



# The Customer Sentiment Tracker

7th Sept 2020

## NPS scores at record high

The hospitality industry net promoter score (NPS) has bounced back to record levels following the end of the EOTHO scheme. For the first time since re-opening the industry's NPS score hit 60, which is even higher than pre-lockdown levels and +7 points compared with last week.

	Pre-lockdown 3-9 Feb	Week 6 10-16 Aug	Week 7 17-23 Aug	Week 8 24-30 Aug	Week 9 31-6th Sept	Best-in-class Operator
<b>NPS</b> Net Promotor Score	58	55	56	53	60 ↑	
Casual Dining	58	51	48	44	52 ↑	86
Fast casual	64	31	20	20	45 ↑	71
Premium Casual	58	63	64	63	67 ↑	85
Pubs	60	49	59	58	63 ↑	86

## No.1.

### Word of Mouth

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

"We're excited to see the hospitality industry NPS bounce back like this. EOTHO certainly drove additional feet through the door but it also presented challenges with some service levels. In research terms, 50+ is generally considered an excellent net promoter score (a measurement of whether customers would recommend a venue), so this week's industry score of 60 shows that the UK hospitality industry is back to delighting it's customers.."

KATY MOSES, MD, KAM MEDIA

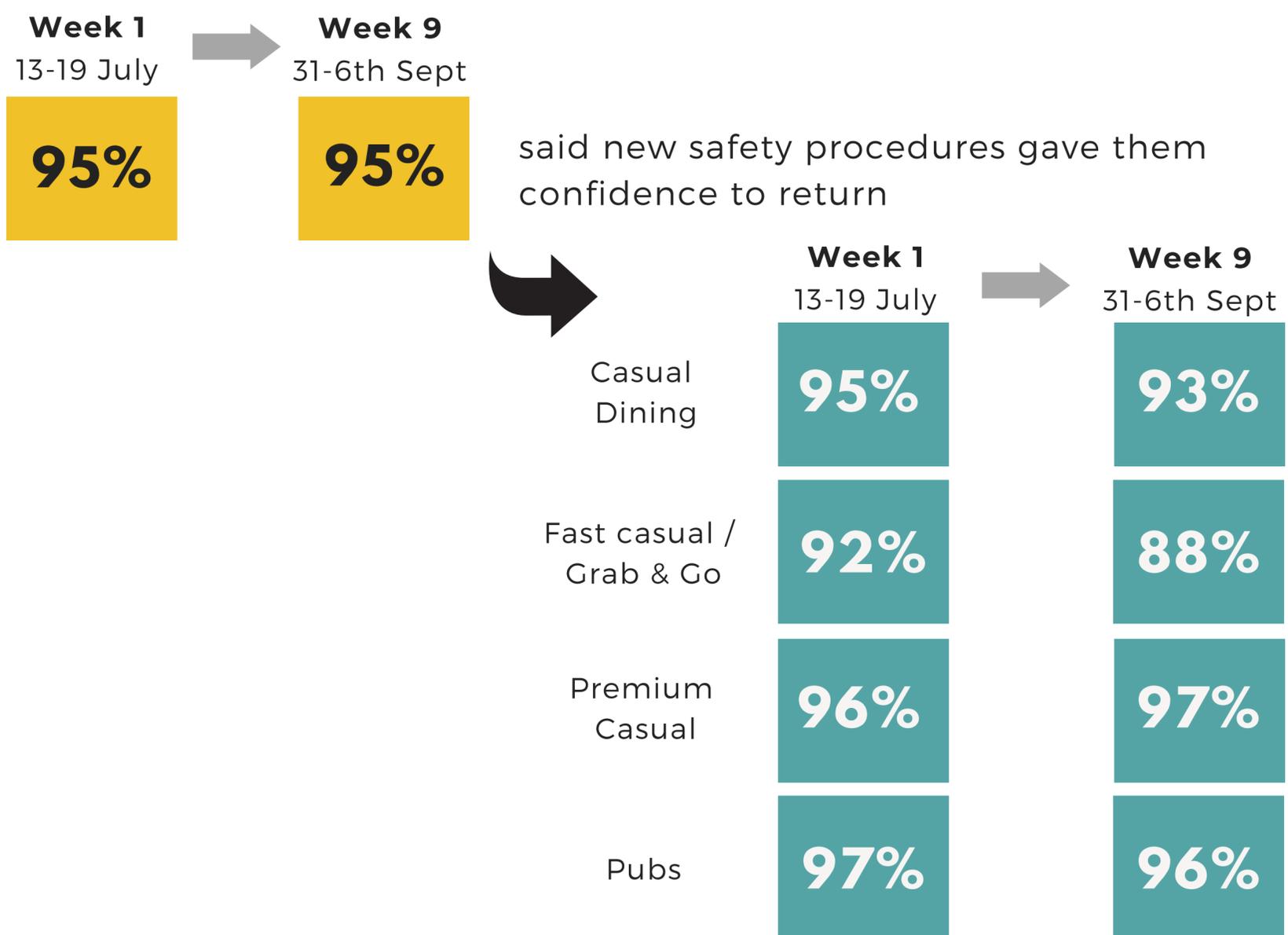
Source: Feed It Back, \*KAM Media,

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## Customers feel consistently safe overall

