



The Customer Sentiment Tracker

Oct 2020

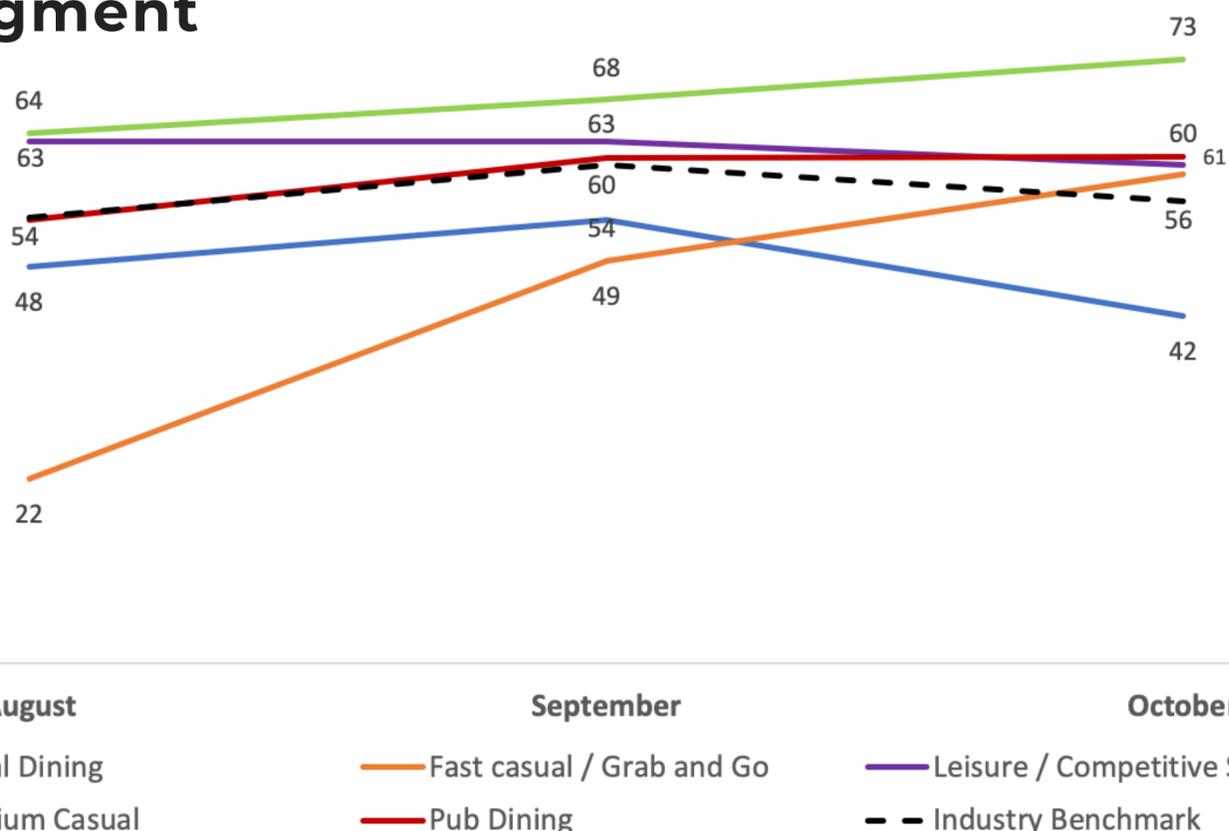
Lockdown starts just as customers accept hospitality's 'new normal'

	Aug 2020	Sept 2020	Oct 2020	Oct 2019
NPS Net Promotor Score	54	60	56	56
Casual Dining	48	53	42	
Fast casual	24	51	59	
Premium Casual	64	68	73	
Pubs	54	61	61	
Leisure / competitive socialising	63	63	60	

The latest Customer Sentiment Tracker from Feed It Back and KAM Media has found that we are entering another lockdown just as things seemed to be heading towards a "normal" level with regards to customer sentiment as scores 'settle' back to 2019 levels in many cases.

Based on feedback from **89,825** customers in October, via the Feed It Back platform, NPS (net promoter score) for October 2020 tracked in line with October 2019, rising back up following a dip during Eat Out To Help Out in August (54).

NPS by segment



Source: Feed It Back.

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'Fast casual' segment sees significant improvement

Fast casual social scores:	Aug 2020	Sept 2020	Oct 2020
facebook.	4.4	4.4	4.7
Google	4.0	4.0	4.3
Tripadvisor	3.2	3.4	4.2

The biggest recovery in the customers eyes comes from the Fast Casual sector with NPD for this sector jumping from a low in August of 22 to an impressive 59 in October.

Social media scores have also grown for Fast Casual from an average of 3.9 in August to 4.3 in October*.

*available for other segments.

"The Fast Casual sector has struggled in the eyes of its customers since re-opening, consistently gaining lower NPS scores, satisfaction ratings and customer confidence levels. October saw a considerable improvement and just as many venues have to close, it seems the sector has won back customers trust. I hope they are able to pick up where they left off."

