

THE MOMENT OF TRUTH

Interrupting, engaging and
influencing **in-venue**

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KAM

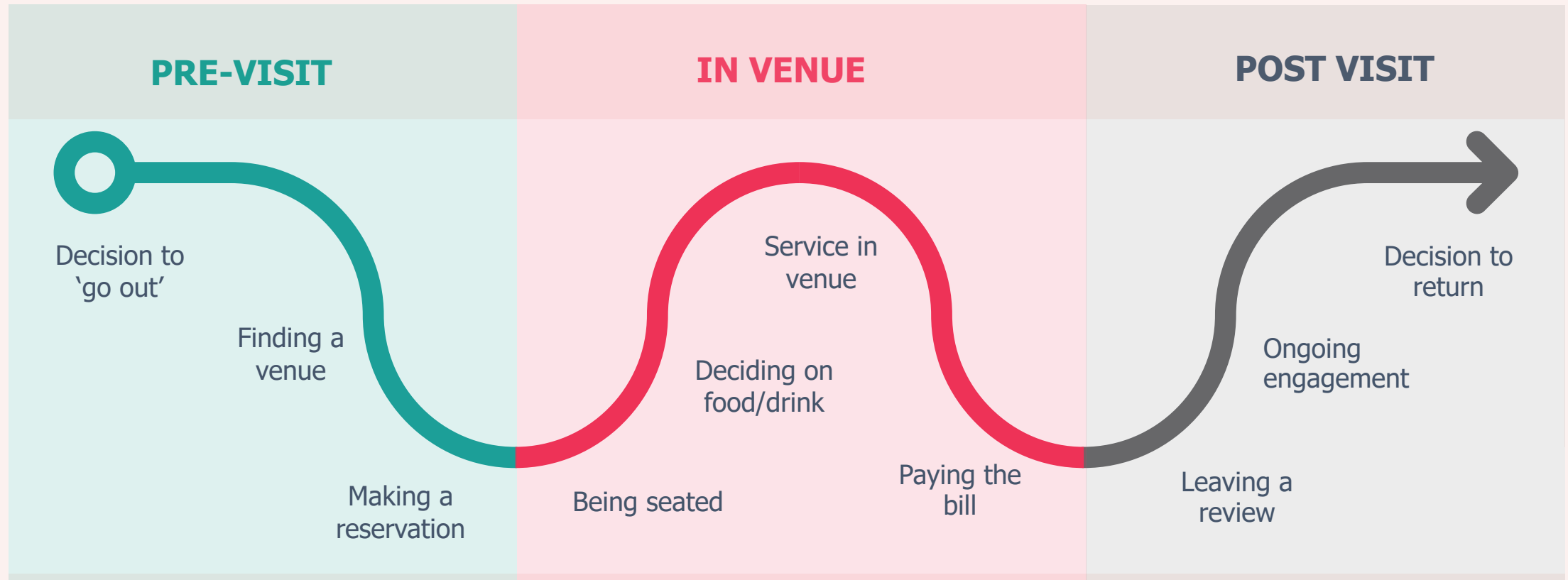
In partnership with:

paytronix

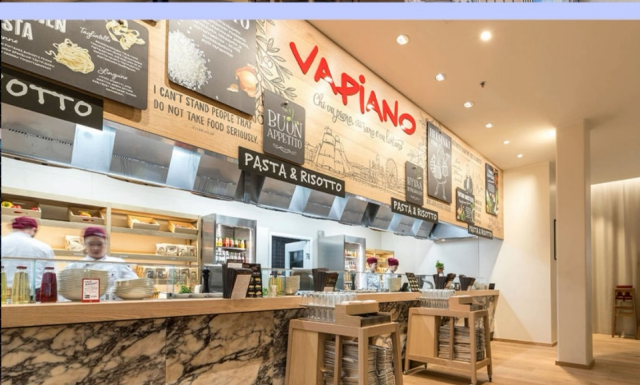
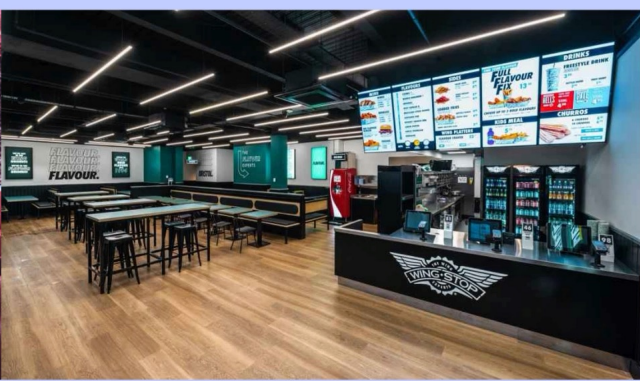
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SO MANY OPPORTUNITIES TO INFLUENCE THE CUSTOMER JOURNEY



BUT THIS IS WHERE THE MAGIC HAPPENS...



