



The Customer Sentiment Tracker

24th August 2020

Overall the hospitality net promoter scores remain strong. Fast casual remains the sector getting the lowest scores overall - this significant difference was not evident pre-lockdown.

	Week 4 27 Jul-2 Aug	Week 5 3-9 Aug	Week 6 10-16 Aug	Week 7 17-23 Aug		Best-in-class Operator
NPS Net Promoter Score	59	54	55	56	↑	
Casual Dining	53	49	51	48	↓	76
Fast casual / Grab & Go	23	23	31	20	↓	71
Premium Casual	72	68	63	64	↑	85
Pubs	55	46	49	59	↑	85

The 'fast casual' sector continues to under-perform in it's customers' eyes compared with other hospitality sectors. The proportion of customers who say they would recommend their 'fast casual' outlet continues to fall. Operators need to pause and really listen to their customers to find out why."

CARLO PLATIA, CEO, FEED IT BACK

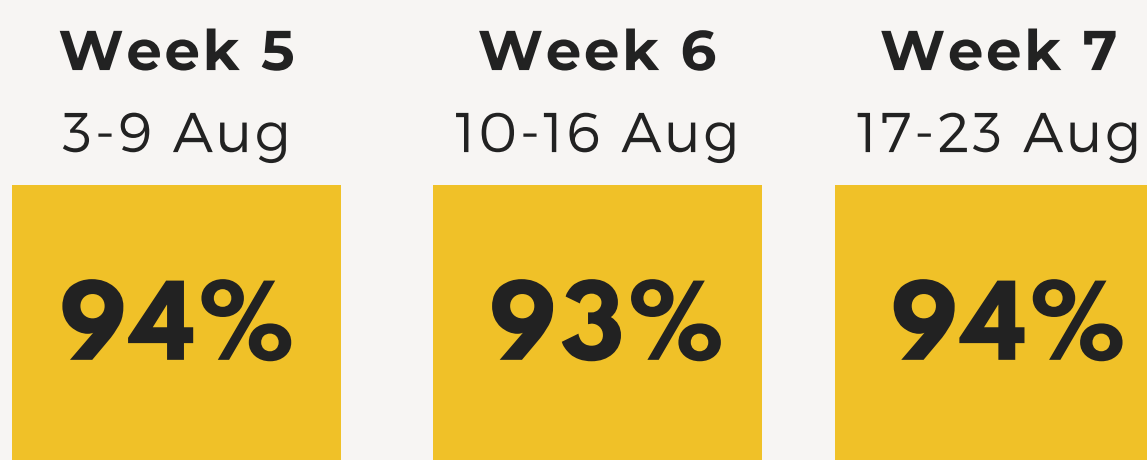
Source: Feed It Back.



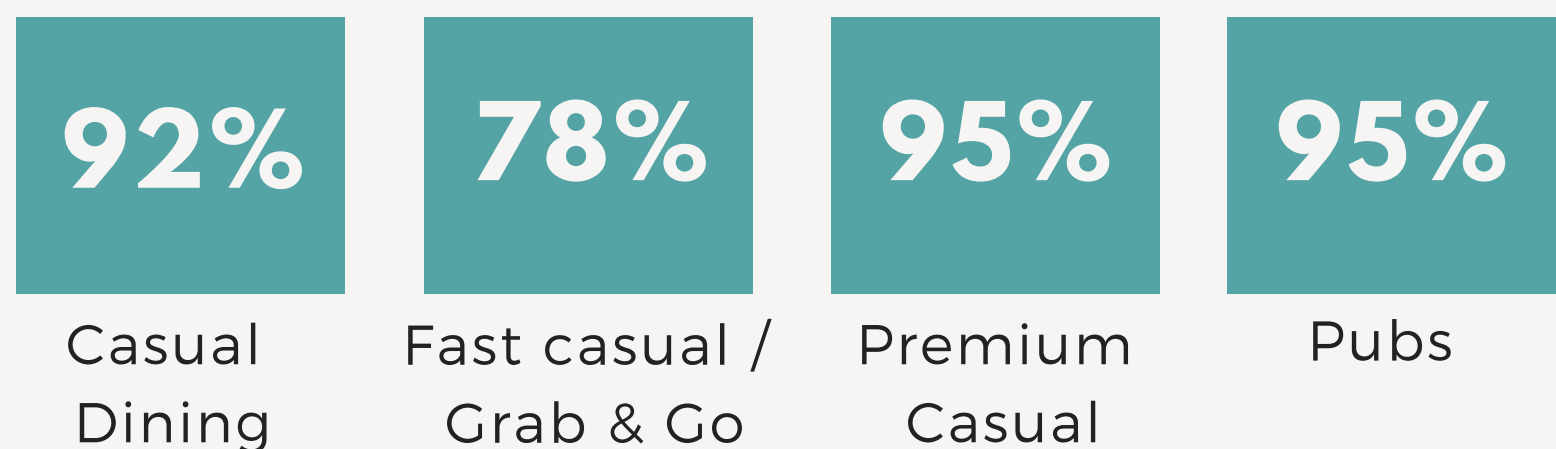
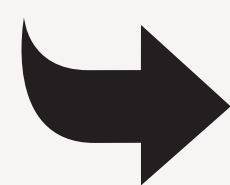
The Customer Sentiment Tracker

24th August 2020

Customer Confidence:



said new safety procedures gave them confidence to return



Top 3 reasons some customers won't return:

(Arrows reflect comparison with previous week)

Lack of social distancing is the number one reason given for the third week running. Social distancing is an even higher concern within 'fast casual' venues with 1-in-5 customers stating it is the reason they will not return.



