

Research report

YouGov / Portman Group survey on UK alcohol consumption post the COVID-19 lockdown

September 2020



Overview

- The Portman Group has been vigilant in tracking the numerous initial public polls to understand how COVID-19 and the lockdown were impacting the UK's drinking behaviour. However, to gain a deeper understanding, the Portman Group commissioned YouGov to conduct the first UK-wide survey¹ to measure weekly unit intake prior to and since COVID-19 in May 2020.
- Our initial research with YouGov in May showed that the moderate majority of UK consumers were drinking the same or less during lockdown and remained within Government guidelines (including almost half of those drinking more).
- We now seek to further explore how UK drinking habits may have changed since the reopening of pubs and bars as part of the easing of lockdown measures.
- We commissioned YouGov to conduct a further poll into drinking habits across the UK since the respective reopening of the hospitality sectors in England (4 July), Wales (3 August), Scotland (15 July) and Northern Ireland (3 July).
- YouGov surveyed 2,296 adults from across the UK online between 12 and 13 August 2020. The figures have been weighted and are representative of all UK adults (aged 18+). All figures, unless otherwise stated, are from YouGov Plc.

The survey found overall:

- Fears that the hospitality industry reopening would fuel an increase in drinking were unfounded. The vast majority of Brits are continuing to drink moderately and within Government low risk guidelines of 14 units a week.
- 88% of UK drinkers reported drinking the same (55%), less (26%) or have cut alcohol out altogether (7%) since the hospitality sector reopened compared to before lockdown.
- This is a large relative increase compared to our previous survey in May 2020, where 65% of UK adults reported drinking the same or less compared to before lockdown.
- This can be partly explained by a collapse in the number of those reporting drinking more, from 35% during lockdown to 8% post-lockdown, suggesting that any increases in consumption may have been temporary, with large numbers of drinkers returning to pre-lockdown levels.
- The moderate majority of UK drinkers (66%) continue to drink responsibly within the Chief Medical Officer guidelines of 14 units per week. Weekly intakes remain similar to before lockdown, with 65% of UK drinkers in the May 2020 drinking within the guidelines.
- The research reinforces the data from Public Health England which suggests that COVID-19 has largely unaffected drinking habits, with self-reported mean weekly alcohol units consumed in all adults remaining around 11 units.²
- Whilst our previous research has shown that not all increases in drinking are a cause for a concern, we encourage anyone concerned about their own, or another person's, drinking to visit Drinkaware or the NHS online for free advice and guidance.

¹ [Portman Group Press Release](#), 5 June 2020, YouGov surveyed 2070 adults from across the UK online between 22 and 26 May 2020. The figures have been weighted and are representative of all UK adults (aged 18+). All figures, unless otherwise stated, are from YouGov Plc.

² [Public Health England: Wider impacts of COVID-19 on health: summary](#), 27 August 2020

- Almost half (42%) of English adults have returned to pubs and bars since they have reopened, compared to 37% in Wales, 30% in Scotland and 26% in Northern Ireland.
- The youngest generation (18-24) – so-called Generation Z - are the most likely to have visited pubs and bars since they reopened, with over half (51%) visiting at least once. The older generation are slower to return to pubs and bars, with 36% of those aged over 45 having visited pubs and bars since they reopened.
- Whilst 72% of UK pubgoers have made a cautious return to the pub, with many visiting less than they usually would, just under a quarter (24%) of UK pubgoers say they have yet to return.
- The hospitality sector has taken extensive measures to ensure that social distancing can occur while retaining the atmosphere that customers seek. However, our survey suggests that fear of COVID-19 remains an understandable prime deterrent for consumers. This will likely be familiar to businesses across many industries, not just hospitality, with recent data suggesting shopper footfall remains over a third (34.9%) lower on UK highstreets compared to last year, whilst around half of working adults (43%) continue to avoid the commute and to work from home and London Underground journeys remaining 72% down compared to 2019.³
- Other key reasons cited by those visiting less than usual or yet to return include the impact of social distancing measures as well as changing economic circumstances meaning that people have less money to spend, for example because they have lost their job or continue to be furloughed.

Final thoughts

- The moderate majority of drinkers in the UK practice responsible drinking and understand how to drink within the CMO guidelines. Much of this can be attributed to various Governments campaigns such as Change4Life, Drinkaware's drink free days and the [Count14](#) campaign in Scotland.
- The industry are also far along the path in updating the guidance on containers to state the low risk guidance, which will act as a further reminder to people to remain drinking moderately.
- Whilst not all increases in consumption are a cause for concern, previous research suggests that increases are partly fuelled by those already drinking at heavier and more harmful rates. We would welcome further support for these vulnerable drinkers as part of funding announcements across the UK and look forward to the UK Government's forthcoming Addiction Strategy.
- We also believe valuable lessons can be learned from the ongoing success of trials in local authorities, such as the Walsall Healthcare NHS Trust's successful 'Managing Complex Patients Project', which features a tailored multi-agency approach to tackle the underlying causes of problem drinkers, reduce alcohol-related admissions and save substantial healthcare costs.
- Our findings reinforce the warnings from Hospitality UK and the British Beer and Pub Association that, despite the successful rollout of social distancing measures across the hospitality industry, additional support may be needed to help secure the long-term future of the sector it enters the Autumn and Winter period.

³ [Daily Mail](#), 1 September 2020 / [City AM](#), 3 September 2020 / [Telegraph](#), 3 September 2020

At a glance

England



- 85% of English drinkers are drinking the same, less or have stopped drinking altogether compared to before lockdown.
- 66% of English drinkers remain within the Government low risk guidelines of 14 units per week, similar to pre-lockdown intake levels.
- Almost half (42%) of English adults have returned to pubs and bars since they reopened on 4 July.
- 29% of English pubgoers are either visiting the pub at the same rate or more compared to before lockdown.

