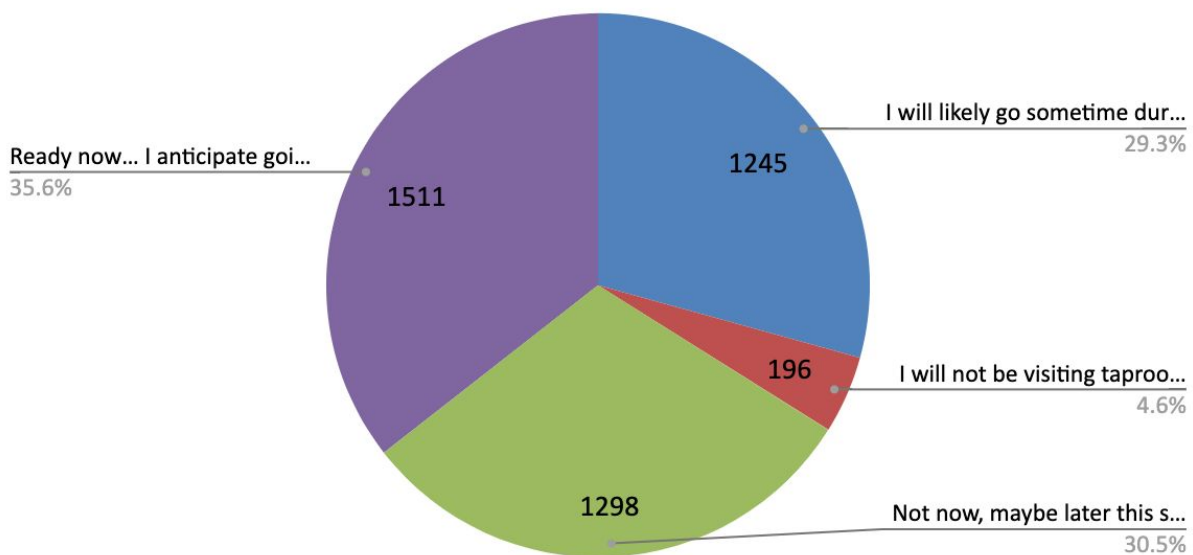
2. North Carolina anticipates reopening taprooms and restaurants for on-premise service in Phase 2 of the state's reopening plan (currently scheduled for May 22, 2020.)

When NC reopens for on-premises service, how likely are you to visit a taproom or brewpub?

- Ready now... I anticipate going as soon as they open (at the start of Phase 2, late May.)
- I will likely go sometime during Phase 2 (May-June)
- Not now, maybe later this summer (Phase 3, late June or after.)
- I will not be visiting taprooms or brewpubs for the foreseeable future.

When NC reopens for on-premises service, how likely are you to visit a taproom or brewpub?

Based on 4,251 responses.