WHAT CAN WE AS MARKETEERS INFLUENCE IN-VENUE?



1. How the visit affects overall **brand sentiment**
2. How **likely they will be to come back**
3. **What they choose** to drink/eat
4. **How much they spend** (premium options/side etc)
5. **How long** they spend in-venue
6. How likely they will be to **share their experience**

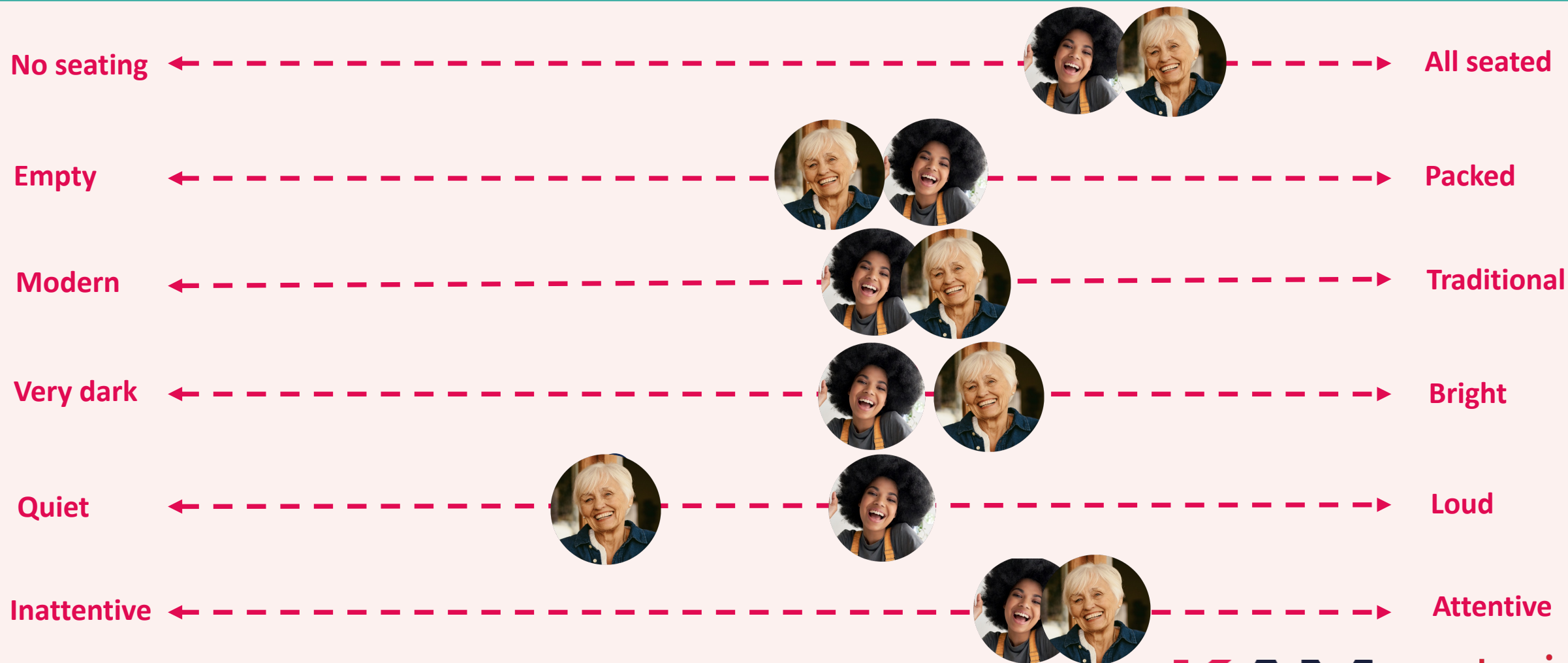
MANY VENUES ARE CURRENTLY LOSING RETURN VISITS

Top experiences which have put UK adults off returning to a specific venue within the last 3 months...

1. Unfriendly staff
2. Music too loud
3. Lack of atmosphere
4. Uncomfortable seating
5. Lack of healthy options

'Poor Wifi' and 'poor range of alcohol-free drinks' both mentioned by 5%

GETTING THE ATMOSPHERE 'RIGHT'



Source: KAM Golden Years 2023

Respondents were asked, on a sliding scale, to craft their 'ideal venue' - chart compares Gen Z vs Golden Years customer groups.