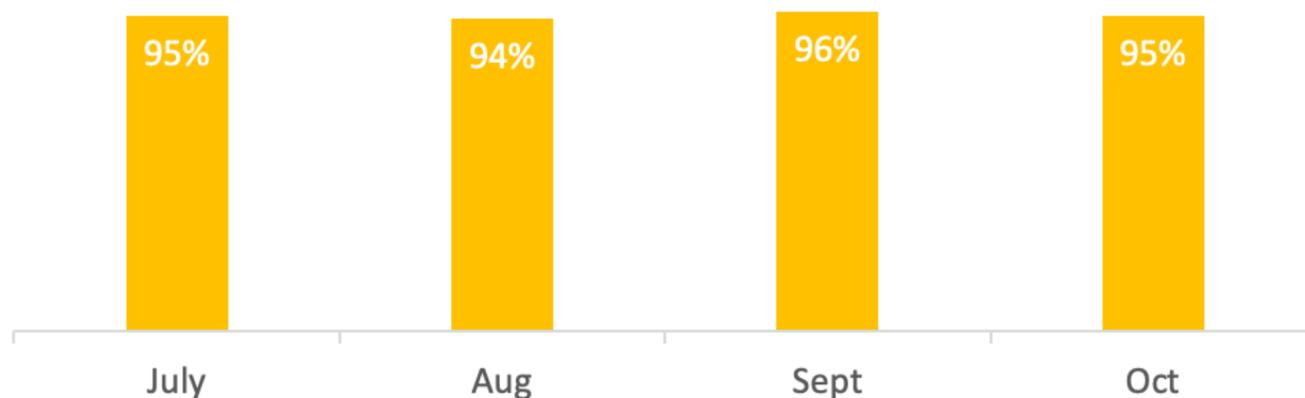
CARLO PLATIA, CEO, FEED IT BACK



Customers have felt consistently safe since re-opening

Despite changing Covid safety measures, regional lockdowns and differing tiers, customers have remained confident in the safety measures which the hospitality industry has implemented, even with the increase fear which comes with a second wave of Covid numbers.

% who visit hospitality and feel safe enough to return:



Source: Feed It Back

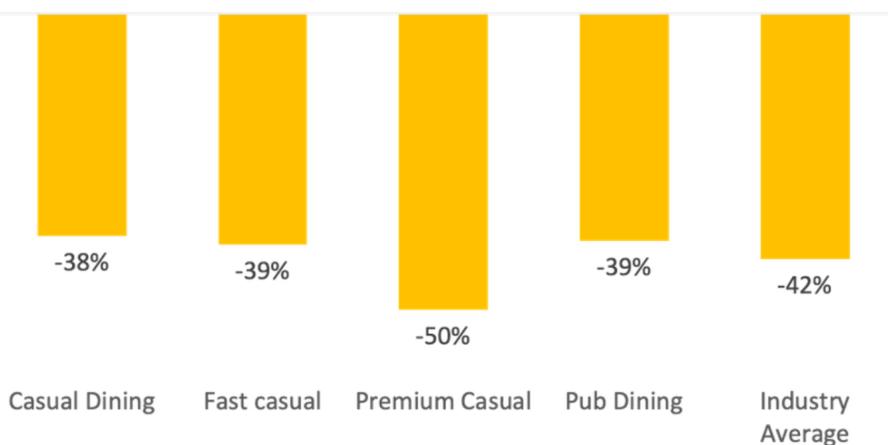


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Significant fall in complaints across all sectors

% change in proportion of complaints:

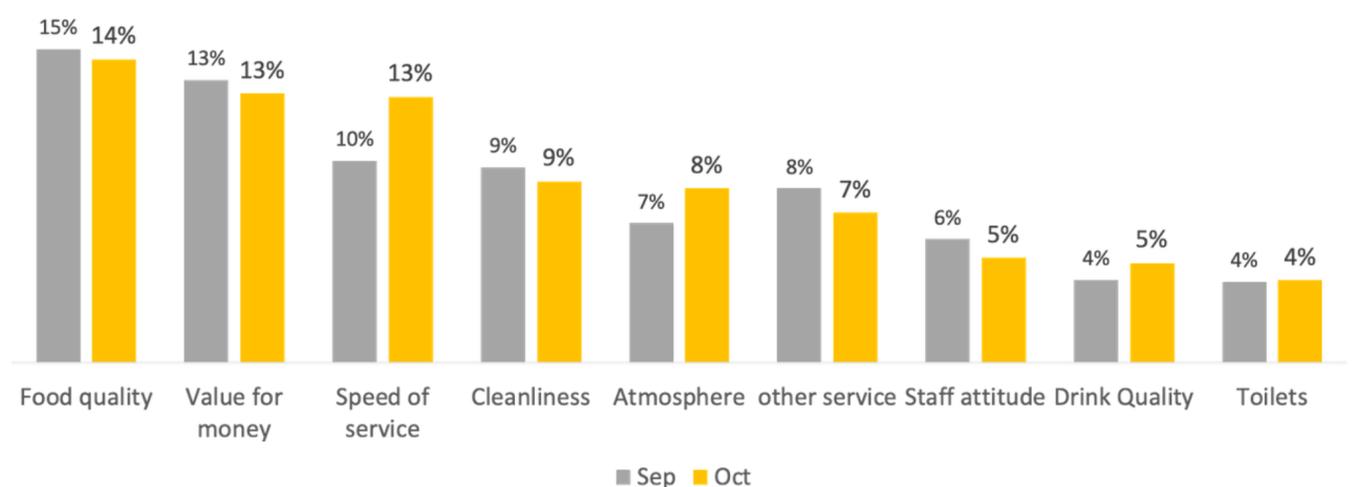


October saw a 42% drop in the volume of complaints compared with September, suggesting that customers were really beginning to settle into the 'new normal' of hospitality.

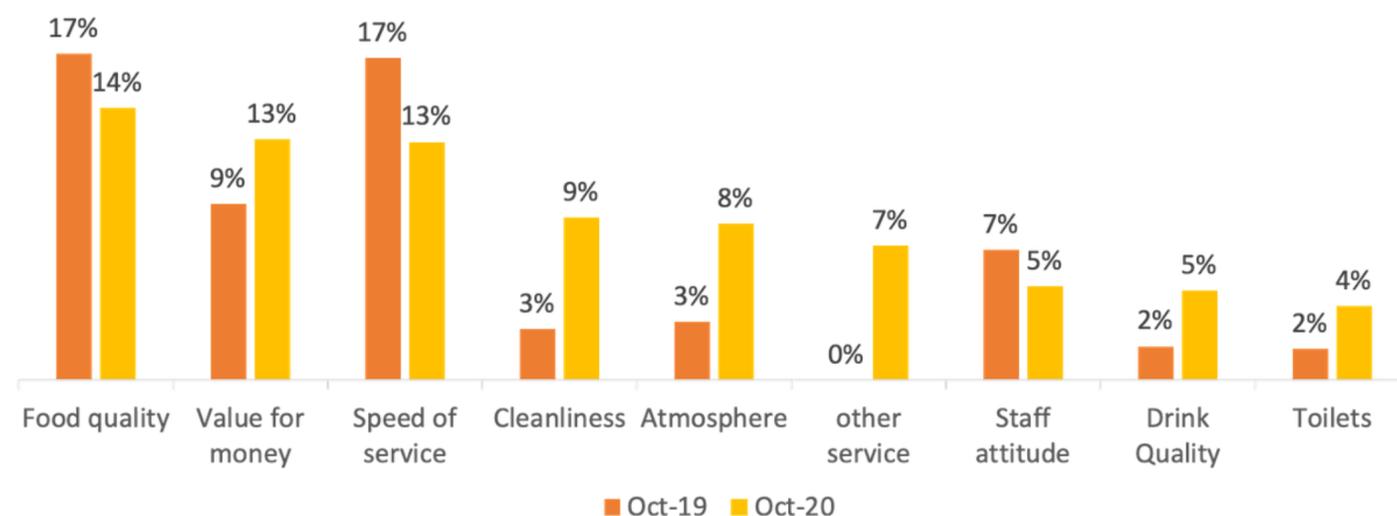
With regards to complaints topics, cleanliness remains a key focus for customers (no surprise!) and it has grown significantly in importance since March.

October also bought a further rise in complaints about 'atmosphere' as a result of Covid procedures. Complaints about 'atmosphere' now account for 8% of all complaints over all, compared with just 3% this time last year.

Complaints topics Sept v Oct:



Complaints topics 2019 vs 2020:



Source: Feed It Back.



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What does the festive period look like?

2-in-3

expect to drink less alcohol in hospitality venues this Xmas

55%

expect to drink more at home (38% same)

1-in-3

who went out last NYE, don't expect to this year

10%

plan to spend MORE in hospitality this festive period vs last year

Source: KAM MEDIA

“The data is showing us that the atmosphere and hospitality experience still isn't quite as customers expect it to be. Going into this second lockdown consumers are less fearful and more stressed and frustrated. There is a huge opportunity for hospitality to be a saviour in the eyes of its customers and give them something to smile about once lockdown measures lift again.

2-in-3 say that they expect to drink out less this festive period, so the industry has work to do to entice them out of their homes. Now the industry knows how to keep our customers safe, re-opening should focus on bringing them some much needed joy and happiness!”

KATY MOSES, MD, KAM MEDIA



Sign up to receive this tracker directly to your inbox each month:
kam-media.co.uk/customer_sentiment_tracker

or email dan@feeditback.com to include your venues in the tracker.