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The Guest Engagement Company

PLAN TO PLATE

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

Volume 2| Jan - Mar 24

Introducing the new & improved 'Plan to Plate' consumer tracker from KAM

Every quarter, KAM will track and trend UK consumer behaviour from 'plan to plate', understanding every touchpoint of their journey within hospitality.

Data for this wave was collected in March 2024. Analysing consumer behaviour for the period Jan - March 2024. From a sample size of 1,000 nationally representative UK adults (+18).

1/4
New quarterly tracker from KAM

1000
Nat Rep sample of UK adults (+18)

Mar
Latest wave of research conducted

Jun 24 **Sep 24** **Dec 24**
Upcoming waves this year

" "

We're pleased to partner with KAM on the Plan to Plate report, showcasing important drinking and dining trends in hospitality. Younger generations depend on their mobile to decide when and where to eat. Not only that, they value technology as a part of the overall visit experience. If building better guest experience is what we want, digital guest engagement should be central to our efforts.

Getting guests to visit more frequently and spend more per visit goes to the heart of what guest engagement technology is meant to do for restaurants and pubs.

To that end, this report will provide valuable insight into key hospitality trends for each stage of the customer journey, from plan to plate and more.

Charles Gray, Chief Revenue Officer, Paytronix

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THE PLAN TO PLATE CUSTOMER JOURNEY

From their initial decision to go out, to their in-venue influences and their on-going engagement and future loyalty.

Evaluation

Understanding how customers decide on which venues to eat & drink out at and how we can impact their decision process.

Influences

We have the ability to control and influence visit frequency, spend, dwell time, loyalty and social engagement. Discover what tools are most impactful.

Engagement

Discover how customers behave when in-venue, and how each customer touchpoint (menus, staff, POS & tech) engages and influences their decisions.

WHY YOU NEED TO TRACK YOUR CUSTOMER FROM PLAN TO PLATE.

72%

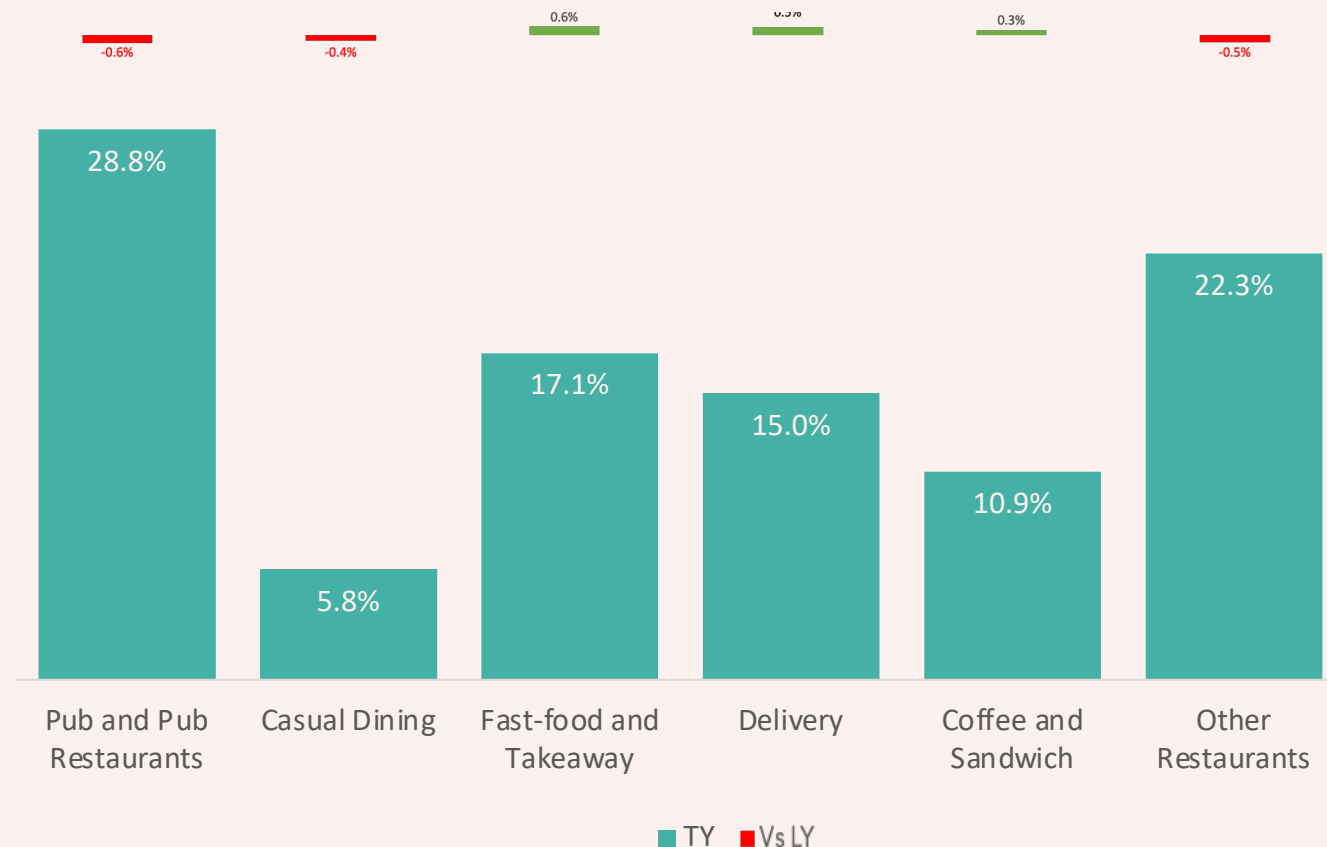of customers make up their mind when they are IN the venue.

Source: KAM Plan to Plate 2023 Tracker (Dec 2023)

UK Hospitality market breakdown.

Pubs & Pub Restaurants are the largest sector of the UK Hospitality market as measured by HDI's panel, based on the card spending of 10.2 million unique customers. Fast-food & Takeaway and Coffee & Sandwich Shops are seeing growth in their spend share year on year.

Q. How often have you been out for food and/or drinks in pubs, bars and restaurants in e last 3 months?

UK Hospitality Channel Shares and YonY Changes

Channel	TY	Vs LY
Pub and Pub Restaurants	28.8%	-0.6%
Casual Dining	5.8%	-0.4%
Fast-food and Takeaway	17.1%	0.6%
Delivery	15.0%	0.3%
Coffee and Sandwich	10.9%	0.3%
Other Restaurants	22.3%	-0.5%

■ TY ■ Vs LY

KAM Hospitality Consumer Confidence Index

Introducing the new KAM Hospitality Consumer Confidence Index.

Based on the following consumer question:

Q. Thinking about the next 3 months ahead, how confident are you that you will have money to spend on going out to pubs, bars and restaurants as often as you would want to?

Index calculated by taking the % of those saying they not confident from the % of those saying they are confident. Max confidence = 100, minimum confidence = 0.

*this is new question for Quarter 2, so no previous trending data is available.

Category	Value
Total	65.8
Male	70.7
Female	61.4
18-34	66.3
35-44	64.2
45-54	63.2
55-64	58.5
65+	75.2

■ Q2 (Jan-Mar 24)

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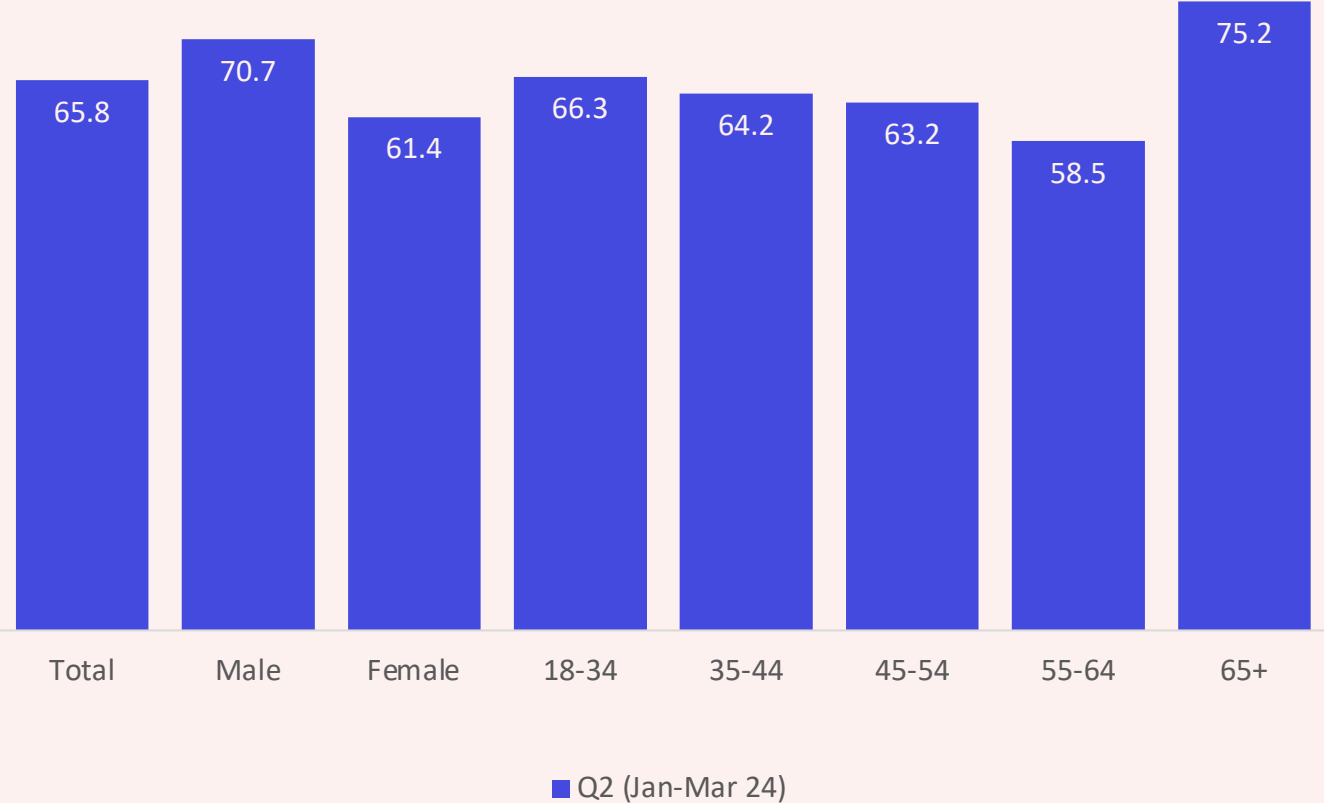
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Customer Factors

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What do I want (food and/or drink) and what needs am I attempting to satisfy?

5 Budget

How many drinks / dishes do I want and how much money am I prepared to spend?

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How much time have I got to spend here?

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Evaluation

Understanding how customers decide on which venues to eat & drink out at and how we can impact their decision process.

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Visit frequency to UK pubs, bars and restaurants.

Average visit frequency per month

The average UK adult (+18), visited a pub, bar, or restaurant, for food and/or drinks, 5.8 times per month, for the period Jan-Mar, with higher visit frequency for males, 18-34s and 55-64s compared to the previous 3-month period.

Q. How often have you been out for food and/or drinks in pubs, bars and restaurants in the last 3 months?

	Q1 (Oct-Dec 23)	Q2 (Jan-Mar 24)
Total	4.8	5.8
Male	5.6	6.1
Female	3.8	5.5
18-34 years	9.0	9.6
35-44 years	6.6	6.6
45-54 years	4.5	4.2
55-64 years	3.7	4.1
65 years or over	3.2	3.3

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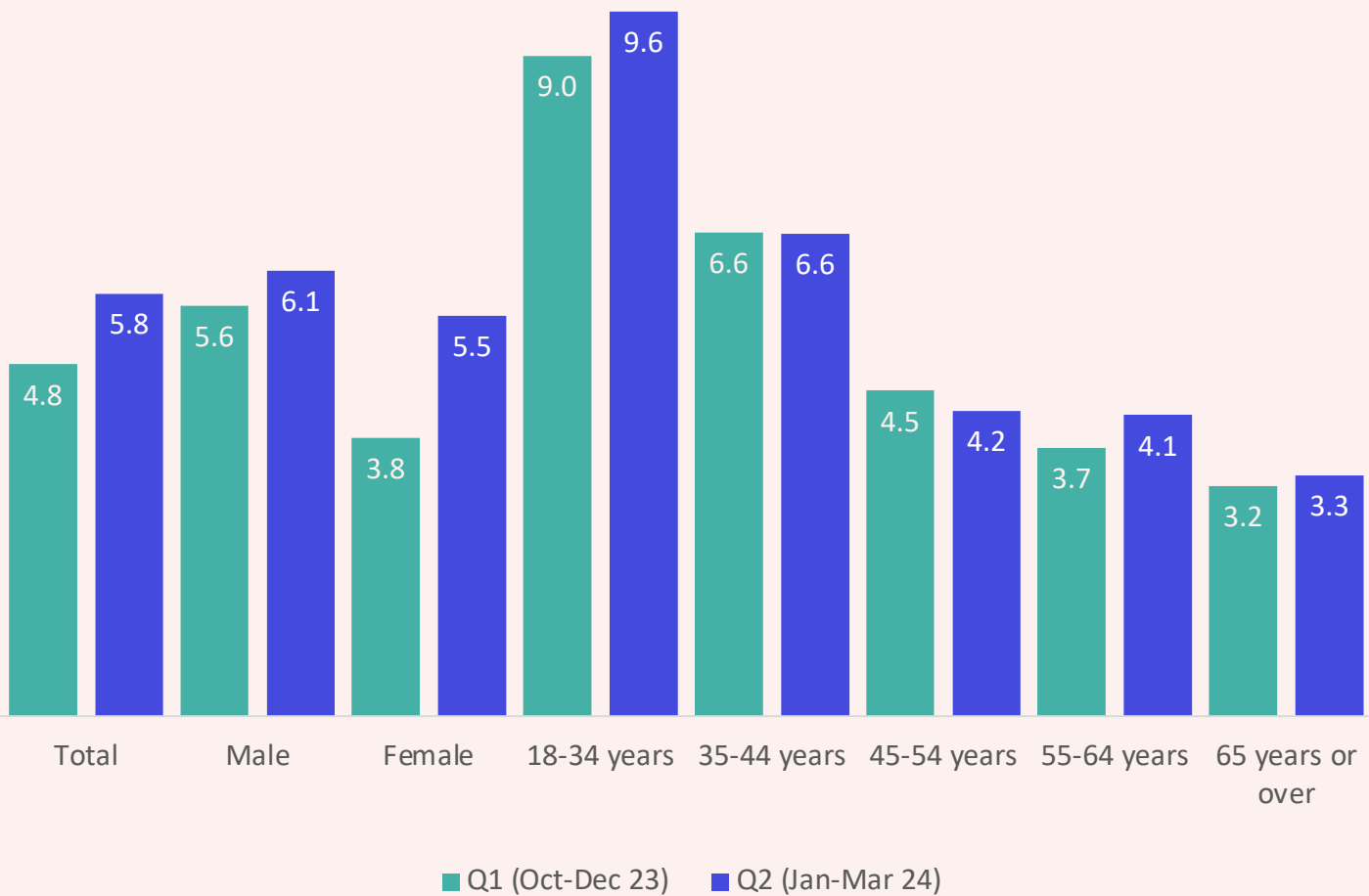
Most popular days of the week for visiting pubs, bars, and restaurants.

For the period Jan-Mar 24

Friday and Saturday are the most popular days of the week. We see both Weds and Thursday also being popular with 55+, and Monday being most popular with 18-34s.

this is new question for Quarter 2, so no previous trending data is available.

Q. How often have you been out for food and/or drinks in pubs, bars and restaurants in the last 3 months?

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Total	9%	12%	18%	21%	50%	58%	27%
18-34	12%	13%	17%	18%	54%	66%	31%
35-44	7%	10%	15%	19%	55%	64%	27%
45-54	4%	7%	8%	13%	56%	64%	23%
55+	11%	15%	24%	29%	43%	46%	27%

Legend: ■ Total ■ 18-34 ■ 35-44 ■ 45-54 ■ 55+

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Source: KAM x Paytronix Plan to Plate 2023 Tracker (March 2024)
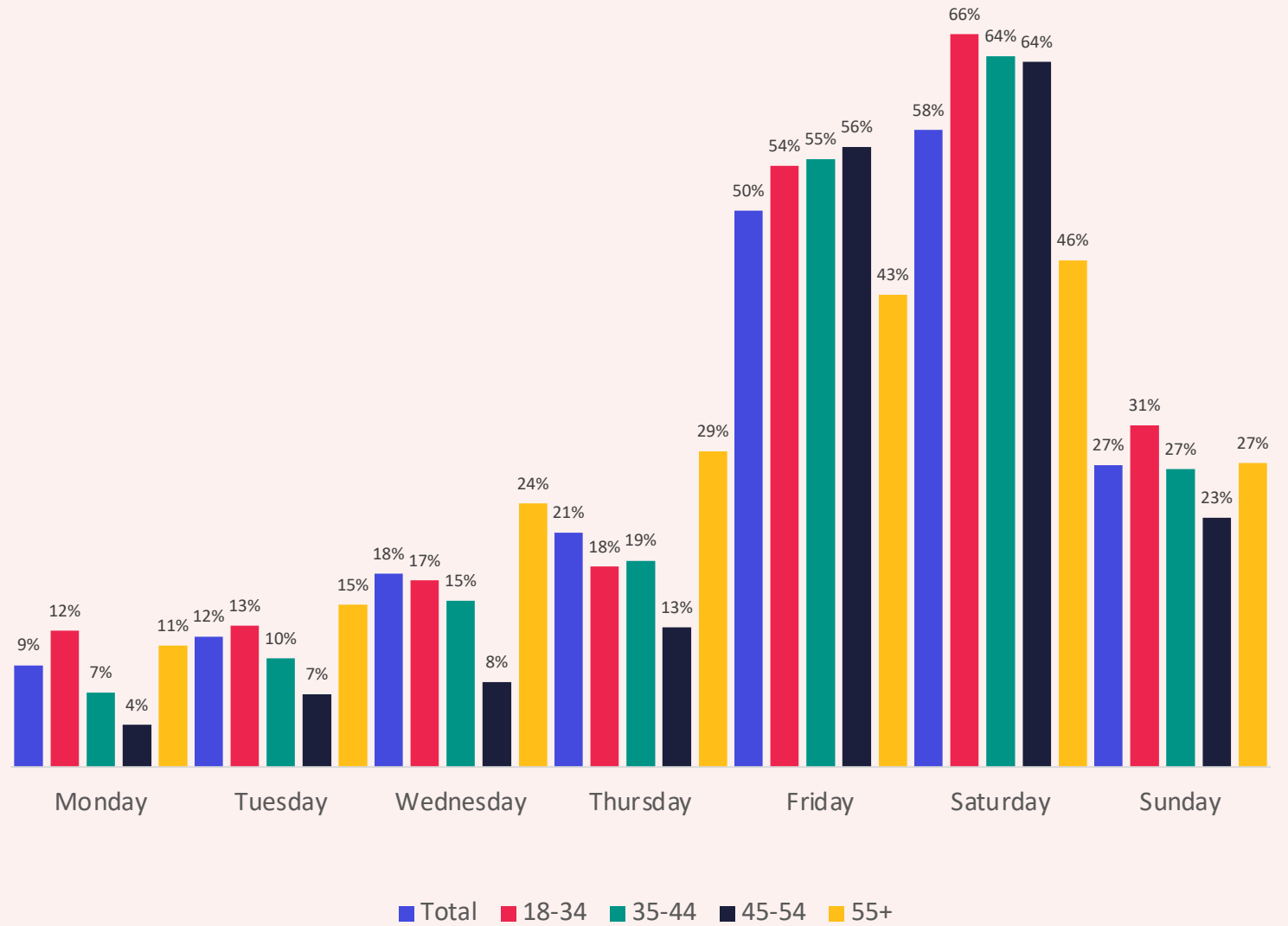
Top occasions for visiting pubs, bars and restaurants.

These are the top 15 occasions for which UK adults (18+) have visited pubs, bars and restaurants in the last 3 months. Drinks with friends and family and dinner (Friday-Saturday) have been the most popular occasions. A leisurely lunch has dropped in frequency as an occasion, down from 2nd to 3rd most popular, compared to the previous period.

Q. Which of the following 'occasions' have you visited a pub, bar or restaurants for in the last 3 months?

Occasion	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Drinks with family/friends	55%	51%
Dinner (Friday – Saturday)	32%	29%
Leisurely lunch	31%	35%
Sunday lunch	25%	25%
Celebrations	23%	24%
Dinner (Sunday – Thursday)	21%	25%
Coffee	20%	20%
After work drinks	19%	15%
Lunch break / quick lunch	16%	12%
Breakfast	16%	13%
Brunch	15%	12%
Habitual meet-up with friends	13%	14%
Romantic occasion	13%	9%
Watched live sport on TV	13%	9%
Accommodation	8%	11%

■ Q2 (Jan-Mar 24) ■ Q1 (Oct-Dec 23)

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Most important factors when choosing where to go for 'drinks'.

These are the top 15 answers given when we asked UK adults what have been the most important factors for them when considering a venue to choose for 'drinks' in the last 3 months. Value for money was number 1. Range of drinks has jumped up in importance compared to the previous period, and coupled with an increase in demand for low & no options, quality coffee and a choice of healthy drinks, the results suggest that customers have been more demanding of venues to provide a wider selection of choice above and beyond the classic alcoholic options.

Q. What have been most important factors for you, when considering a venue to choose for **drinks** in the last 3 months?