All hospitality segments, except 'fast casual', have received fairly consistent levels of customer confidence with safety procedures since re-opening. Premium casual continues to dip and lack of social distancing is still the main factor which concerns customers.



## Lack of social distancing is still a concern

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

(Arrows reflect comparison with previous week)



Source: Feed It Back



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## Unclean tables are increasingly being noticed

As well as attracting a higher proportion of cleanliness related complaints, the focus on tables not being cleaned continues to rise. It accounted for more 1-in-5 cleanliness related complaints this week.

### Top 3 cleanliness related complaints:

**Week 1**  
13-19 July

- 1. Toilets 19%**
- 2. Unclean tables 16%**
- 3. General cleanliness 15%**

**Week 9**  
31-6th Sept

- 1. Unclean tables 22%**
- 2. Toilets 17%**
- 3. General cleanliness 12%**

## No.1. Regular service cleans

Regular service cleans are the no.1 "must have" COVID prevention measure, according to customers, and should include tables, chairs and the bar.

73% of customers see this as a "must have" and 21% as a "nice to have"\*

*"It may seem a small thing but week after week a significant number of customers are telling us that their tables are not clean – this number of complaints about table cleanliness has steadily risen since re-opening. It might be that teams were really "on it" in the first few weeks of re-opening and are now either letting standards slip or are just not as "visible" in their cleaning. As always, for customers, perception is reality. This should be an easy fix."*

