



# The Customer Sentiment Tracker

3rd Aug 2020

The industry net promoter score is creeping up week by week at an industry average level, Although the different hospitality segments do differ significantly with 'fast casual' seeing a significant drop compared with pre-lockdown levels.

	Pre-lockdown 3-9 Feb	Week 1 6-12 July	Week 2 13-19 July	Week 3 20-26 July	Week 4 27-2 Aug	Best-in-class Operator
<b>NPS</b> Net Promotor Score	58	57	58	59	59	
Casual Dining	58	48	55	54	53	86
Fast casual	64	39	35	21	23	80
Premium Casual	58	66	69	74	72	90
Pubs	60	60	57	55	55	83

## No.1. Word of Mouth

'Word of mouth' is the no.1 way that people find out about new venues to visit\*

50+ is generally considered an excellent net promoter score and at an overall level the industry is scoring higher than pre-lockdown levels. NPS is a measurement of whether a customer would recommend you - a solid indication of a happy customer - these overall scores really are cause for the industry to celebrate."

KATY MOSES, MD, KAM MEDIA

Source: Feed It Back, \*KAM Media,



# The Customer Sentiment Tracker

3rd Aug 2020

## Customers remain consistently happy with safety procedures:



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

(Arrows reflect comparison with previous week)

Lack of masks remains the number 1 reason nervous customers won't return. This week 'service levels' also rises up the agenda - only 11% of customers mentioned 'service' as a reason not to return last week compared with 16% this week. As customers get used to Covid-measures it is likely that they will re-focus more on service, food quality, speed etc.



### 37%

say having 'clear social distancing measures' would positively influence their choice of venue\*

Confidence in hospitality remains strong with a consistent 95% of customers saying that they feel confident enough to return for three weeks in a row now. But the growing customer base are still looking for improvements and their expectations for service levels in particular look like they are growing.

