



The Customer Sentiment Tracker

17th August 2020

Overall the hospitality net promoter scores (NPS) remains strong and has recovered from it's first significant decline in the previous week. All segments, except for Premium Casual have seen increases in their NPS since the previous week. Premium casual has fallen but from a higher relative base compared to the rest.

	Week 3 20-26 July	Week 4 27 Jul-2 Aug	Week 5 3-9 Aug	Week 6 10-16 Aug		Best-in-class Operator
NPS Net Promotor Score	59	59	54	55	↑	
Casual Dining	54	53	49	51	↑	81
Fast casual / Grab & Go	21	23	23	31	↑	90
Premium Casual	74	72	68	63	↓	85
Pubs	55	55	46	49	↑	96

Best in class NPS is as high as 96 for 'pubs' and 90 for Fast casual / grab & go. Across all sectors, however we are seeing really strong NPS for businesses which are clearly going above and beyond to ensure their customers remain safe and satisfied.

"We have seen a resurgence in the Fast casual/ grab & go sector this week, with NPS up from 23 to a post-lockdown high of 31. In fact, NPS scores have risen across the board, with the only exception being the Premium Casual sector, which has seen a second consecutive NPS decline - it suggests that this sector is regressing back towards the NPS mean."

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 remains the number 1 reasons nervous customer won't return. Service remains in 2nd, but has seen an increase since the previous week, and Covid hygiene has increased from 9% to 14% in the last week.



62%

of customer say health and safety concerns are the biggest barriers to returning to venues*

"Fast casual / grab & go, continues to underperform in comparison, however. Customers who said their safety measures give them confidence to return has dropped for the second consecutive week (88%-82%-78%). All other sectors have remained relatively consistent, week-on-week, so this should raise significant concerns for Fast casual / grab & go, as we know that delivering on safety measures is a major factor in gaining consumer confidence and loyalty."