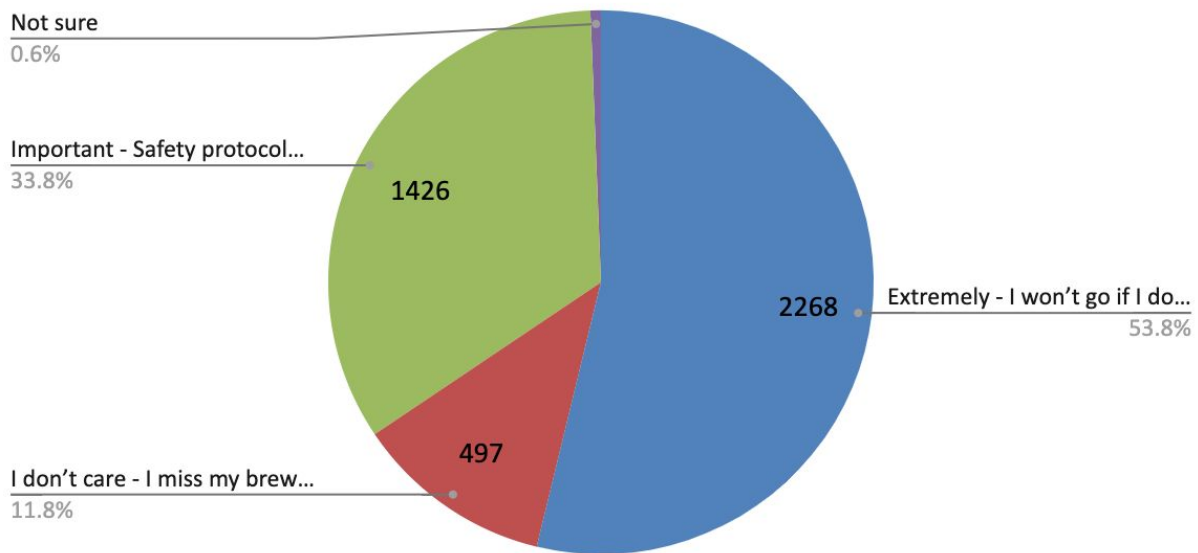


Time-frame for Next Visit	Ready now (start of Phase 2)	Likely sometime during Phase 2 (May-June)	Later this summer (Phase 3 late June or after)	Not visiting taprooms for the foreseeable future.
# of respondents	1511	1245	1298	196
% of respondents	35.6%	29.3%	30.5%	4.6%

3. How important is it that your favorite taproom or brewpub communicates clear safety protocols to its customers?
- Extremely - I won't go if I don't know their safety protocols in advance
 - Important - Safety protocol signage posted at entrance is sufficient
 - I don't care - I miss my brewery and will come regardless
 - Not sure

How important is it that your favorite taproom or brewpub communicates clear safety protocols to its customers?

Based on 4,217 responses.



Safety Protocol Communication	Extremely Important - Need safety protocols in advance	Important - Safety protocol signage at entrance is sufficient	I don't care - I miss my brewery and will come regardless	Not sure
# of responses	2268	1426	497	26
% of responses	53.8%	33.8%	11.8%	0.6%

4. While taprooms & restaurants will already be following stringent cleaning & public distancing requirements, which of the below additional safety measures would make you more likely to visit?

Rank according to priority (assign a different priority rank for each option):

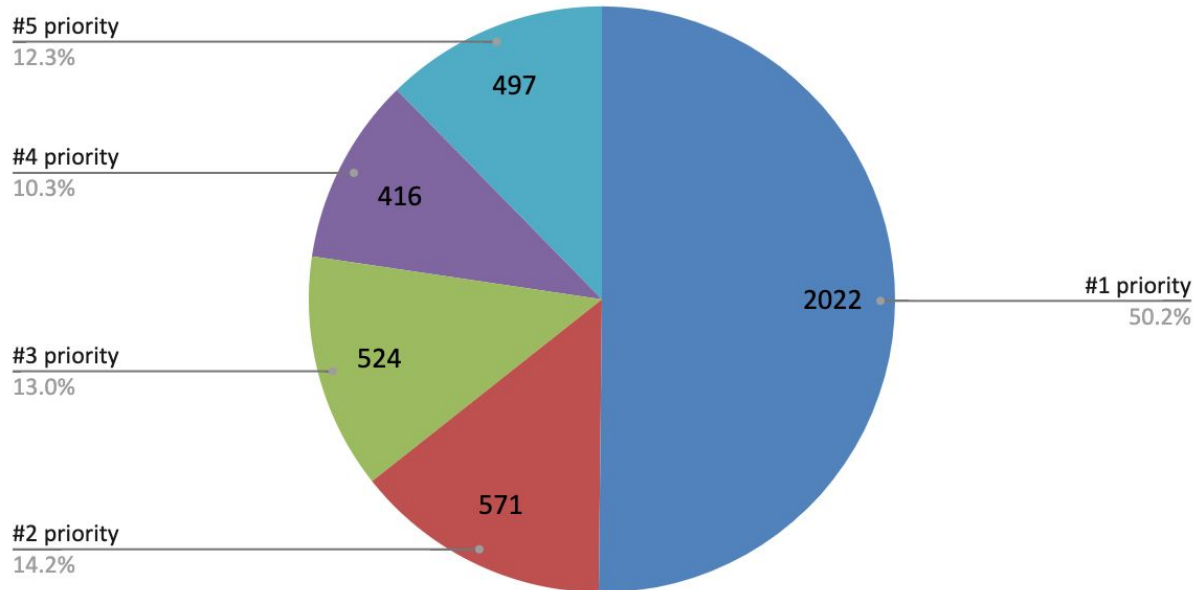
	#1 priority	#2 priority	#3 priority	#4 priority	#5 priority
Outdoor seating	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Customer health screenings at entry	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Contactless taproom (payment, menus, etc...)	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Touchless restrooms	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Employees wearing masks/gloves	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5