Scotland



- 92% of Scottish drinkers are drinking the same, less or have stopped drinking altogether compared to before lockdown, the highest in the UK.
- 69% of Scottish drinkers remain within the Government low risk guidelines of 14 units per week, the highest in the UK and similar to pre-lockdown intake levels.
- Almost a third (30%) of Scottish adults have returned to the pub since the reopening of the hospitality trade on 15 July.
- 29% of Scottish pubgoers are either visiting the pub at the same rate or more compared to before lockdown.

Wales



- 88% of Welsh drinkers are drinking the same, less or have stopped drinking altogether compared to before lockdown, with Welsh drinkers most likely to cut down compared to the rest of the UK.
- 68% of Welsh drinkers remain within the Government low risk guidelines of 14 units per week, similar to pre-lockdown intake levels.
- Over a third (37%) of Welsh adults have returned to the pub since the hospitality trade reopened on 3 August.
- 28% of Welsh pubgoers are either visiting the pub at the same rate or more compared to before lockdown.

Northern Ireland



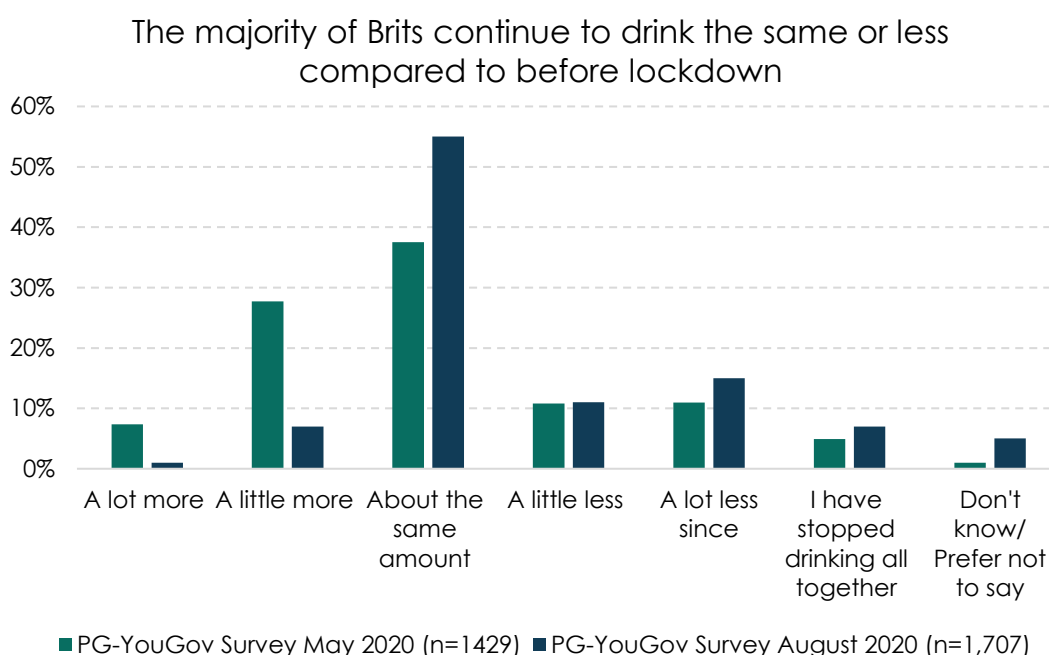
- 89% of Northern Irish drinkers are drinking the same, less or have stopped drinking altogether compared to before lockdown.
- Over a quarter (26%) of Northern Irish adults have returned to pubs since they reopened on 3 July.
- Close to a third (32%) of pubgoers in Northern Ireland have either visited the pub at the same rate or more compared to lockdown.

Survey Results

1. Brits continue to drink the same or less, with those drinking more returning to pre-lockdown levels

65% of all UK adults say they have been drinking the same (41%), less (19%) or stopped (5%) drinking since the reopening of the hospitality industry in their region, compared to before lockdown. 6% say they have been drinking more (5% a little more / 1% a lot more), and 26% of respondents do not drink.

However, if we take out non-drinkers from the sample, 88% of UK drinkers reported drinking the same (55%), less (26%) or have cut alcohol out altogether (7%) since the hospitality sector reopened compared to before lockdown. There is 1% drinking a lot more and 7% drinking a little more (the remaining 5% state they don't know).

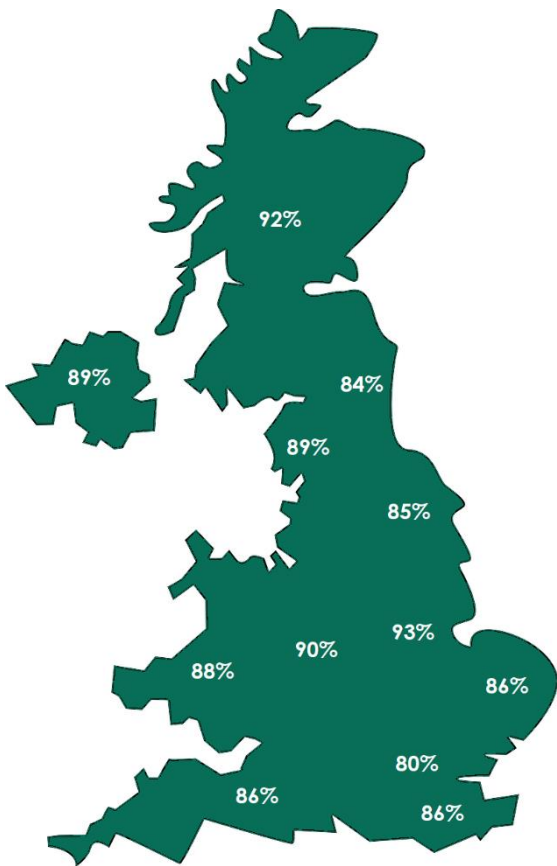


*Non-drinkers removed from the August 2020 sample to allow comparisons with the survey from May 2020