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WE'RE STILL NOT DELIVERING *IN-VENUE* FOR THE 'GOLDEN YEARS'

Their recent hospitality experiences...

>1-in-10 Difficulties reading the menu

1-in-10 Felt 'too old' for the atmosphere

29% Music too loud



WANT TO KNOW HOW TO *REALLY* PISS YOUR CUSTOMERS OFF?

(NB. they ALL happen in-venue)



1.

Tell them the dish they want is unavailable

2.

Under attentive staff

3.

Make them wait 'too long' to pay

4.

Don't have your 'specials' written down

5.

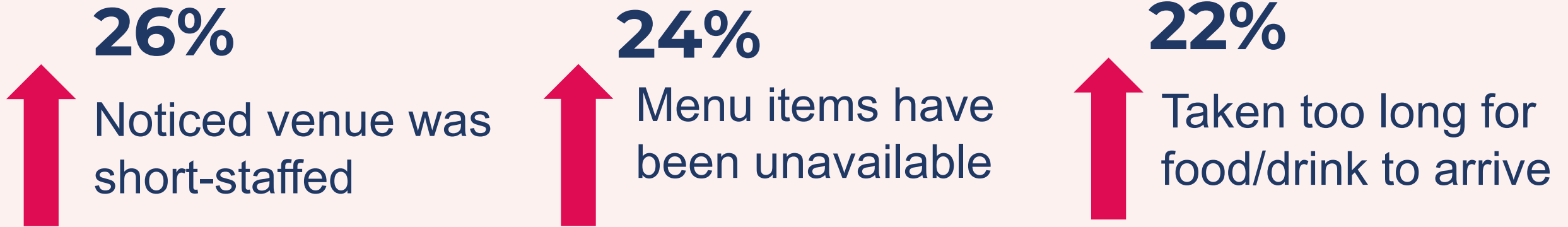
Make them wait 'too long' to order

Source: KAM Golden Years 2023 - How frustrating do you find the following when eating and/or drinking out?

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WHAT'S THE CURRENT REALITY IN TERMS OF CUSTOMER EXPERIENCE?

(in the last 3 months)



Source: KAM 2023 - Qn. Which of the following has happened to you when visiting a restaurant/pub in the last three months?

INFLUENCING FOOD / DRINK CHOICE

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75%

of customers make up their mind when they are IN the venue.

(56% will have also looked at food/drinks menu before arriving. Even higher for GenZ and those with young kids.)



THE CURRENT REALITY?

1. A below par purchasing experience for some (Here are just some examples!)

>1-in-5

craft beer drinkers said they are often
'overwhelmed by choice'*

>1-in-5

customers don't feel confident ordering
wine in pubs, bars and restaurants

1-in-9

find choosing a wine *intimidating*

Source: *KAM X Brixton Brewery Craft Beer research 2023, KAM X Hallgarten & Novum Wine Decisions 2022

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THE CURRENT REALITY?

2. We're missing (so many) opportunities to upsell (Here's just one example!)

1-in-4 customers will default to tap water if they are not drinking alcohol

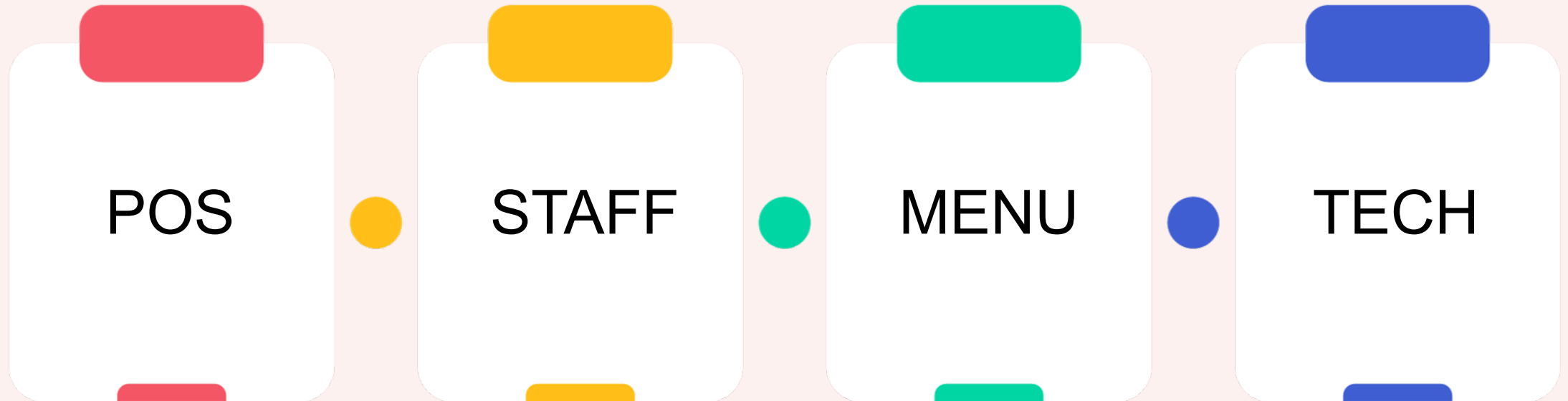
>1-in-3 visits to venues **do not involve alcohol**



