



The Customer Sentiment Tracker

10th August 2020

Overall the hospitality net promoter scores (NPS) remains strong but has experienced it's first significant decline since re-opening, down to 54. All segments, bar fast casual/ grab & go, have witnessed declines in NPS scores since the previous week.

	Week 2 13-19 July	Week 3 20-26 July	Week 4 27 Jul-2 Aug	Week 5 3-9 Aug	Best-in-class Operator
NPS Net Promotor Score	58	59	59	54	↓
Casual Dining	55	54	53	49	↓
Fast casual / Grab & Go	35	21	23	23	
Premium Casual	69	74	72	68	↓
Pubs	57	55	55	46	↓
					76
					86
					91
					94

Best in class NPS is as high as 94 for 'pubs' and 91 for premium casual, showcasing that although the average NPS has fallen, there remain certain operators who are really over-delivering in terms of safety procedures, food and drink quality and overall experience.

"All segments, with the exception of fast casual/ grab & go, have experienced declines in NPS scores compared to the previous week, with pubs seeing one of the largest drop-offs. We will show, later on in the report, that this may be due to the impact of the EOTHO scheme being launched this week and an influx of a new customer type to the venue - only time will tell."

CARLO PLATIA, CEO, FEED IT BACK

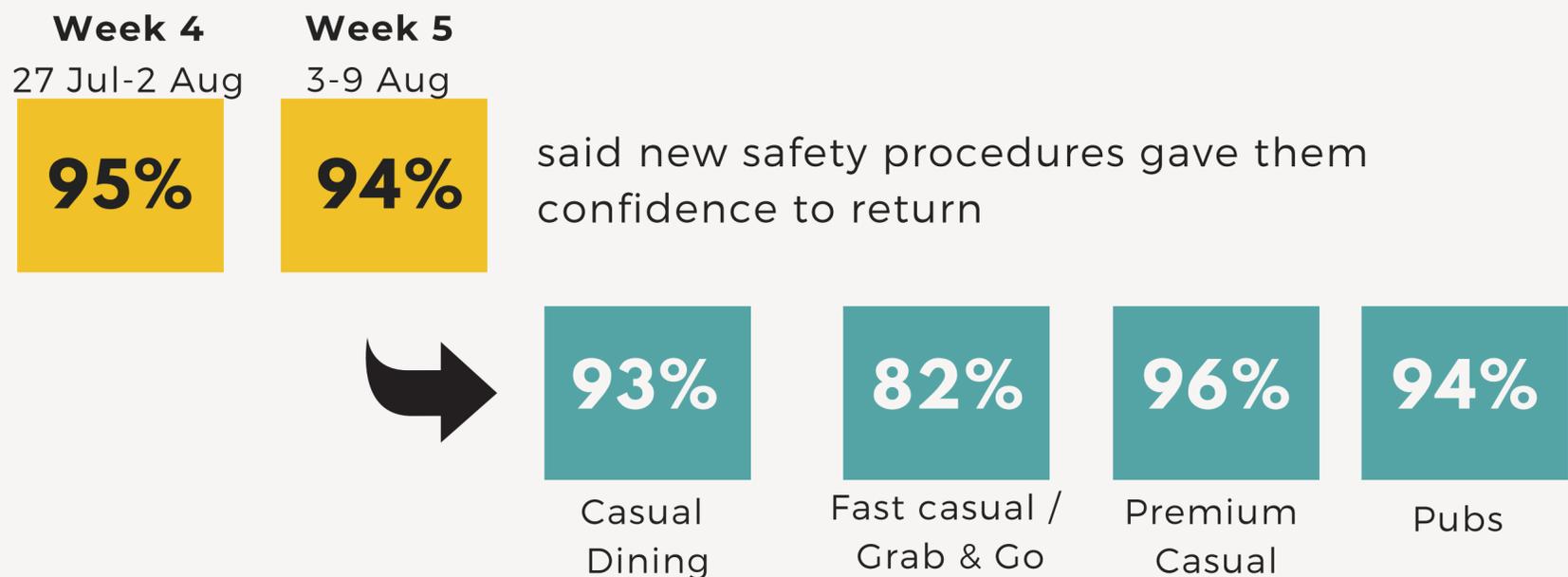
Source: Feed It Back.



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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, social distancing is the number 1 reasons nervous customer won't return. Interestingly, this was the 3rd highest concern in the previous week when the top concern was no masks/PPE.



37%

of customer say clear social distancing measures will influence their choice of venue*

"Broadly speaking, venues are continuing to do a fantastic job in delivery against the hygiene and safety measures expected of them in the current climate. Fast casual / grab & go, continues to underperform in comparison, however. Customers who said their safety measures give them confidence to return has dropped (88%-82%) since the previous week. These venues must understand and address the issues at play or risk being left behind by their competitive set.