CARLO PLATIA, CEO, FEED IT BACK

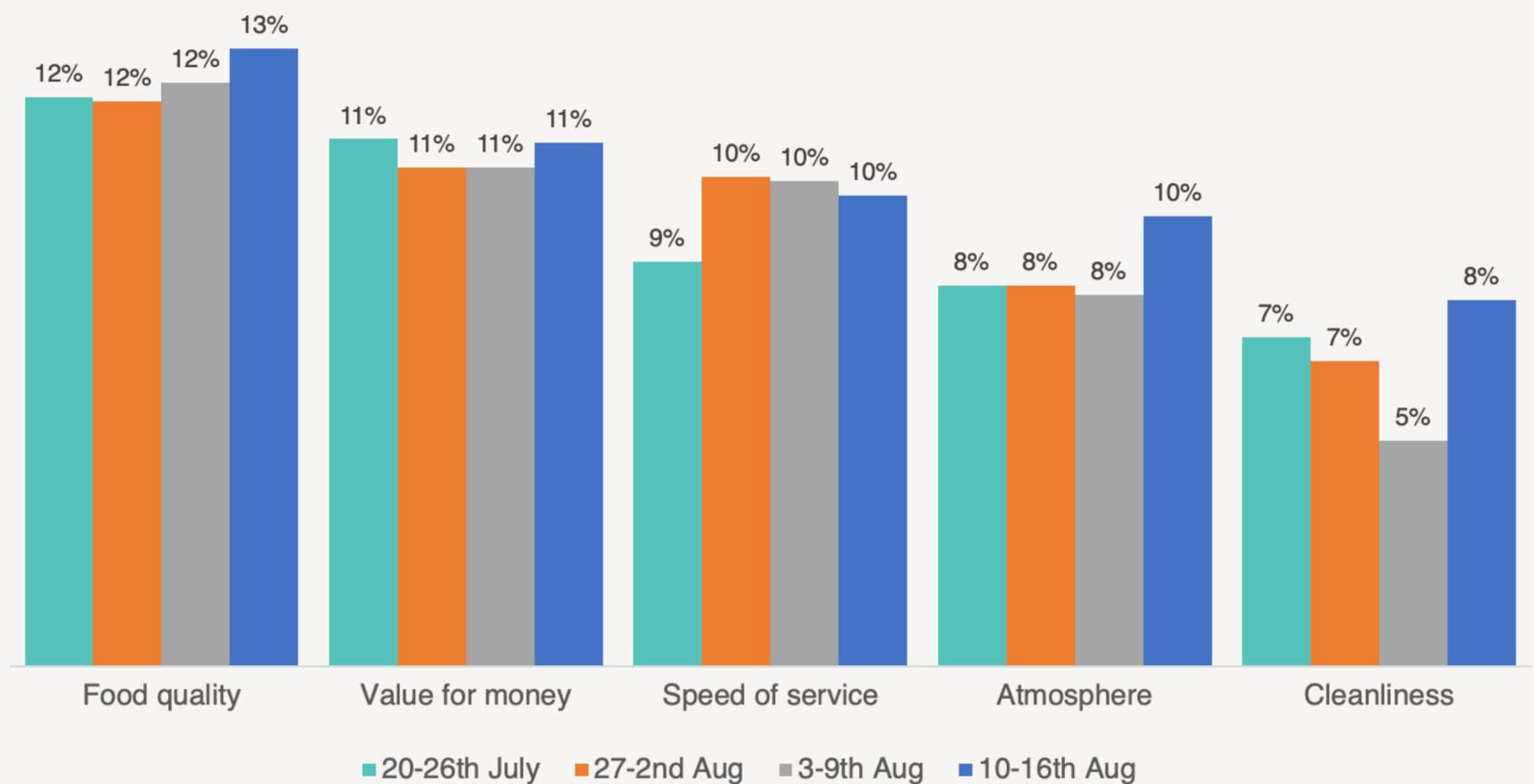
Source: Feed It Back, *KAM Media

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The top complaints topics pre-lockdown vs re-opening

We are seeing a rise across many of the leading complaint topic areas this week. Increased footfall and demand as a result of the EOTHO scheme may be a factor here as venues struggle to cope with the customer numbers in addition to the continued health & safety guidelines.



The areas of cleanliness which customers are most concerned about this week remain unclean tables (22%) and toilets (13%).

80%

of customers say they would like to see a member of staff supervising the toilets in venues to ensure Covid prevention standards are maintained

"Clearly there are two main areas around hygiene which are being picked up by customers when visiting venues. These are tables and toilets. Extra care and attention should be given to these two areas in order to address the main hygiene concerns that customers when visiting hospitality venues. It may not be possible for all, but 8 -in-10 customers would like to see a member of staff supervising toilets to ensure that Covid prevention standards are maintained."

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

As with the first week of EOTHO, NPS are significantly lower during the Mon - Weds compared to Thur-Sun. However, we have seen a slightly improvement in Casual Dining and Fast Casual NPS when we look at the EOTHO period in week 1 of the scheme compared to week 2.

		Casual Dining	Fast casual / Grab & Go	Premium Casual	Pubs
Mon - Weds of week 1 of EOTHO scheme 3-5 Aug	49	47	15	59	41
Mon - Weds of week 2 of EOTHO scheme 10-12 Aug	49	50	18	58	39
Thur - Sun of week 2 of EOTHO scheme 13-16 Aug	61	53	45	71	60

50%

of families with young children say they will be taking advantage of the EOTHO scheme. These party dynamics offer a unique challenge to ensure everyone has a satisfactory experience.*

"The 'family dining' occasion is worth an estimated £7.2bn to the eating out sector. The EOTHO scheme will undoubtedly increase this value. Getting the offer and atmosphere right is a challenge, which is heightened at this time. However, the size of the opportunity for all venues is huge and the task is to offer children's menus that deliver on quality, variety, sustainability and health..

KATY MOSES, MD, KAM MEDIA

Source: Feed It Back, *KAM Media