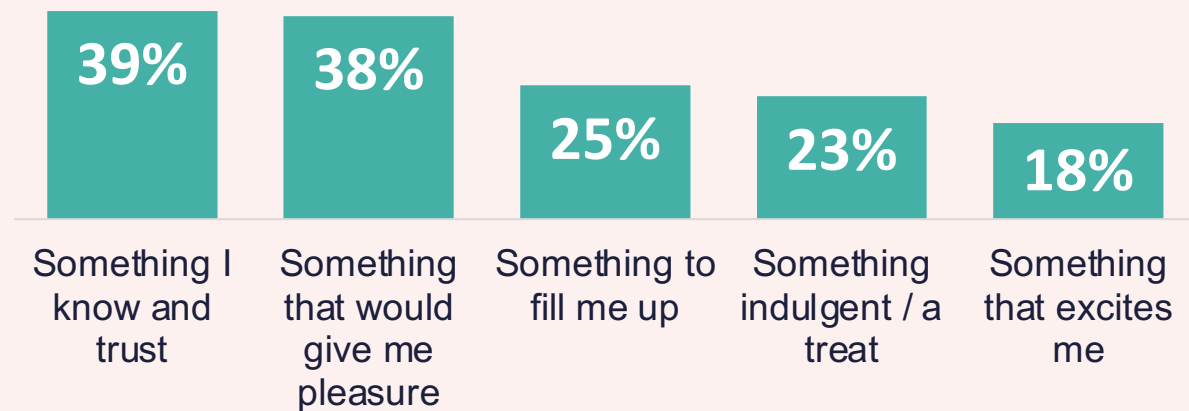
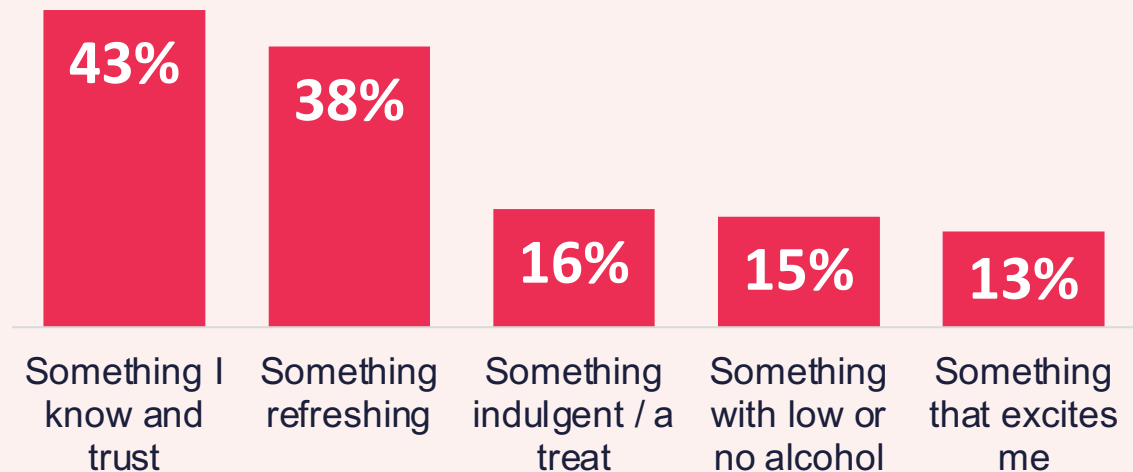
£800m

Missed annual revenue opportunity for venues when consumers order tap water

WHAT TOOLS DO WE HAVE AT OUR DISPOSAL IN-VENUE?



WHAT ARE PEOPLE LOOKING FOR WHEN ORDERING?





55%

of customers said they noticed some form of POS on their last visit.