CARLO PLATIA, CEO, FEED IT BACK

Source: Feed It Back, \*KAM Media

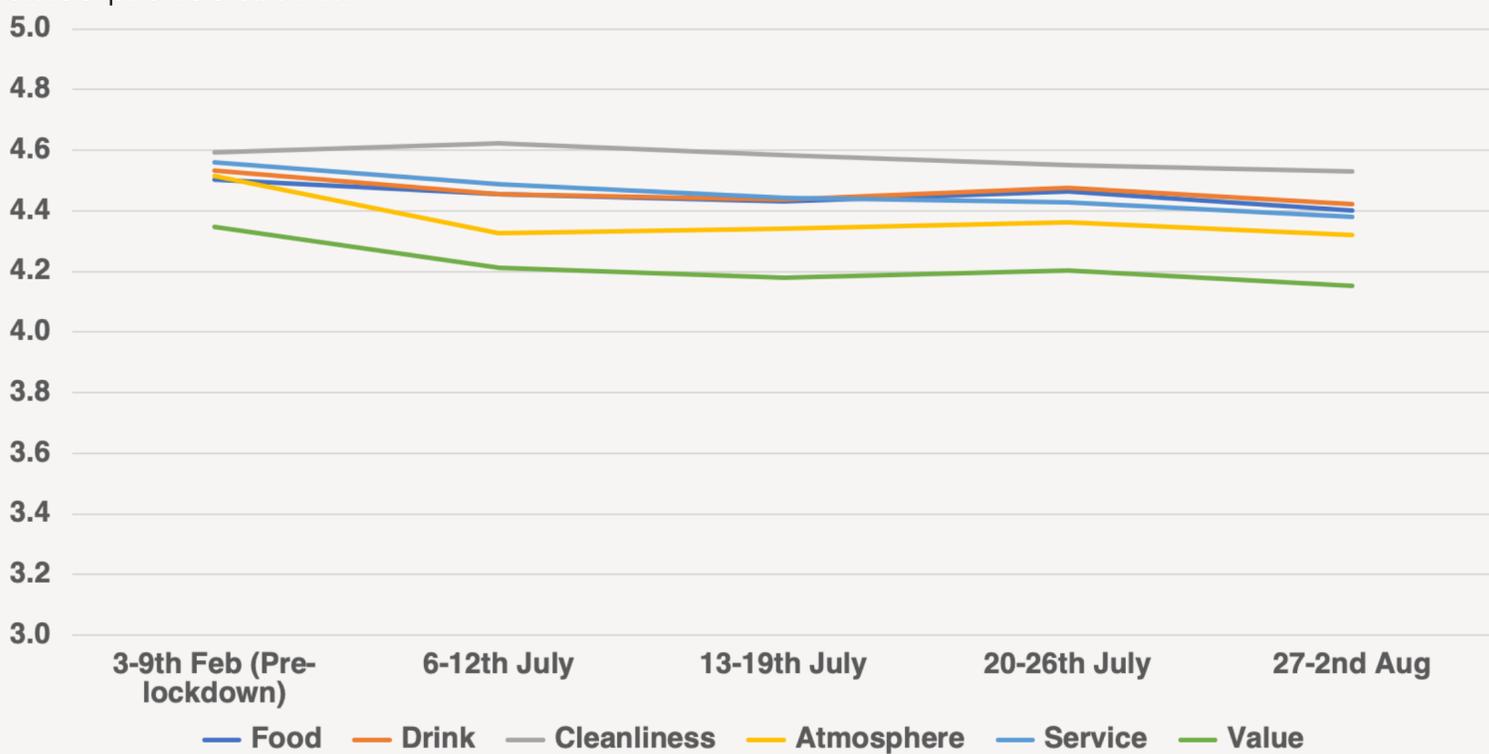


# The Customer Sentiment Tracker

3rd Aug 2020

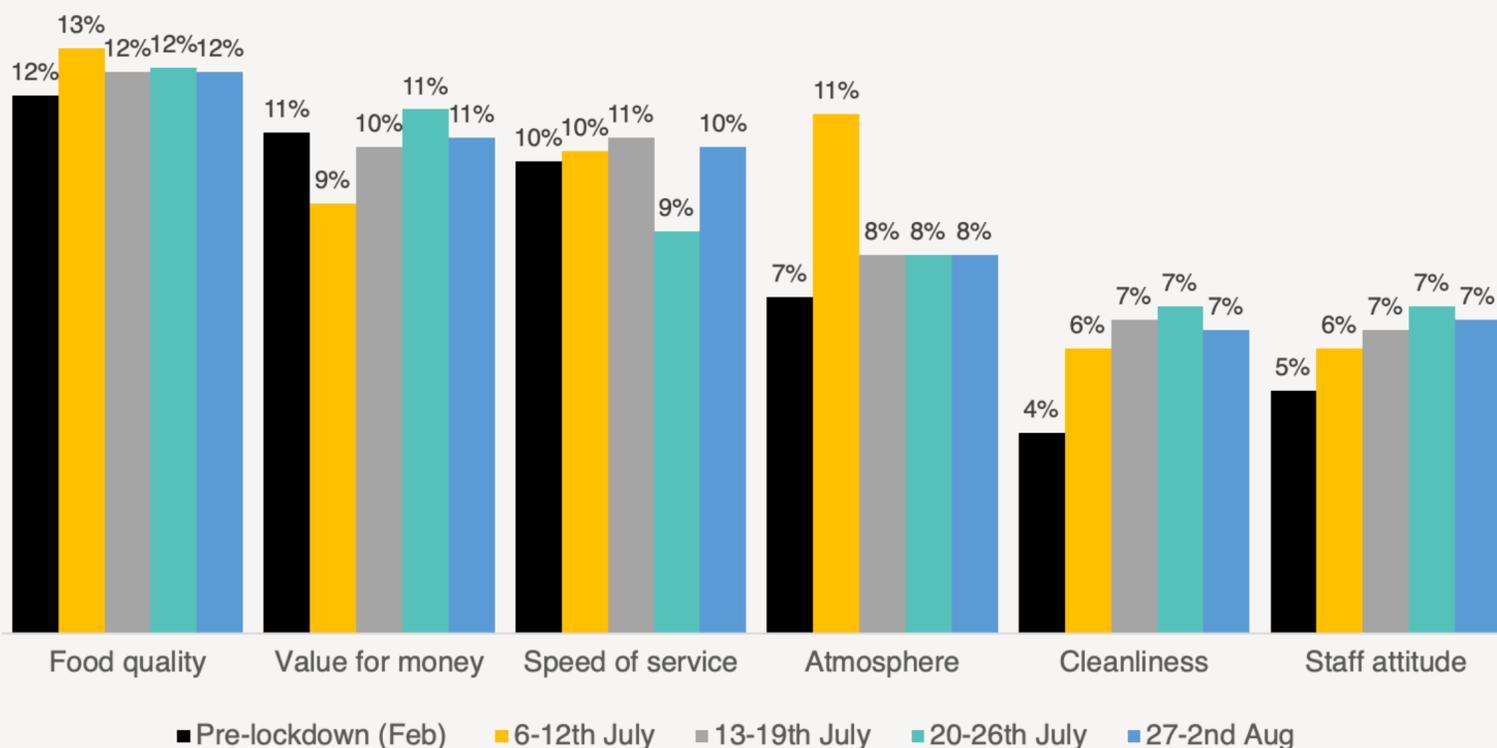
## Customer Satisfaction Ratings (out of 5, at industry level)

At an industry level, satisfaction ratings are still slightly below pre-lockdown levels but have remained fairly consistent since re-opening. Atmosphere, service and value for money have seen the biggest drop in satisfaction since pre-lockdown.