Factor	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Value for money	52%	54%
Range/choice of drinks	40%	34%
The atmosphere	40%	39%
Quality of food	35%	37%
Quality of coffee	26%	21%
How easy it is to get to	20%	28%
The quality of drinks serve	19%	17%
Availability of drinks	17%	13%
Speed of service	16%	17%
Inside space	15%	18%
Quality of staff	14%	16%
Choice of healthy drinks	11%	6%
The venue décor	10%	12%
Recommendation by friends/family	9%	9%
Choice of low & no	8%	7%

■ Q2 (Jan-Mar 24) ■ Q1 (Oct-Dec 23)

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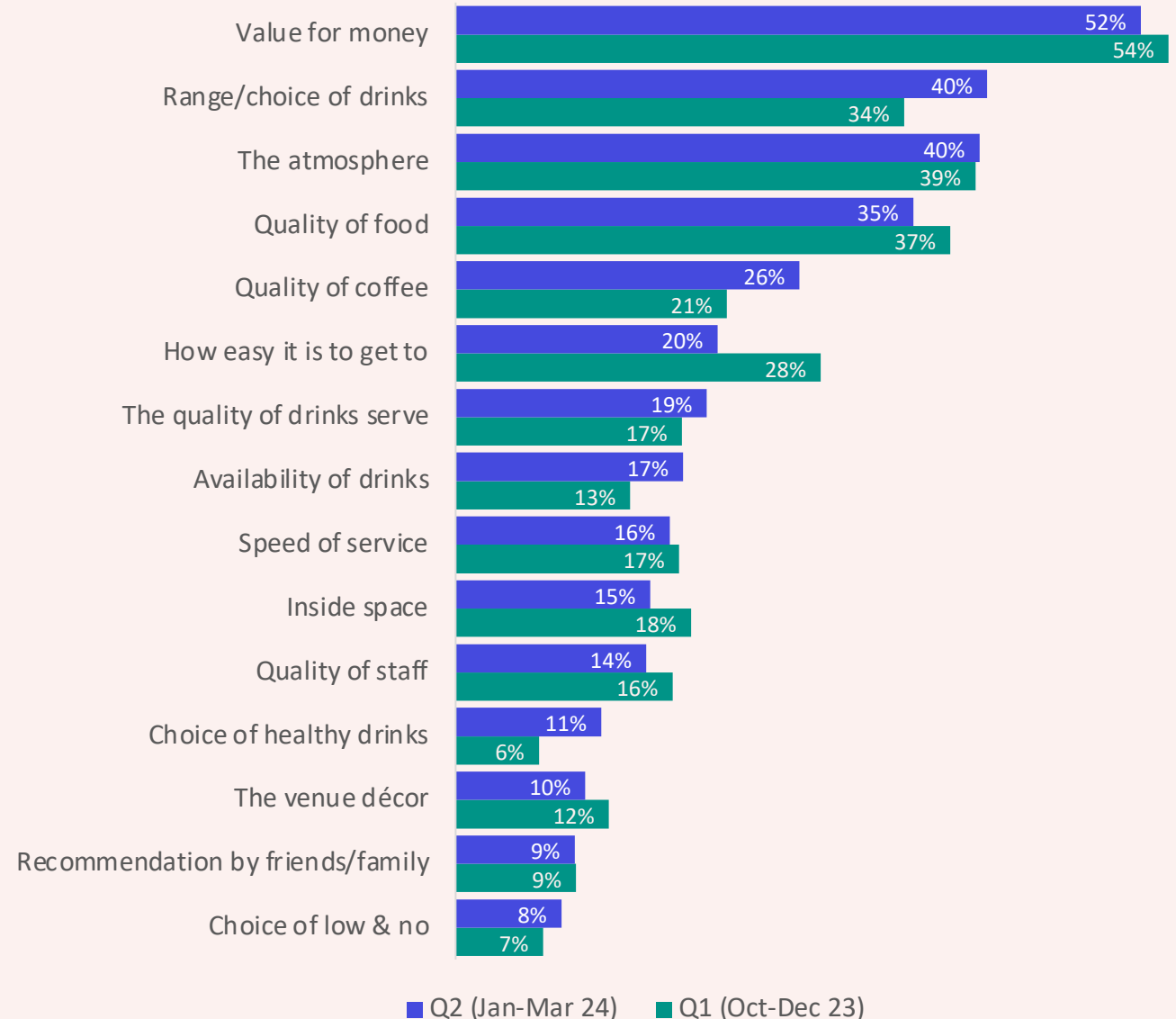
Most important factors when choosing where to go for 'food'.

These are the top 15 answers given when we asked UK adults what have been the most important factors for them, when considering a venue to choose for 'food' in the last 3 months. Quality is, by far, the number one driver. As with drinks, we have seen an increase in the importance that customers are placing on 'having a wide choice', this period compared to the last – which again chimes with a similar increase in the importance for healthy options and dishes that cater for dietary needs, suggesting that customers are looking to change their habits at the start of the new year.
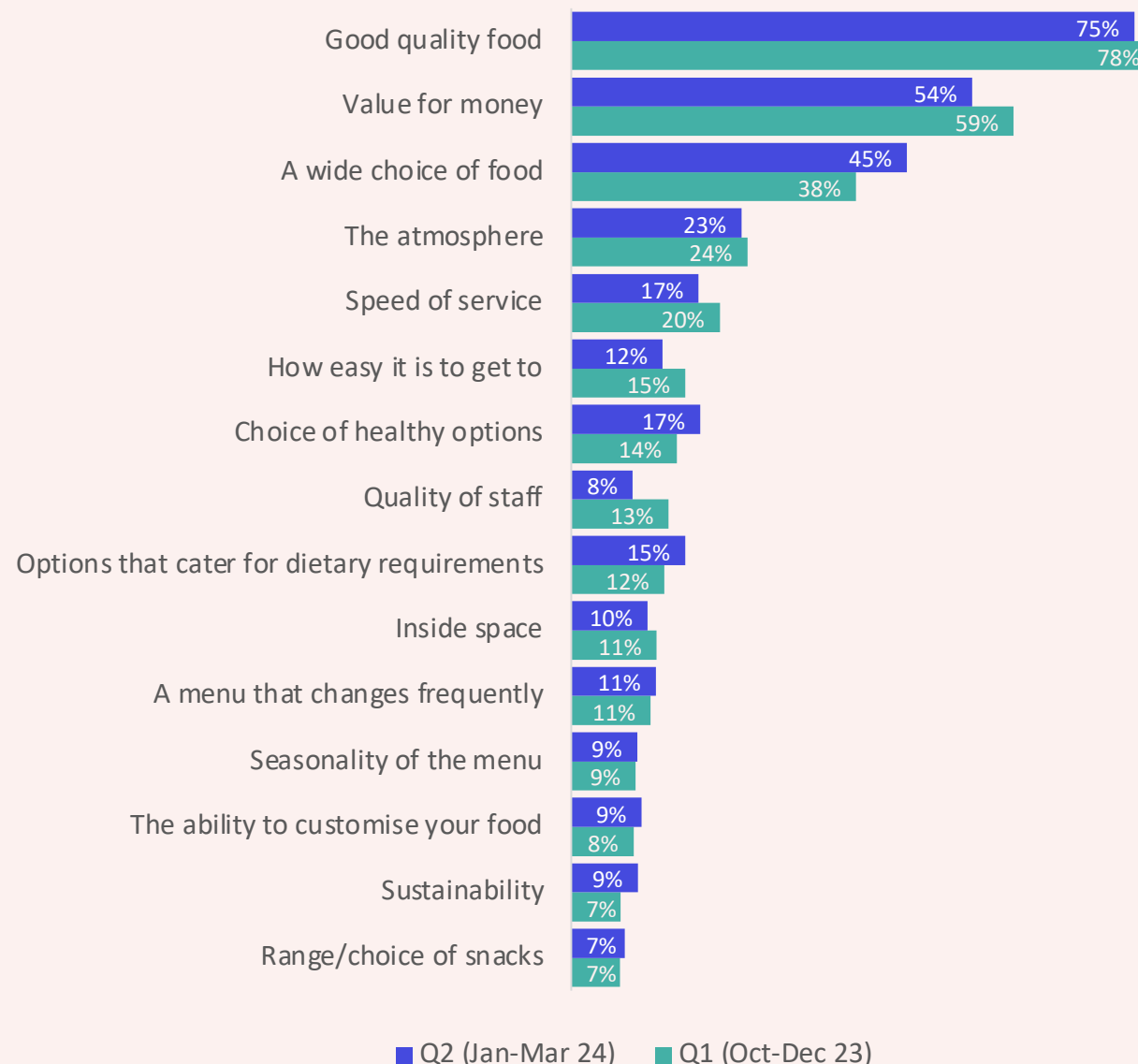
Q. What have been the most important factors for you, when considering a venue to choose for **food** in the last 3 months?

Factor	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Good quality food	75%	78%
Value for money	54%	59%
A wide choice of food	45%	38%
The atmosphere	23%	24%
Speed of service	17%	20%
How easy it is to get to	12%	15%
Choice of healthy options	17%	14%
Quality of staff	8%	13%
Options that cater for dietary requirements	15%	12%
Inside space	10%	11%
A menu that changes frequently	11%	11%
Seasonality of the menu	9%	9%
The ability to customise your food	9%	8%
Sustainability	9%	7%
Range/choice of snacks	7%	7%

■ Q2 (Jan-Mar 24)   ■ Q1 (Oct-Dec 23)

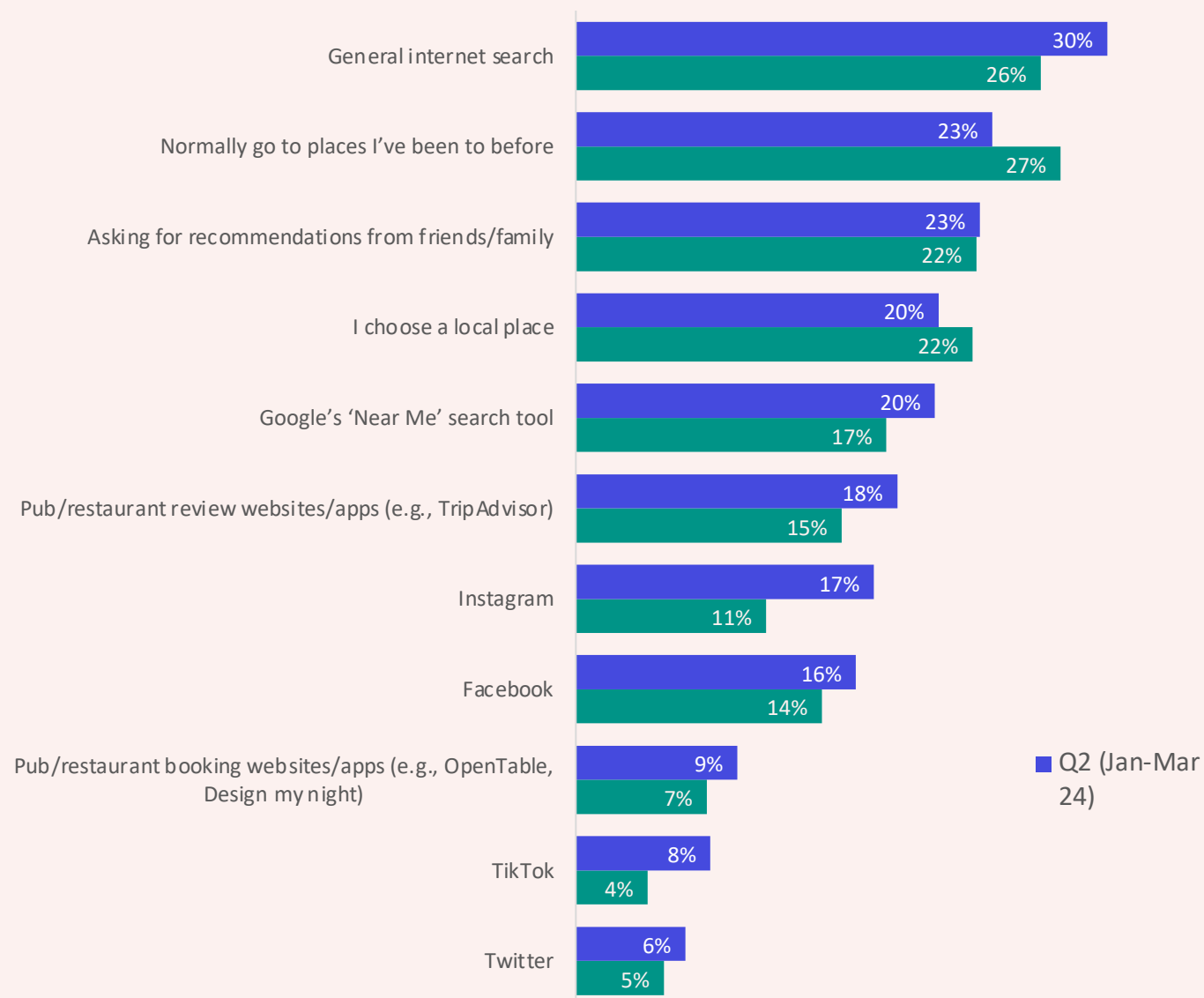**KAM**   **paytronix** The Guest Engagement Company

Pre-visit customer research and discovery.

What sources of information do they use to help them find and/or choose a pub, bar or restaurant?

General internet search, Google's 'near me' search, and social media have all risen in usage this period compared to last. Coupled with a decline in customer choosing their local place or places they normally go, this suggests that an increase in 'exploration' when it comes to venue choice in this period, compared to the last.

Q. Which of the following, if any, have you used to help you find and/or choose a pub, bar or restaurant to visit in the last 3 months?

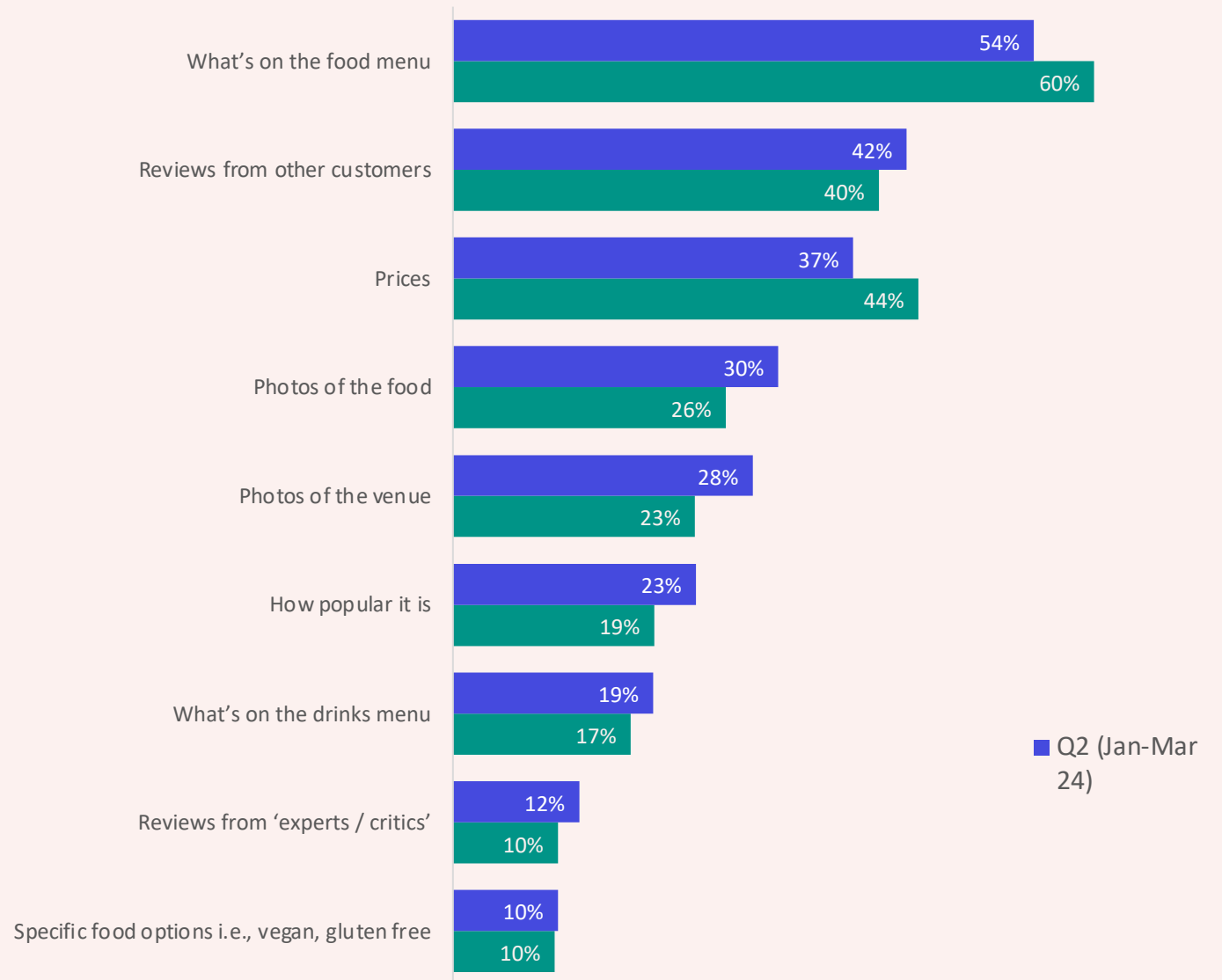| Source	Q2 (Jan-Mar 24)	Previous
General internet search	30%	26%
Normally go to places I've been to before	23%	27%
Asking for recommendations from friends/family	23%	22%
I choose a local place	20%	22%
Google's 'Near Me' search tool	20%	17%
Pub/restaurant review websites/apps (e.g., TripAdvisor)	18%	15%
Instagram	17%	11%
Facebook	16%	14%
Pub/restaurant booking websites/apps (e.g., OpenTable, Design my night)	9%	7%
TikTok	8%	4%
Twitter	6%	5%

Legend: ■ Q2 (Jan-Mar 24)

Pre-visit customer research and discovery.

What information are customers looking for?

Discovering what's on the food menu, reviews from other customers, prices and photos of the food and drinks, are all key pieces of information that customers are looking for when researching a venue before visiting.

Q. Why do you 'research' a venue before choosing it. What are you looking for in particular?

What's on the food menu
- 54%
- 60%

Reviews from other customers
- 42%
- 40%

Prices
- 37%
- 44%

Photos of the food
- 30%
- 26%

Photos of the venue
- 28%
- 23%

How popular it is
- 23%
- 19%

What's on the drinks menu
- 19%
- 17%

Reviews from 'experts / critics'
- 12%
- 10%

Specific food options i.e., vegan, gluten free
- 10%
- 10%

■ Q2 (Jan-Mar 24)

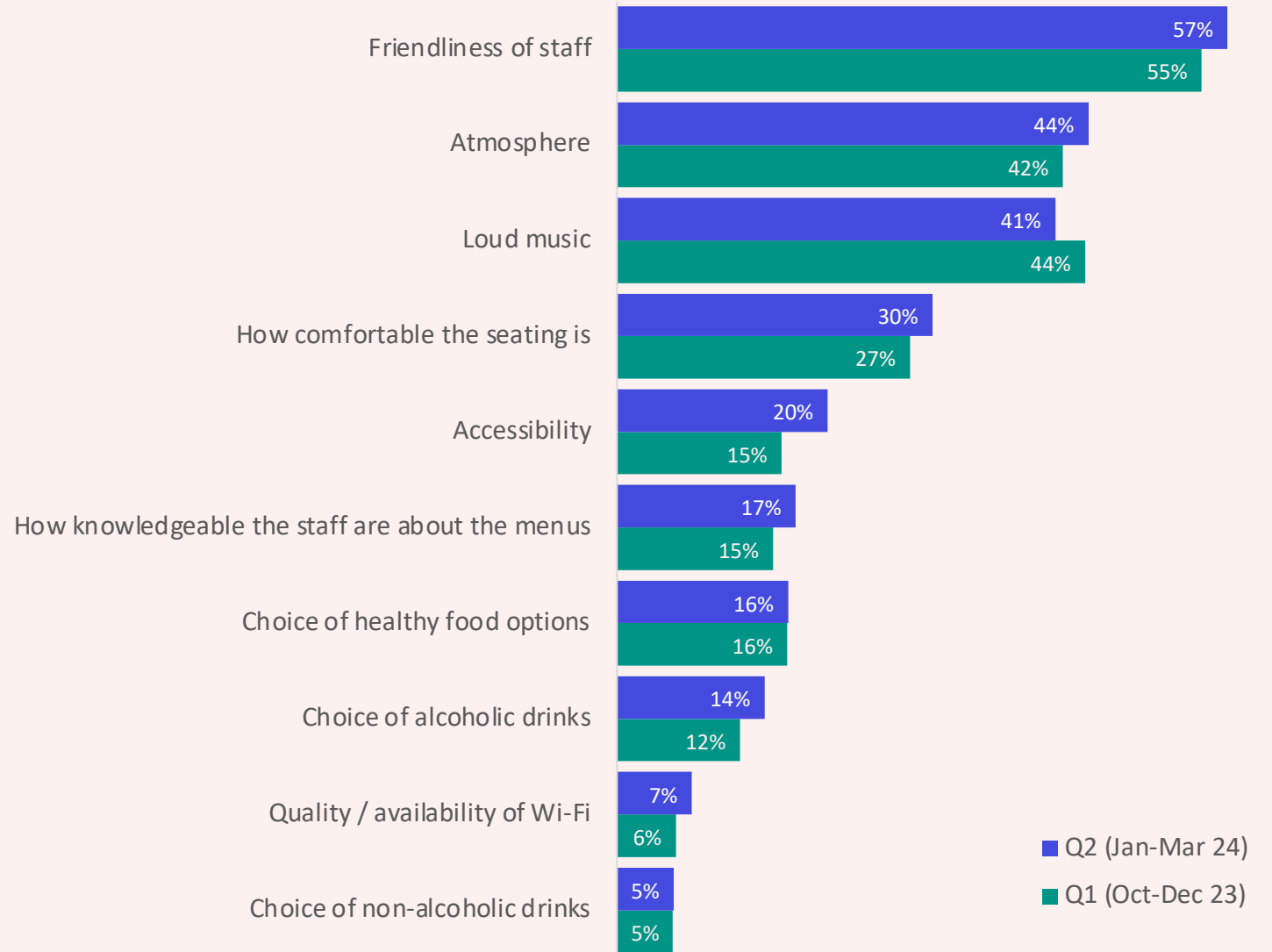KAM paytronix
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The top pub, bar and restaurant turn-offs.

These are the top negative/bad experiences which have put UK adults off returning to a specific pub, bar, or restaurant within the last 3 months.

With the top 3 being the friendliness (or lack of) from staff, a bad atmosphere and loud music.

Category	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Friendliness of staff	57%	55%
Atmosphere	44%	42%
Loud music	41%	44%
How comfortable the seating is	30%	27%
Accessibility	20%	15%
How knowledgeable the staff are about the menus	17%	15%
Choice of healthy food options	16%	16%
Choice of alcoholic drinks	14%	12%
Quality / availability of Wi-Fi	7%	6%
Choice of non-alcoholic drinks	5%	5%

■ Q2 (Jan-Mar 24)
■ Q1 (Oct-Dec 23)

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Evaluation

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- The average UK adult (+18), claimed they visited a pub, bar, or restaurant, for food and/or drinks, 5.8 times/per month in the period Jan-Mar 2024. An increase from 4.8 times in the previous quarter, with higher visit frequency for males, 18-34s and 55-64s compared to the previous 3-month period.