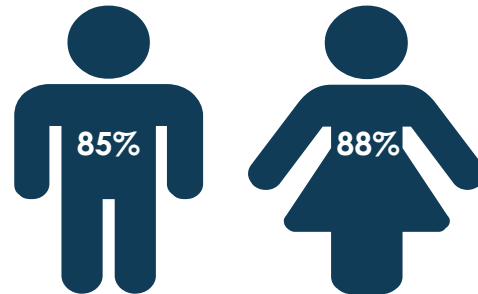
There has been an increase in the number of those drinking the same or less since our last survey, rising from 65% in May 2020 to 88% in August 2020.

This partly reflects a drastic fall in all those who report drinking either a little or a lot more and a commensurate increase in those reporting drinking the same, suggesting that those who were drinking more during lockdown have returned to drinking at pre-lockdown levels now that pubs and bars have reopened.

This is a very encouraging trend for the majority of UK drinkers, though this is not to understate the concerning issue represented by the 1% who say they are drinking a lot more compared to before lockdown, which we will explore later in this report.



Across gender, 85% of men and 88% of women are drinking the same, less or have cut out alcohol altogether. However, men are slightly more likely to be drinking less (26% vs 24%) or cut out alcohol (8% vs 6%). Although men are also more likely to be drinking more, with 10% of male drinkers drinking more versus 7% of female drinkers.



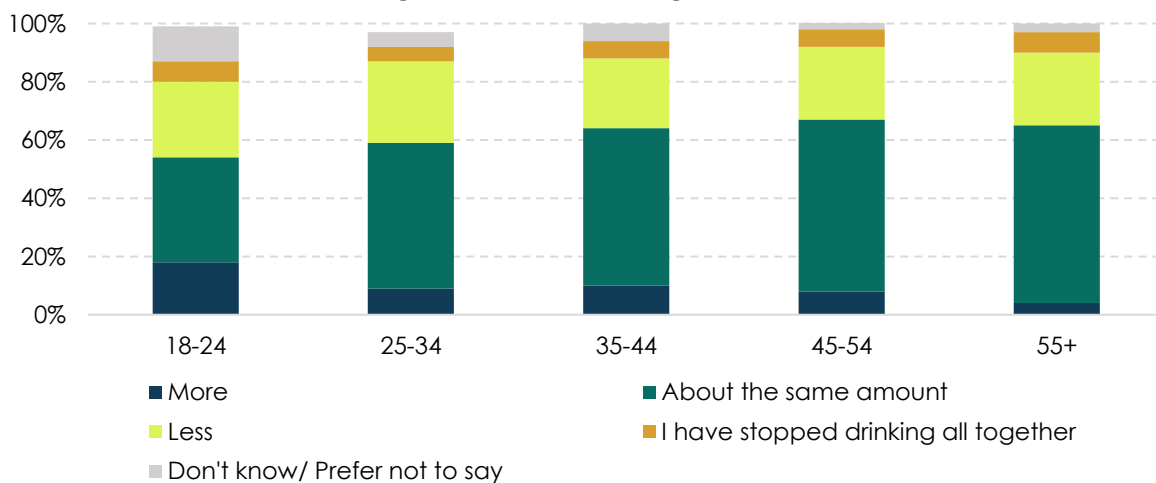
Drinking the same, less or cut out alcohol altogether compared to before lockdown

Across the UK, Scottish drinkers are the most likely to be drinking the same, less or to have stopped altogether (92%) compared to drinkers in England (85%), Wales (88%) and Northern Ireland (89%).

In England, the figures range from 93% in the East Midlands and 90% in the West Midlands to 80% in London.

This trend is also seen across all generations, as the majority in each age group drink the same, less or have cut out alcohol altogether. Younger drinkers (18-34 year olds) are slightly ahead of their older counterparts in cutting down, with a third (33%) drinking less or cutting out alcohol altogether. However, Generation Z (18-24 year olds) also appear to be the most likely to have increased their drinking compared to before lockdown.

Moderate drinking is the norm across all generations, with younger drinkers cutting their intake