(48% of 55yrs+ v 76% 18-34yrs)



MOST NOTICED POS

1. At entrance
2. On tables
3. Outside venue
4. At the bar
5. In toilets



Information that
customers ‘actively’
look for *when in-venue*



Food menu prices

Specials of the day / dish of the day

Promotions/deals/special offers

Drink menu prices

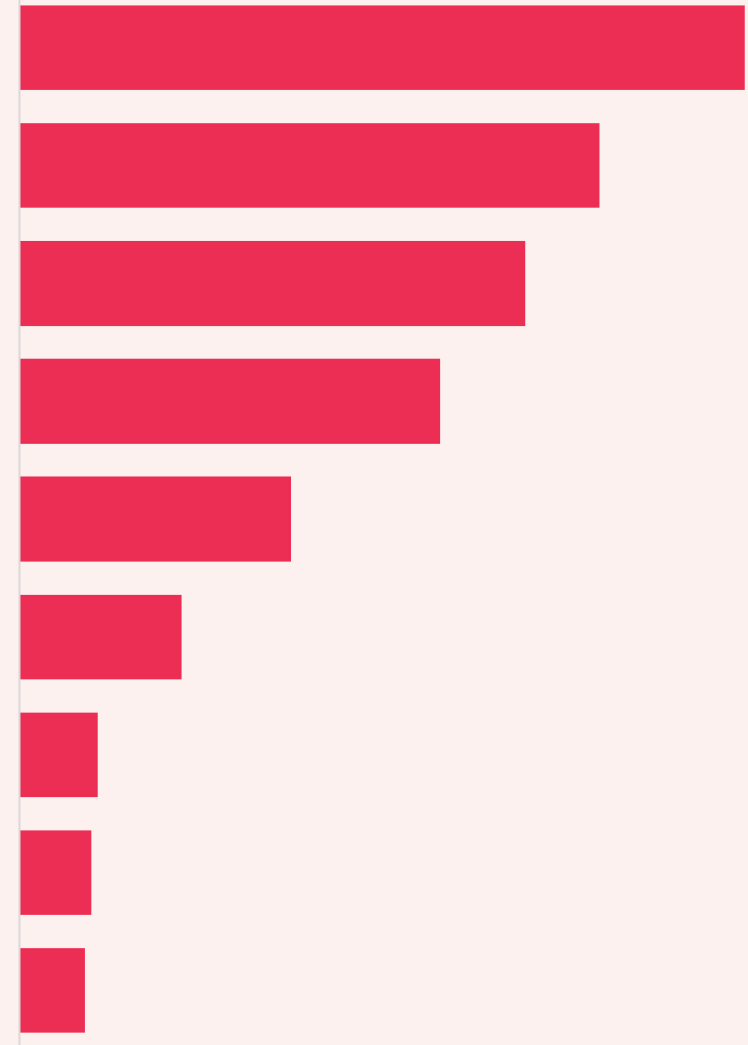
Hygiene ratings

Events that are on / coming up

Information about how sustainable the food
and drinks are

Information about how sustainable the venue is

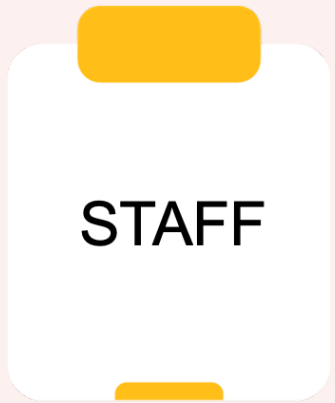
Community/charity initiatives



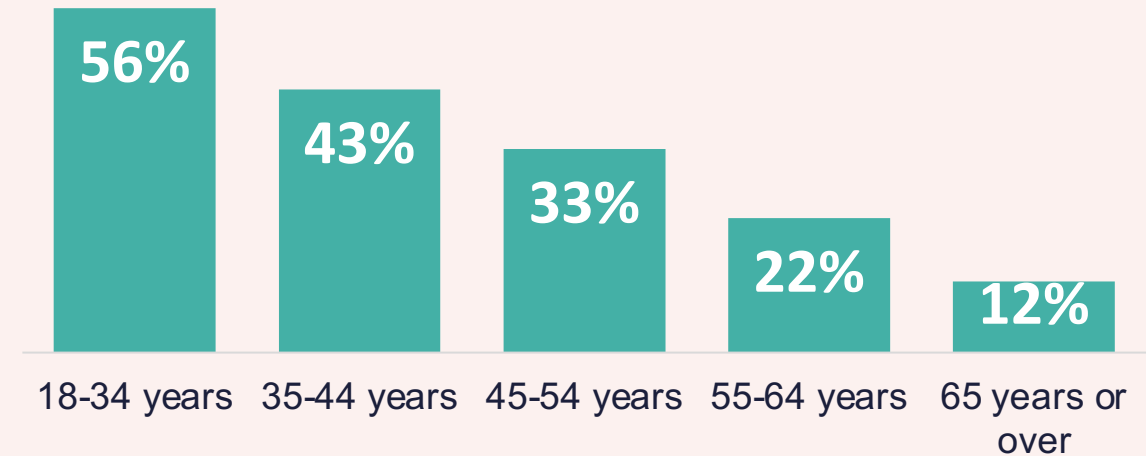
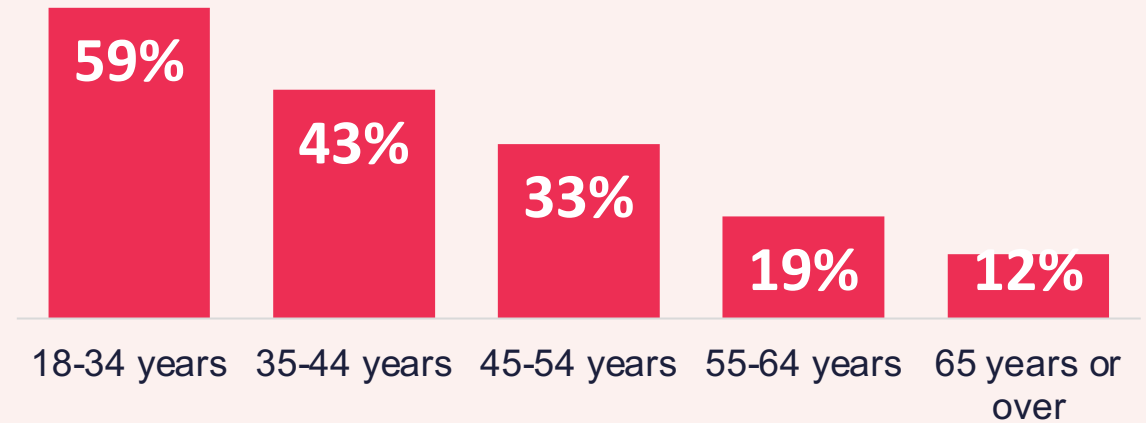


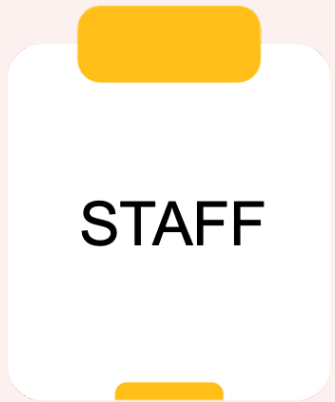
65%

of customers are open to recommendations of certain food or drinks when ordering by staff.



