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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 3 | Apr - June 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 June 2024. Analysing consumer behaviour for the period Apr - June 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)

Jun
Latest wave of research conducted

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

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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.

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

Executive summary.

“ Data from the latest quarterly release of PLAN TO PLATE shows that consumer confidence has fallen since March. This has had a short-term impact, with 44% of consumers saying that they’ve consciously tried to spend less money when out in pubs, bars and restaurants, and a further 1-in-4 saying that they have been choosing cheaper food/drink items and buying fewer drinks than normal. Price has clearly become a bigger driver of behaviour over the last 3 months.

As well as drivers, we also capture consumer pain points. Speed of service (taking too long for someone to take an order and then also taking too long for said orders to arrive) would appear to have been causing the biggest frustrations with consumers visiting pubs, bars and restaurants in the last 3 months.

As nearly 3-in-4 visitors to UK pubs, bars and restaurants make up their purchasing decisions when they get to the venue, understanding the key areas for customer engagement are crucial in ensuring venues (and brands) can maximise the revenue opportunities for each customer who comes through the door. Within our research we’ve identified four key tools that are at our disposal: point of sale, staff, menus and technology. For each of these tools we track and quantify the benefits, each quarter. Namely to what extent they will make your customers visit more, spend more, stay longer, be more loyal and be more vocal about your brand through socials. For example, 24% of customers said they would have visited pubs, bars and restaurants more often, in the last 3 months, if the food & drinks menus were improved.

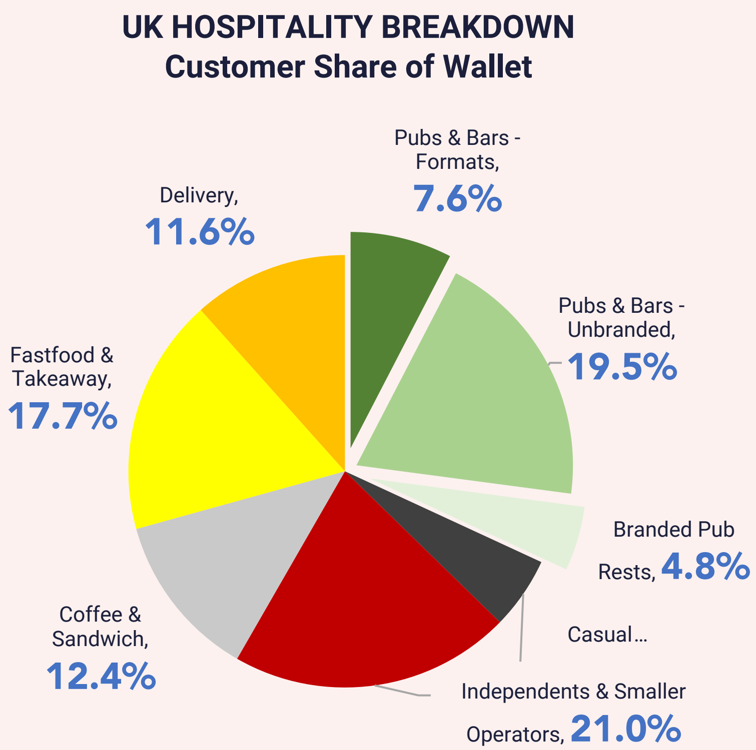
Loyalty remains a key metric for many operators. 27% of customers currently participate in a pub, bar or restaurant loyalty scheme, for the period of Apr-Jun 24, compared to 24% and 20% in the previous two quarter, respectively. Not only are they becoming more prominent, but loyalty schemes are also becoming more influential. A loyalty scheme has influenced 27% of customers to visit a particular pub, bar or restaurant in the last 3 months. This is up from 23% and 18% in the previous two quarters, respectively.

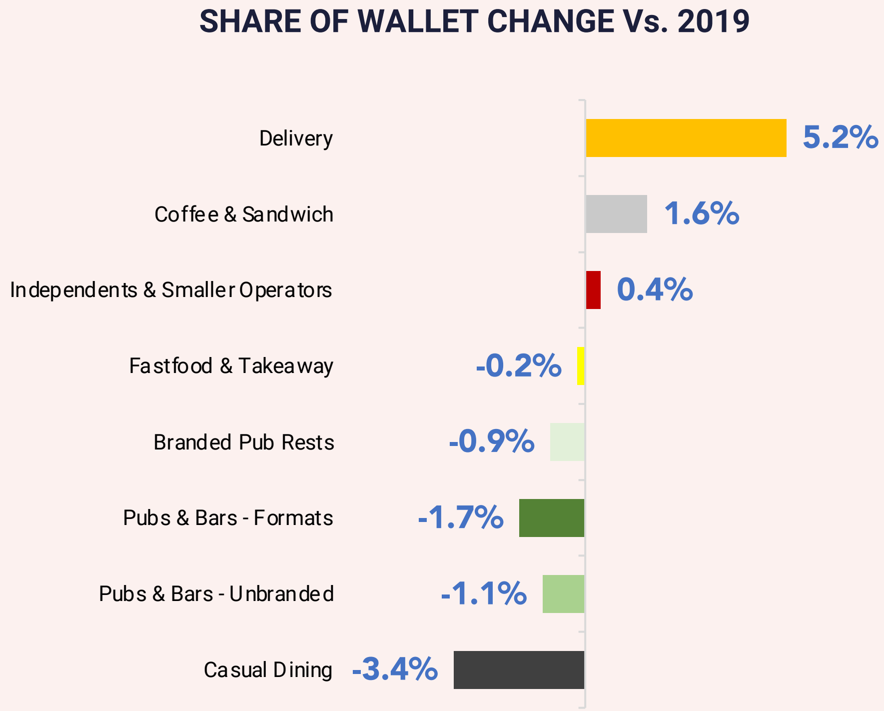
Blake Gladman, Strategy & Insight Director, KAM