All UK adults (non-drinkers removed) (n=1,707)
YouGov, 12-13 August 2020

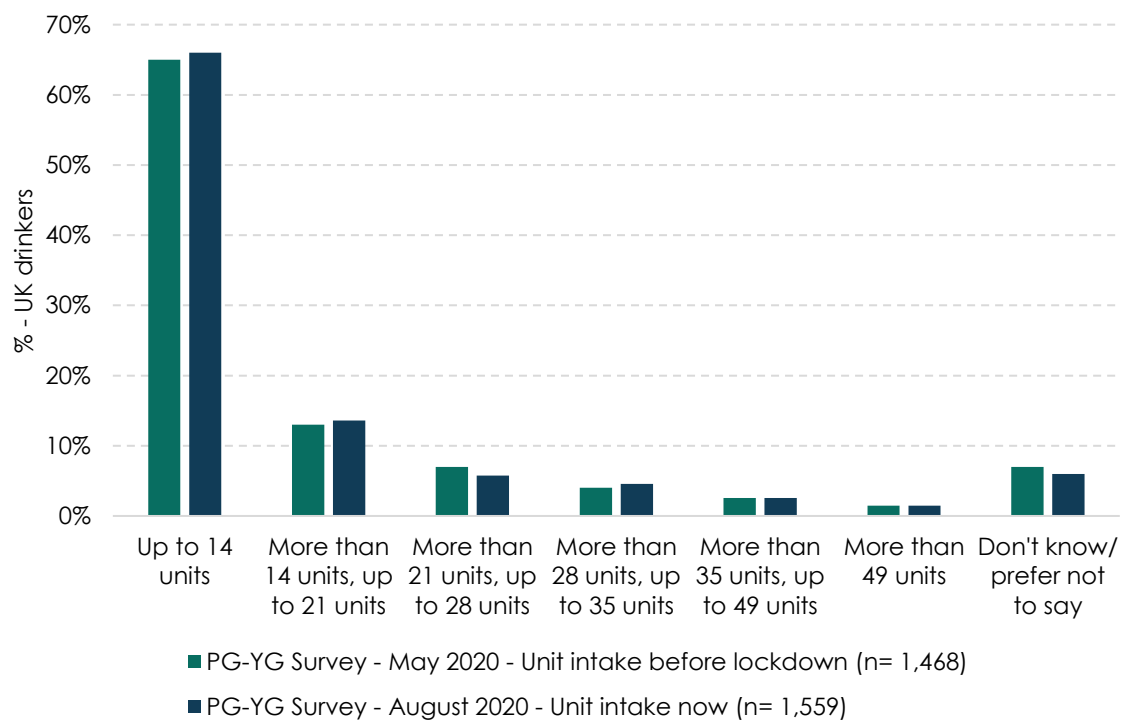
2. The moderate majority remain with Government guidelines, with little impact on weekly unit intake

Our survey results suggest that the moderate majority of those who drink alcohol in the UK continue to drink responsibly and within the Chief Medical Officer (CMO) guidelines, with overall weekly unit intake similar to before the lockdown.

66% of UK drinkers in our August poll said that they were currently drinking within the 14 units a week guideline, compared with the 65% of drinkers before lockdown registered by our previous poll in May 2020. There has also been little relative change in weekly unit intake among those drinking above 14 units a week.

This provides a counterpoint to claims that the UK suffered excessive drinking throughout the lock down or since the reopening of the hospitality trade.

The moderate majority continues - weekly intake remains largely unchanged pre and post lockdown



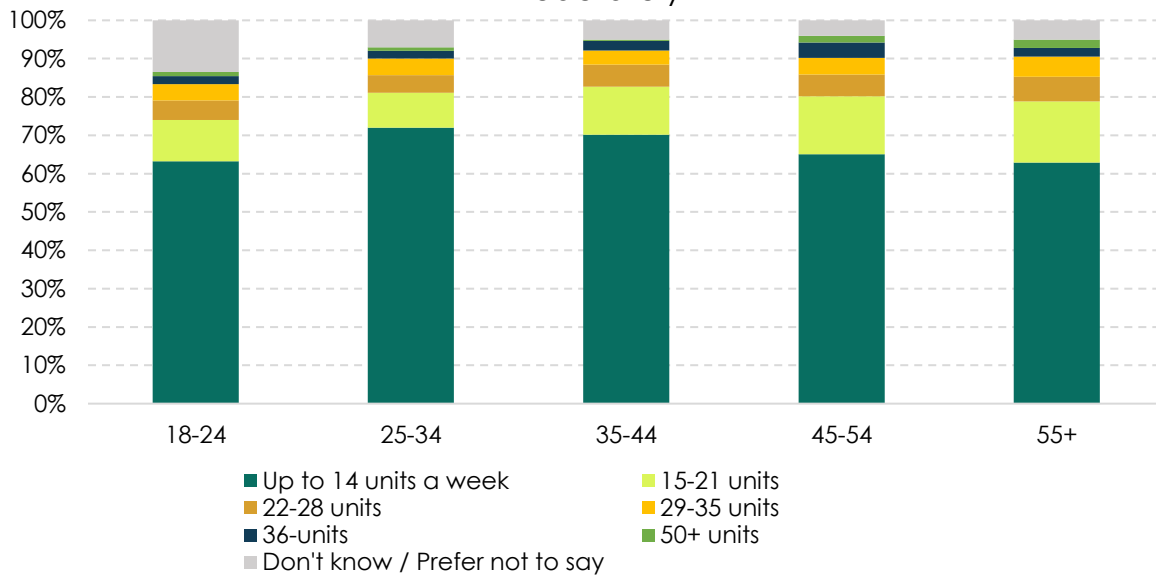
*Non-drinkers removed from May 2020 sample to allow comparisons with the current survey in August 2020

In keeping with previous surveys, women are more moderate drinkers than men, with 71% of women drinking within the CMO weekly guidelines, compared to 61% of men. In contrast, men are more likely to be 'higher risk' drinkers, with 3% drinking over 50 units a week, compared to 1% of women drinking over 35 units a week.

The majority across all age groups are drinking within the Government guidelines. However, in contrast to previous surveys, those in their late 20s to early 40s (25-44 years old) are the most likely to be drinking within Government guidelines (71%), compared to 63% of 18-24 year olds, previously painted as 'Generation Sober'. This could reflect increased drinking in younger people since the lockdown has ended, with Generation Z free to go out to socialise.

However, older drinkers (seen below as those aged 45 years old and over) remain the most likely to be drinking at the heaviest and most harmful rates.