**Likelihood to take
staff's recommendations
for drinks and food
(by age group)**



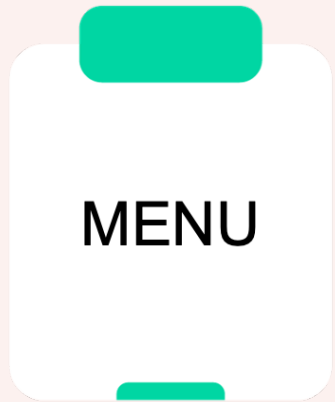


**The top things which
customers expect staff to
be knowledgeable about...**



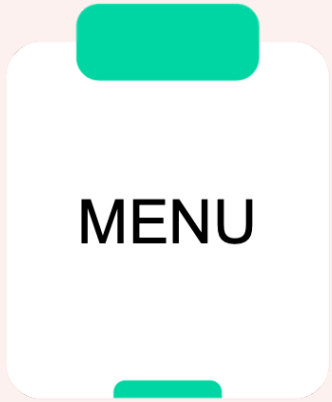
- Have knowledge of what is on the food menu
- Have knowledge of what is on the drink menu
- Have knowledge of allergens
- To know how the food is prepared and cooked
- Have knowledge of what foods will suit specific dietary requirements
- To be able to make personal food and/or drink recommendations
- To know where the food is sourced from





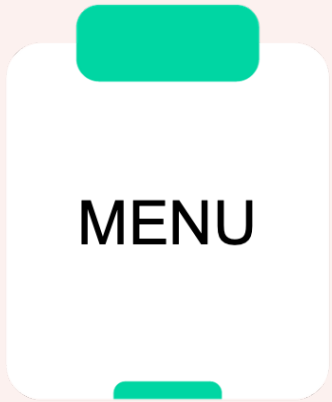
21%

of customers haven't ordered an item on the menu simply because they couldn't pronounce it!