CARLO PLATIA, CEO, FEED IT BACK

Source: Feed It Back, \*KAM Media

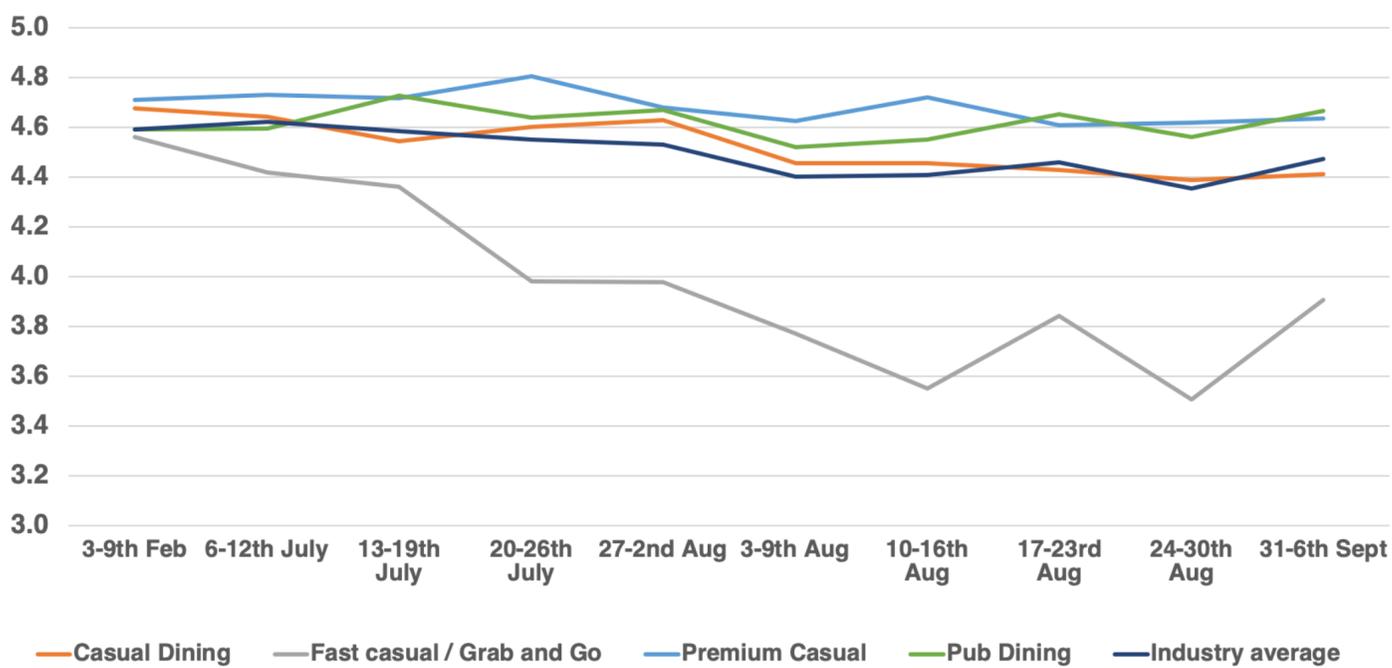


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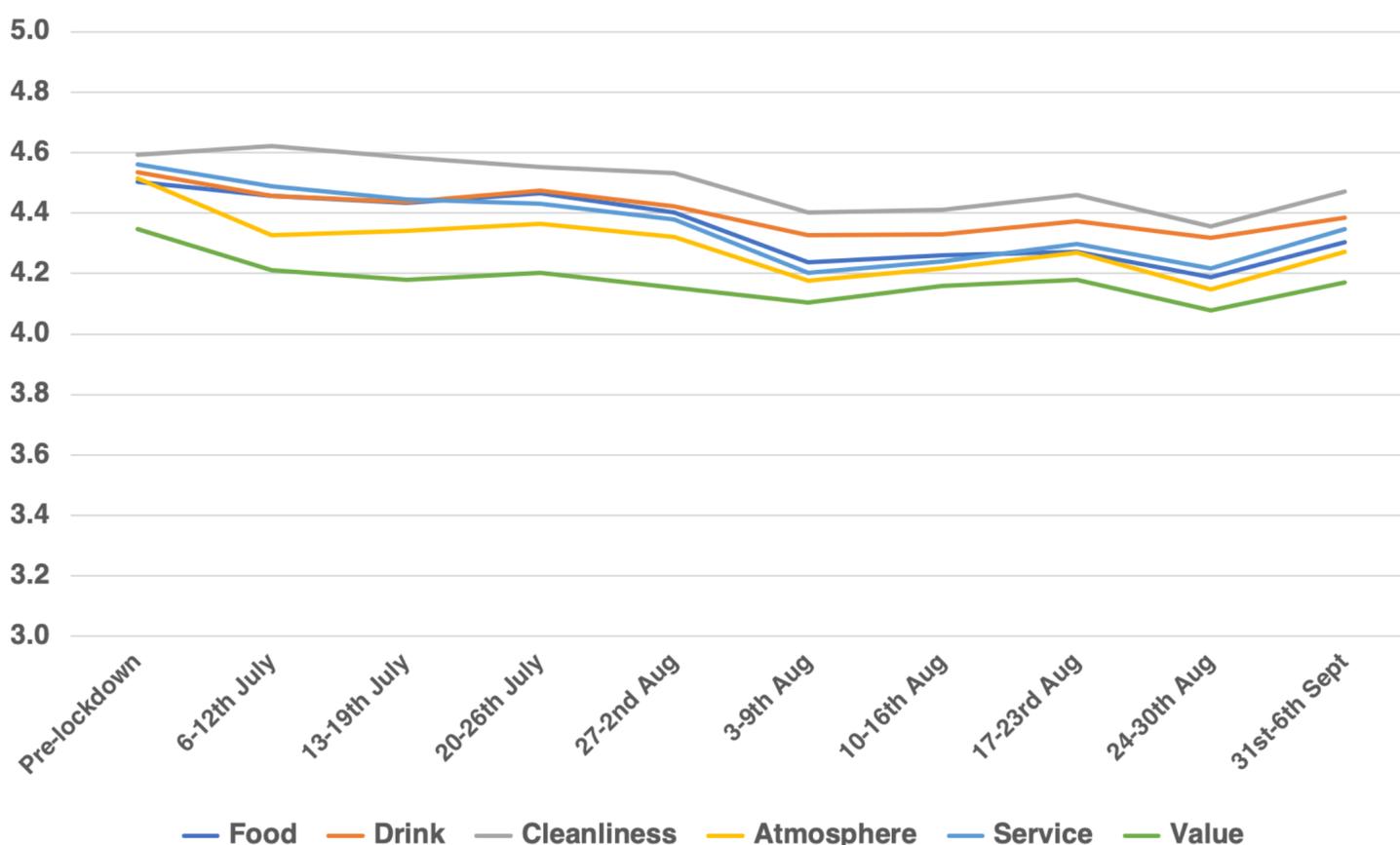
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## Customer Satisfaction Ratings (out of 5) - CLEANLINESS

Cleanliness ratings remain fairly stable across most segments, although we have seen a slight dip since pre-lockdown and a higher proportion of customers are leaving cleanliness related complaints. The 'fast casual' segment has however seen a concerning decrease in satisfaction which has continued to decline over the last few weeks, perhaps driven by EOTHO crowds who tended to be much harsher critics.



## Customer Satisfaction Ratings (out of 5) - Industry average level.



Source: Feed It Back.