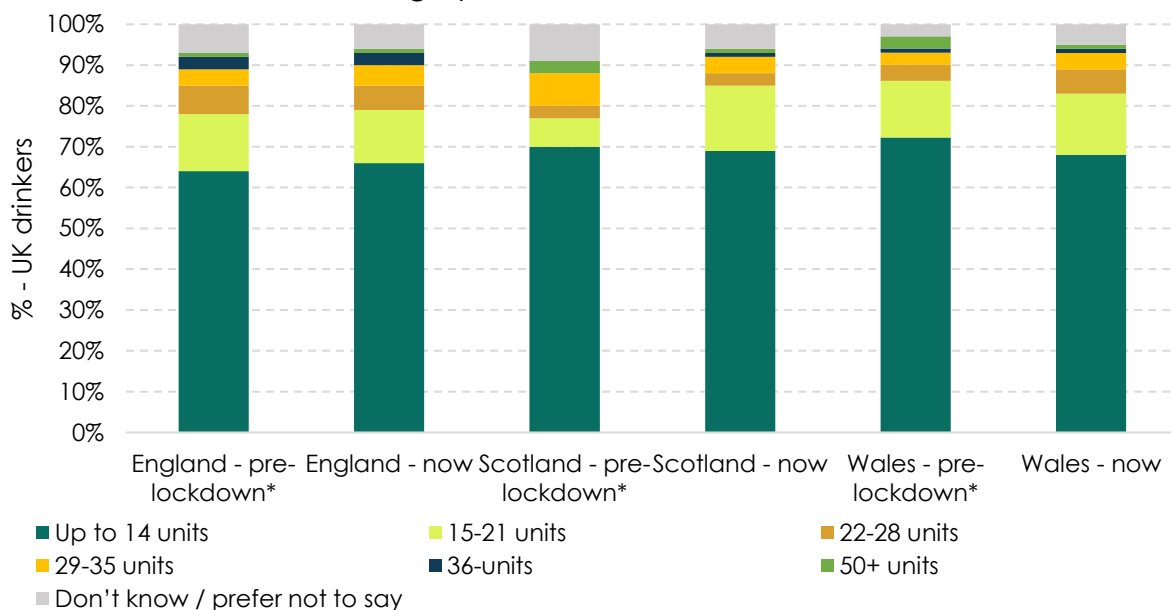
The majority of drinkers across all age groups drink moderately



All UK adults who drink (n=1,559)
YouGov, 12-13 August 2020

Across Britain⁴, Scottish drinkers are slightly more likely to drink moderately within 14 units a week (69%) compared to their English (66%) and Welsh (68%) counterparts, which all remain broadly in line with pre-lockdown weekly intake. There appears to have been a slight decline in the heaviest drinkers in Wales and Scotland, though rates have remained relatively stable in England.

Weekly unit intake pre and post lockdown has remained largely the same across Britain

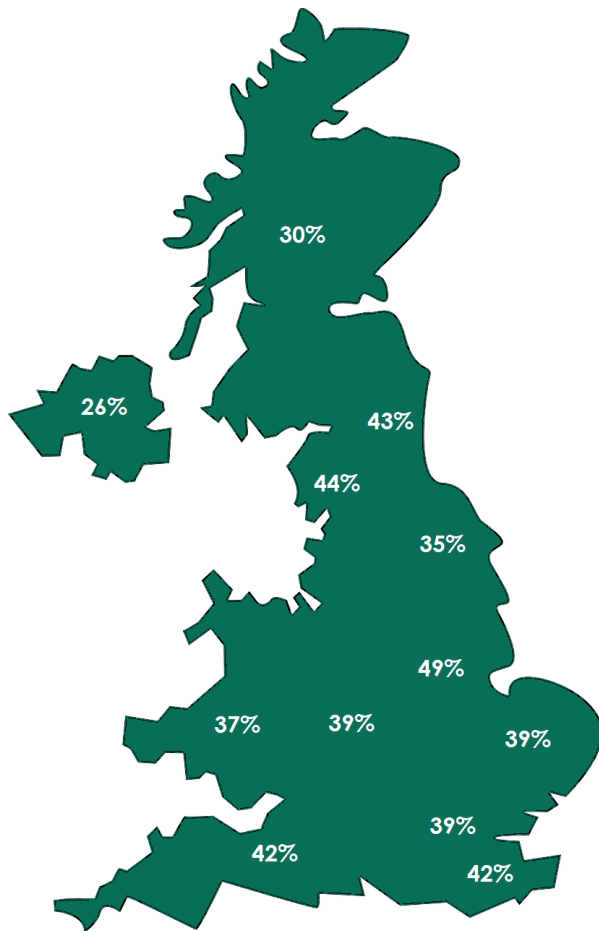


*Non-drinkers removed from May 2020 sample to allow comparisons with the current survey in August 2020

⁴ Unfortunately, the Northern Irish survey results for this question were too small to be able to quote.

3. Brits cautiously return to pubs, led by Generation Z

Brits are cautiously returning to pubs and bars since the hospitality trade has reopened, though there appears to be differing levels of enthusiasm across the UK and between age groups. Overall, 40% of UK adults say they have been to a pub or bar at least once since they reopened, although 26% say they are visiting less than once a week.



English pubgoers are leading the way, with almost half (42%) of English adults returning to pubs and bars since they reopened on so-called 'Super Saturday' on 4 July. This is compared to over a third (37%) of Welsh adults since their hospitality trade reopened on 3 August, 30% of Scottish adults since 15 July and just over a quarter (26%) of Northern Irish adults since 3 July.

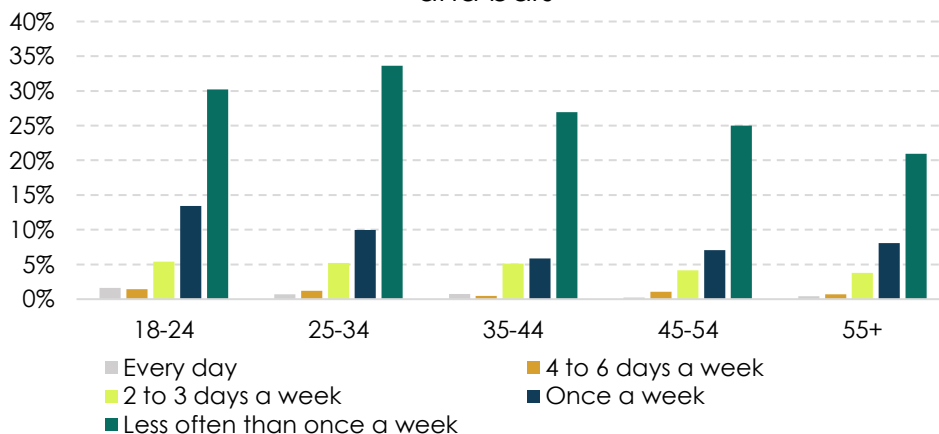
There is also regional variation within England, with almost half (49%) of adults in the East Midlands visiting a pub or bar at least once, compared to just over a third (35%) of adults in Yorkshire and the Humber.

