# The Customer Sentiment Tracker
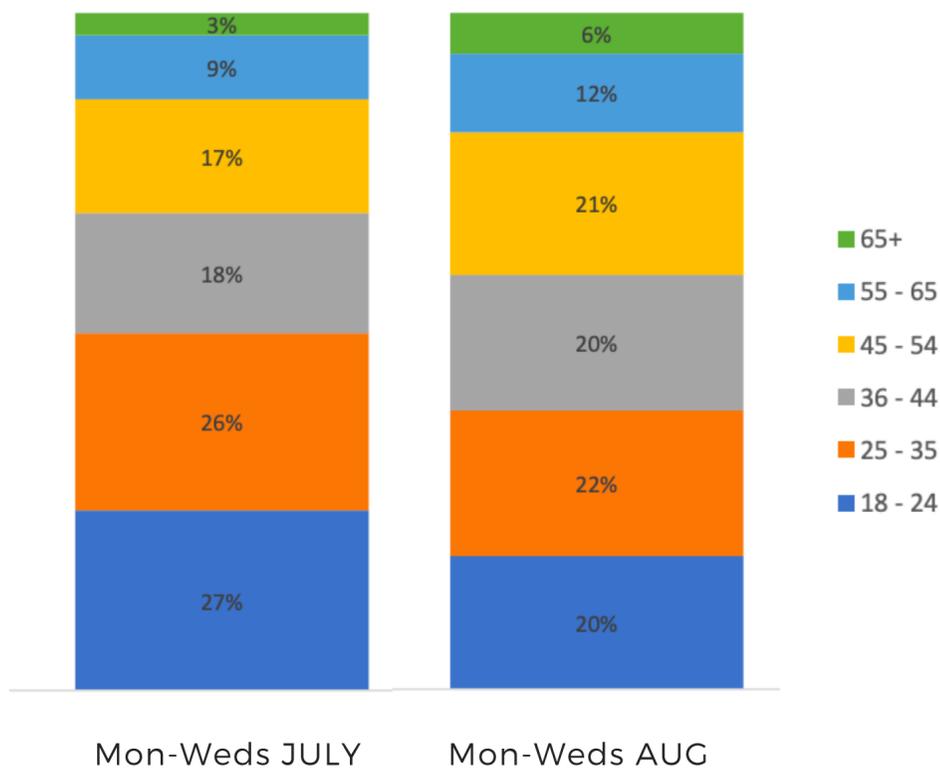
*It's an Eat Out to Help Out special focus this week as we take a deep dive into how the scheme has impacted customer sentiment.*

## Older customers return during EOTHO



**Mon-Weds JULY**
- 3%
- 9%
- 17%
- 18%
- 26%
- 27%

**Mon-Weds AUG**
- 6%
- 12%
- 21%
- 20%
- 22%
- 20%

Legend:
- 65+
- 55 - 65
- 45 - 54
- 36 - 44
- 25 - 35
- 18 - 24

*The EOTHO scheme has attracted a higher proportion of older customers - the customer group most worried about returning to hospitality.*

*Over 55-year olds made up 18% of hospitality customers during EOTHO, up from 12% on the same weekdays in July.*

*Great news for the industry that the scheme has helped get these valuable customers back through the doors.*

## 57%
of 55+yrs previously said they were worried for their safety when eating out*

*"Great news that older customers have been given the confidence to return to hospitality, lured in by the EOTHO offer. This customer group is the most nervous to return to venues. During lockdown 39% said they expected to eat out less frequently post lockdown and 57% said they were worried for their safety when eating out. The temptation of EOTHO seems to have helped win many of them over. Hopefully they will now feel confident enough to return.*