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

Cleanliness (or lack of it) and 'staff attitude' have both attracted a higher number of complaints post lockdown. Other topics are now reflective of pre-lockdown, at an industry average at least.



Source: Feed It Back.

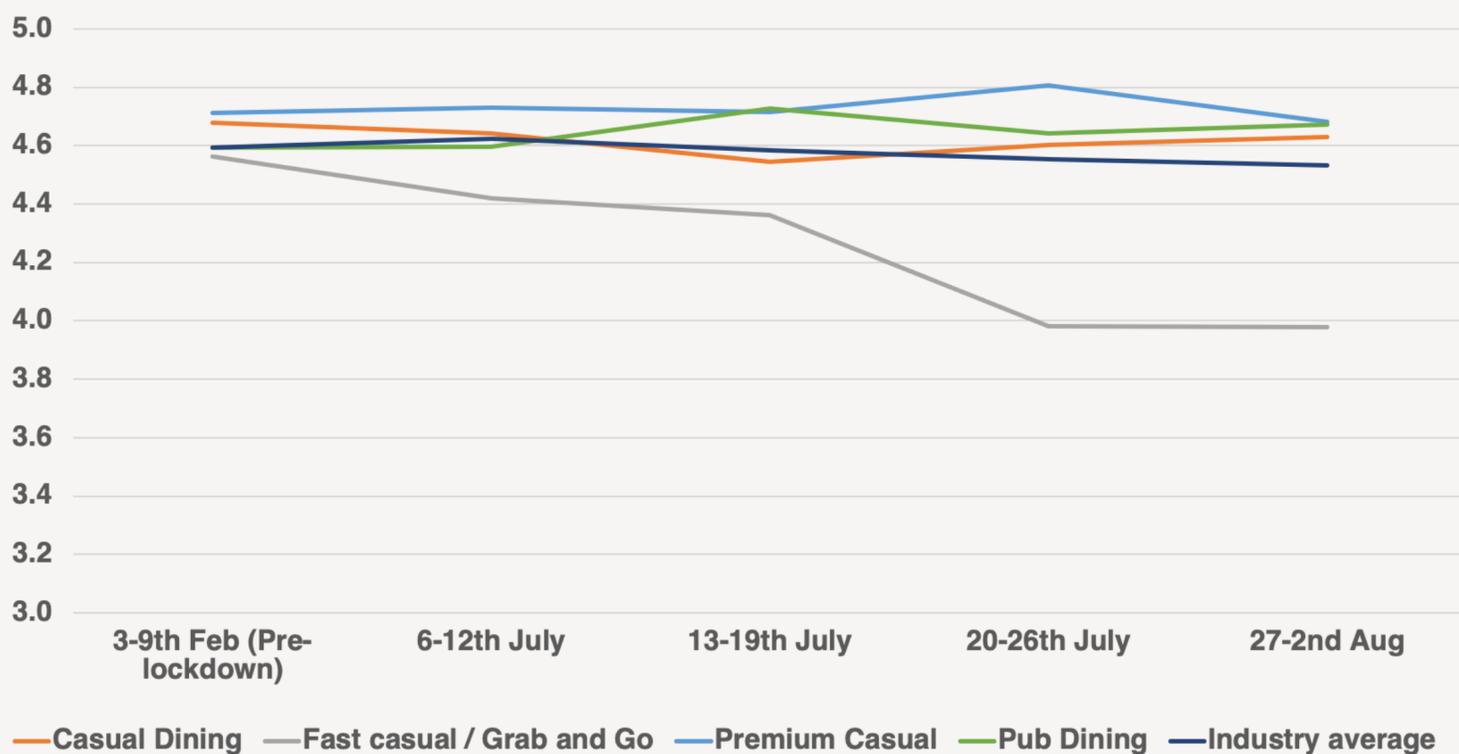


# The Customer Sentiment Tracker

3rd Aug 2020

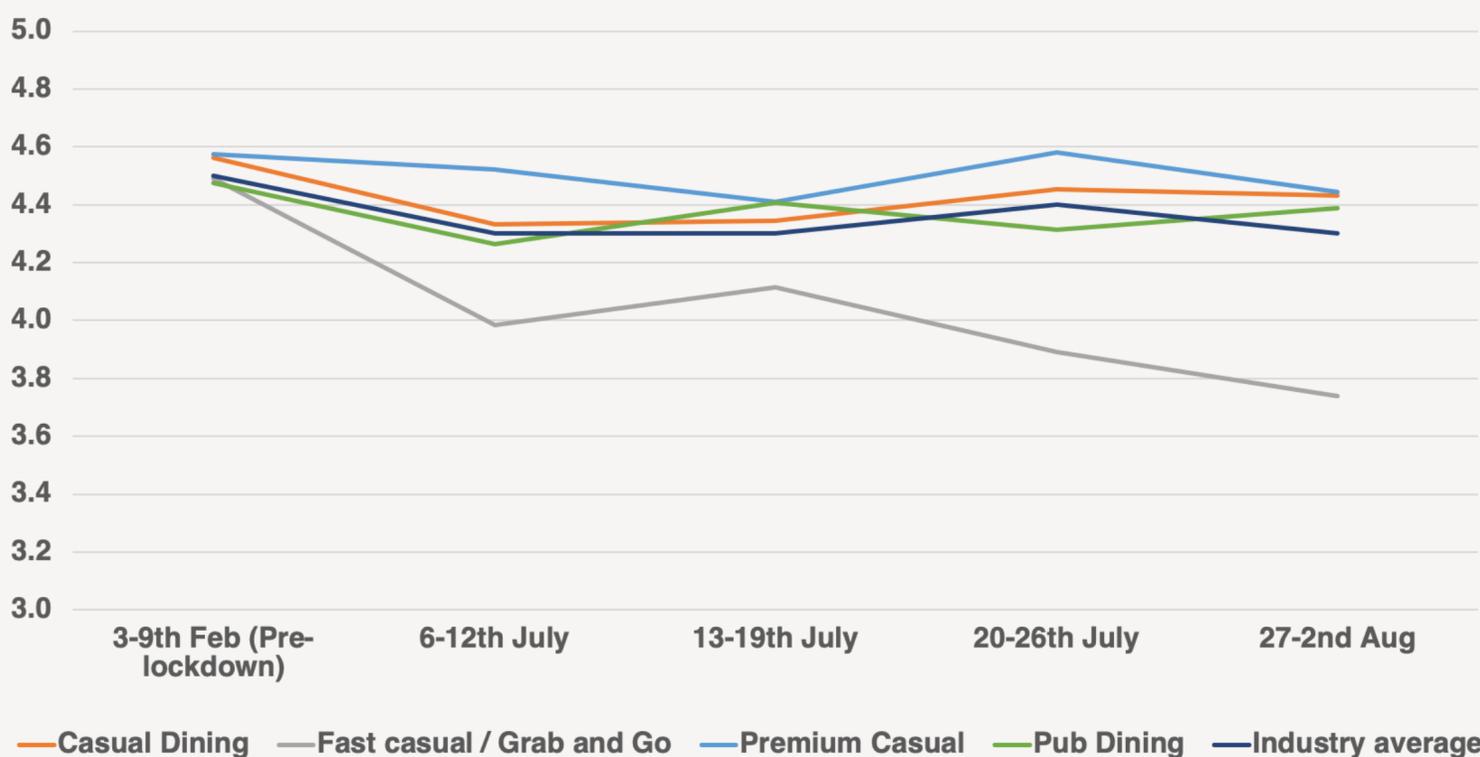
## Customer Satisfaction Ratings (out of 5) - CLEANLINESS

Cleanliness ratings remain fairly strong across most segments, especially given that it is obviously a more important factor to customer now compared with pre-lockdown. The 'fast casual' segment has however seen a concerning decrease in satisfaction which has continued to decline over the last few weeks.



## Customer Satisfaction Ratings (out of 5) - ATMOSPHERE

All segments have seen a drop in satisfaction for 'atmosphere'- again 'fast casual' has seen the most significant drop.



Source: Feed It Back.