Overall ranked results:

Priority Ranking	Additional Safety Measure	% of #1 priority rankings
#1 Priority Overall:	Outdoor seating	50.2%
#2 Priority Overall:	Employees wearing masks/gloves	21.9%
#3 Priority Overall:	Contactless taproom (payment, menus, etc...)	18.8%
#4 Priority Overall:	Customer health screenings	13.2%
#5 Priority Overall:	Touchless restrooms	12.9%

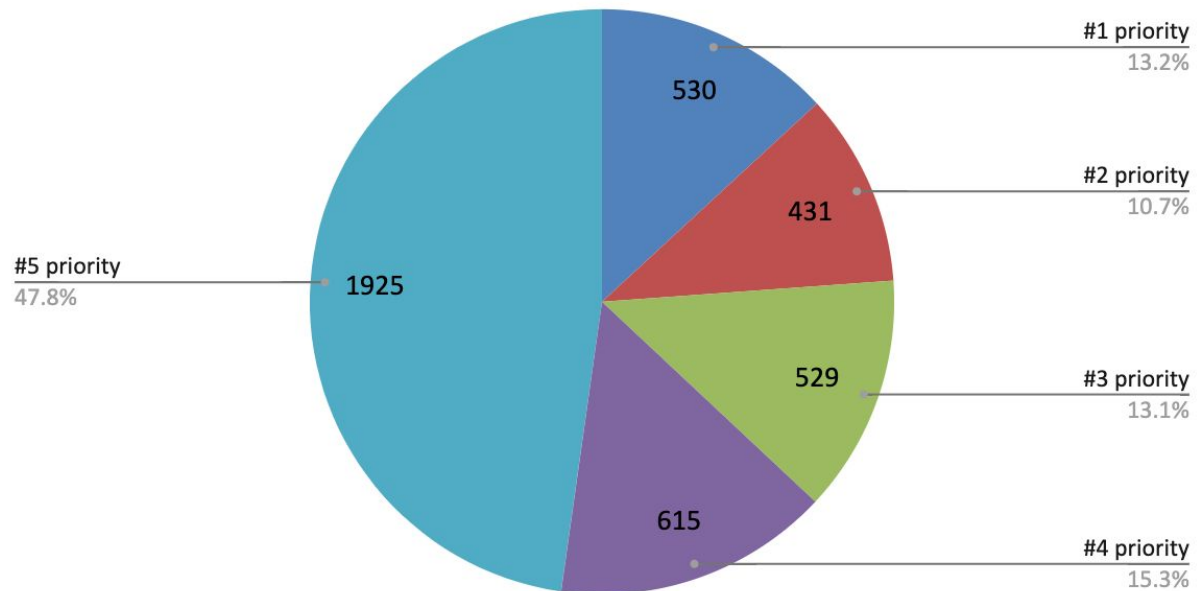
Safety Measure: Outdoor Seating

Based on 4030 responses.



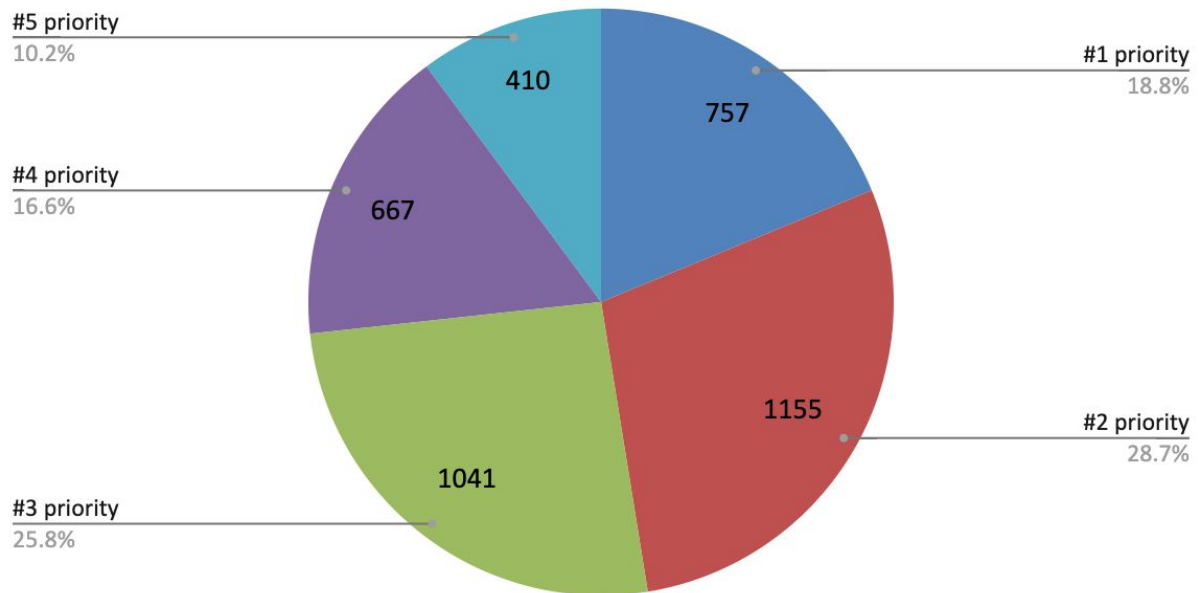
Safety Measure: Customer Health Screening