KATY MOSES, MD, KAM MEDIA
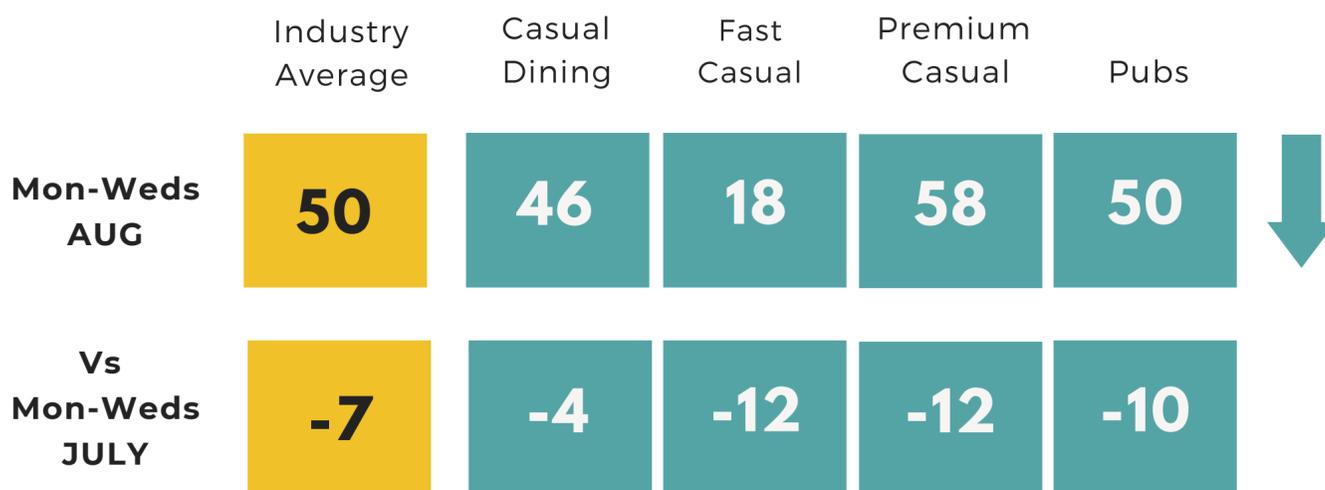
Source: Feed It Back. *KAM Media,

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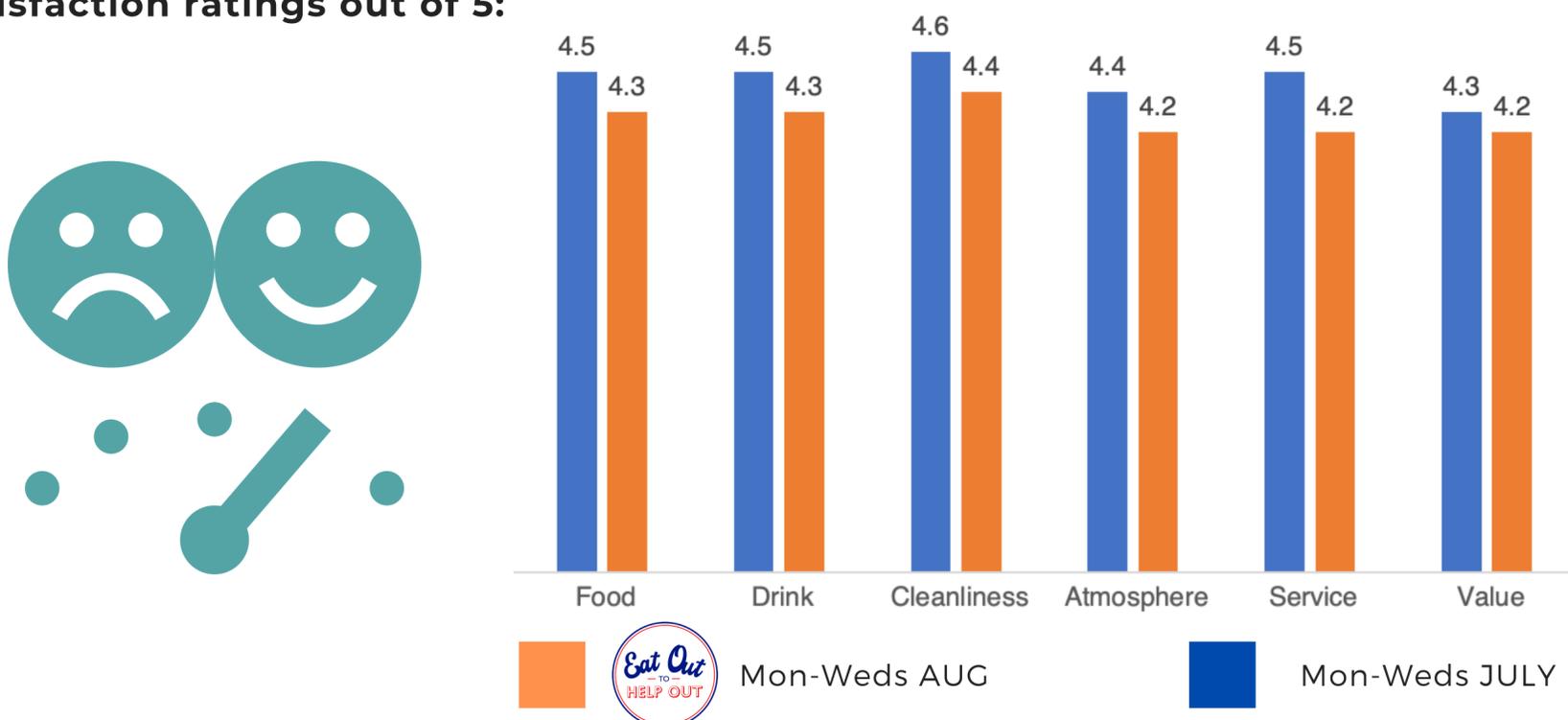
## EOTHO attracted lower NPS scores