37%

of customers say '**clear social distancing measures**' have a significant influence on their choice of venue*

"The 'fast casual' sector continues to underperform in comparison with other hospitality sectors in terms of customer confidence. It's seen a significant drop in confidence even since re-opening. The smaller size of many 'fast casual' venues and the need for queue management is clearly causing extra concern for customers when it comes to physical distancing. Speed of service is of course also especially important for these customers, so operators have a particularly tricky conundrum. How do they distance their customers and ensure they feel safe without it impacting service time, or perceived service time? Not an easy task."

KATY MOSES, MD, KAM MEDIA

Source: Feed It Back, *KAM Media

The Customer Sentiment Tracker

24h August 2020

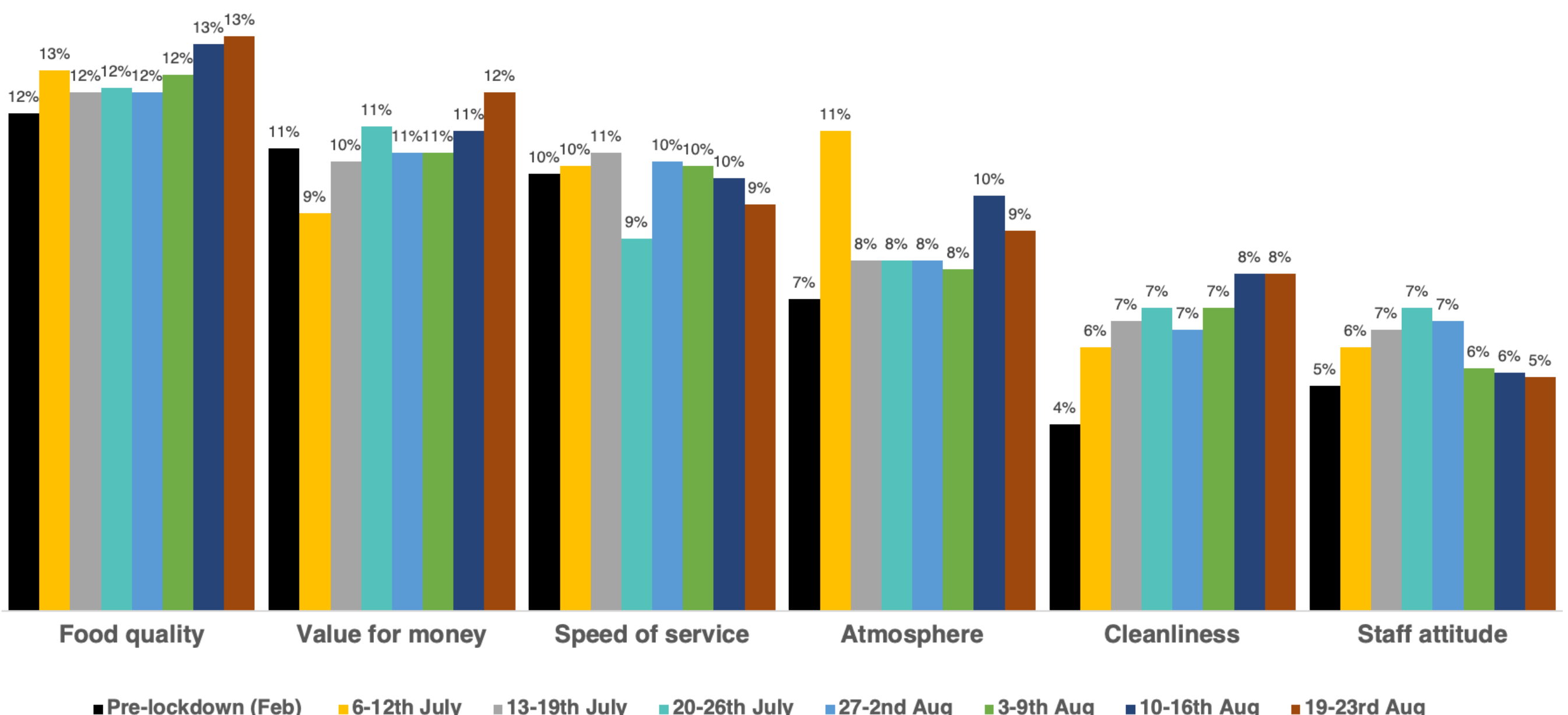
Top 3 factors influencing venue choice*:

For many customers their choice of venue is still driven by finding a location which they know and trust and which provides a safe environment. The availability of an outside space is also of increased importance to many people at this time and will influence the venue choice for 45% of customers.

1. A venue I have been to before
2. A venue with a beer garden or outdoor space
3. A venue with clear social distancing measures in place

The top complaints pre-lockdown vs re-opening

The key areas attracting complaints remain relatively constant. Unsurprisingly, 'cleanliness' continues to feature much higher on customers' radars compared to pre-lockdown.



Source: Feed It Back, *KAM Media



The Customer Sentiment Tracker

24th August 2020

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

Overall, EOTHO customers continue to be harsher critics in terms of NPS. Scores were significantly lower Mon-Weds compared to Thur-Sun, although at an industry level the gap is lessening week by week.

		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
Mon - Weds of week 3 of EOTHO scheme 17-19 Aug	52	48	19	59	56
Thur - Sun of week 3 of EOTHO scheme 20-23 Aug	60	47	23	70	62

'Eat Out to Help Out' has minimal impact on 'Value for Money' satisfaction ratings /5

	Week 1	Week 2	Week 3
Mon - Weds	4.2	4.2	4.3
Thur - Sun	4.1	4.2	4.2

41%

of those over 55yrs say they **intended to 'eat out to help out'***
A great way to get the most nervous demographic back into venues and enjoying summer safely.

Source: Feed It Back, *KAM Media