- Drinks with friends and family and dinner (Friday-Saturday) have been the most popular occasions. A leisurely lunch has dropped in frequency as an occasion, down from 2nd to 3rd most popular, compared to the previous period.

- Value for money was the number one factor when choosing a venue for drinks in the last 3 months. Range of drinks has jumped up in importance compared to the previous period, and, coupled with an increase in demand for low & no options, quality coffee and choice of healthy drinks, this suggests that customers have been more demanding of venues to provide a wider selection of choice above and beyond the classic alcoholic options.

- Quality is, by far, the number one driver for choice of venue when eating out. As with drinks, we have seen an increase in the importance that customers are placing on 'having a wide choice', this period compared to the last – which again chimes with a similar increase in the importance for healthy options and options that cater for dietary needs, suggesting that customers are looking to change their habits at the start of the new year.

- The top 3 'turn-offs' when visiting pubs, bars, and restaurants remain the friendliness (or lack of) from staff, a bad atmosphere and loud music.

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Influences

We have the ability to control and influence visit frequency, spend, dwell time, loyalty and social engagement. Discover what tools are most impactful.

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THE FACTORS WE NEED TO CONSIDER WHEN LOOKING TO INFLUENCE CUSTOMERS IN VENUES.

NEED STATE

What do I want (food and/or drink) and what needs am I attempting to satisfy?

BUDGET

How many drinks / dishes do I want and how much money am I prepared to spend?

TIME

How much time have I got to spend here?

PARTY SIZE & COMPOSTION

How many people are with me and who is with me (e.g. vegetarians, non-drinkers, children, etc.)?

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NEED STATE

What do I want (food and/or drink) and what needs am I attempting to satisfy?

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The top need states influencing customer decisions when ordering drinks.

The top 5 need states which influence the customer decision when ordering **drinks** in pubs, bars and restaurants in the last 3 months.

'Something refreshing' overtakes 'something I know and trust' as the top influencing factor for this current period.

Need state	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Something refreshing	44%	38%
Something I know and trust	40%	43%
Something indulgent / a treat	17%	16%
Something that excited me	16%	13%
Try something new	15%	13%
Something with low or no alcohol	12%	15%
Something to pick me up / give me some energy	8%	6%
Something to soothe me / calm me	7%	5%
Something healthy / low calorie	6%	6%

■ Q2 (Jan-Mar 24)
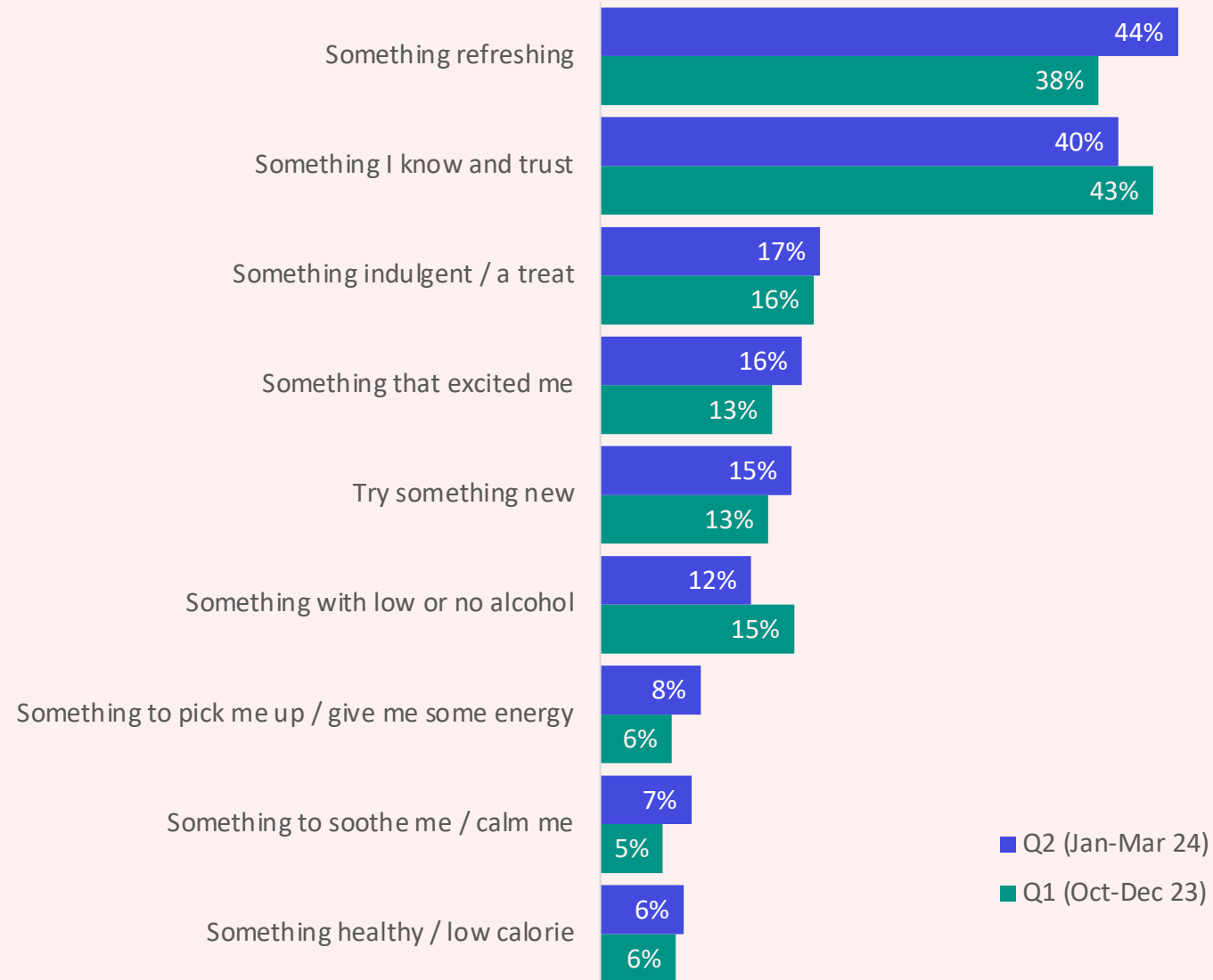■ Q1 (Oct-Dec 23)

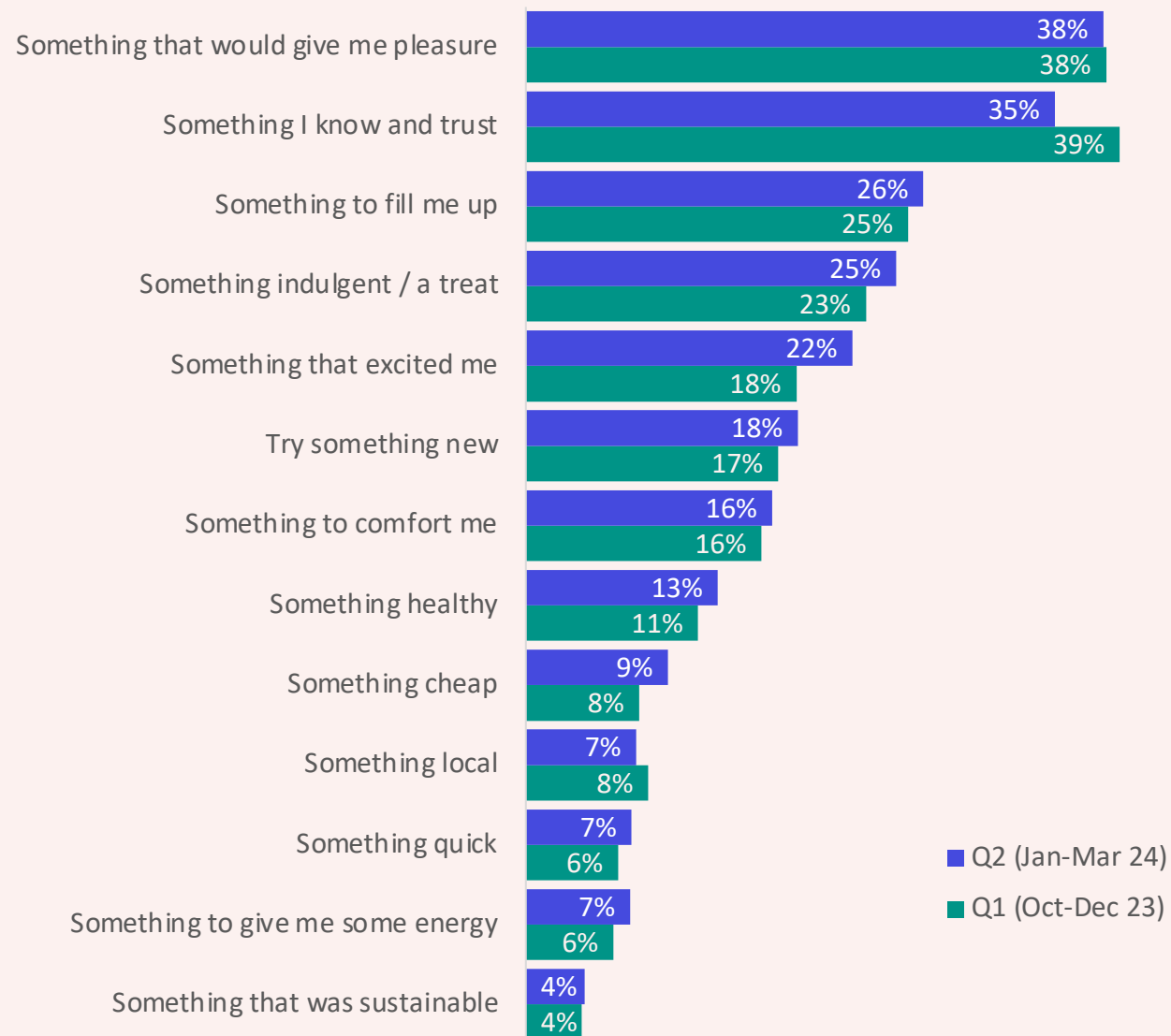KAM   paytronix
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The top need states influencing customer decisions when ordering food.

The top 5 need states which influence the customer decision when ordering **food** in pubs, bars and restaurants in the last 3 months.

'Something that would give me pleasure' overtakes 'something I know and trust' as the main influencing factor when ordering food in this period.

Q. Thinking now about the last time you ordered **some food** in a pub, bar or restaurant, which of the following 'needs' were influencing your decision on what you had?

Need state	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Something that would give me pleasure	38%	38%
Something I know and trust	35%	39%
Something to fill me up	26%	25%
Something indulgent / a treat	25%	23%
Something that excited me	22%	18%
Try something new	18%	17%
Something to comfort me	16%	16%
Something healthy	13%	11%
Something cheap	9%	8%
Something local	7%	8%
Something quick	7%	6%
Something to give me some energy	7%	6%
Something that was sustainable	4%	4%

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BUDGET

How many drinks / dishes do I want and how much money am I prepared to spend?
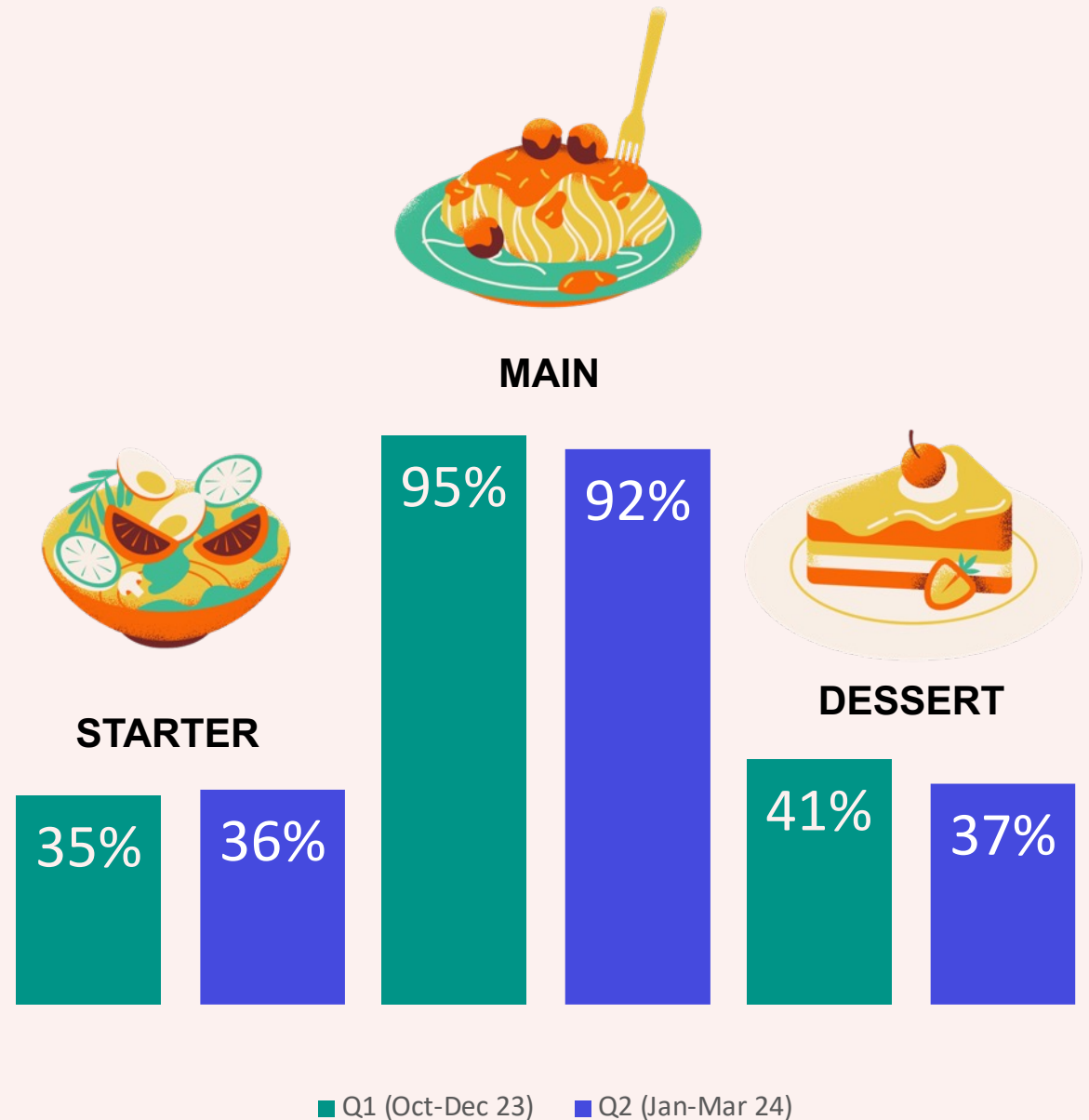
Number of courses customers are ordering when dining in pubs, bars and restaurants.

Based on 'last visit' for within the period

Data is based on last visit, when dining out, to a pub, bar or restaurant within the last 3-month period. Just over 1 in 3 had a starter, with slightly more (2 in 5) having a pudding. **The average number of courses had was 1.6 (compared to 1.7 in the previous period).**

Q. Thinking about the last time you when out for *food* to a pub, bar or restaurant, how many dishes did you have?
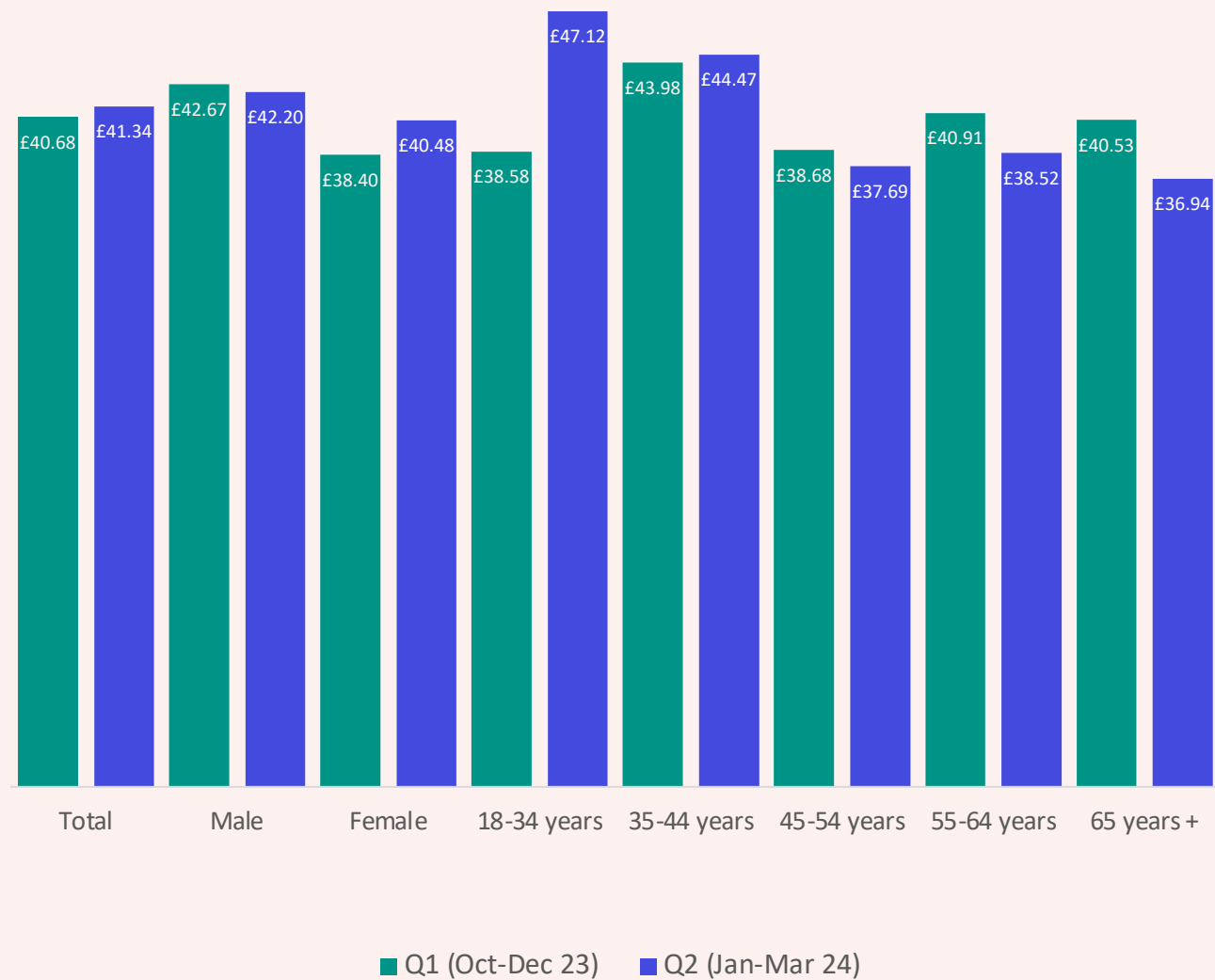
MAIN

STARTER

DESSERT

35% 36% 95% 92% 41% 37%

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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Average customer spend 'personally' on food and/or drinks in pubs, bars and restaurants.

Based on 'last visit' for within the period

Figures show claimed spend from UK adults (+18), based on their last visit to either a pub, bar or restaurant, within the 3-month period.

Average spend has increased since the previous period, mainly due to a significant increase in spend from the 18-34 age group.

Q. Thinking now about your last visit to a pub, bar or restaurant, how much did you spend **personally** on food and/or drinks?

	Q1 (Oct-Dec 23)	Q2 (Jan-Mar 24)
Total	£40.68	£41.34
Male	£42.67	£42.20
Female	£38.40	£40.48
18-34 years	£38.58	£47.12
35-44 years	£43.98	£44.47
45-54 years	£38.68	£37.69
55-64 years	£40.91	£38.52
65 years +	£40.53	£36.94

■ Q1 (Oct-Dec 23)   ■ Q2 (Jan-Mar 24)

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Average customer time spent, per visit, in pubs, bars and restaurants.

Based on 'last visit' for within the period

Figures show claimed dwell time from UK adults (+18), based on their last visit to either a pub, bar or restaurant, for the 3-monty period. **Figures shown in minutes.**

Q. Thinking now about your last visit to a pub, bar or restaurant, how long did you stay for?

Category	Q1 (Oct-Dec 23)	Q2 (Jan-Mar 24)
Total	127	126
Male	127	125
Female	126	128
18-34 years	136	134
35-44 years	134	129
45-54 years	123	127
55-64 years	128	119
65 years +	121	120

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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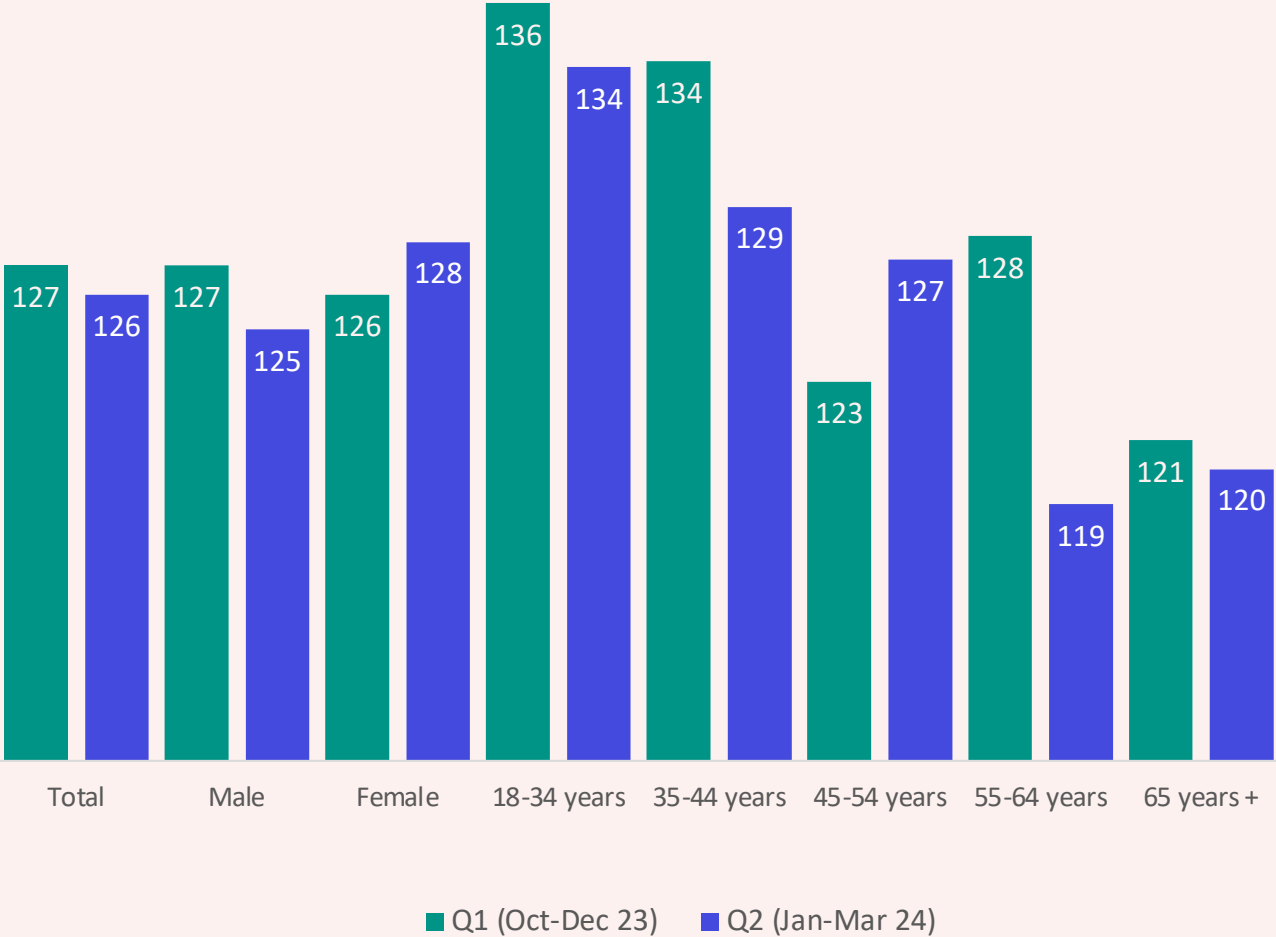
PARTY SIZE & COMPOSITION

How many people are with me and who is with me (e.g. vegetarians, non-drinkers, children, etc.)?