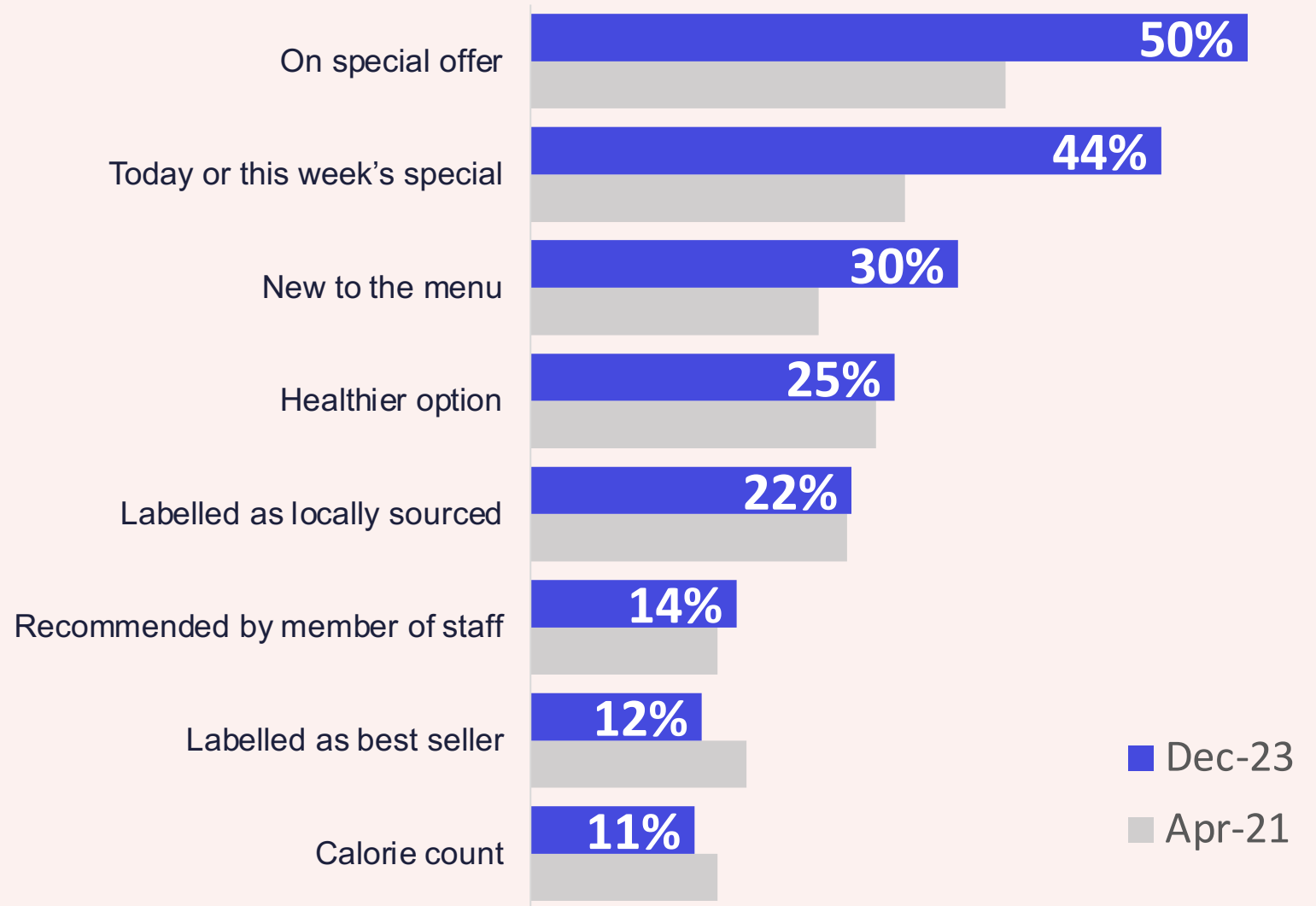


54%

of customers say clear descriptions on the menus would encourage purchase (v 33% in 2021)



The following, if
flagged against dishes
on a food menu, would
encourage customers
to order





**The top things that
customers have used
QR codes/digital
screens for...**



*(of those who've used
them in the last 3 months)*





65%

of customers would like more detail about dishes, such as nutritional info, dietary info, origin, food miles, etc.