Based on 4030 responses.



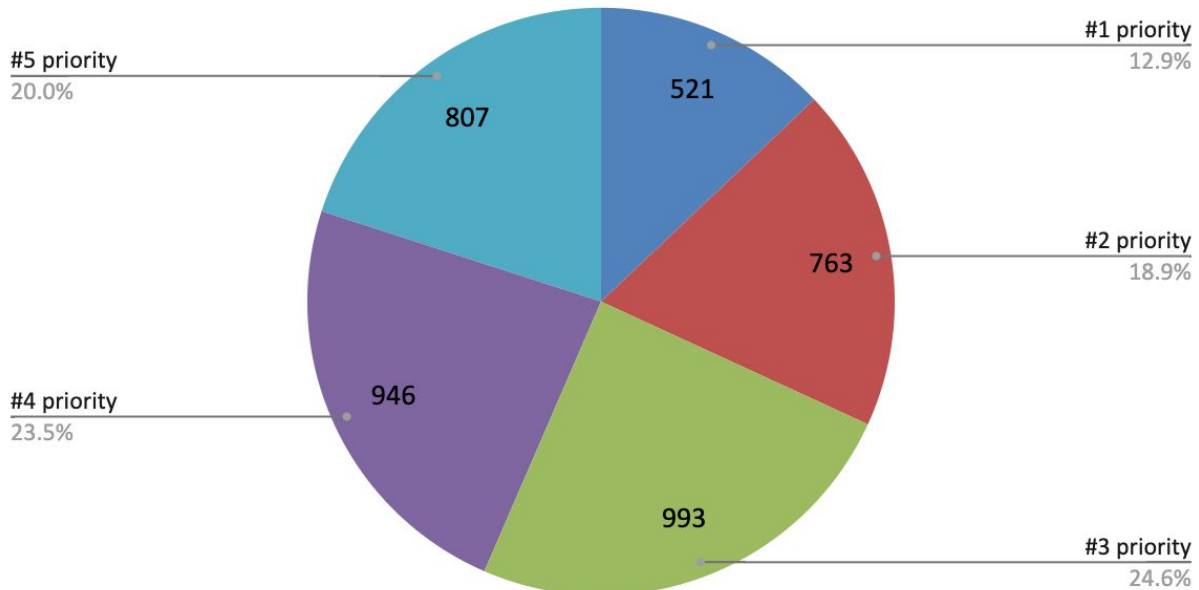
Safety Measure: Contactless Taproom (Payment, Menus, etc...)

Based on 4030 responses.