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Average party size when visiting pubs, bars and restaurants.

Based on 'last visit' within the period

Figures show claimed party size from UK adults (+18), based on their last visit to either a pub, bar or restaurant, for the 3-month period.

The most common party size remains 2 (same as the previous period).

Q. Thinking now about your last visit to a pub, bar or restaurant, how many other people were with you? (including yourself)

Category	Green	Blue
Total	4.4	4.6
Male	4.3	4.4
Female	4.5	4.8
18-34 years	6.0	5.9
35-44 years	4.7	5.1
45-54 years	4.5	4.3
55-64 years	4.1	3.9
65 years +	4.6	3.4

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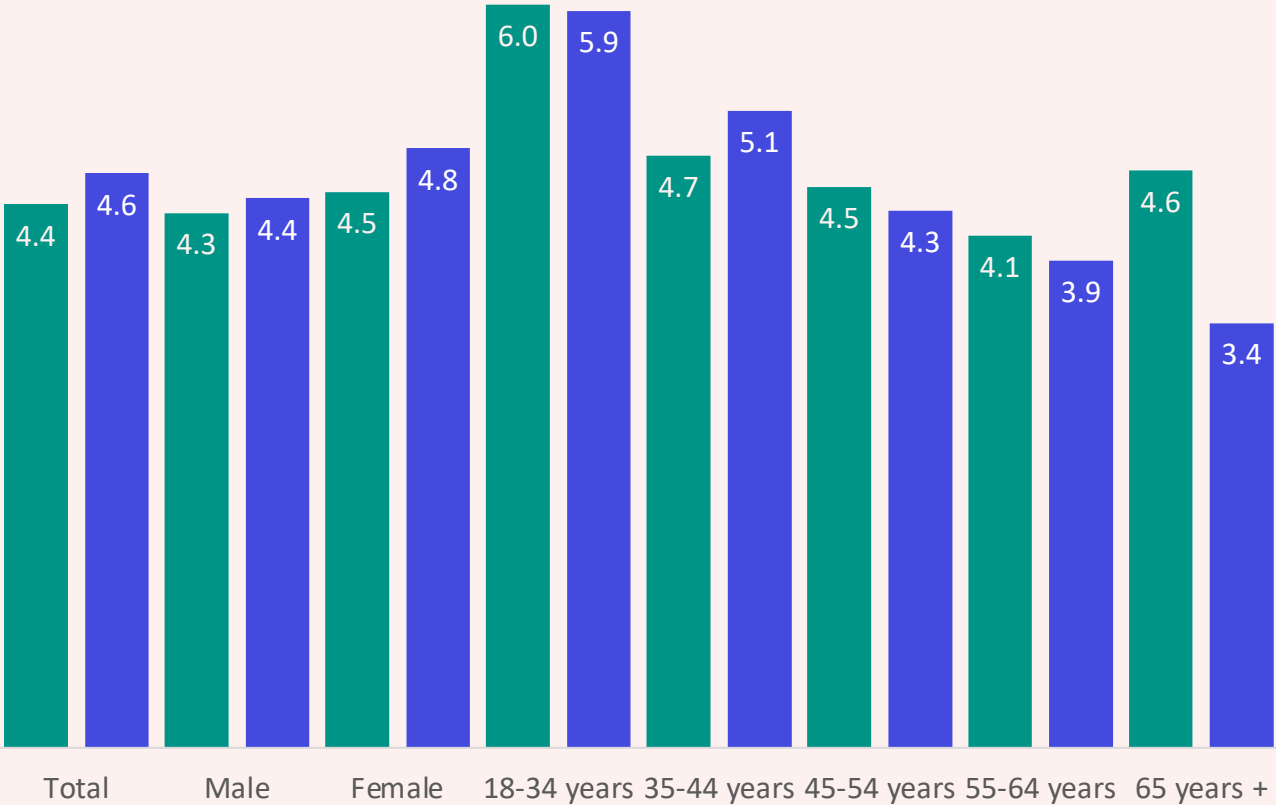
Demographic breakdown of most frequent pub, bar and restaurant goers.

% shown is based on those UK adults (+18) who say they visited pubs, bars or restaurant once week or more, on average, in the last 3 months.

Legend: Q1 (Oct-Dec 23) ■ Q1 (Jan-Mar 24)

Demographic	Q1 (Oct-Dec 23)	Q1 (Jan-Mar 24)
Total	42%	48%
Male	47%	53%
Female	35%	43%
18-34 years	63%	67%
35-44 years	55%	53%
45-54 years	39%	42%
55-64 years	35%	39%
65 years +	32%	34%

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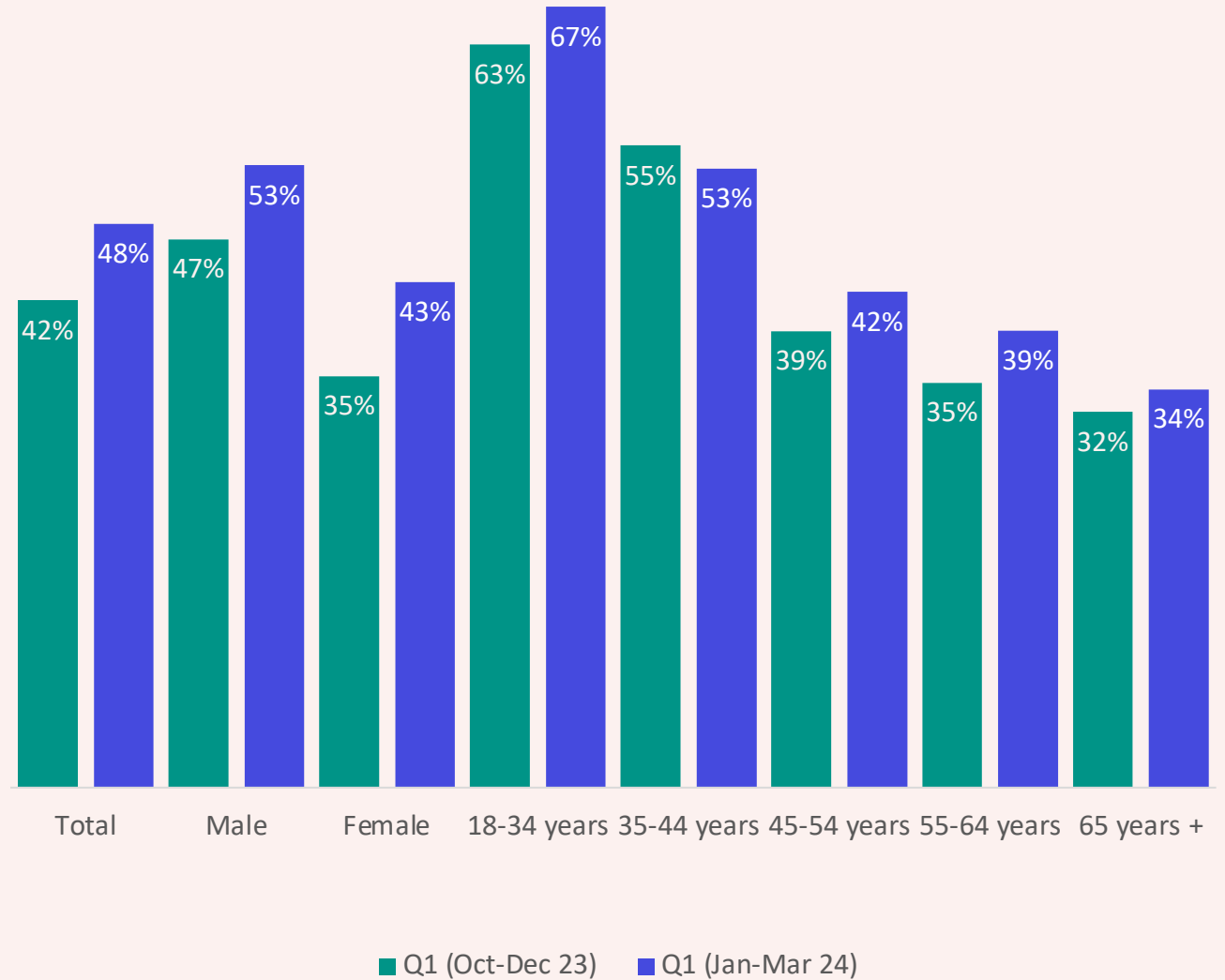
Influences

- 'Something refreshing' overtakes 'something I know and trust' as the top factor influencing customers choice of drink orders for the last 3 months, in pubs, bars and restaurants.

- 'Something that would give me pleasure' overtakes 'something I know and trust' as the main influencing factor when ordering food for the last 3 months, in pubs, bars and restaurants.

- The average number of courses had by customers, when eating in pubs, bars and restaurants was 1.6 for this quarter (compared to 1.7 in the previous period).

- The average customer spend, on their last visit to a pub, bar or restaurant, in the period Jan-Mar 24, was £41.34, and increase from £40.68 in Q1.

- The dwell time, on their last visit to a pub, bar or restaurant, in the period Jan-Mar 24, was 126 minutes, a slight decrease from 127 minutes in Q1.

- The average party size, on their last visit to a pub, bar or restaurant, in the period Jan-Mar 24, was 4.6 people, up from 4.4 people in Q1.

- Jan-Mar 24 saw an increase in the amount of customers visiting pubs, bars and restaurants at least once a week, up from 42% to 48%. The increase being driven by all age groups.

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Engagement

Discover how customers behave when in-venue, and how each customer touchpoint (menus, staff, POS & tech) engages and influences their decisions.

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WHAT TOOLS DO WE HAVE AT OUR DISPOSAL TO INFLUENCE THE CUSTOMER IN VENUE?

POINT OF SALE

The impact of varying point-of-sale messaging on customer behvaiour.

STAFF

The role staff can play in educating, engaging and influencing the customer journey.

MENU

The importance of the food and drink menus - informing and influencing.

TECHNOLOGY

How technology in-venue can be the conduit between customer demands and staff capabilities.

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POINT OF SALE

The impact of varying point-of-sale messaging on customer behaviour.

GET IT NOW!

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What POS was noticed by customers when visiting pubs, bars and restaurants?

Based on 'last visit' for within the period

60% of customers noticed some form of POS on their last visit to a pub, bar or restaurant (within the last 3 months), up from 55% in the previous period.

Q. On your last visit to a pub, bar or restaurant, can you remember if you noticed any of the following when you where there?

	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Posters and/or message boards by the entrance to the venue as you came in	31%	25%
Posters and/or message boards outside the venue	31%	21%
Leaflets/cards/signs on the tables	23%	24%
Posters and/or message boards at the bar	23%	
Posters and/or message boards in the toilets	14%	12%
None of the above	40%	45%

Q2 (Jan-Mar 24)   **Q1 (Oct-Dec 23)**

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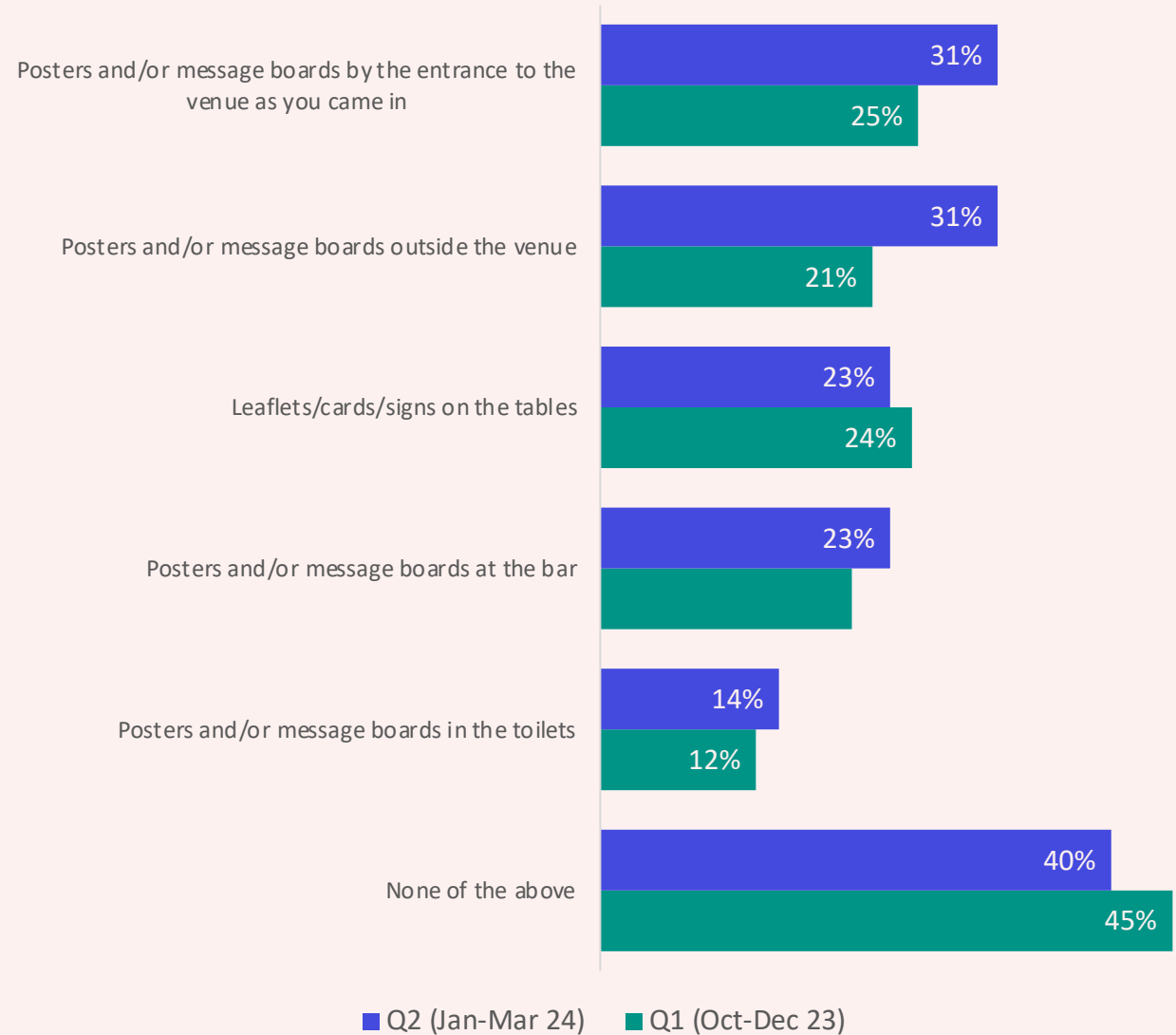
Information/ messaging that customers are 'actively' looking for in venue

Customers have been 'actively' looking out for the following information/messaging when they have inside a pub, bar or restaurant in the last 3 months.

Q. Would you say that you 'actively' look out for any of the following information when you are inside a pub, bar or restaurant?

Food menu prices
- 53%
- 55%

Specials of the day / dish of the day
- 41%
- 44%

Promotions/deals/special offers
- 36%
- 38%

Drink menu prices
- 34%
- 32%

Hygiene ratings
- 18%
- 20%

Events that are on / coming up
- 13%
- 12%

Information about how sustainable the food and drinks are
- 7%
- 6%

Information about how sustainable the venue is
- 7%
- 5%

Community/charity initiatives
- 6%
- 5%

Food miles / how sustainable the food and drinks are
- 5%
- 3%

■ Q2 (Jan-Mar 24)
■ Q1 (Oct-Dec 23)

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Source: KAM x Paytronix Plan to Plate 2023 Tracker (March 2024)

BENEFITS OF GETTING POS RIGHT FOR THE CUSTOMER.

If pubs, bars and restaurants improved the quality and relevancy of their posters / messaging / signs in-venue, in the next 3 months, do you think it would influence you to do any of the following?

VISIT MORE

16% would visit more often.

Up from 13% in Q1

SPEND MORE

16% would spend more per visit.

Up from 10% in Q1.

STAY MORE

15% would stay longer.

Up from 12% in Q1.

LOYALTY

17% would be more likely to return.

The same as in Q1.

ENGAGEMENT

12% would recommend to others.

Up from 11% in Q1.

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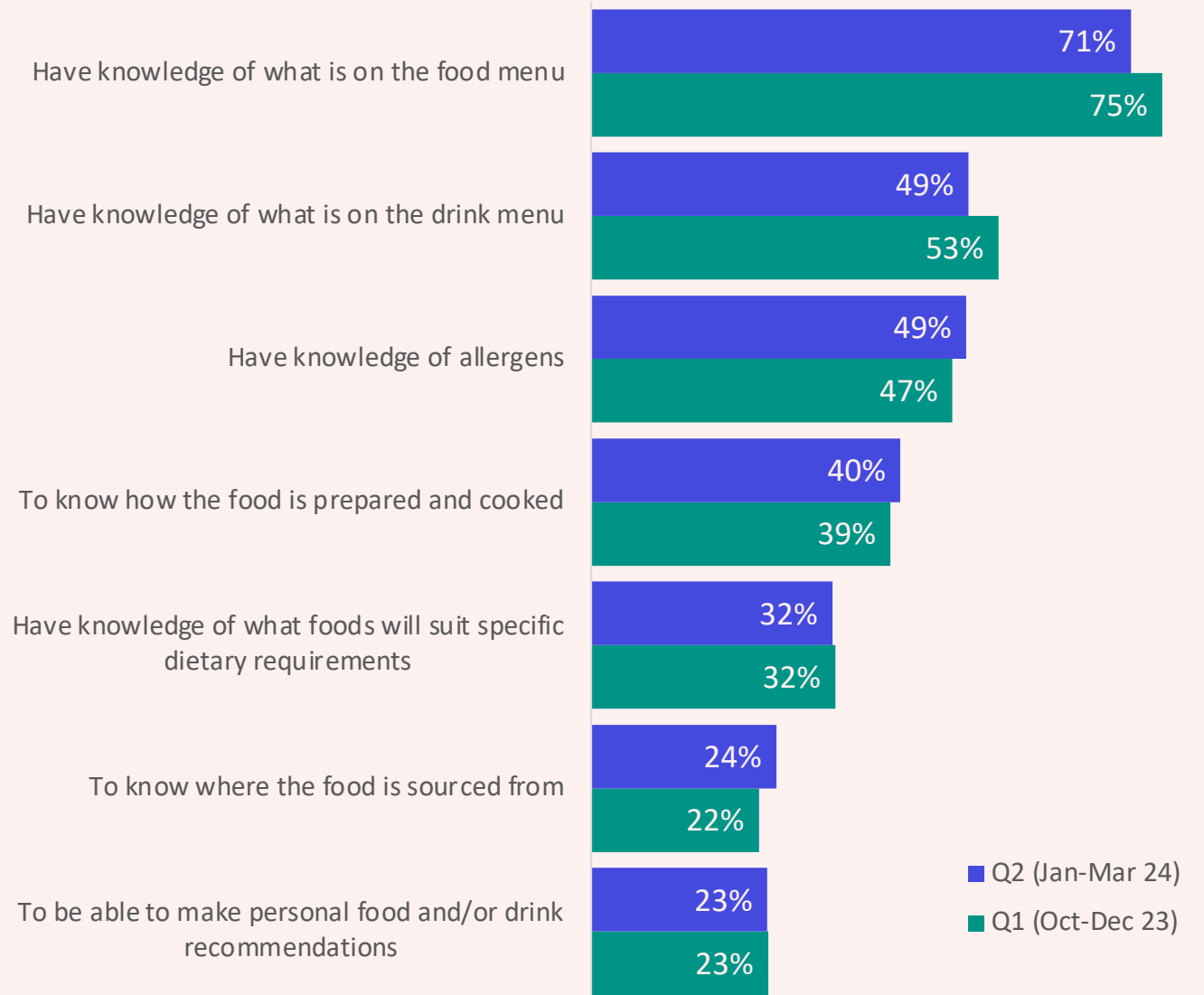The Guest Engagement Company
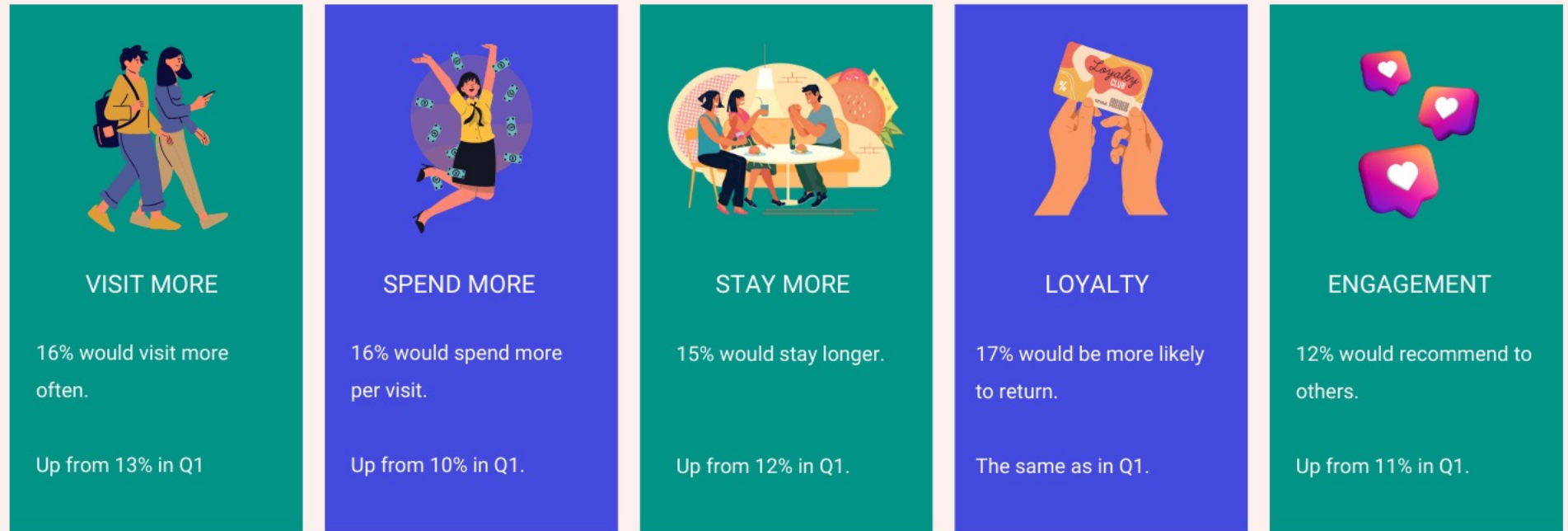
STAFF

The role staff can play in educating, engaging and influencing the customer journey.