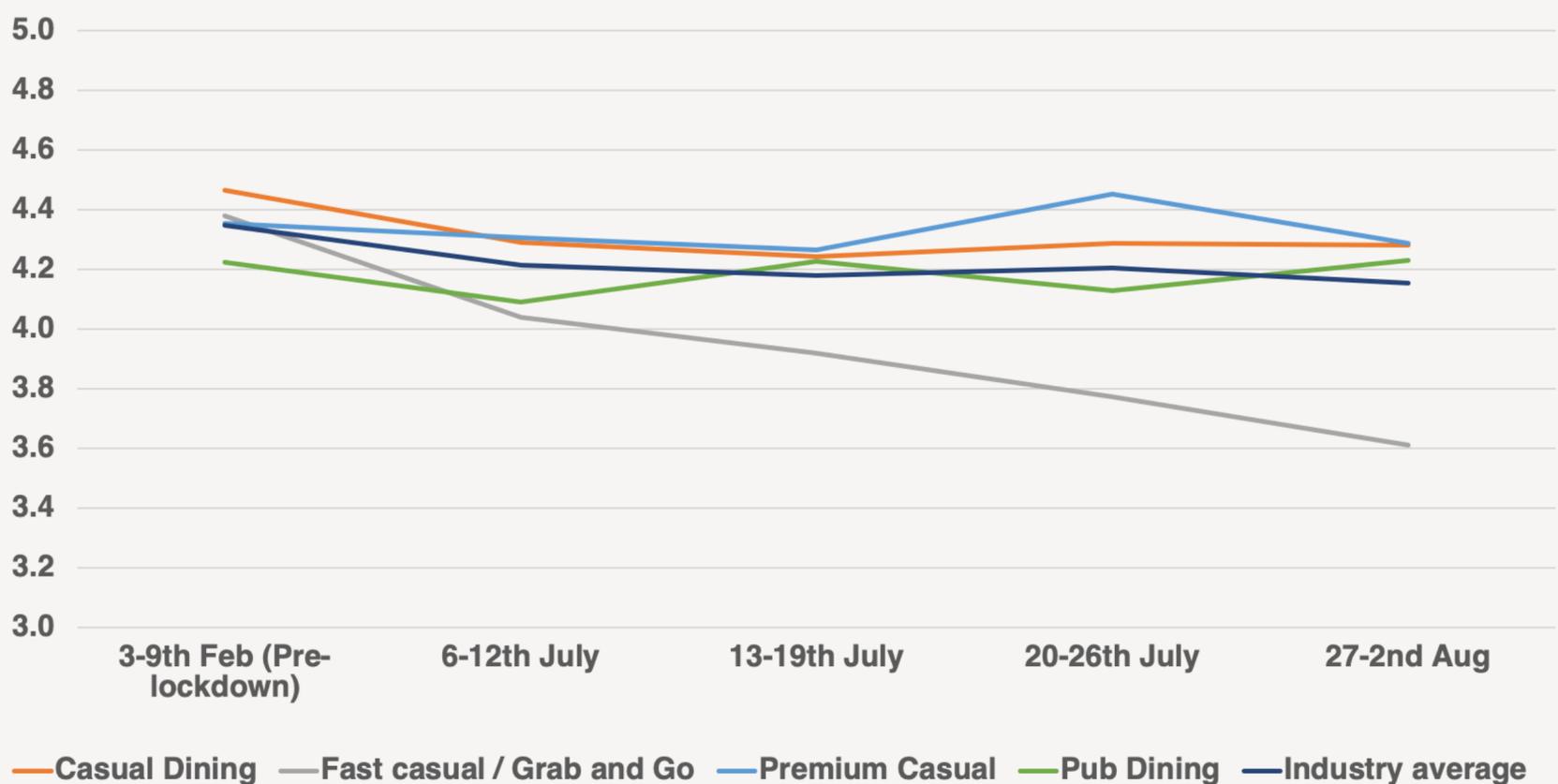


# The Customer Sentiment Tracker

3rd Aug 2020

## Customer Satisfaction Ratings (out of 5) - VALUE FOR MONEY

All segments apart from pubs have seen at least a slight drop in satisfaction in 'value for money' compared with pre-lockdown, but the most significant change is again within the 'fast casual' segment. This is unlikely to have much to do with price but more that other things about the experience are not justifying the cost.



"Our feedback shows that the 'fast casual' segment is struggling to keep up with regards to customer satisfaction – it's seen the biggest fall in NPS and also satisfaction ratings. Obviously these scores will differ by operator but this should be a call to action for venues which sit within this segment. It's only by listening carefully to customers' feedback and concerns, on a regular basis, that the industry will be able to continue to grow"

CARLO PLATIA, CEO, FEED IT BACK

Source: Feed It Back, \*KAM Media