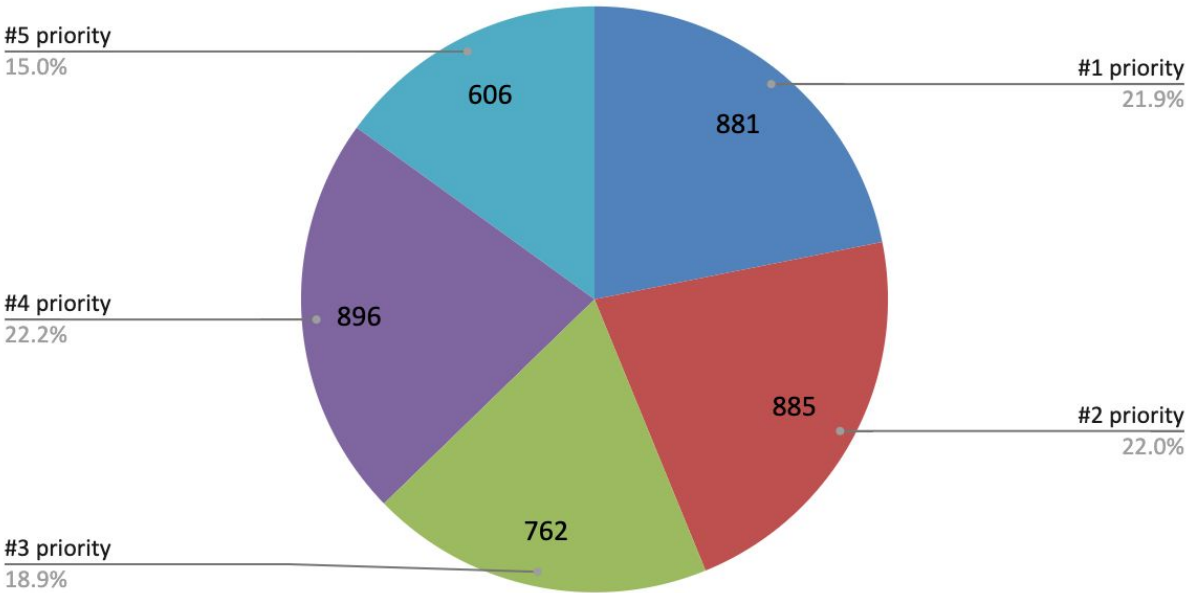
Safety Measure: Touchless Restrooms

Based on 4030 responses.



Safety Measure: Employees Wearing Masks/Gloves

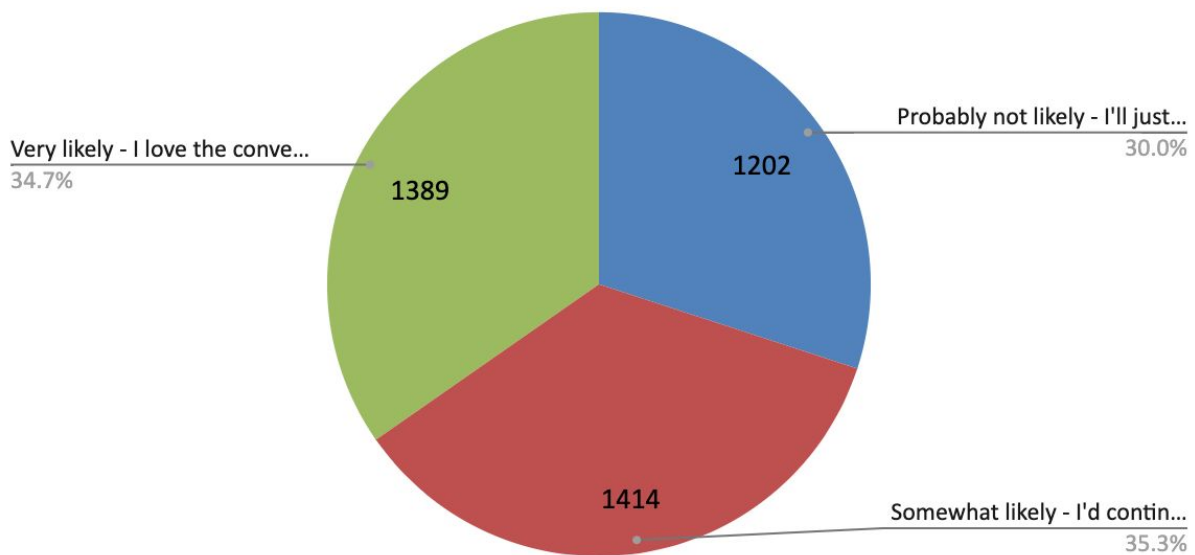
Based on 4030 responses.



5. Once taprooms and brewpubs have reopened for onsite consumption, how likely are you to continue to use curbside pickup or delivery options?
- Very likely - I love the convenience of curbside to-go and/or delivery!
 - Somewhat likely - I'd continue to use these options, but not as frequently.
 - Probably not likely - I'll just swing in for a visit instead.

Once breweries have reopened for onsite consumption, how likely are you to continue to use curbside pickup or delivery options?

Based on 4005 responses.



Likelihood of using curbside & delivery	Very likely	Somewhat likely	Probably not likely
# of responses	1389	1414	1202
% of responses	34.7%	35.3%	30.0%