



# The Customer Sentiment Tracker

27th July 2020

Overall the hospitality net promoter scores (NPS) remain really strong at 59, with the 'premium casual' segment leading the charge (74). Satisfaction ratings in 'premium casual' are also well above other hospitality segments.

	Pre-lockdown 3-9 Feb	Week 1 6-12 July	Week 2 13-19 July	Week 3 20-26 July	Best-in-class Operator
<b>NPS</b> Net Promotor Score	58	57	58	59	
Casual Dining	58	48	55	54	86
Fast casual / Grab & Go	64	39	35	21	67
Premium Casual	58	66	69	74	84
Pubs	60	60	57	55	93

Best in class NPS is as high as 84 for 'premium casual' and 93 for pubs, suggesting that some operators are really over-delivering in terms of safety procedures, food and drink quality and overall experience.

*"Premium casual is really justifying it's price tag. The segment is attracting 'satisfaction ratings' above pre-lockdown levels for all areas. Best in class NPS is as high as 84, suggesting that some operators are really over-delivering in terms of safety procedures, food and drink quality and overall experience."*

CARLO PLATIA, CEO, FEED IT BACK

Source: Feed It Back.



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The vast majority of customers remain happy with safety procedures:



## Top 3 reasons some customers won't return:

(Arrows reflect comparison with previous weekend.)

This week, masks are the number 1 reasons nervous customer won't return. Interestingly, this hasn't featured as a concern in previous weeks when the top concerns were social distancing and covid-hygiene.



10%

said staff wearing PPE would positively influence their choice of venue\*

"When we look at feedback for specific venues where their staff do wear masks, their customers seem to be very happy about it and feel very safe. As people get increasingly used to seeing masks in general, it may go so far as becoming an expectation or even a requirement for some customers when choosing which venues to visit."