52%

of customers would like personal recommendations based off what they've ordered and/or what they usually have.

95%

of customers would like staff to be more knowledgeable about what they sell than they are currently.

WE'VE REACHED THE END, NOW ITS TIME TO PAY.

How likely customers are to want to do the following when paying their bill at a pub, bar or restaurant?

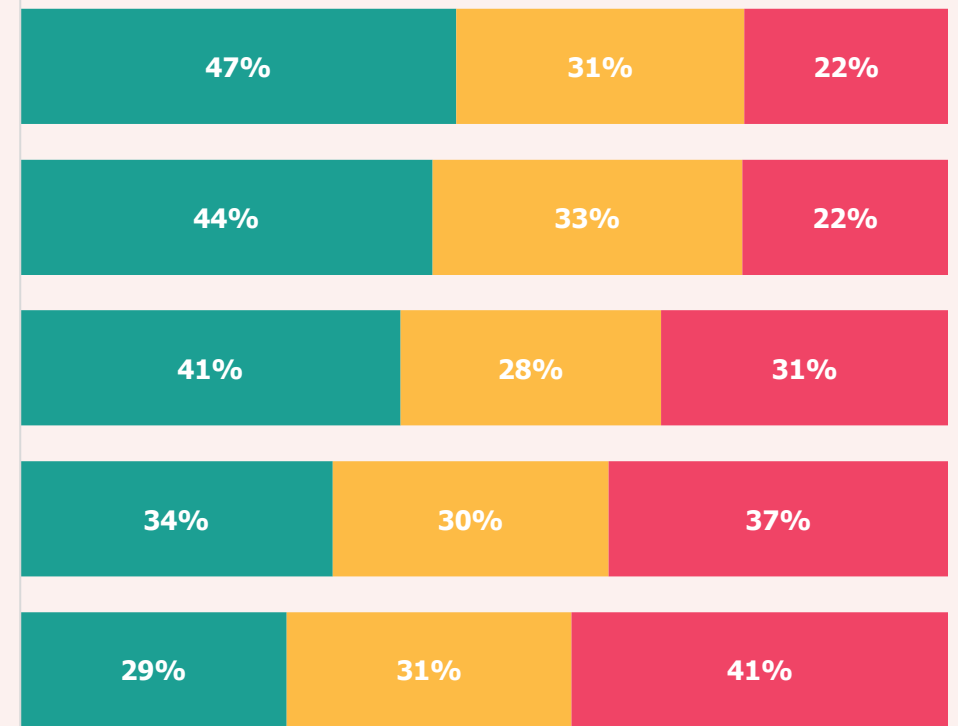
Be able to see how much they're spending as you go, rather than waiting for the final bill

Be able to automatically split your bill with other guests

Pay via an app on your phone rather than with server

Pay when you order via your phone

Give the venue your payment details at the start and then just get automatically charged for whatever you spend at the end



■ Very likely / likely ■ Neither likely nor unlikely ■ Very unlikely / unlikely

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In summary...

1

Understand the whole journey- make sure you truly understand what's happening in venue and how you can influence it

2

Atmosphere (obviously) is paramount. Are you 'tracking' that for different customers/occasions/times of day?

3

Inclusion of all demographics is easier (and harder) than you think

4

Don't overcomplicate the customer's path to purchase- make it easy for them to make decisions

5

Your teams are your most powerful weapon but they can also do the most damage! (Use tech to free them up.)

PLAN TO PLATE

How hospitality brands and operators can interrupt, engage and influence the customer journey.

To better support hospitality operators and brands as they adapt to an ever evolving world, KAM are re-launching this updated report, in partnership with NFS Technology/Paytronix, to understand the hospitality customer's decision journey, from plan to plate.

Every quarter, KAM will track and trend UK consumer behaviour from 'plan to plate', focused on understanding the customer journey from the initial decision to leave the house and venue choice through to ordering, paying and leaving a review.

1/4

New quarterly
tracker from
KAM

1000

Nat Rep
sample of UK
adults (+18)

Dec

Latest wave of
research
conducted

Apr
24

July
24

Oct
24

Jan
25

Upcoming
waves this
year

Access full
Plan to Plate report



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About us.



So much more than just a research agency, KAM is the supportive voice of the UK hospitality industry. We take pride in offering cutting-edge consultancy backed by deep insights. We thrive on providing our clients with valuable and actionable insight solutions that drive real results and purposeful change. If you're ready to be informed, educated, and inspired, hop on board and let's embark on an exciting journey together.
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