Men appear to be more enthusiastic than women, with 42% visiting a pub or bar at least once, compared to 39% of women.

The youngest generation, those aged between 18 and 24, are the most likely to have visited pubs and bars since they reopened, with over half (51%) visiting at least once, whilst the older generation are most likely to avoid pubs and bars, with 64% of those aged over 45 not having visited pubs and bars since they reopened. The youngest generation are also the most likely

to visit pubs and bars the most frequently since they reopened, with 8% of 18-24 years visiting at least two to three days a week.

Generation Z is leading the way back to pubs and bars

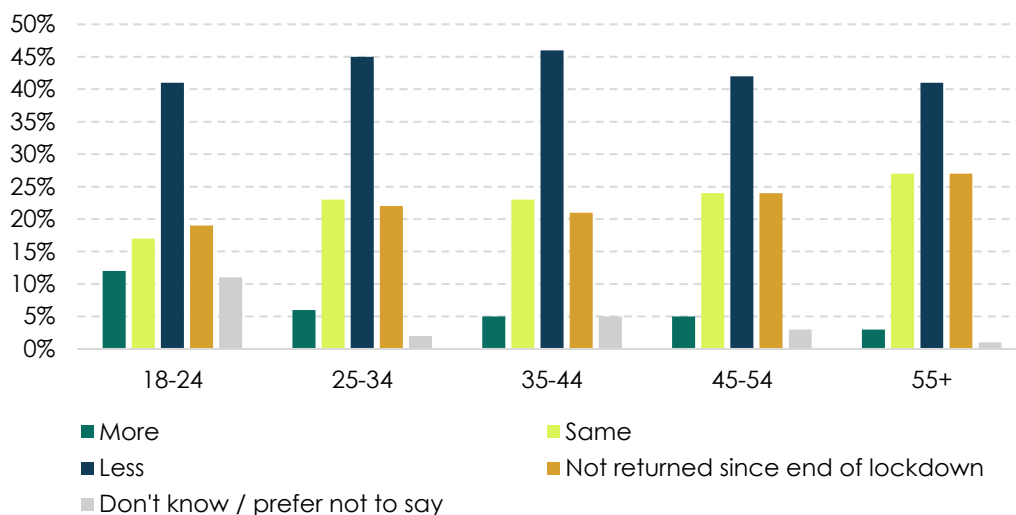


All UK adults (n = 2,296)
YouGov, 12-13 August 2020

Whilst 72% of self-defined UK pubgoers have made a cautious return to the pub, around 43% visiting less than they usually would and just under a quarter (24%) of UK pubgoers say they have yet to return. Yet close to a third (29%) are visiting at the same rate or more often compared to before lockdown.

Despite being seen as at greater risk of COVID-19, close to a third (30%) of pubgoers over the age of 55 are either visiting the pub at the same rate or more compared to before lockdown, the highest out of any age group, although there has been the greatest increase in pub visits amongst the younger generation (18-24 year olds).

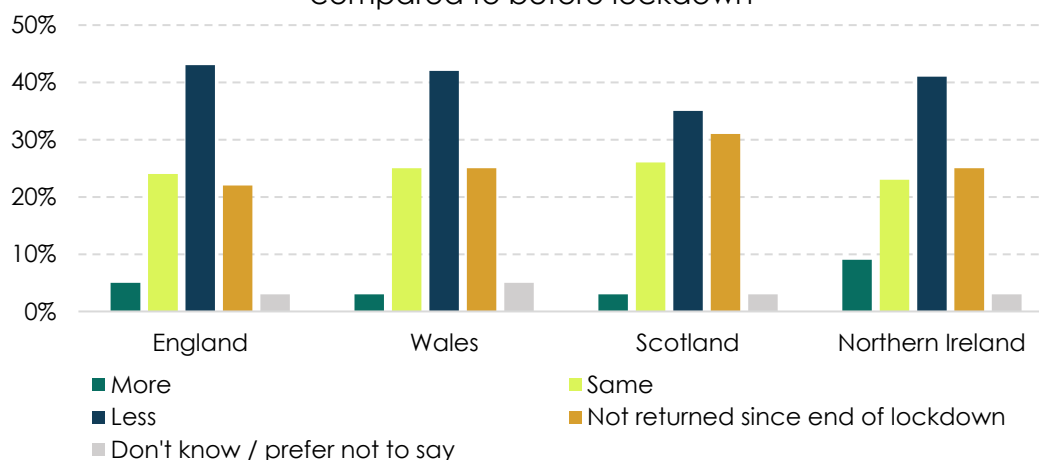
Older pubgoers returning to old habits



All UK pubgoers (n = 1,712)
YouGov, 12-13 August 2020

Close to a third (32%) of pubgoers in Northern Ireland have either visited the pub at the same rate or more compared to before lockdown, compared to 29% of English and Scots pubgoers and 28% of Welsh pubgoers.