WE'RE OPEN

What customers in pubs, bars and restaurants expect staff to be knowledgeable about.

The top areas which customers expect staff in pubs, bars and restaurants to be knowledgeable in.

Q. Which of the following do you expect staff in pubs, bars and restaurants to be knowledgeable about?

Have knowledge of what is on the food menu
- 71%
- 75%

Have knowledge of what is on the drink menu
- 49%
- 53%

Have knowledge of allergens
- 49%
- 47%

To know how the food is prepared and cooked
- 40%
- 39%

Have knowledge of what foods will suit specific dietary requirements
- 32%
- 32%

To know where the food is sourced from
- 24%
- 22%

To be able to make personal food and/or drink recommendations
- 23%
- 23%

■ Q2 (Jan-Mar 24)
■ Q1 (Oct-Dec 23)

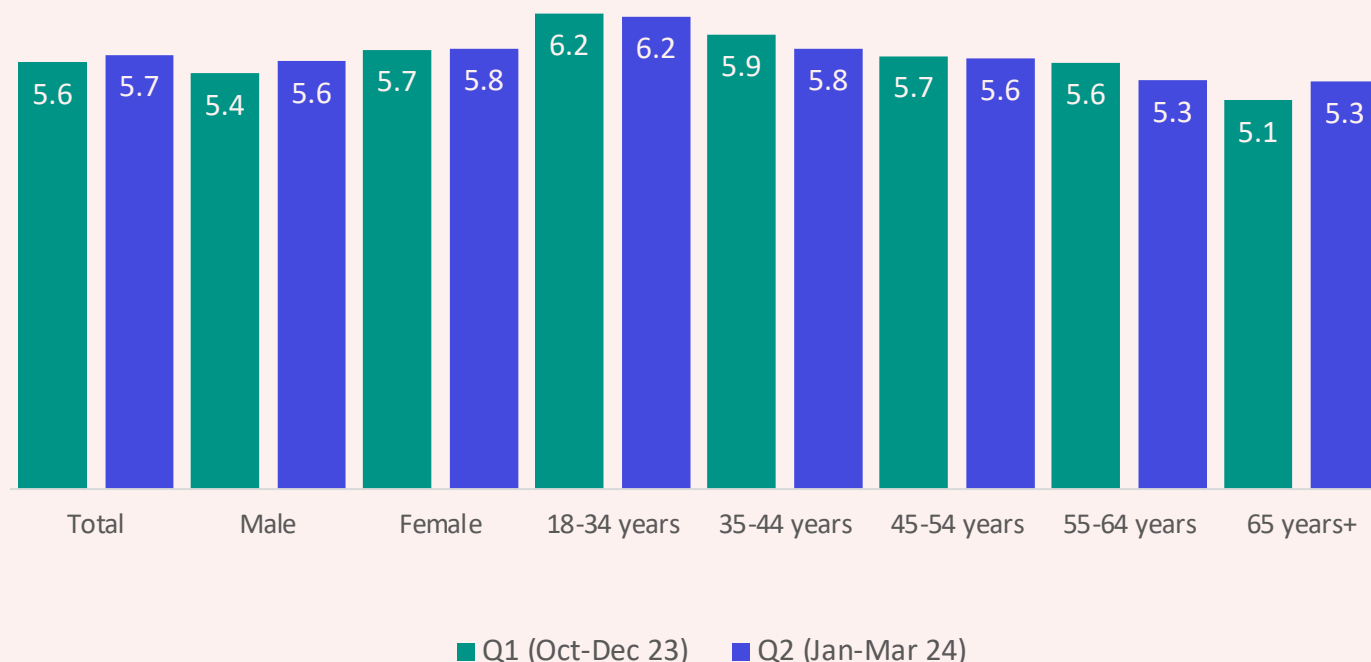KAM   paytronix
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Do customers love or hate staff recommendations.

Do customers mind if staff try to recommend certain food and/or drinks to them when they order in a pub, bar or restaurant?

Rating on a scale of 1-10, where 1 is 'I hate it' and 10 is 'I love it'.

Category	Q1 (Oct-Dec 23)	Q2 (Jan-Mar 24)
Total	5.6	5.7
Male	5.4	5.6
Female	5.7	5.8
18-34 years	6.2	6.2
35-44 years	5.9	5.8
45-54 years	5.7	5.6
55-64 years	5.6	5.3
65 years+	5.1	5.3

■ Q1 (Oct-Dec 23)   ■ Q2 (Jan-Mar 24)

Q. Do you mind it if staff in pubs, bars and restaurants try to recommend certain food and/or drinks to you when you order?

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Have staff recommended any food and/or drinks in the last 3 months?

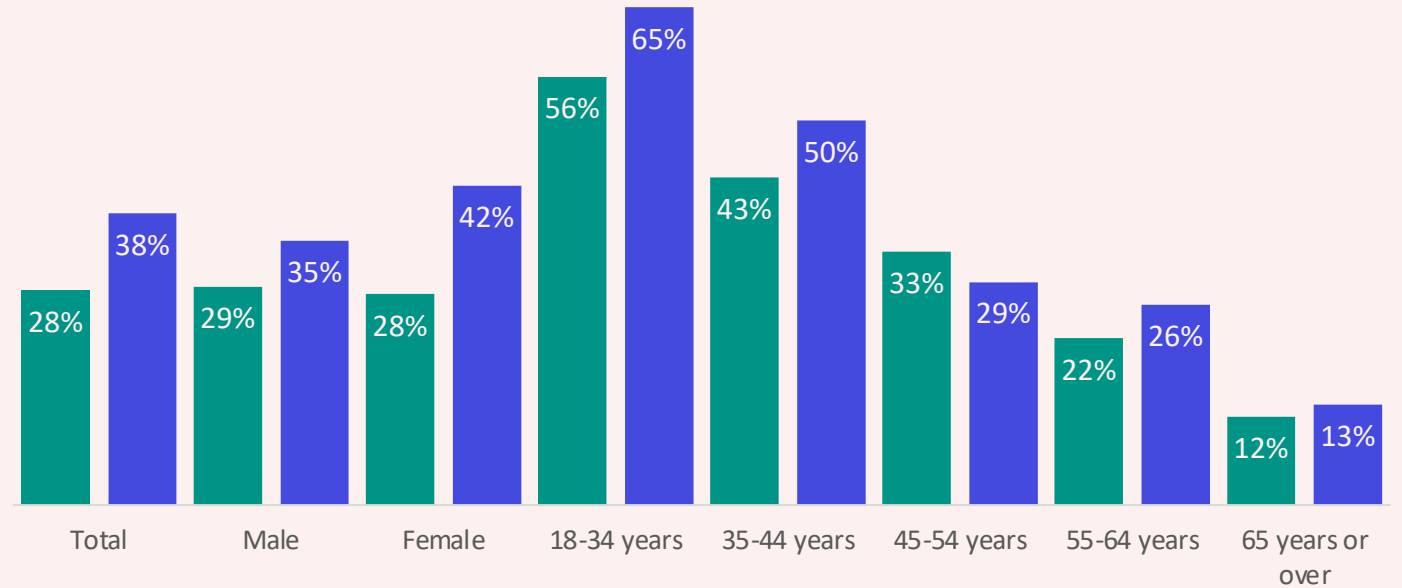Data shows % of customers who, in the last 3 months, say staff in pubs, bars and restaurants have tried to recommend certain food and/or drinks to customers when they visited.
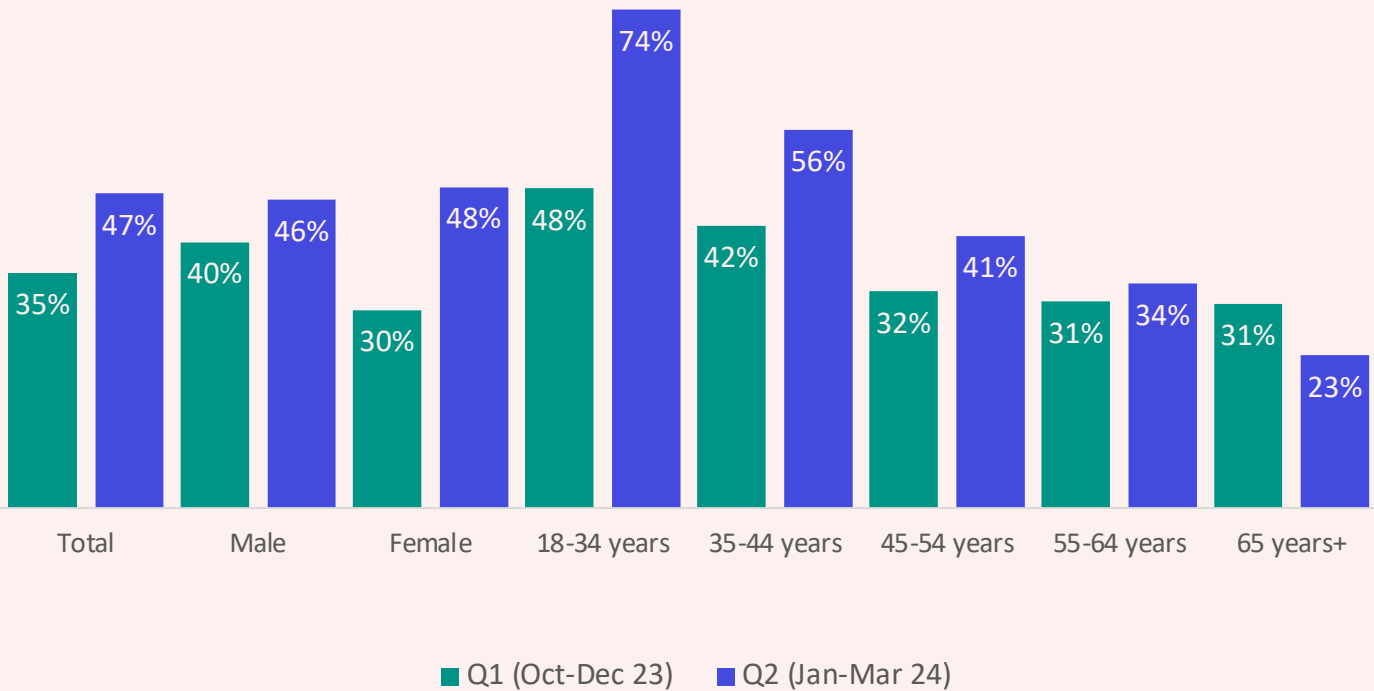
Q. In the last 3 months, have any staff in pubs, bars and restaurants (you've visited) try to recommend certain food and/or drinks to you?

Category	Q1 (Oct-Dec 23)	Q2 (Jan-Mar 24)
Total	35%	47%
Male	40%	46%
Female	30%	48%
18-34 years	48%	74%
35-44 years	42%	56%
45-54 years	32%	41%
55-64 years	31%	34%
65 years+	31%	23%

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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How likely customers are to go with staff recommendations on food.

Data shows % of customers who, in the last 3 months, say they would likely go with staff recommendations for **food** when they are in a pub, bar or restaurant.

Q. If staff in pubs, bars and restaurants (that you've visited in the last 3 months) had recommended certain **food** to you - how likely would you have been to go with their recommendations?

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years or over
Q1 (Oct-Dec 23)	28%	29%	28%	56%	43%	33%	22%	12%
Q2 (Jan-Mar 24)	38%	35%	42%	65%	50%	29%	26%	13%

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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How likely customers are of going with staff recommendations on drinks.

Data shows % of customers who, in the last 3 months, say they would likely go with staff recommendations for **drinks** when they are in a pub, bar or restaurant.
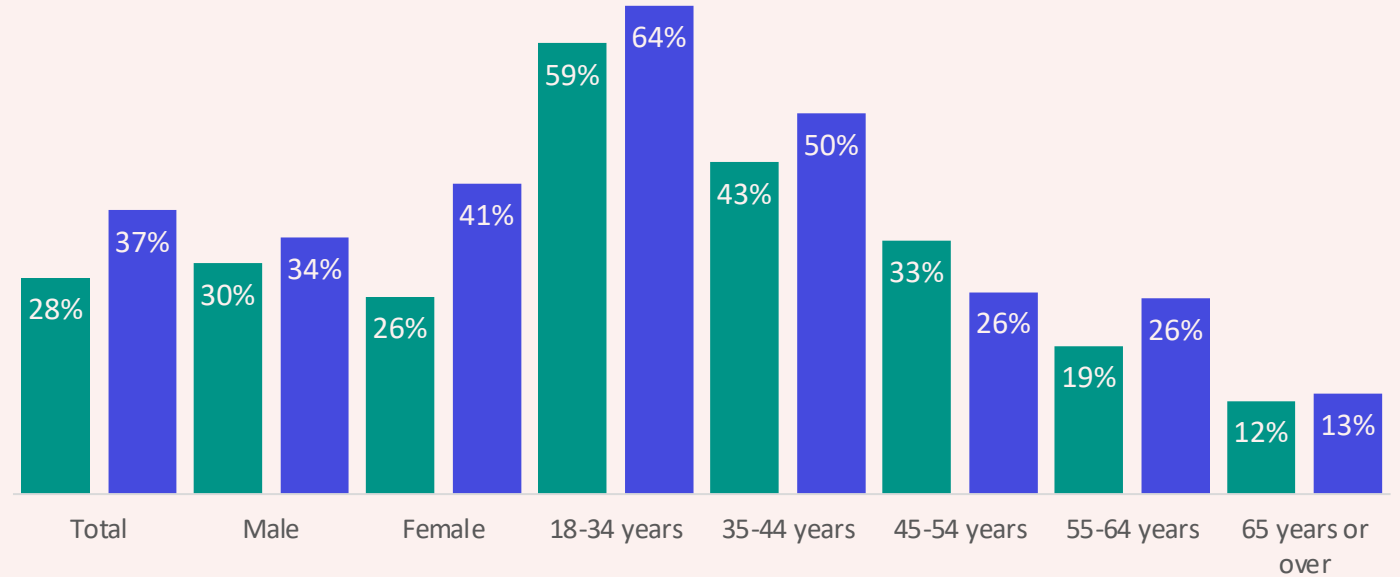
	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years or over
Q1 (Oct-Dec 23)	28%	30%	26%	59%	43%	33%	19%	12%
Q2 (Jan-Mar 24)	37%	34%	41%	64%	50%	26%	26%	13%

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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BENEFITS OF GETTING STAFF ENGAGEMENT RIGHT FOR THE CUSTOMER.

If pubs, bars and restaurants improved the quality of their staff engagement, in the next 3 months, do you think it would influence you to do any of the following?

VISIT MORE

30% would visit more often.

Down from 32% in Q1.

SPEND MORE

23% would spend more per visit.

Up from 15% in Q1.

STAY MORE

21% would stay longer.

Up from 15% in Q1.

LOYALTY

29% would be more likely to return.

Down from 31% in Q1.

ENGAGEMENT

20% would recommend to others.

Down from 23% in Q1.

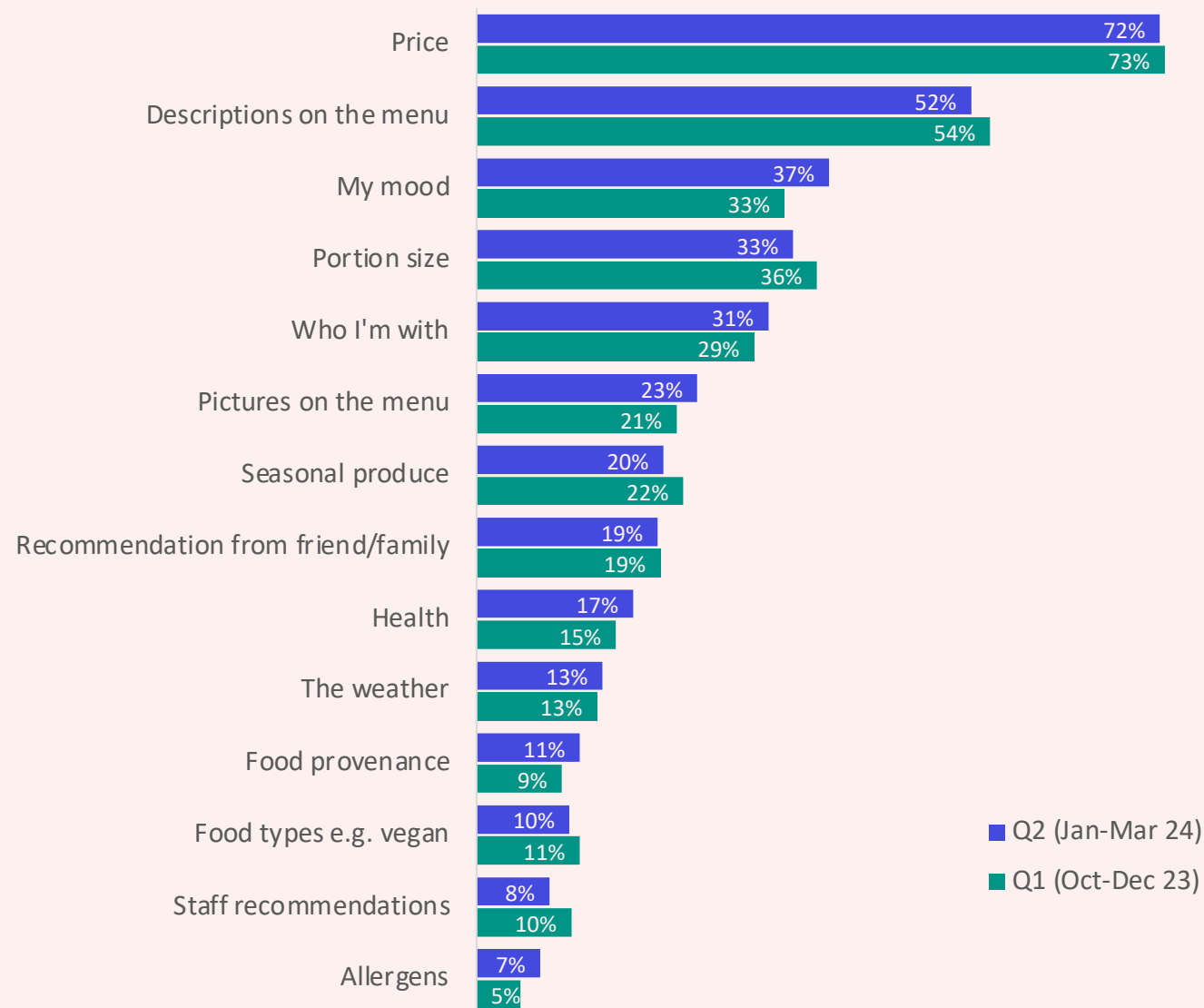**KAM** **paytronix**
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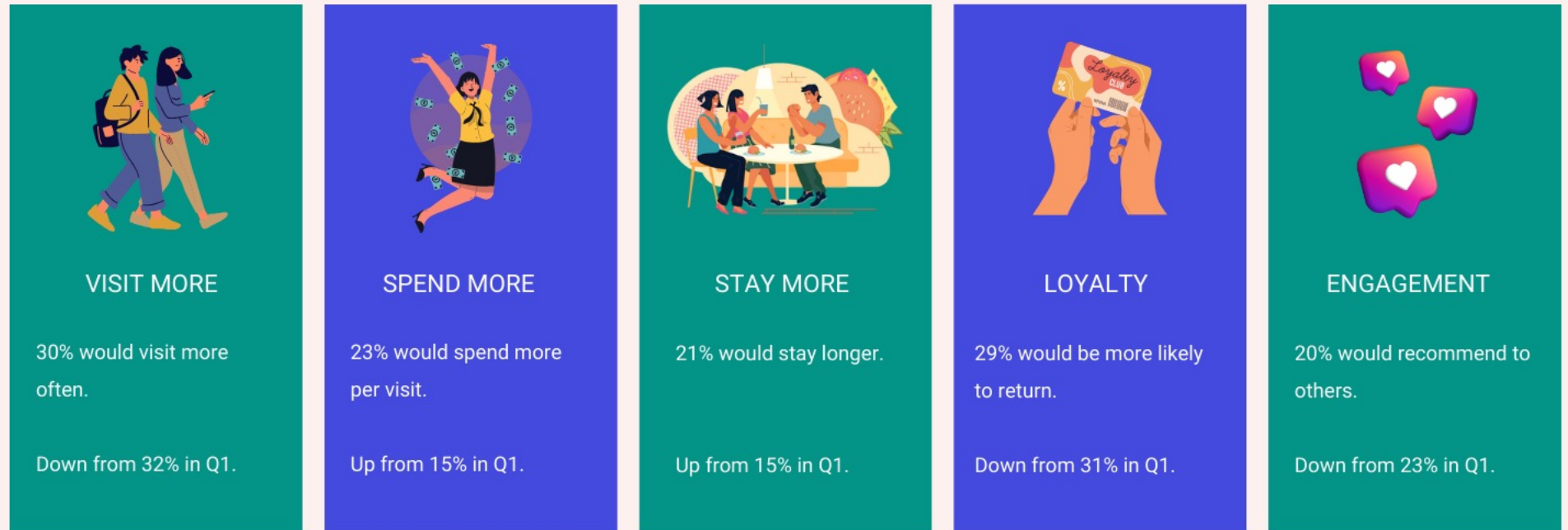
MENUS

The importance of the food and drink menus - informing and influencing.

