



The Harris Café Report, conducted by YouGov Galaxy, surveyed 1,000 Australian café -goers and small business owners, to uncover attitudes towards Australia's café culture and owners' fears and hopes in a post-COVID-19 world.

HARRIS CAFÉ REPORT – NATIONAL FINDINGS

- 70% of Aussies are worried Australia's cafés will never be the same again
- Almost five million Australians claim to have missed their local café more than pubs and clubs during COVID-19
- Just under ten million Australians said they felt isolated from their local community due to café closures during COVID-19
- 71% of Australians would spend more cash at their local café now compared to pre-lockdown if it helped to keep them open
- 70% of Australians see their local café as the centre of the community, ahead of other amenities including the post office and
- 70% of Australians travel to regional areas around the country just for a new and unique café experience
- Two thirds of small business owners in hospitality (majority of which are café owners) are worried that Australia's next generation will be too scared to work in cafes as a result of the recent disruption to the industry
- 80% of small business owners in hospitality (the majority of which are café owners), won't be able to recover from recent hardships without third party support
- 43% of small businesses in hospitality (majority of which are cafes) said that without third party support they wouldn't be able to stay open for longer than six months from now.
- 89% of small businesses in hospitality (majority of which are cafes) say they lost revenue in the last 12 months as a result of the bushfires and COVID-19, more than half report they have lost 50% or more of their revenue over this time.
- Almost nine in ten café owners are concerned that the decline in regional tourism resulting from the COVID-19 lockdown travel restrictions will be ongoing and negatively impact the number of customers who visit their regional businesses once lockdown restrictions ease

HARRIS CAFÉ REPORT – NSW FINDINGS

- 71% of people in New South Wales view their local café as more important than other community amenities.
- 42% of people in New South Wales felt isolated from their local community as a result of cafes closing during COVID-19 lockdown
- 51% of small businesses in hospitality across NSW lost more than half of their revenue due to recent forced closures.
- 68% of people in New South Wales are concerned that Australia's café culture is dead following recent hardships of the bushfires and COVID-19 pandemic.
- 69% of people in New South Wales say they travel to regional destinations around Australia just to visit the cafes
- 82% of small business owners in hospitality across NSW are concerned that customers will rely more on food delivery services and therefore not return to their business after lockdown restrictions completely ease.
- 68% of people in New South Wales said they would spend more cash in local cafes post-COVID than they did pre-COVID if it helped them to stay open.



- 85% of small business owners in hospitality across NSW say they won't be able to recover from recent hardships without third party support
- 87% of café owners in New South Wales are concerned that the decline in regional tourism resulting from the COVID-19 will negatively impact their business.

HARRIS CAFÉ REPORT – VICTORIA FINDINGS

- 71% of people in Victoria view their local café as more important than other community amenities
- 71% of Victorians are concerned that Australia's café culture is dead following recent hardships of the bushfires and COVID-19 pandemic.
- 70% of Victorians have said they would spend more cash in local cafes post-COVID than they did pre-COVID if it helped them to stay open.
- 43% of people in Victoria felt isolated from their local community as a result of cafes closing during COVID-19 lockdown
- 67% of Victorians say they travel to regional destinations around Australia just to visit the cafes
- 82% of small business owners in hospitality across Victoria say they won't be able to recover from recent hardships without third party support
- 60% of small businesses in hospitality across Victoria lost more than half of their revenue due to recent forced closures.
- Victorian business owners and managers of hospitality SMEs, many of which are cafes, have had to let more staff go than any other state in the country.
- 77% of small business owners in hospitality across Victoria are concerned that customers will rely more on food delivery services and therefore not return to their business after lockdown restrictions completely ease.
- 81% of café owners in Victoria are concerned that the decline in regional tourism resulting from the COVID-19 will negatively impact their business.

HARRIS CAFÉ REPORT – QUEENSLAND FINDINGS

- 64% of people in Queensland view their local café as more important than other community amenities.
- 67% of Queenslanders are concerned that Australia's café culture is dead following recent hardships of the bushfires and COVID-19 pandemic.
- 71% of Queenslanders have said they would spend more cash in local cafes post-COVID than they did pre-COVID if it helped them to stay open.
- 36% of Queenslanders felt isolated from their local community as a result of cafes closing during COVID-19 lockdown
- 68% of Queenslanders say they travel to regional destinations around Australia just to visit the cafes
- 80% of small business owners in hospitality across Queensland say they won't be able to recover from recent hardships without third party support
- 50% of small businesses in hospitality across Queensland lost more than half of their revenue due to recent forced closures.
- 68% of small business owners in hospitality across Queensland are concerned that customers will rely more on food delivery services and therefore not return to their business after lockdown restrictions completely ease.
- 98% of café owners in Queensland are concerned that the decline in regional tourism resulting from the COVID-19 will negatively impact their business.

Harris Café Report: Red Havas commissioned YouGov to conduct 2 online surveys; the first amongst a sample of 1,056 Australians aged 18+ years between 11-14 June; and the second amongst a sample of 204 SME business owners and managers from the hospitality sector between 11-17 June, 2020. The final data for the consumer survey was weighted by age, gender and region using the latest ABS population estimates, and the

final data for the SME survey was weighted by region using the latest ABS business estimates, to ensure they were representative of the respective populations.