Third of Northern Irish pubgoers visiting at same rate or more compared to before lockdown

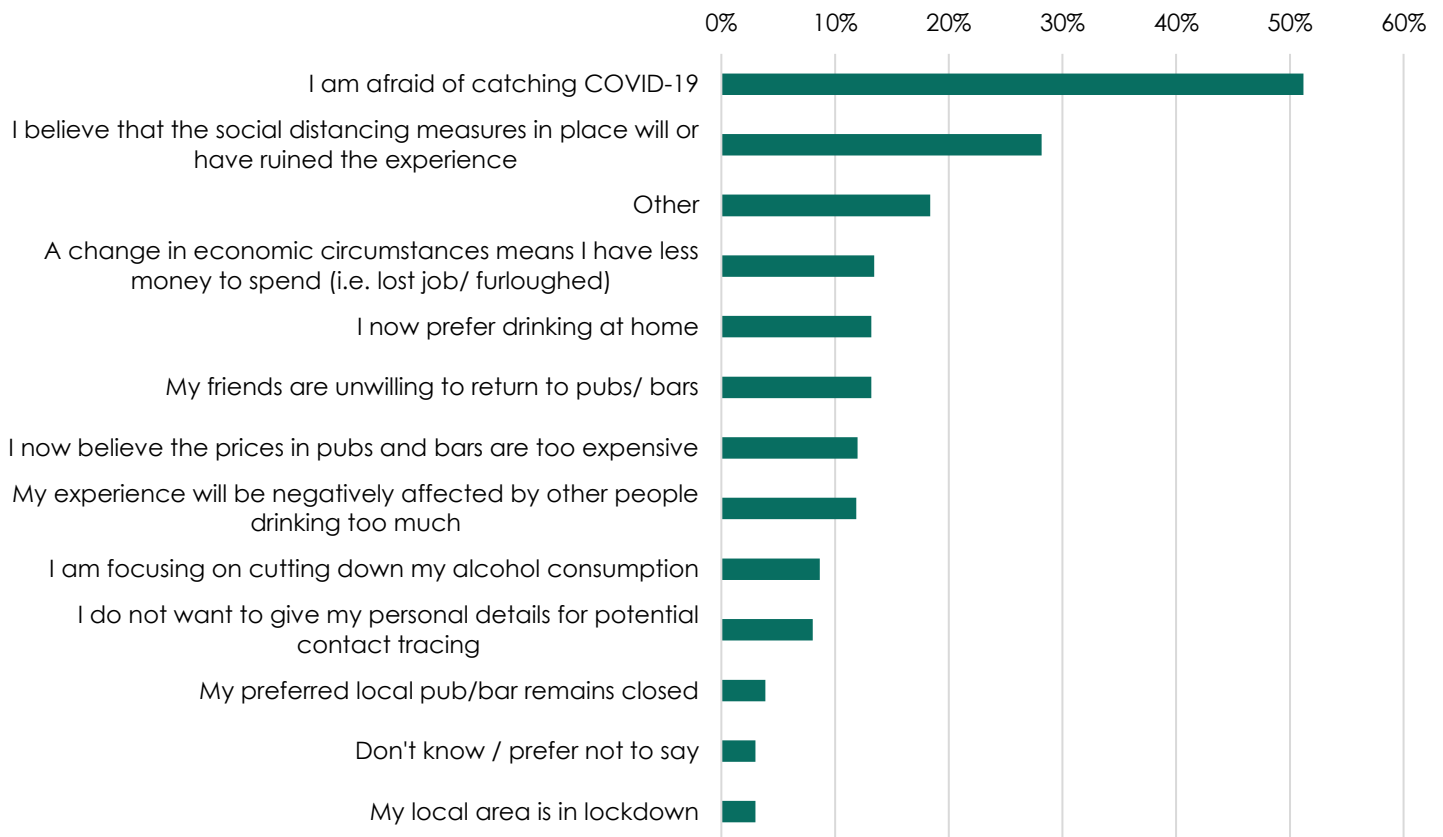


All UK pubgoers (n=1,712)
YouGov, 12-13 August 2020

4. Wary consumers poorer and remain afraid of Covi-19

Our research echoes warnings from Hospitality UK and the British Beer and Pub Association that further support for the UK hospitality industry may be needed heading into the Autumn as just over half of former pubgoers (51%) say they remain wary of returning to pubs and bars due the fear of catching COVID-19.

Reasons given for not returning to pubs and bars



All UK adults who go to bars less / stopped (n=1,142)
YouGov, 12-13 August 2020

This fear of catching the coronavirus is consistent across all age groups as the single largest reason for avoiding the hospitality industry, though understandably a greater fear amongst the older generation.

Another key reason given by those who are visiting pubs less or have stopped altogether are the social distancing measures in place (28%), though inversely this indicates that the majority (72%) have not been put off by the measures put in place by pubs and bars to keep the public safe.

Women are more afraid of catching COVID-19 than men (56% vs 46%), whilst men are more concerned social distancing measures have negatively impacted the pub going experience (32% vs 25%).

The ongoing economic fallout of COVID-19 and impact on the UK job-market can be seen in 13% of respondents suffering financial hardship due to changing economic circumstances, such as losing or job or continuing to be furloughed. This appears particularly prevalent amongst the younger generations, with around a fifth of those aged 18-34 saying they have less money to spend due to a change in their economic circumstances.