Without a doubt EOTHO customers seem to be harsher critics compared with people visiting on Thurs-Sun in August but also Mon-Weds in July. NPS scores across all hospitality sectors were down during EOTHO.

| | Industry Average | Casual Dining | Fast Casual | Premium Casual | Pubs | |
|---|---|---|---|---|---|---|
| Mon-Weds AUG | 50 | 46 | 18 | 58 | 50 | ↓ |
| Vs Mon-Weds JULY | -7 | -4 | -12 | -12 | -10 | |

## Satisfaction ratings dipped during EOTHO

They certainly didn't plummet but we saw a clear dip in satisfaction ratings across all criteria during EOTHO. Overall however, ratings remain high across the industry as a whole, with each criteria receiving 4+ out of 5.

**Satisfaction ratings out of 5:**

| | Food | Drink | Cleanliness | Atmosphere | Service | Value |
|---|---|---|---|---|---|---|
| Mon-Weds JULY | 4.5 | 4.5 | 4.6 | 4.4 | 4.5 | 4.3 |
| Mon-Weds AUG | 4.3 | 4.3 | 4.4 | 4.2 | 4.2 | 4.2 |

■ Mon-Weds AUG    ■ Mon-Weds JULY
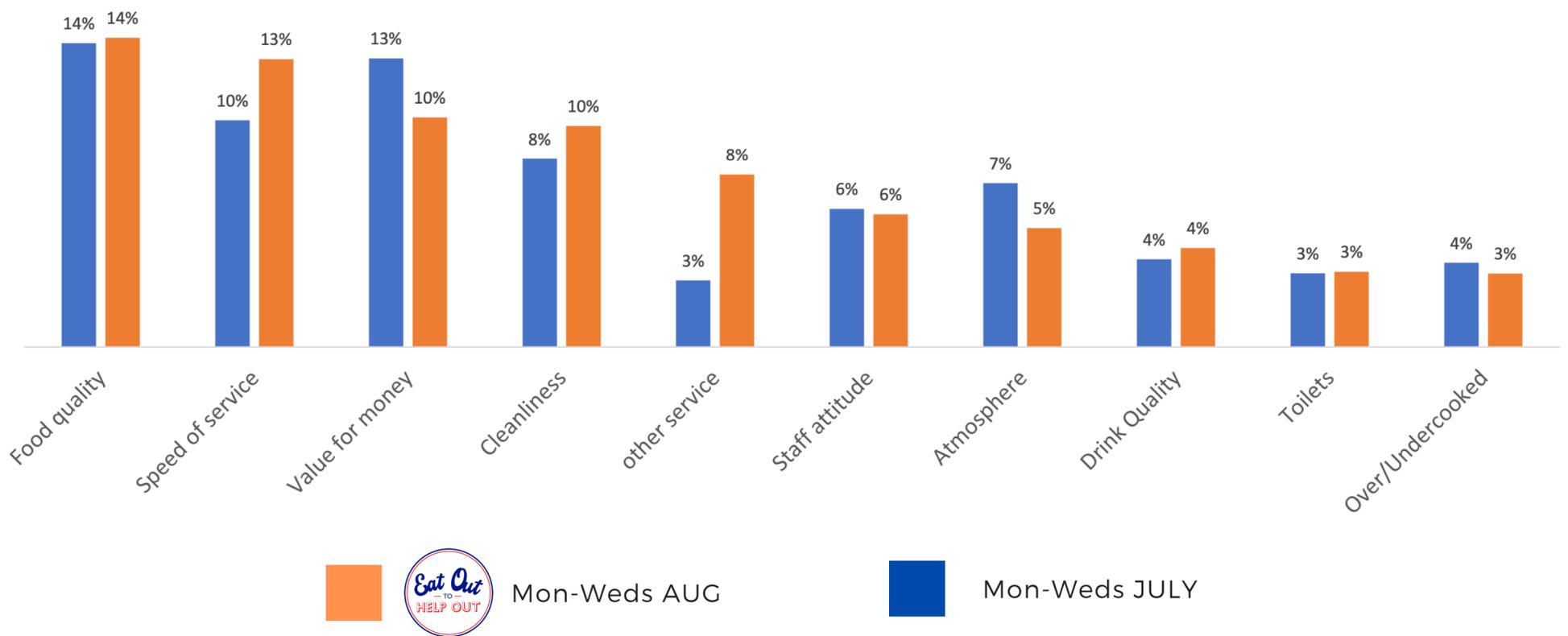
Source: Feed It Back,

# The Customer Sentiment Tracker

1st Sept 2020

## Service related complaints increased during EOTHO

Service attracted a higher proportion of complaints during EOTHO compared with the same days of the week in July. Speed of service was a particular bugbear, which would make sense due to the significant uplift in customer numbers which many venues saw and staffing issues reported. It's good to see that complaints about 'value for money' fell as customers took advantage of the scheme.