The top factors which influence customer choice of food when ordering in pubs, bars and restaurants.

Outside of price, it's descriptions on the menu that are the biggest influence of customer choice.

Factor	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Price	72%	73%
Descriptions on the menu	52%	54%
My mood	37%	33%
Portion size	33%	36%
Who I'm with	31%	29%
Pictures on the menu	23%	21%
Seasonal produce	20%	22%
Recommendation from friend/family	19%	19%
Health	17%	15%
The weather	13%	13%
Food provenance	11%	9%
Food types e.g. vegan	10%	11%
Staff recommendations	8%	10%
Allergens	7%	5%

Q2 (Jan-Mar 24)
Q1 (Oct-Dec 23)

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The top menu attributes which would influence a customer's order when in a pub, bar or restaurant.

Data shows the menu attributes that, if flagged against dishes on a food menu, would encourage customers to order it, in the last 3 months.

Q. Which of the following that, if flagged against dishes on a food menu, would encourage you to order it?

On special offer
- Q2 (Jan-Mar 24): 50%
- Q1 (Oct-Dec 23): 50%

Today or this week's special
- Q2 (Jan-Mar 24): 41%
- Q1 (Oct-Dec 23): 44%

New to the menu
- Q2 (Jan-Mar 24): 30%
- Q1 (Oct-Dec 23): 30%

Healthier option
- Q2 (Jan-Mar 24): 28%
- Q1 (Oct-Dec 23): 25%

Labelled as locally sourced
- Q2 (Jan-Mar 24): 22%
- Q1 (Oct-Dec 23): 22%

Recommended by member of staff
- Q2 (Jan-Mar 24): 16%
- Q1 (Oct-Dec 23): 14%

Calorie count
- Q2 (Jan-Mar 24): 14%
- Q1 (Oct-Dec 23): 11%

Labelled as best seller
- Q2 (Jan-Mar 24): 12%
- Q1 (Oct-Dec 23): 12%

Labelled as vegetarian
- Q2 (Jan-Mar 24): 7%
- Q1 (Oct-Dec 23): 8%

An authentic story behind the dish
- Q2 (Jan-Mar 24): 7%
- Q1 (Oct-Dec 23): 7%

Labelled as vegan
- Q2 (Jan-Mar 24): 5%
- Q1 (Oct-Dec 23): 4%

Specific dietary requirements
- Q2 (Jan-Mar 24): 5%
- Q1 (Oct-Dec 23): 5%

Labelled as pescatarian
- Q2 (Jan-Mar 24): 4%
- Q1 (Oct-Dec 23): 3%

Q2 (Jan-Mar 24)
Q1 (Oct-Dec 23)
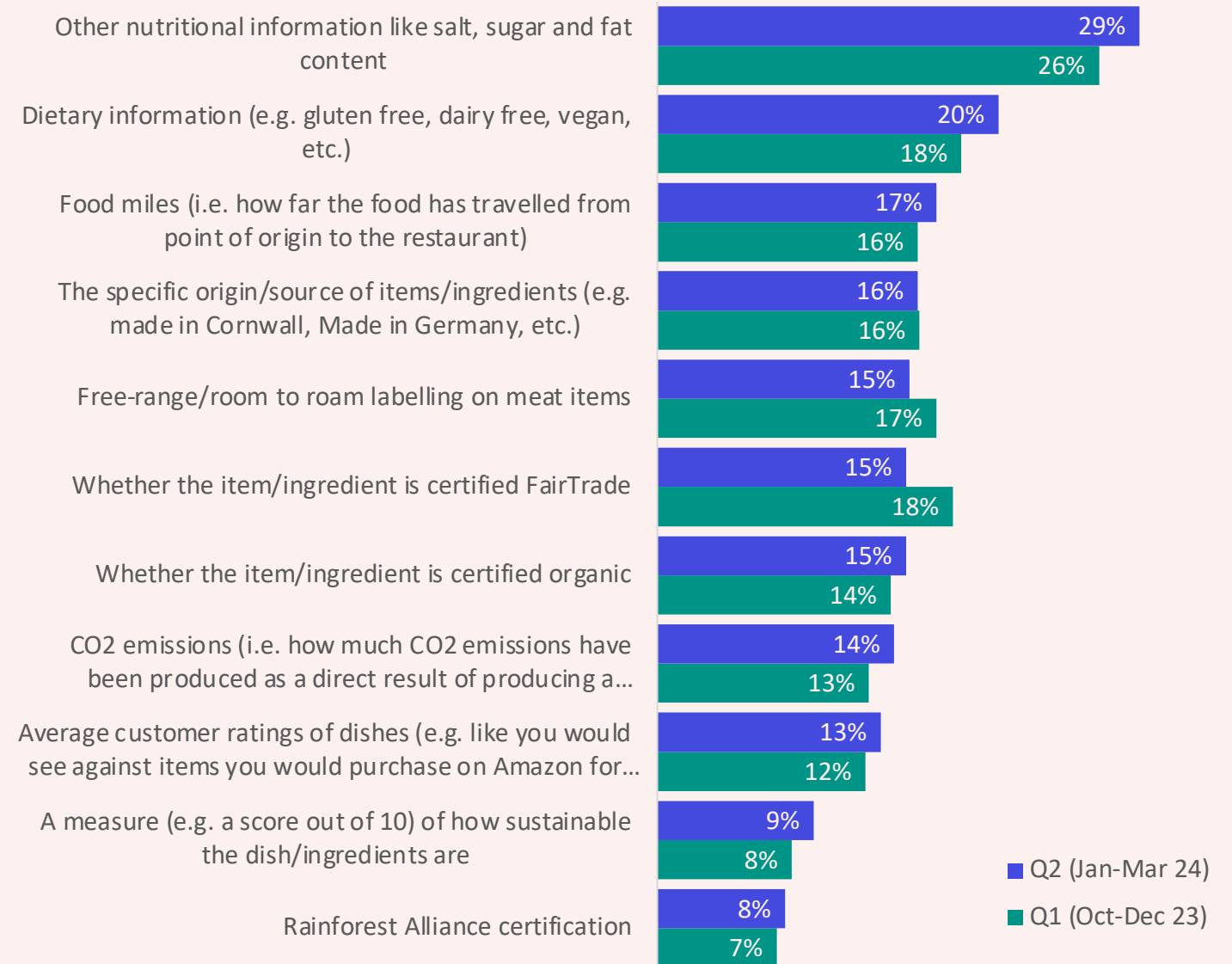
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Additional information customers would like to see on food menus in pubs, bars and restaurants.
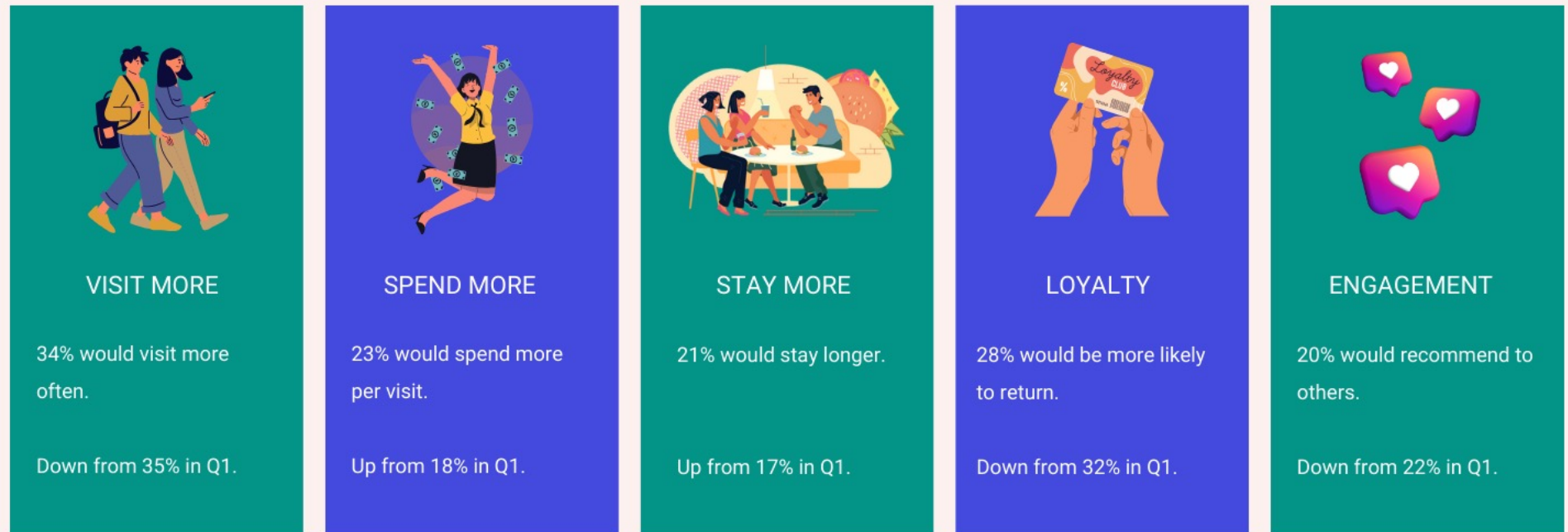
67% of pub, bar and restaurant customers would like at least one of these additional pieces of information shown on food menus. Up from 65% in Q1.

Q. Which of the following details would you like to have the option to read about dishes on a menu?

Other nutritional information like salt, sugar and fat content
- 29%
- 26%

Dietary information (e.g. gluten free, dairy free, vegan, etc.)
- 20%
- 18%

Food miles (i.e. how far the food has travelled from point of origin to the restaurant)
- 17%
- 16%

The specific origin/source of items/ingredients (e.g. made in Cornwall, Made in Germany, etc.)
- 16%
- 16%

Free-range/room to roam labelling on meat items
- 15%
- 17%

Whether the item/ingredient is certified FairTrade
- 15%
- 18%

Whether the item/ingredient is certified organic
- 15%
- 14%

CO2 emissions (i.e. how much CO2 emissions have been produced as a direct result of producing a...
- 14%
- 13%

Average customer ratings of dishes (e.g. like you would see against items you would purchase on Amazon for...
- 13%
- 12%

A measure (e.g. a score out of 10) of how sustainable the dish/ingredients are
- 9%
- 8%

Rainforest Alliance certification
- 8%
- 7%

■ Q2 (Jan-Mar 24)
■ Q1 (Oct-Dec 23)

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BENEFITS OF GETTING FOOD & DRINK MENUS RIGHT FOR THE CUSTOMER.

If pubs, bars and restaurants improved their food and drink menus, in the next 3 months, do you think it would influence you to do any of the following?
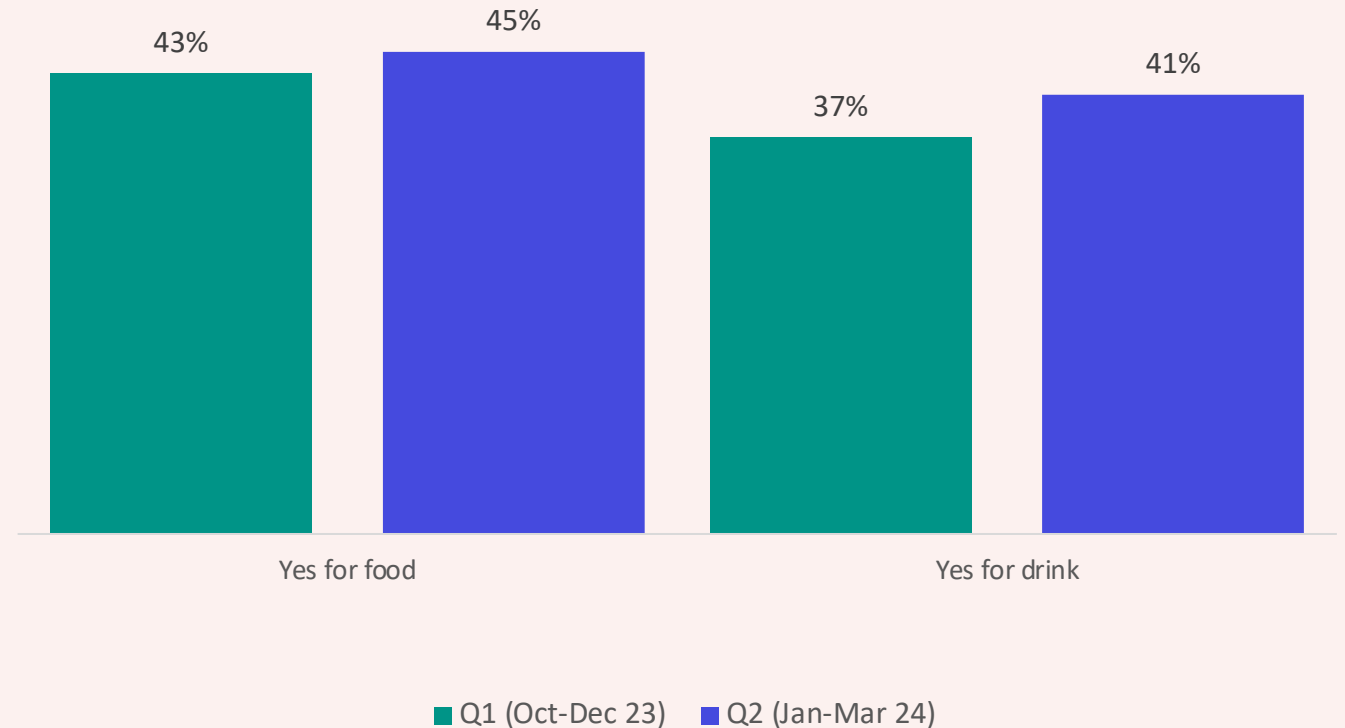

VISIT MORE

34% would visit more often.

Down from 35% in Q1.

SPEND MORE

23% would spend more per visit.

Up from 18% in Q1.

STAY MORE

21% would stay longer.

Up from 17% in Q1.

LOYALTY

28% would be more likely to return.

Down from 32% in Q1.

ENGAGEMENT

20% would recommend to others.

Down from 22% in Q1.

TECHNOLOGY

How technology in-venue can be the conduit between customer demands and staff capabilities.

The demand for personalised recommendations based on what customers have previously ordered.

Data shown helps us to understand the propensity for customers to share their order history (and other personal information) in order to receive curated recommendations from the pubs, bars and restaurants they regularly visit.

Yes for food: 43% / 45%
Yes for drink: 37% / 41%

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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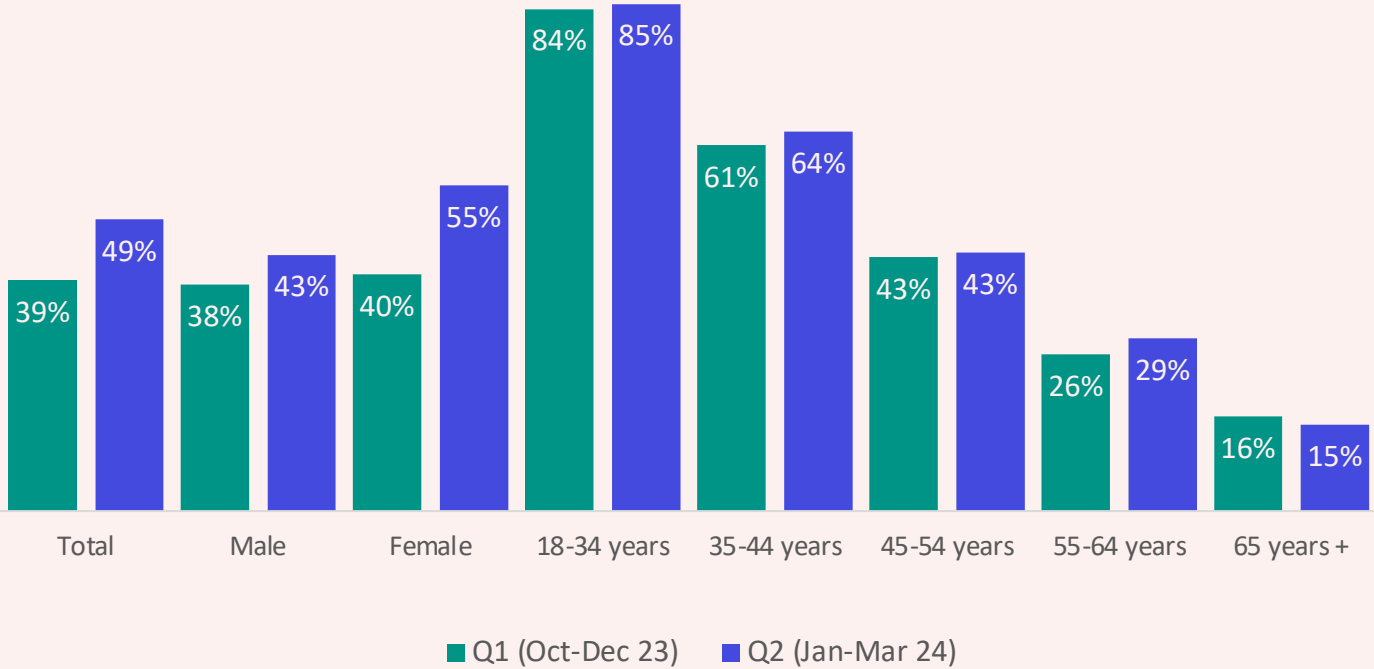# The demand for sharing personal information to receive tailored offers and promotions.

Data shown helps us to understand customers' willingness to share personal information with pubs, bars and restaurant venues in order to receive bespoke offers and suggestions tailored specifically to them. (% of yes responses)

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years or over
Q1 (Oct-Dec 23)	47%	49%	45%	63%	56%	54%	48%	32%
Q2 (Jan-Mar 24)	52%	53%	51%	63%	58%	49%	48%	40%

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)
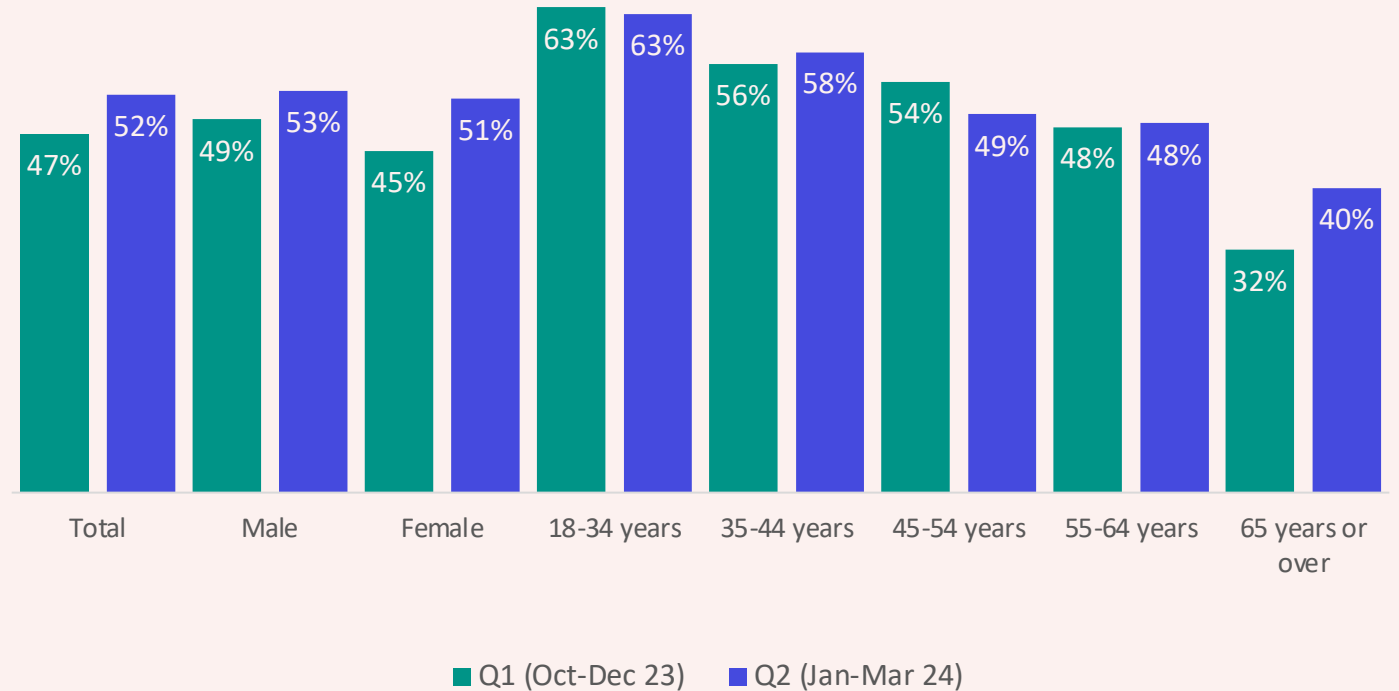
Q. Would you be willing to share more personal information with pubs, bars and restaurant venues in order to receive bespoke offers and suggestions tailored specifically to you?

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Which customers have used a QR code or digital screen in a pub, bar or restaurant?