5. How do these results fit in to the wider picture of lockdown drinking?

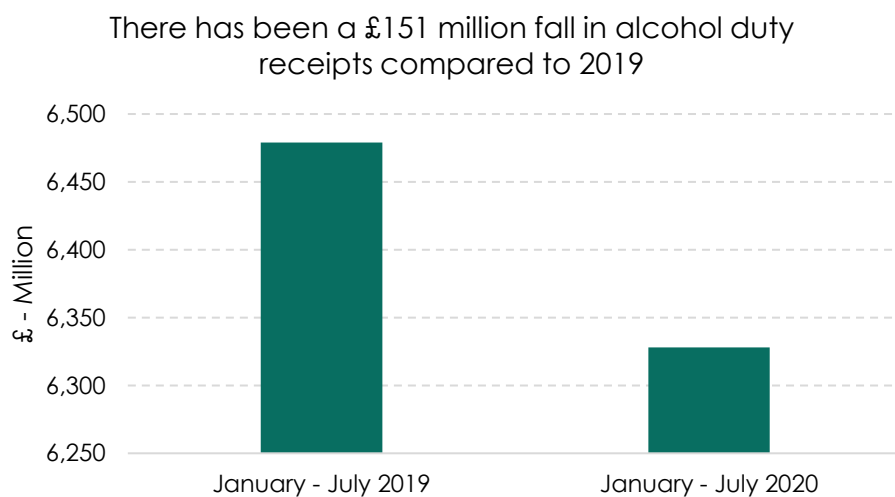
Our survey results indicate that, despite further media-fuelled fears - such as headlines trumpeting so-called 'Super Saturday' - that the reopening of the hospitality trade would fuel an increase in irresponsible consumption across the UK, the moderate majority continue to drink responsibly.

Our results suggest that the vast majority of Brits continue to drink the same or less compared to before lockdown, building on the work of numerous surveys (including our previous research from May 2020), showing that lockdown measures and their subsequent easing have not led to a spike in consumption.

Indeed, our poll suggests a drastic fall in the number of people who report an increase in their drinking compared to before lockdown, as well as an increase in those drinking thereabouts the same compared to our previous poll from May 2020. This suggests that those who were drinking more during lockdown have returned to drinking at pre-lockdown levels now that pubs and bars have reopened, although around a quarter of Brits continue to report drinking less.

This trend of people drinking less during this unprecedented time and appears supported by Nielsen data which suggests that in the 17-week period covering lockdown to 11 July 2020 that Brits consumed almost 1.3bn litres of alcohol during the UK's lockdown period, almost half the 2bn litres consumed in the same period last year.⁵

This is further reinforced by data from HMRC which shows there has been a £151m drop in alcohol duty receipts in the period from January to July 2020 compared to the same period in 2019.⁶



Source: HMRC Alcohol Bulletin, 28 August 2020

A large majority of these drinkers remain within the Chief Medical Officer 14 unit-a-week lower risk guidelines. Our data also suggests that at a population-level, there has been little impact on weekly unit intake, with current reported in self-reported intake similar to the levels seen pre-lockdown in our May 2020 survey.

⁵ [Talking Retail: Brits almost halve their alcohol intake in lockdown](#), 29 July 2020

⁶ [HMRC Alcohol Bulletin](#), 28 August 2020 – Based on the latest provisional statistics, which could be reviewed due to late payments.

The research reinforces the data available from Public Health England that, on the whole, COVID-19 has largely unaffected overall unit intake, with self-reported mean weekly alcohol units consumed in all adults remaining around 11 units.⁷

Our data shows a welcome cautious return to pubs and bars across the UK, especially amongst English pubgoers and the younger generation – Generation Z – who are leading a return to celebrate the end of the summer.

However, it also starkly illustrates the ongoing difficulties that the UK hospitality trade faces, with plenty of UK consumers still feeling too uncomfortable to return, either through the risks raised by COVID-19 or the economic hardship it has produced. This raises further financial concerns for many local pubs and bars, although is by no means unique to the hospitality sector. Recent data suggests that shopper footfall remains over a third (34.9%) lower on UK highstreets compared to last year, whilst around half of working adults (43%) continue to avoid the commute and to work from home and London Underground journeys remaining 72% down compared to 2019.⁸

Data from the British Beer and Pub Association shows that over a third (37%) of pubs in England reported that they could not break even a month after reopening. Furthermore, 25% of brewing and pub sector business said they did not feel at present that their business was sustainable beyond the end of March 2021.⁹

As the UK enters the Autumn and the prospect of a second wave of COVID-19 cases and local lockdown measures, we must be mindful that whilst the moderate majority prevails, the long-term viability of many long-loved local pubs and bars remains in doubt.

Final thoughts

- The moderate majority of drinkers in the UK practice responsible drinking and understand how to drink within the CMO guidelines. Much of this can be attributed to various Governments campaigns such as Change4Life, Drinkaware's drink free days and the [Count14](#) campaign in Scotland.
- The industry are also far along the path in updating the guidance on containers to state the low risk guidance, which will act as a further reminder to people to remain drinking moderately.
- Whilst not all increases in consumption are a cause for concern, previous research suggests that increases are partly fuelled by those already drinking at heavier and more harmful rates. We would welcome further support for these vulnerable drinkers as part of funding announcements across the UK and look forward to the UK Government's forthcoming Addiction Strategy.
- We also believe valuable lessons can be learned from the ongoing success of trials in local authorities, such as the Walsall Healthcare NHS Trust's successful 'Managing Complex Patients Project', which features a tailored multi-agency approach to tackle the underlying causes of problem drinkers, reduce alcohol-related admissions and save substantial healthcare costs, making better use of existing resources.
- Our findings reinforce the warnings from Hospitality UK and the British Beer and Pub Association that, despite the successful rollout of social distancing measures across the

⁷ [Public Health England: Wider impacts of COVID-19 on health: summary](#), 27 August 2020

⁸ [Daily Mail](#), 1 September 2020 / [City AM](#), 3 September 2020 / [Telegraph](#), 3 September 2020

⁹ [British Beer and Pub Association: More than a third of pubs cannot break even one month after reopening](#), 4 August 2020

hospitality industry, additional support may be needed to help secure the long-term future of the sector it enters the Autumn and Winter period.

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