**Top compaints:**



| Complaint | Mon-Weds JULY | Mon-Weds AUG |
|---|---|---|
| Food quality | 14% | 14% |
| Speed of service | 10% | 13% |
| Value for money | 13% | 10% |
| Cleanliness | 8% | 10% |
| other service | 3% | 8% |
| Staff attitude | 6% | 6% |
| Atmosphere | 7% | 5% |
| Drink Quality | 4% | 4% |
| Toilets | 3% | 3% |
| Over/Undercooked | 4% | 3% |

■ Mon-Weds AUG          ■ Mon-Weds JULY

*"Eat Out to Help Out has been a great success in terms of getting more people through the door, however, the expectation of a smooth, safe service has not been met in the eyes of many customers. September needs to be about driving this new footfall back into venues and proving that service and cleanliness is the top priority. It's time to take the emphasis away from price and focus on an exceptional customer experience again. Something that UK hospitality does so well."*

CARLO PLATIA, CEO, FEED IT BACK

Source: Feed It Back,

# The Customer Sentiment Tracker

1st Sept 2020

## Customers remain consistently happy with safety procedures:

**Week 5**
10-16 Aug

**Week 6**
17-23 Aug

**Week 7**
24-30 Aug

**93%**   **94%**   **94%**

said new safety procedures gave them confidence to return

**91%** Casual Dining

**74%** Fast casual / Grab & Go

**95%** Premium Casual

**94%** Pubs

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

(Arrows reflect comparison with previous week)

Reasons for customers not feeling confident enough to return remain fairly stable. Social distancing is consistently the number one concern.