Breakdown, by demographic, of the customers who have used a QR code or a digital screen in a pub, bar or restaurant in the last 3 months, for the 3-month period.
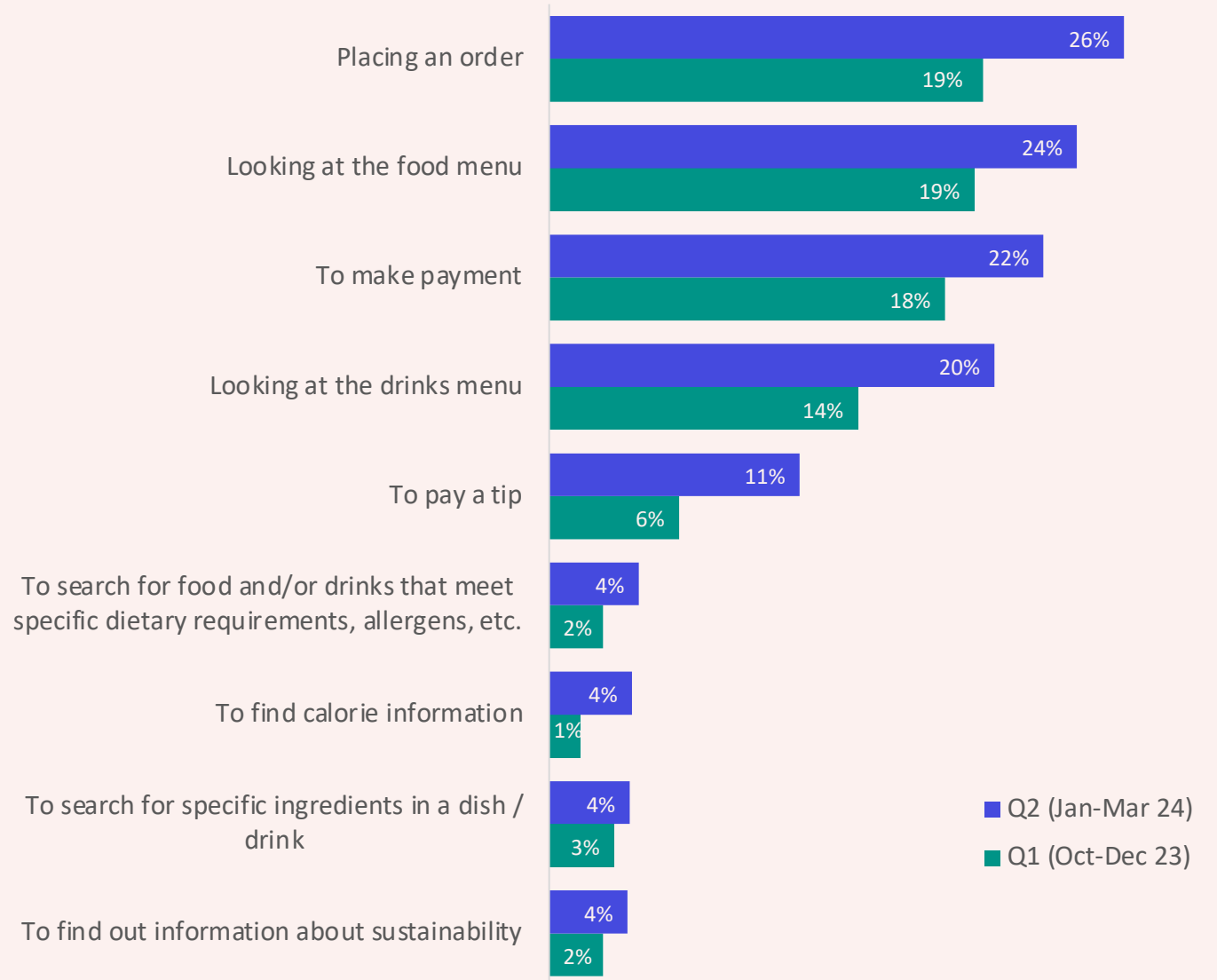
	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
Q1 (Oct-Dec 23)	39%	38%	40%	84%	61%	43%	26%	16%
Q2 (Jan-Mar 24)	49%	43%	55%	85%	64%	43%	29%	15%

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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Top actions that customers use a QR code for in pubs, bars and restaurants.

Placing an order, looking at the food menu and making payments are the top 3 actions that customers have used QR codes for in the last 3 months.
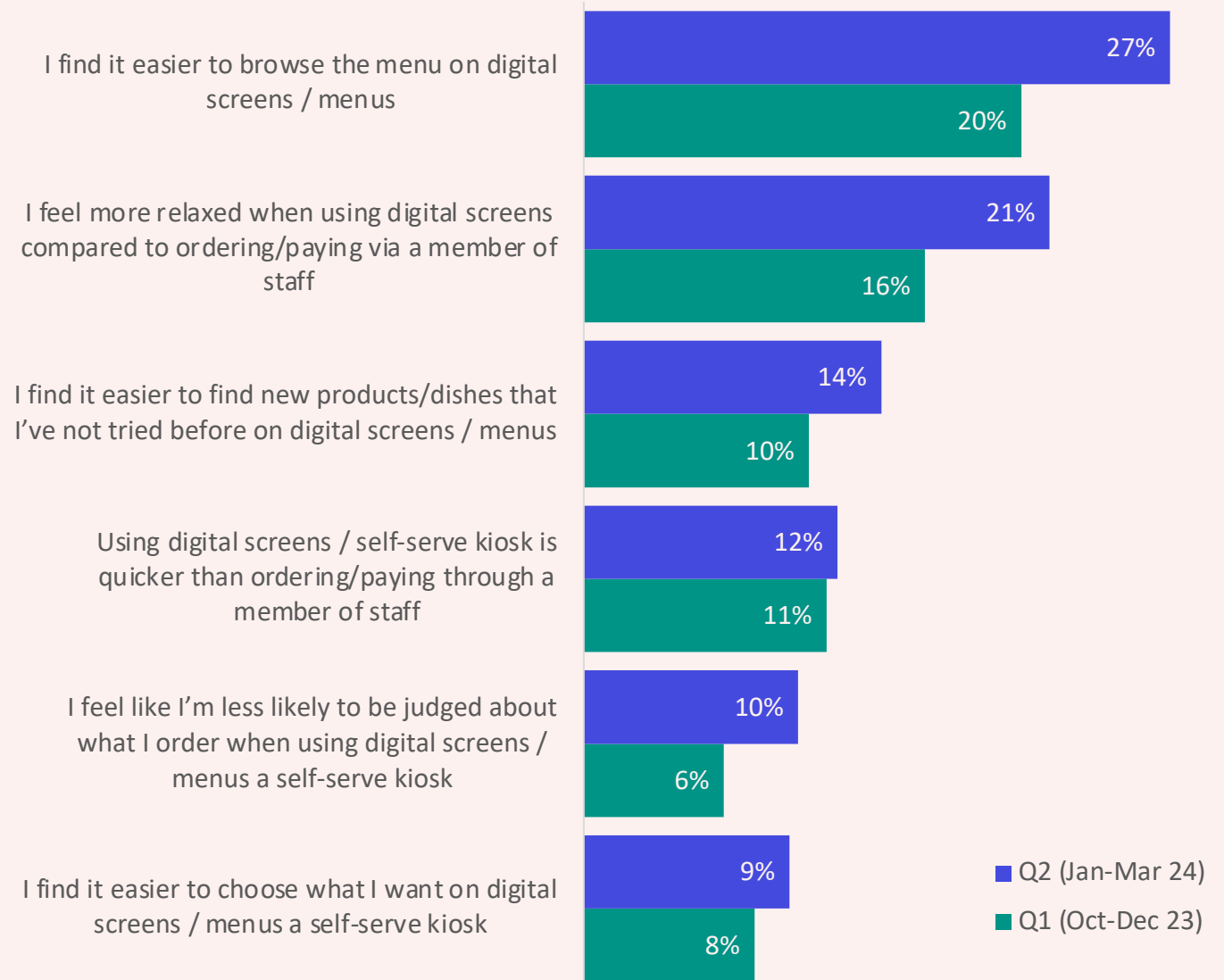
Action	Q2 (Jan-Mar 24)	Q1 (Oct-Dec 23)
Placing an order	26%	19%
Looking at the food menu	24%	19%
To make payment	22%	18%
Looking at the drinks menu	20%	14%
To pay a tip	11%	6%
To search for food and/or drinks that meet specific dietary requirements, allergens, etc.	4%	2%
To find calorie information	4%	1%
To search for specific ingredients in a dish / drink	4%	3%
To find out information about sustainability	4%	2%

■ Q2 (Jan-Mar 24)
■ Q1 (Oct-Dec 23)

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What customers think about QR codes and digital screens in venues.

The more relaxed feel, the ease of browsing and the ability to find new products quicker and easier, are the key drivers for the use of digital screens for ordering and paying in venue.
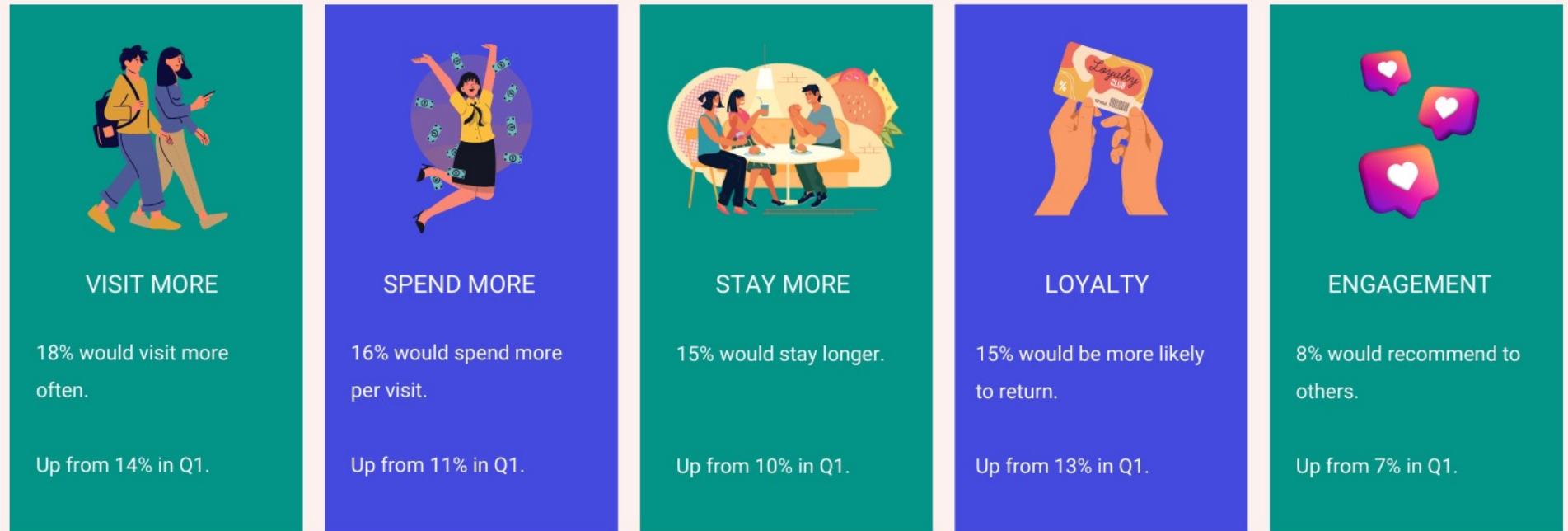
I find it easier to browse the menu on digital screens / menus
- Q2 (Jan-Mar 24): 27%
- Q1 (Oct-Dec 23): 20%

I feel more relaxed when using digital screens compared to ordering/paying via a member of staff
- Q2 (Jan-Mar 24): 21%
- Q1 (Oct-Dec 23): 16%

I find it easier to find new products/dishes that I've not tried before on digital screens / menus
- Q2 (Jan-Mar 24): 14%
- Q1 (Oct-Dec 23): 10%

Using digital screens / self-serve kiosk is quicker than ordering/paying through a member of staff
- Q2 (Jan-Mar 24): 12%
- Q1 (Oct-Dec 23): 11%

I feel like I'm less likely to be judged about what I order when using digital screens / menus a self-serve kiosk
- Q2 (Jan-Mar 24): 10%
- Q1 (Oct-Dec 23): 6%

I find it easier to choose what I want on digital screens / menus a self-serve kiosk
- Q2 (Jan-Mar 24): 9%
- Q1 (Oct-Dec 23): 8%

■ Q2 (Jan-Mar 24)
■ Q1 (Oct-Dec 23)

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BENEFITS OF GETTING THE USE OF QR CODES & DIGITAL SCREENS RIGHT FOR THE CUSTOMER.

If pubs, bars and restaurants improved their use of QR codes and digital screens/menus, in the next 3 months, do you think it would influence you to do any of the following?

VISIT MORE	SPEND MORE	STAY MORE	LOYALTY	ENGAGEMENT
18% would visit more often.	16% would spend more per visit.	15% would stay longer.	15% would be more likely to return.	8% would recommend to others.
Up from 14% in Q1.	Up from 11% in Q1.	Up from 10% in Q1.	Up from 13% in Q1.	Up from 7% in Q1.

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Engagement

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- 60% of customers noticed some form of POS on their last visit to a pub, bar or restaurant (within the last 3 months), up from 55% in the previous period.

- 59% of customers say they don't mind it if staff recommended food and/or drinks to them when they are in venue. Yet just 47% of customers say staff in pubs, bars and restaurants have tried to recommend certain food and/or drinks to them in the last 3 months, compared to 35% in the previous quarter.

- Outside of price, it's descriptions on the menu that are the biggest influence of customer choice. 67% of pub, bar and restaurant customers would like at least one of additional piece of information (outside of a description) shown on food menus. Up from 65% in Q1.

- 49% of the customers have used a QR code or a digital screen in a pub, bar or restaurant in the last 3 months, up from 39% in the previous quarter. Placing an order, looking at the food menu and making payments are the top 3 actions that customers have used QR codes for in the last 3 months.
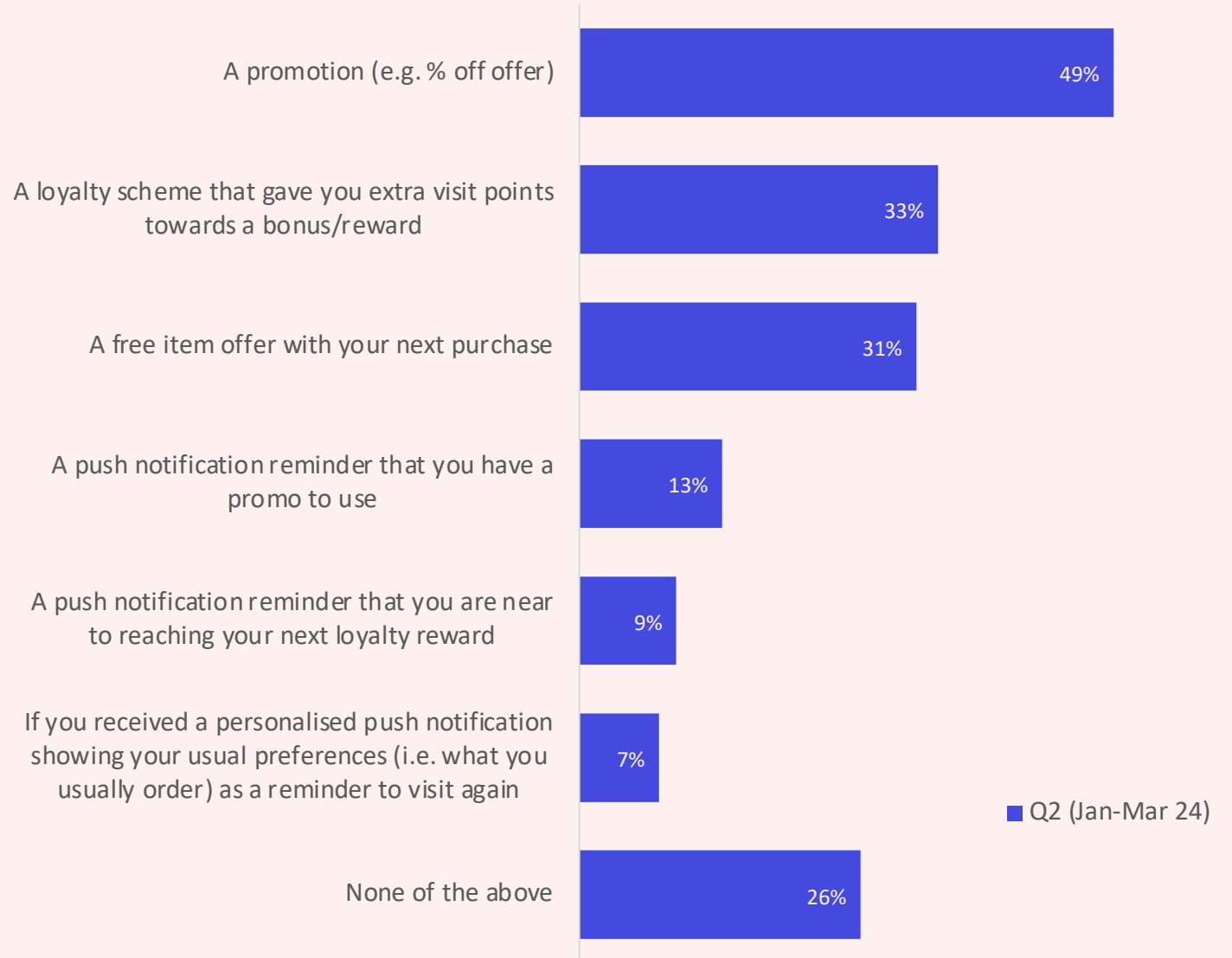
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LOYALTY

Encouraging customers to leave reviews and the role of loyalty schemes in driving footfall to venues.

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# Influencing an additional customer visit to a pub, bar or restaurant

3 in 4 customers would be influence by some type of promotion or reward, in terms of driving an incremental visit to a venue.

Q. Which of the following are most likely to influence you to add an additional visit to a venue (pub, bar or restaurant) that you regularly go to?

A promotion (e.g. % off offer) — **49%**

A loyalty scheme that gave you extra visit points towards a bonus/reward — **33%**

A free item offer with your next purchase — **31%**

A push notification reminder that you have a promo to use — **13%**

A push notification reminder that you are near to reaching your next loyalty reward — **9%**

If you received a personalised push notification showing your usual preferences (i.e. what you usually order) as a reminder to visit again — **7%**

None of the above — **26%**

■ Q2 (Jan-Mar 24)

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Customer review participation when visiting pubs, bars, and restaurants.

Breakdown, by demographic, of the % of customers who HAVE LEFT a review after visiting a pub, bar, or restaurant within the 3-month period.
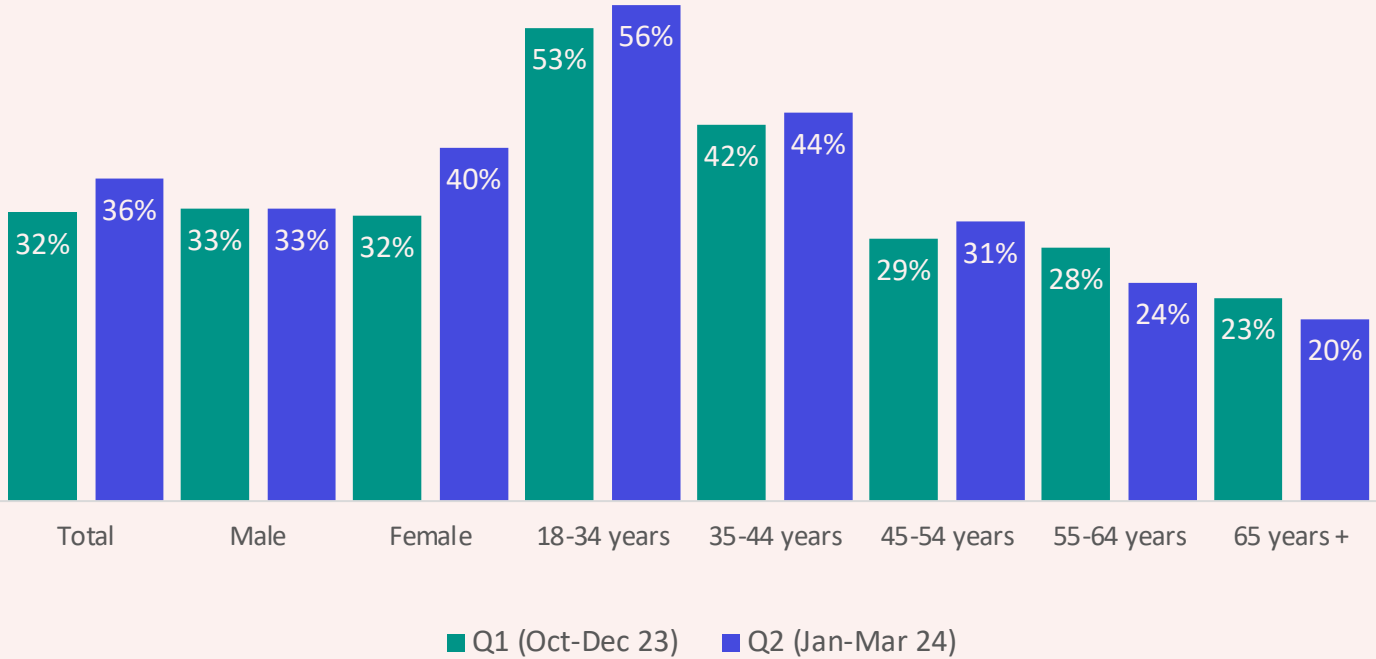
Q. Have you ever left a review of a pub, bar or restaurant that you've visited in the last 3 months?

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
Q1 (Oct-Dec 23)	32%	33%	32%	53%	42%	29%	28%	23%
Q2 (Jan-Mar 24)	36%	33%	40%	56%	44%	31%	24%	20%

■ Q1 (Oct-Dec 23)   ■ Q2 (Jan-Mar 24)

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What would encourage customers to leave reviews more regularly post-visit?

Making it as simple for the customer as possible is more important that offering rewards.

Q Would you be more likely to leave a review if...?

You could do it on your smartphone at your own convenience
- 35%
- 34%

You collected loyalty points/rewards for leaving reviews
- 31%
- 29%

You could do it on your smartphone/ a digital screen at the same time you paid your bill
- 19%
- 16%

- ■ Q2 (Jan-Mar 24)
- ■ Q1 (Oct-Dec 23)

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Current pub, bar and restaurant loyalty scheme participation.