CARLO PLATIA, CEO, FEED IT BACK

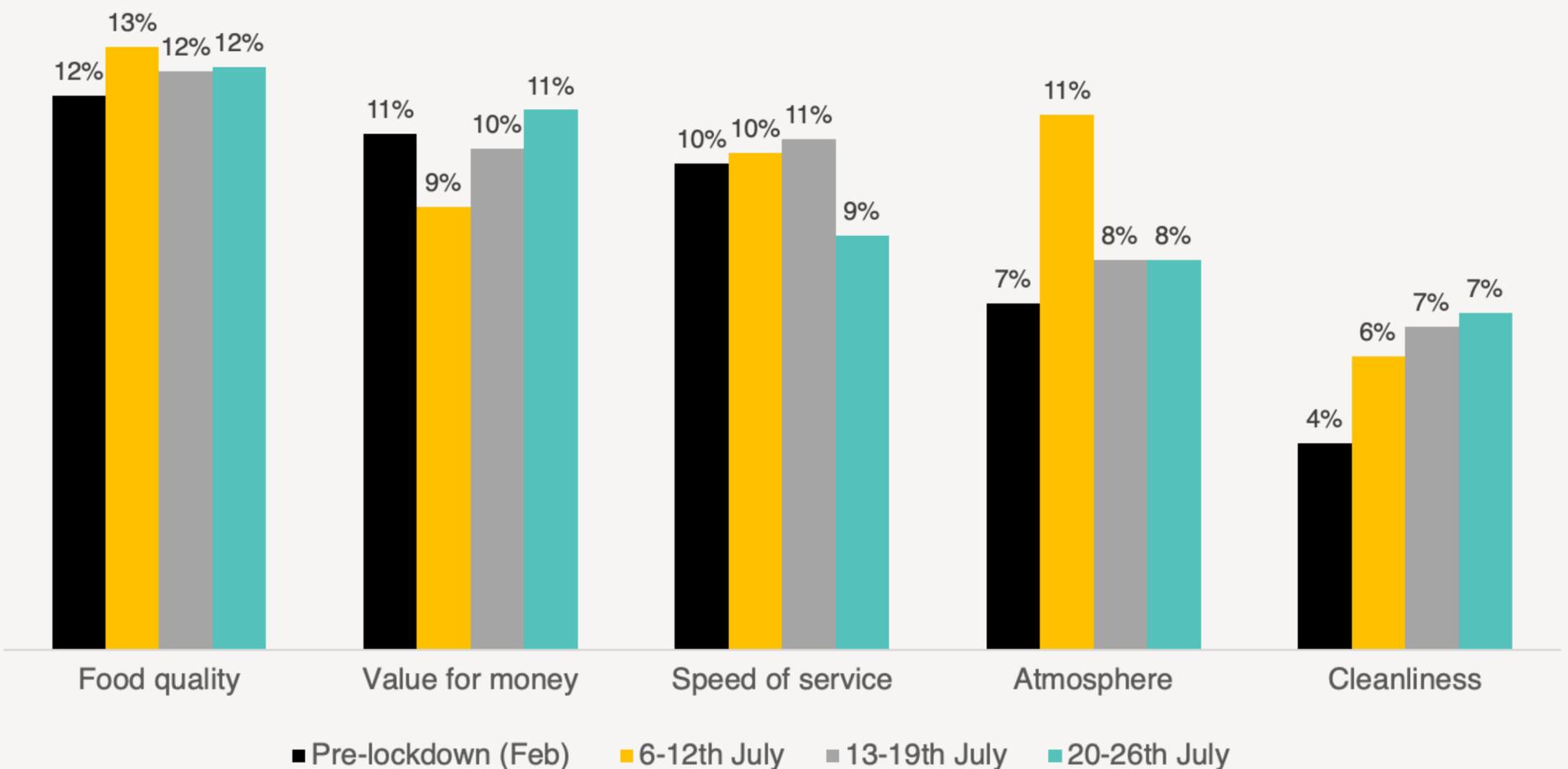
Source: Feed It Back, \*KAM Media

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## The top complaints topics pre-lockdown vs re-opening

Cleanliness (or lack of it) has made a regular appearance in the top 5 customer complaints since re-opening weekend. (It was further down the list pre-lockdown.)



The areas of cleanliness which customers are most concerned about this week are unclean tables, toilets and floors. 1-in-11 also complained about lack of mask wearing.

36%

said if a venue has a strict and **well communicated hygiene policy** it would positively influence their choice of venue\*

*"This isn't the sexy or fun bit of hospitality but right now it's critical. There are two clear areas operators need to get right with regards to covid-hygiene. Firstly the reality of sticking to health and safety procedures. Secondly, how visible this is to customers. This means adopting a more 'high profile' approach to cleanliness. Perception is reality for customers - operators need to leave no doubt in their customers' minds that they are safe."*

KATY MOSES, MD, KAM MEDIA

Source: Feed It Back, \*KAM Media

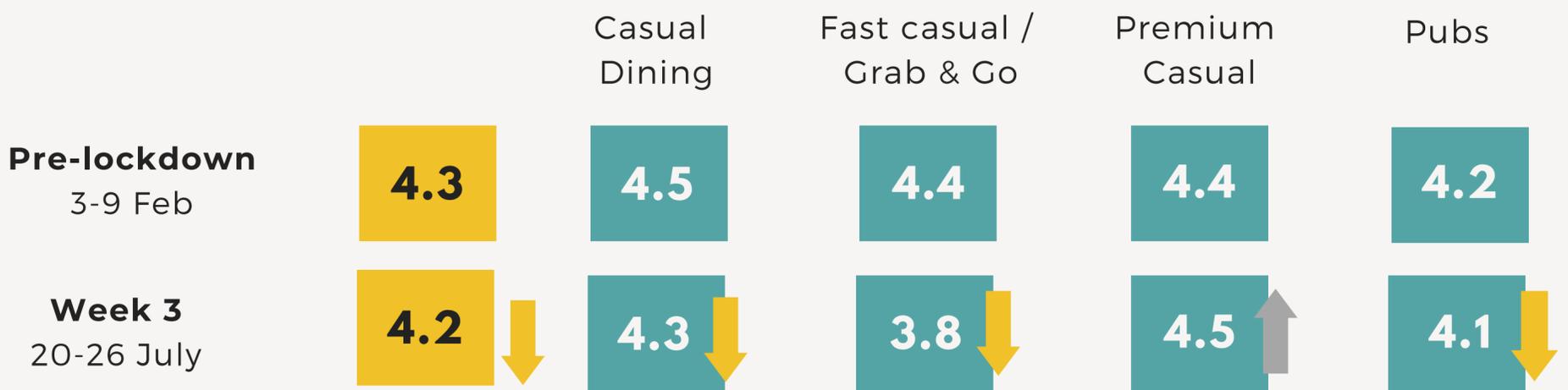


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## Satisfaction ratings for VALUE FOR MONEY (out of 5)

Satisfaction ratings are down for 'value for money' in all segments except Premium Casual. The biggest drop is Fast Casual.



44%

of consumers said the reasons they intend to eat/drink out less post-lockdown is to SAVE MONEY. (The no.2 reason after "worried about my health.")\*

"Another change in sentiment this week: VAT cuts seem to be losing focus. When looking at complaints about 'value', 4% of customers mentioned 'VAT not being passed on to customers' last week. This week it is just 2%.The concern about VAT is likely to be driven by press coverage. As the press move on, it's price and food quality that are the real issues with regards to value for money. Putting our focus on schemes like 'Eat Out to Help Out' will really help hospitality create customer demand."

KATY MOSES, MD, KAM MEDIA

Source: Feed It Back, \*KAM Media