**Social distancing**
**19%**

**Covid. Measures**
**14%**

**Service**
**13%**

**No masks**
**13%**

**37%**

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

**10%**

say having 'staff wear PPE' would positively influence their choice of venue*
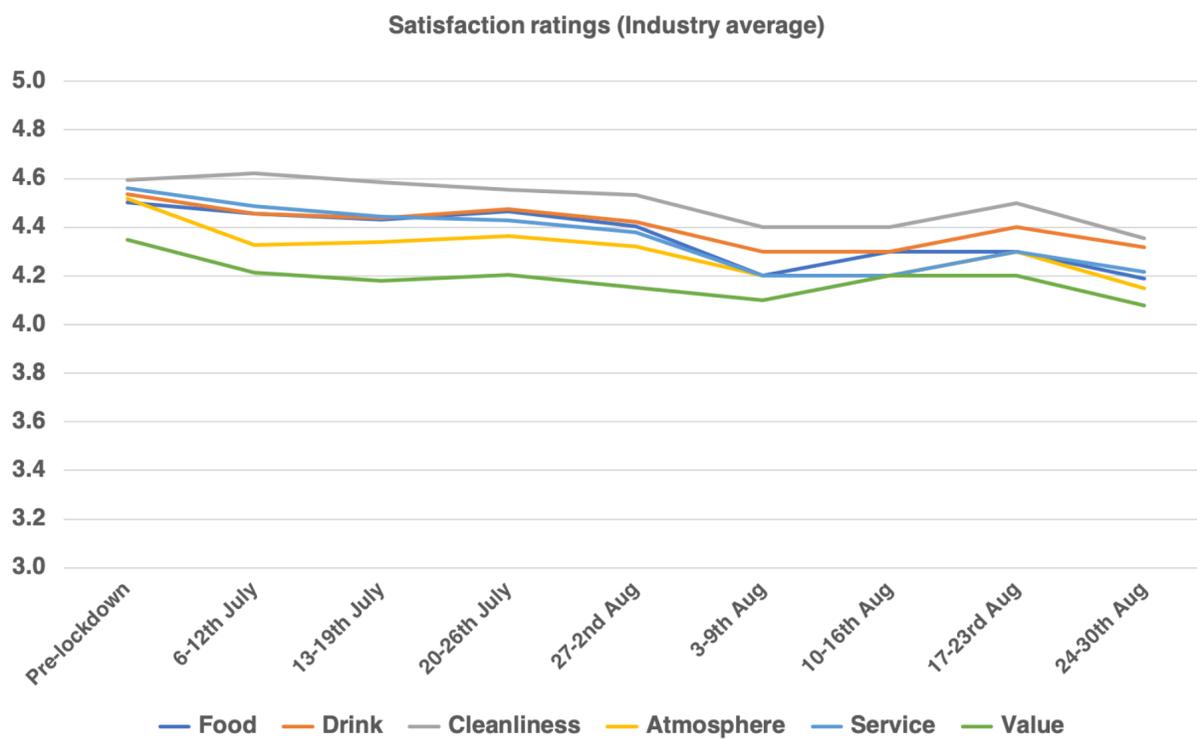
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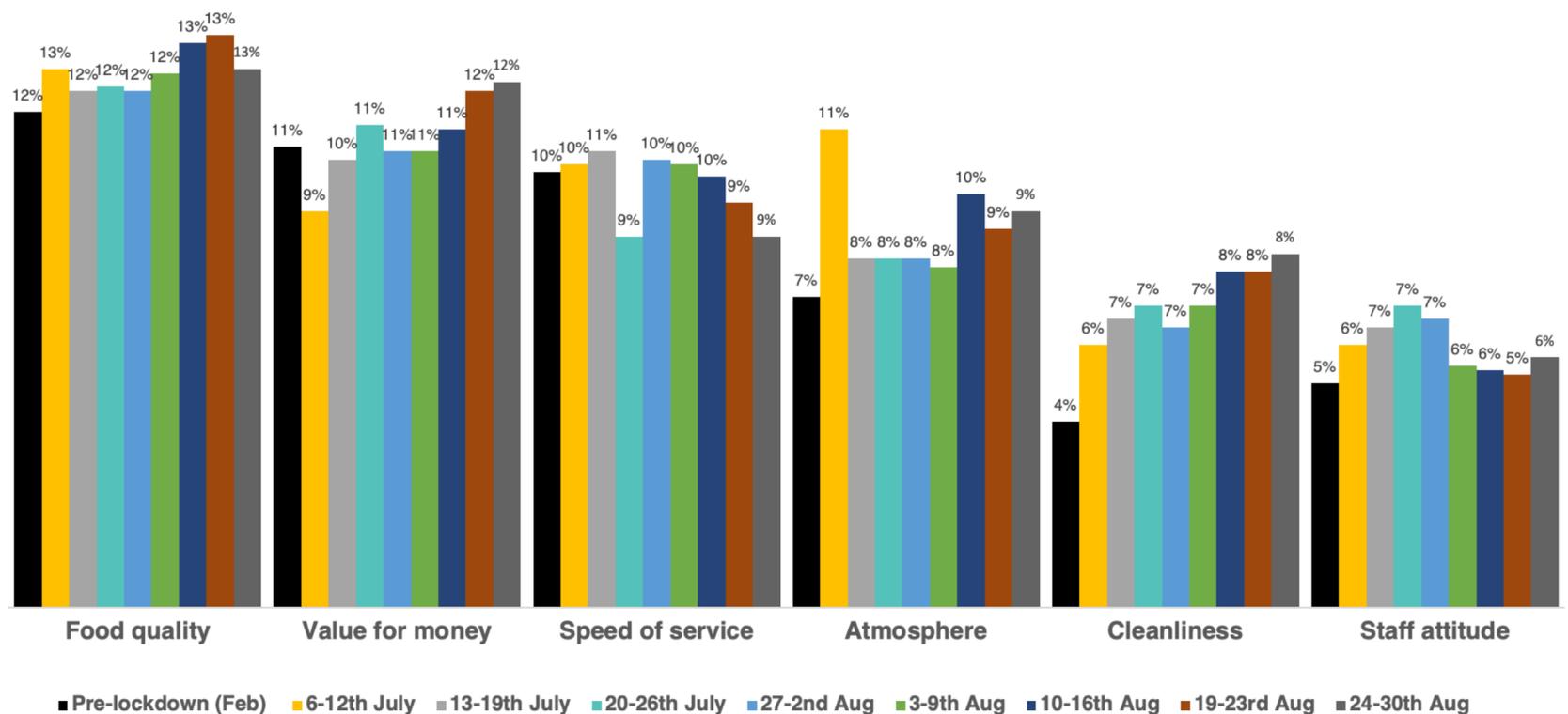
1st Sept 2020

## Post-lockdown customers are less happy with atmosphere

At an industry level, satisfaction ratings are still slightly below pre-lockdown levels and most have dipped slightly since re-opening. Atmosphere has seen the biggest drop in satisfaction levels since pre-lockdown - from 4.5/5 to 4.1/5 this week. This may have been driven further by EOTHO which has seen a rise in complaints about service levels.

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

**Satisfaction ratings (Industry average)**



Legend: Food, Drink, Cleanliness, Atmosphere, Service, Value

X-axis: Pre-lockdown, 6-12th July, 13-19th July, 20-26th July, 27-2nd Aug, 3-9th Aug, 10-16th Aug, 17-23rd Aug, 24-30th Aug

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



Categories: Food quality, Value for money, Speed of service, Atmosphere, Cleanliness, Staff attitude

Legend: Pre-lockdown (Feb), 6-12th July, 13-19th July, 20-26th July, 27-2nd Aug, 3-9th Aug, 10-16th Aug, 19-23rd Aug, 24-30th Aug

Source: Feed It Back,