Breakdown, by demographic, of the customers who have been part of a pub, bar or restaurant loyalty scheme in the last 3 months, for 3 month period. Participation in loyalty schemes is up from 20% to 24% since the previous quarter, driven by an increase from those in the 35-54 age range.
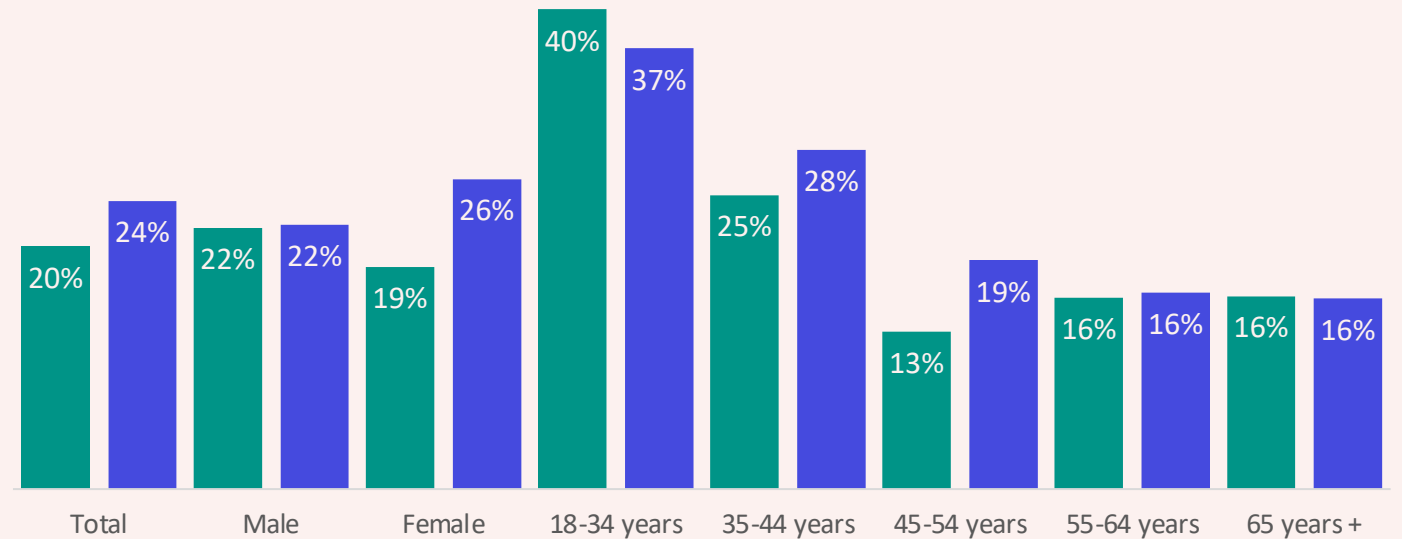
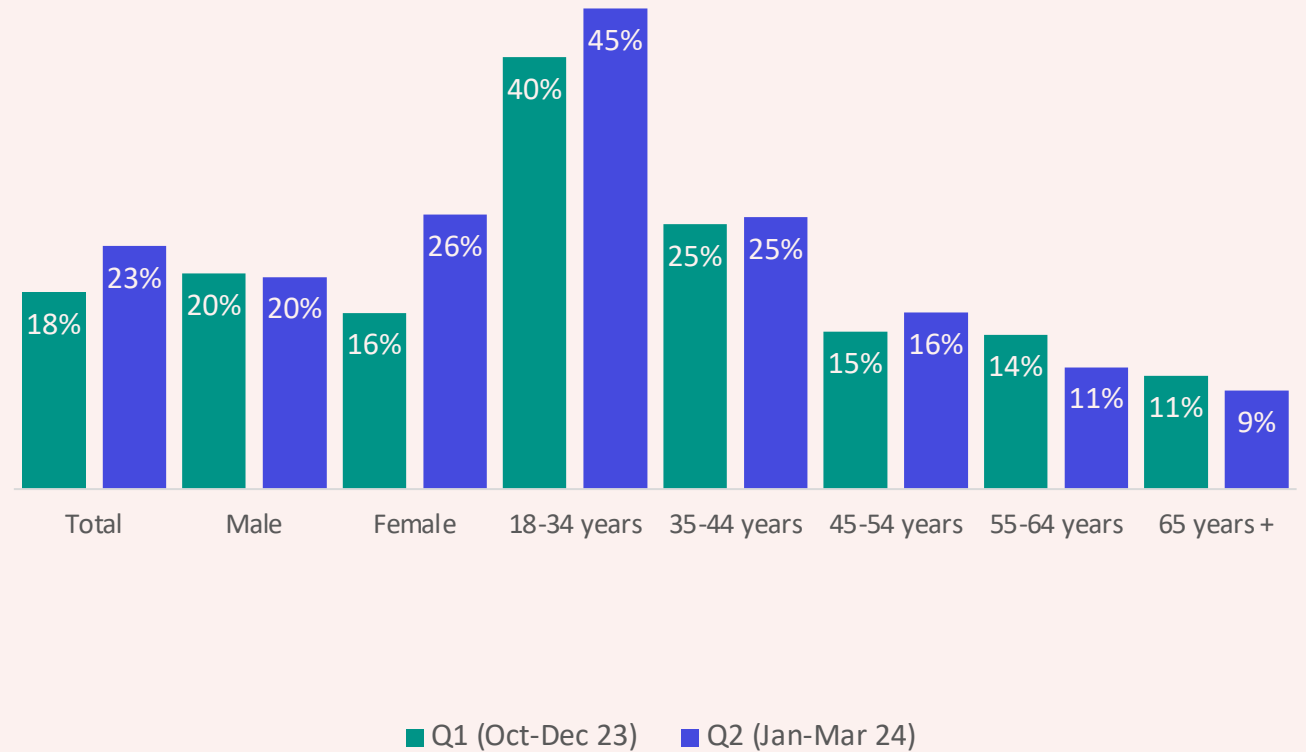Q Are you part of any pub, bar or restaurants loyalty schemes?

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
Q1 (Oct-Dec 23)	20%	22%	19%	40%	25%	13%	16%	16%
Q2 (Jan-Mar 24)	24%	22%	26%	37%	28%	19%	16%	16%

■ Q1 (Oct-Dec 23)   ■ Q2 (Jan-Mar 24)

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Has a loyalty scheme influenced a customer visit to a pub, bar or restaurant?

Breakdown, by demographic, of those customers who say they've been influenced by a loyalty scheme to visit a particular pub, bar or restaurant, in the last 3 months, for the period.

Loyalty schemes are more likely to have driven visits in the last 3 months (compared to the previous quarter), up from 18% to 23%.

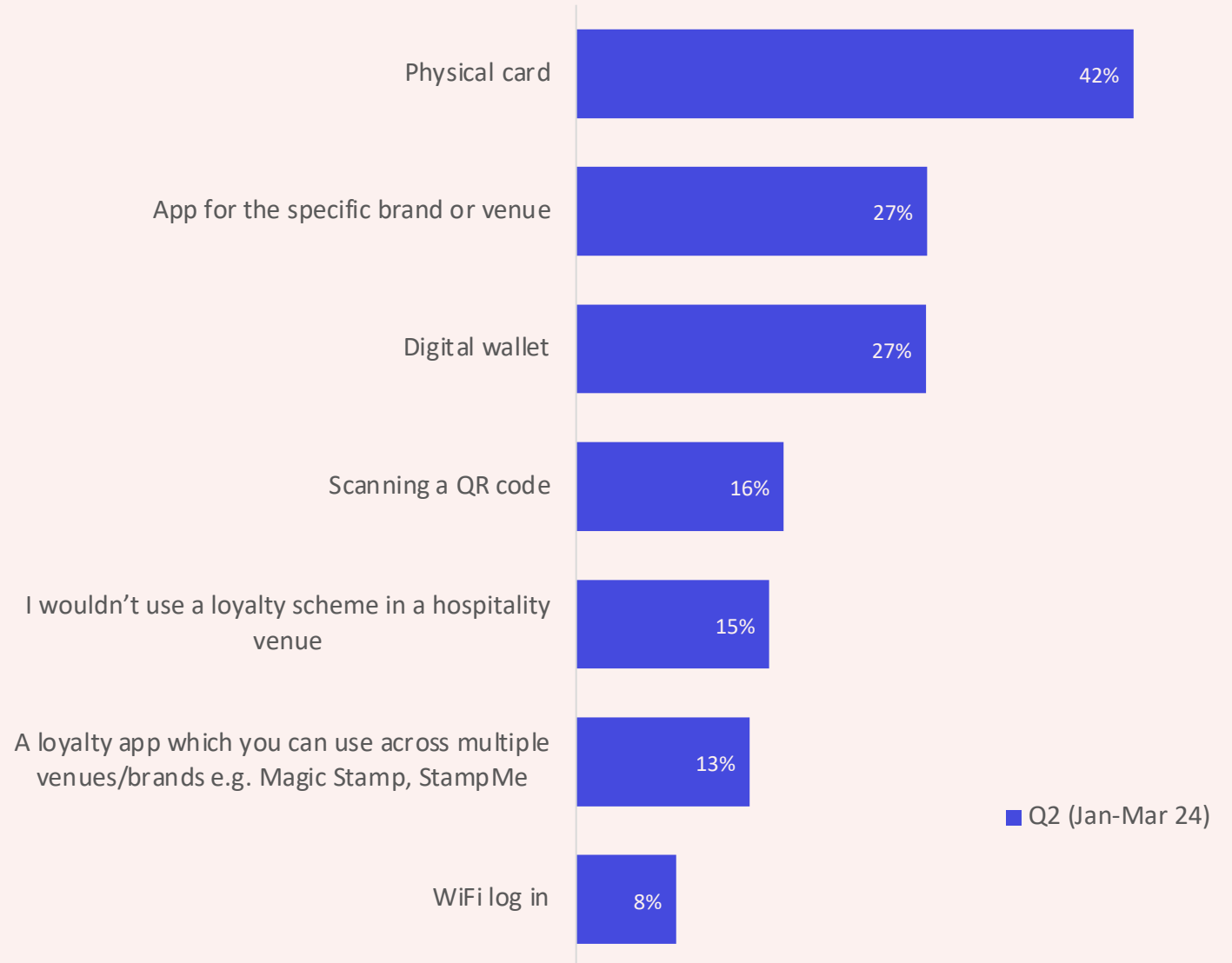Q Has a loyalty scheme influenced you to visit a specific pub, bar or restaurant in the last 3 months?

	Q1 (Oct-Dec 23)	Q2 (Jan-Mar 24)
Total	18%	23%
Male	20%	20%
Female	16%	26%
18-34 years	40%	45%
35-44 years	25%	25%
45-54 years	15%	16%
55-64 years	14%	11%
65 years +	11%	9%

The preferred method of collecting loyalty points and/or rewards.

85% of customers would use a loyalty scheme if it was available. The most popular method of collecting points and/or rewards is through a physical card, followed by apps/digital wallets.

Q. What would be your preferred method of collecting loyalty points / pounds / discounts from a pub, bar or restaurant venue, if available?

Method	Q2 (Jan-Mar 24)
Physical card	42%
App for the specific brand or venue	27%
Digital wallet	27%
Scanning a QR code	16%
I wouldn't use a loyalty scheme in a hospitality venue	15%
A loyalty app which you can use across multiple venues/brands e.g. Magic Stamp, StampMe	13%
WiFi log in	8%

■ Q2 (Jan-Mar 24)

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BENEFITS OF GETTING LOYALTY SCHEMES RIGHT FOR THE CUSTOMER.

If pubs, bars and restaurants improved their loyalty schemes, in the next 3 months, do you think it would influence you to do any of the following?

VISIT MORE	SPEND MORE	STAY MORE	LOYALTY	ENGAGEMENT
41% would visit more often.	21% would spend more per visit.	17% would stay longer.	23% would be more likely to return.	19% would recommend to others.
Up from 39% in Q1.	Up from 19% in Q1.	Up from 12% in Q1.	Down from 27% in Q1.	Up from 17% in Q1.

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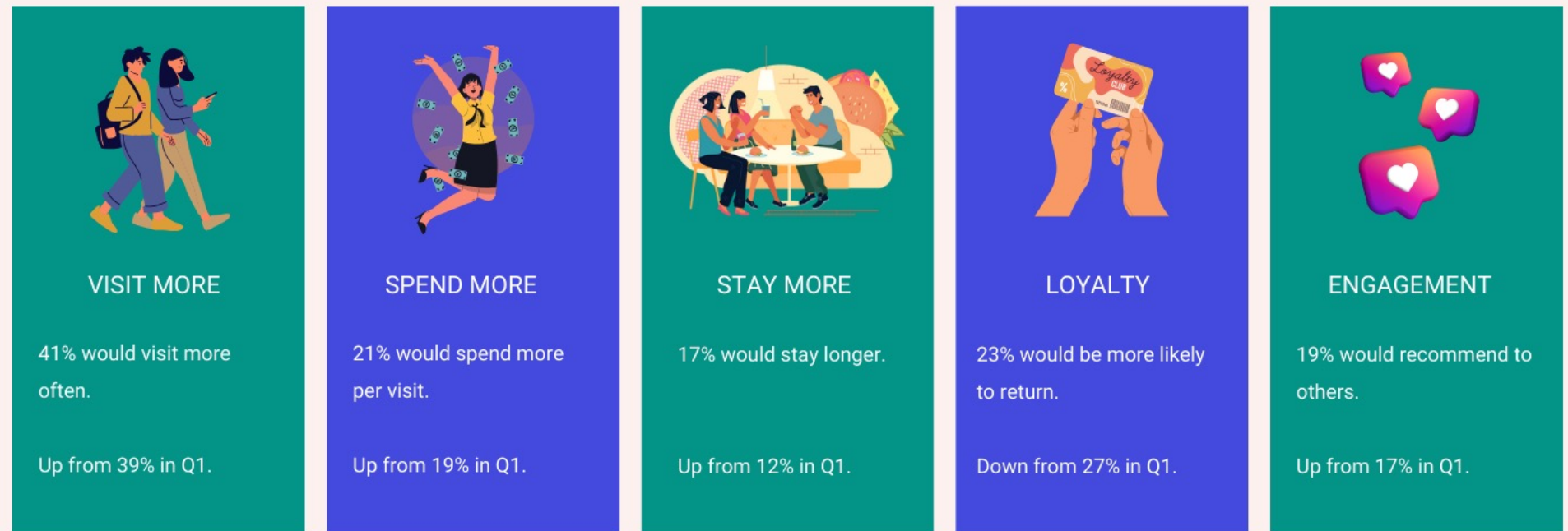
Loyalty

- 24% of customers currently participate in a pub, bar or restaurant loyalty scheme, for the period of Jan-Mar 24, compared to 20% in the previous quarter.

- A loyalty scheme has influenced 23% of customers to visit a particular pub, bar or restaurant in the last 3 months. This is up from 18% in the previous quarter.

- 36% of customers left a review after visiting a pub, bar or restaurant in the last 3 months, up from 32% in the previous quarter. They would be more encouraged to leave reviews if they could do it on their smartphone at their own convenience, and if they could receive loyalty points/rewards for leaving reviews.

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Summary

Which influences have been most impactful, and which in-venue tools have been most effective in the last 3 months?

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The customer influences that have been most impactful on in-venue behaviour

This data shows the ranking in order of which are most likely to influence what they choose to order, with 1 being the most influential.

Q When your in a pub, bar or restaurant, please rank the following in order of which are most likely to influence what you choose to order?

Category	Q1	Q2
The occasion (what I'm here for)	1	1
Need state (what I want)	2	2
Who I'm with	3	3
Budget (how much I have to spend)	4	4
Time (how long I can / I want to spend here)	5	5
Where I've been before / where I'm going after	6	6

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24)

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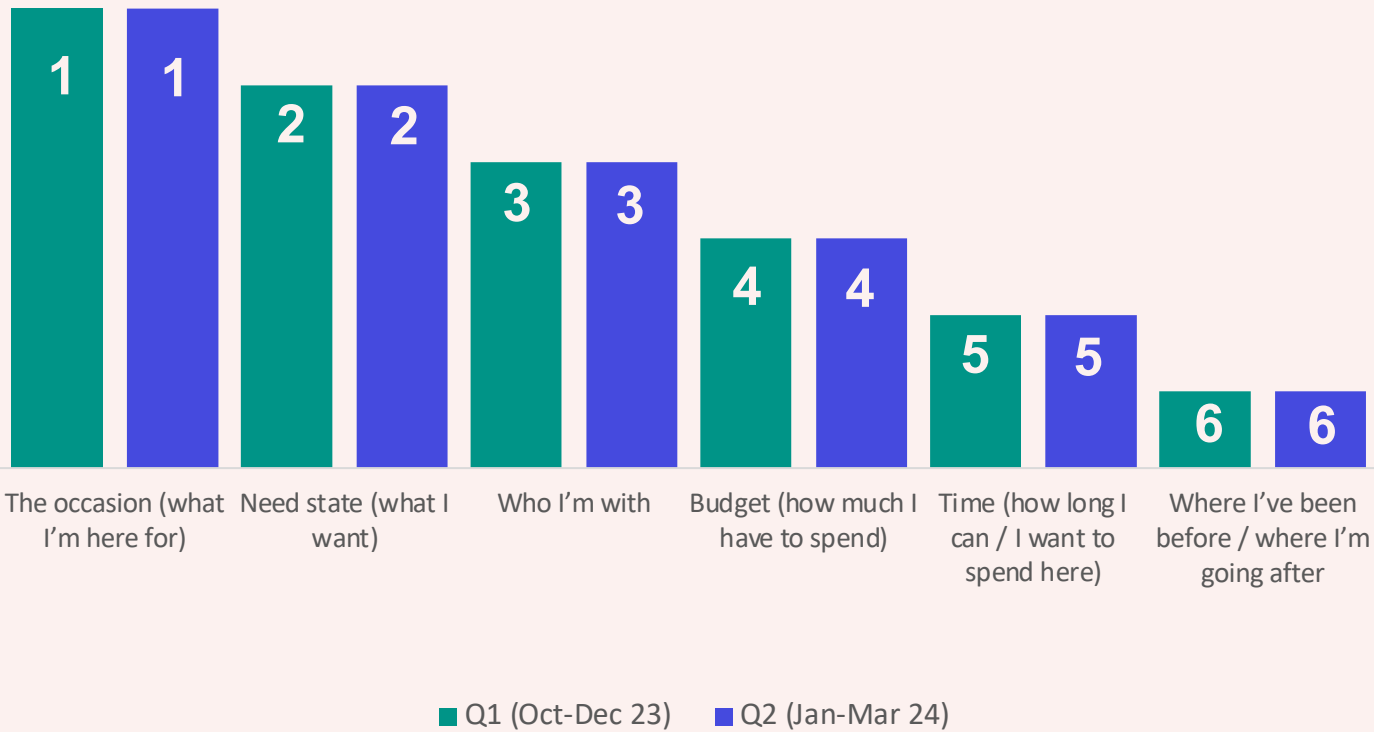
The in-venue tools that have been most effective in driving customer interactions.

This data shows the ranking, in order, of the tools that have been most effective in driving visit frequency, spend, dwell time, loyalty and engagement. The % shown is those that would be influenced to some degree by that particular tool.

	Menus	Staff	Loyalty Scheme	POS	Tech
Q1 (Oct-Dec 23)	73%	71%	63%	41%	35%
Q2 (Jan-Mar 24)	74%	71%	66%	49%	45%

■ Q1 (Oct-Dec 23)   ■ Q2 (Jan-Mar 24)
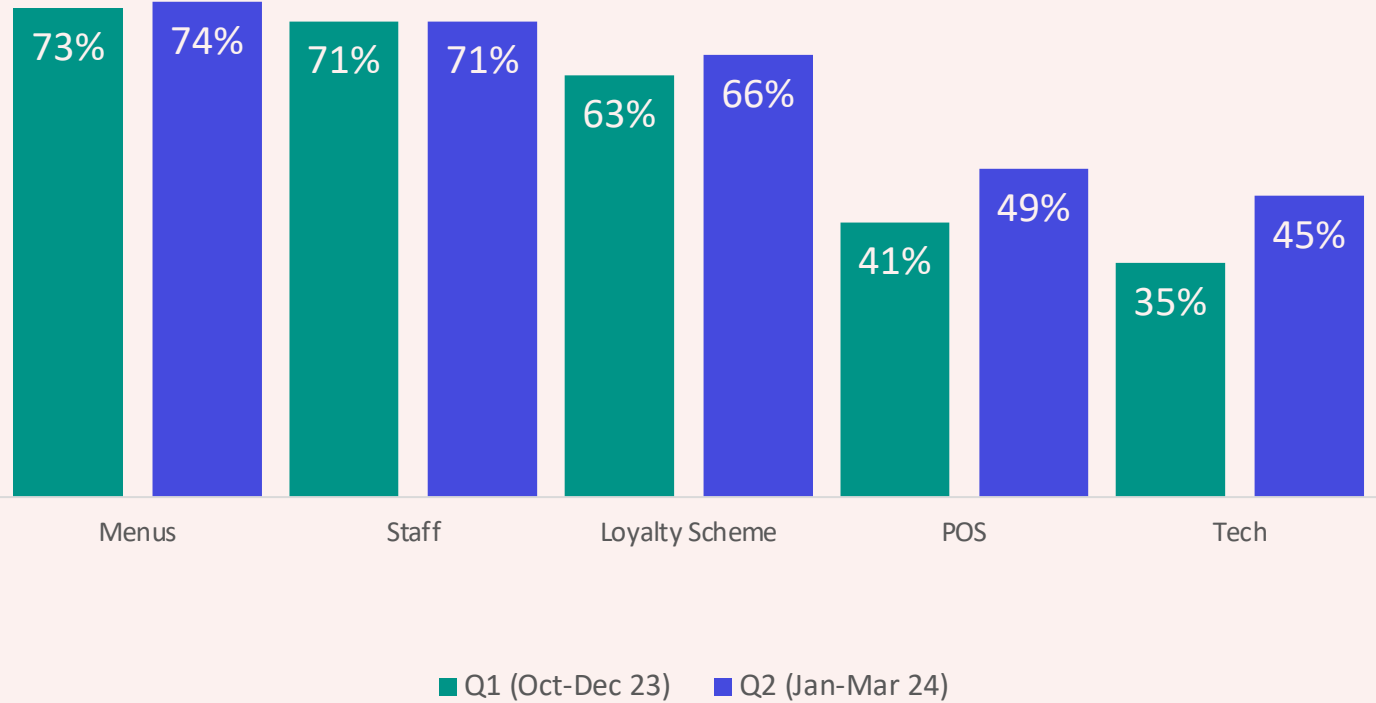
Q If pubs, bars and restaurants improved their xxx, in the next 3 months, do you think it would influence you to do any of the following? (visit more, spend more money, spend more time, make a return visit, share your experience)

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- The average UK adult (+18), claimed they visited a pub, bar, or restaurant, for food and/or drinks, 5.8 times/per month in the period Jan-Mar 2024. An increase from 4.8 times in the previous quarter. With higher visit frequency for males, 18-34s and 55-64s compared to the previous 3-month period.

- Friday and Saturday are the most popular days of the week. We see both Weds and Thursday also being popular with 55+, and Monday being most popular with 18-34s.

- Customers' main motivation, when in venue, for the past 3 months has been the occasion which they are there for, followed by need state and party composition.

- Drinks with friends and family and dinner (Friday-Saturday) have been the most popular occasions. A leisurely lunch has dropped in frequency as an occasion, down from 2nd to 3rd, most popular, compared to the previous period.).

- Menus have been the most impactful in-venue tool of the the last 3 months (period between Jan-Mar 24), with customers telling us that if pubs, bars and restaurants improved their food and drink menus it would encourage 34% of them to visit more often and 23% to spend more per visit. 28% would also be more likely to come back for a repeat visit and it would encourage 20% of those we spoke to to talk about the venue/recommend it to their friends, family and social media followers. Staff have also been very effective in this period. We've also seen an increase in the effectiveness of both loyalty schemes, POS and technology in driving customer interactions since the last quarter.

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PLAN TO PLATE

How hospitality brands and

operators can interrupt, engage and

influence the customer journey

Volume 2| Jan - Mar 24