CARLO PLATIA, CEO, FEED IT BACK

Source: Feed It Back, *KAM Media

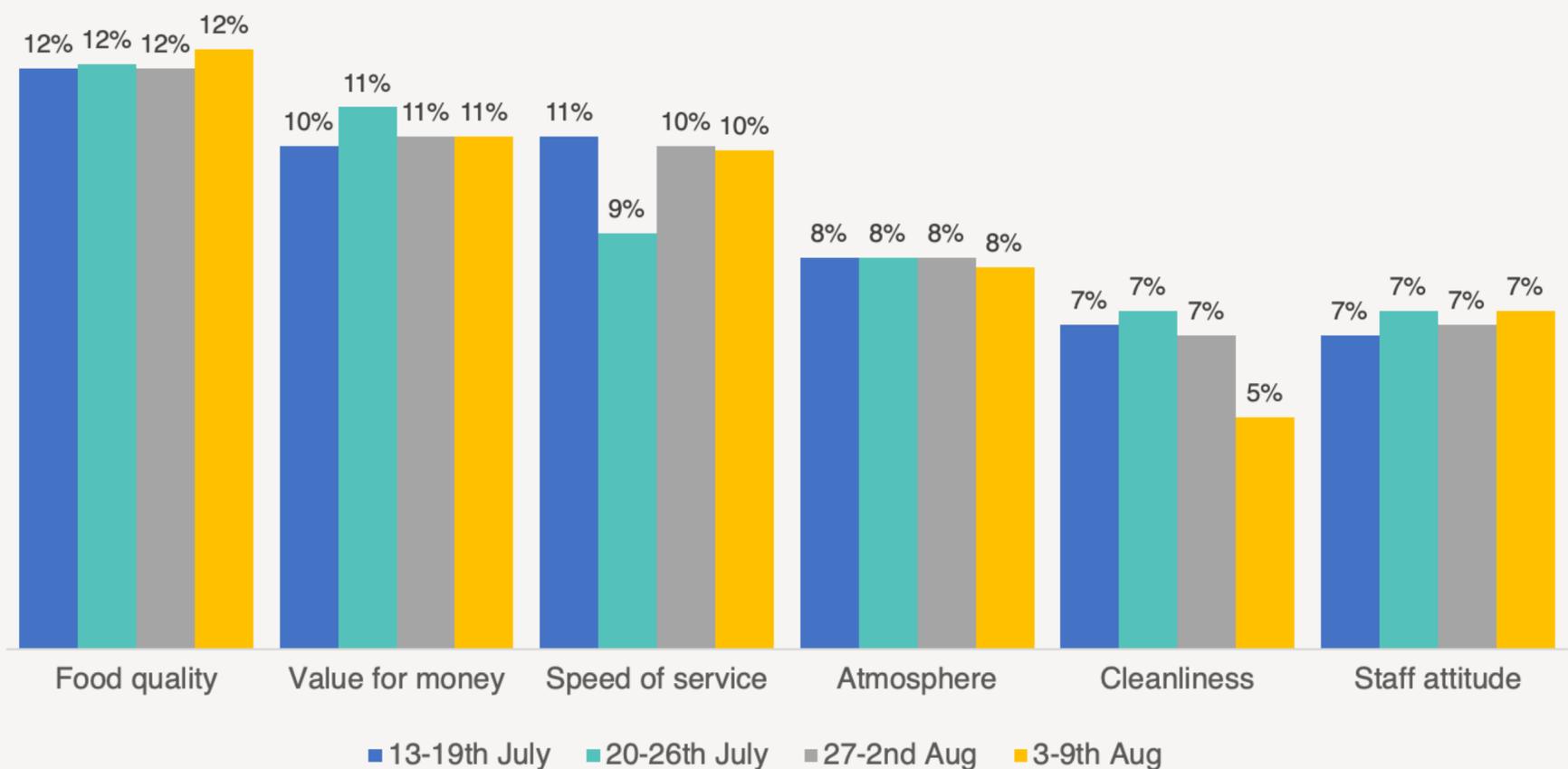


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The top complaints topics pre-lockdown vs re-opening

Interestingly, cleanliness is falling as a complain topic, compared against the rest of the top 6 which remain relatively consistent. Suggesting that customers are becoming more accustomed to the current service levels and that venues are now up to speed with providing the hygiene standards expected.



The areas of cleanliness which customers are most concerned about this week remain unclean tables, toilets, floors and seating.

95%

of customers demand regular service cleaning (tables, chairs, floor, bar, etc.) as standard in the current climate*

"Consumers' disposable income is being squeezed and they are pushing the onus to make their night special onto venues. As an industry we need to embrace this responsibility as it brings into focus the need to provide hospitality, in it's truest sense. In this current climate it's clear that hygiene has rocketed up the list of customer's important factors that a venue must deliver against in order to ensure their experience is one which ensures repeat custom."

KATY MOSES, MD, KAM MEDIA

Source: Feed It Back, *KAM Media



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The impact of the 'Eat Out to Help Out' scheme on NPS

NPS scores are significantly lower during the Mon - Weds of the previous week (3-9 August), which was the launch of the Eat Out to Help Out scheme. Suggesting that the offer has attracted new guests who perhaps who were less likely to come out during the first month, and are therefore harsher critics.

		Casual Dining	Fast casual / Grab & Go	Premium Casual	Pubs
Mon - Weds of week of EOTHO scheme launch 3-5 Aug	49	47	15	59	41
Thur - Sun of week of EOTHO scheme launch 6-9 Aug	60	51	30	78	52

82%

of consumers said they were considering taking advantage of the EOTHO scheme last week. This equates to 35.6 million UK adults.*

"41% of 55+ year olds said they would likely take advantage of the EOTHO scheme, as well as 1 in 2 families with young children. Clearly the scheme is very popular and is drawing in customers from a wider range of demographics, who would be likely to not be a 'typical' Monday to Wednesday customer. Differing expectations, coupled with the 'new normal' of dining out may be contributing factors to the drop-off in NPS scores that have been recorded. It should certainly be one to monitor for venues in case it becomes a trend."

KATY MOSES, MD, KAM MEDIA

Source: Feed It Back, *KAM Media