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

The changing shape of UK hospitality.

We've seen some significant changes in the UK Hospitality landscape over the last 5 years, with Delivery and Coffee & Sandwich being notable winners. Pubs & Bars have seen their share contract, but continue to be the biggest sector delivering c.1/3 of spend overall…





Source: HDI Panel, Customer Share of Wallet by Sector of UK Hospitality, 12 weeks ending 11/6/24 and % change versus 2019

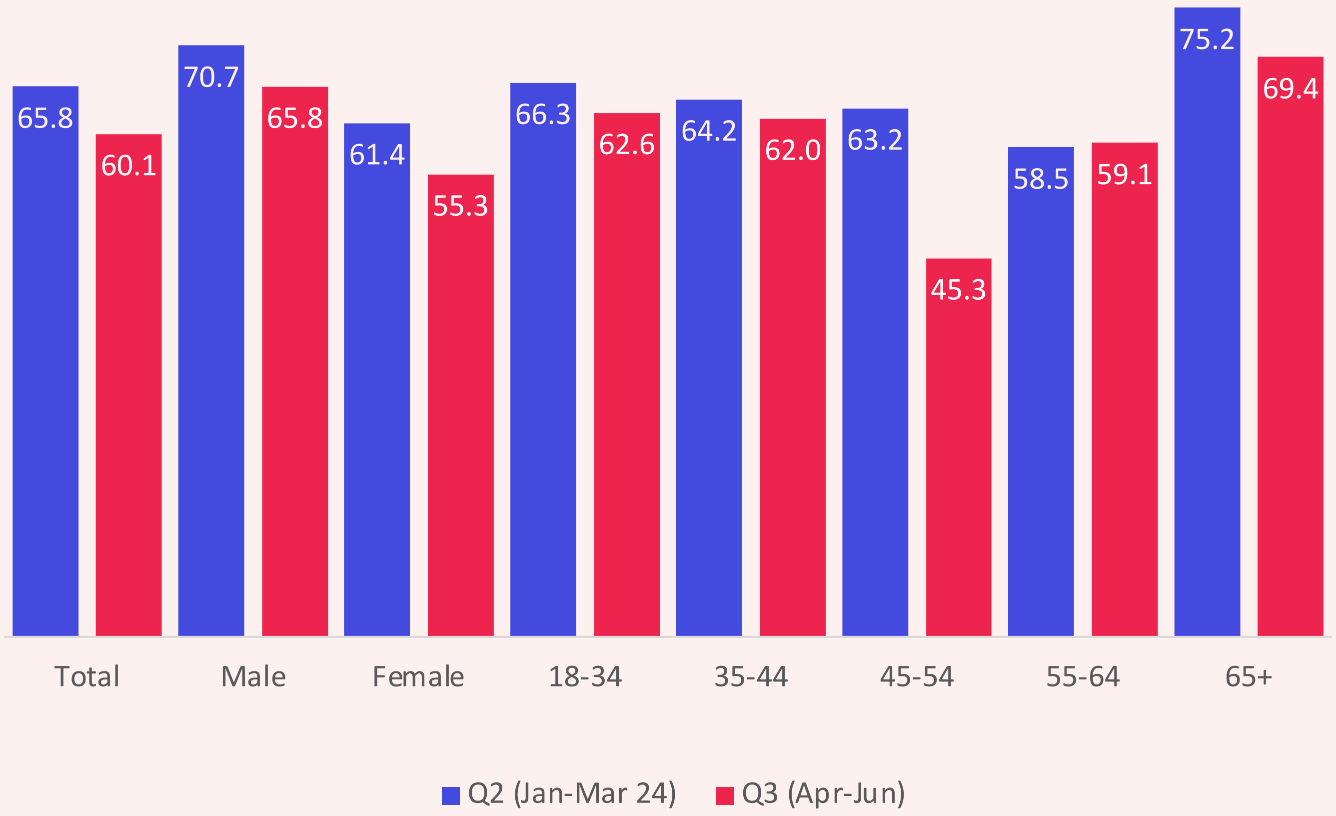
KAM Hospitality Consumer Confidence Index.

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.



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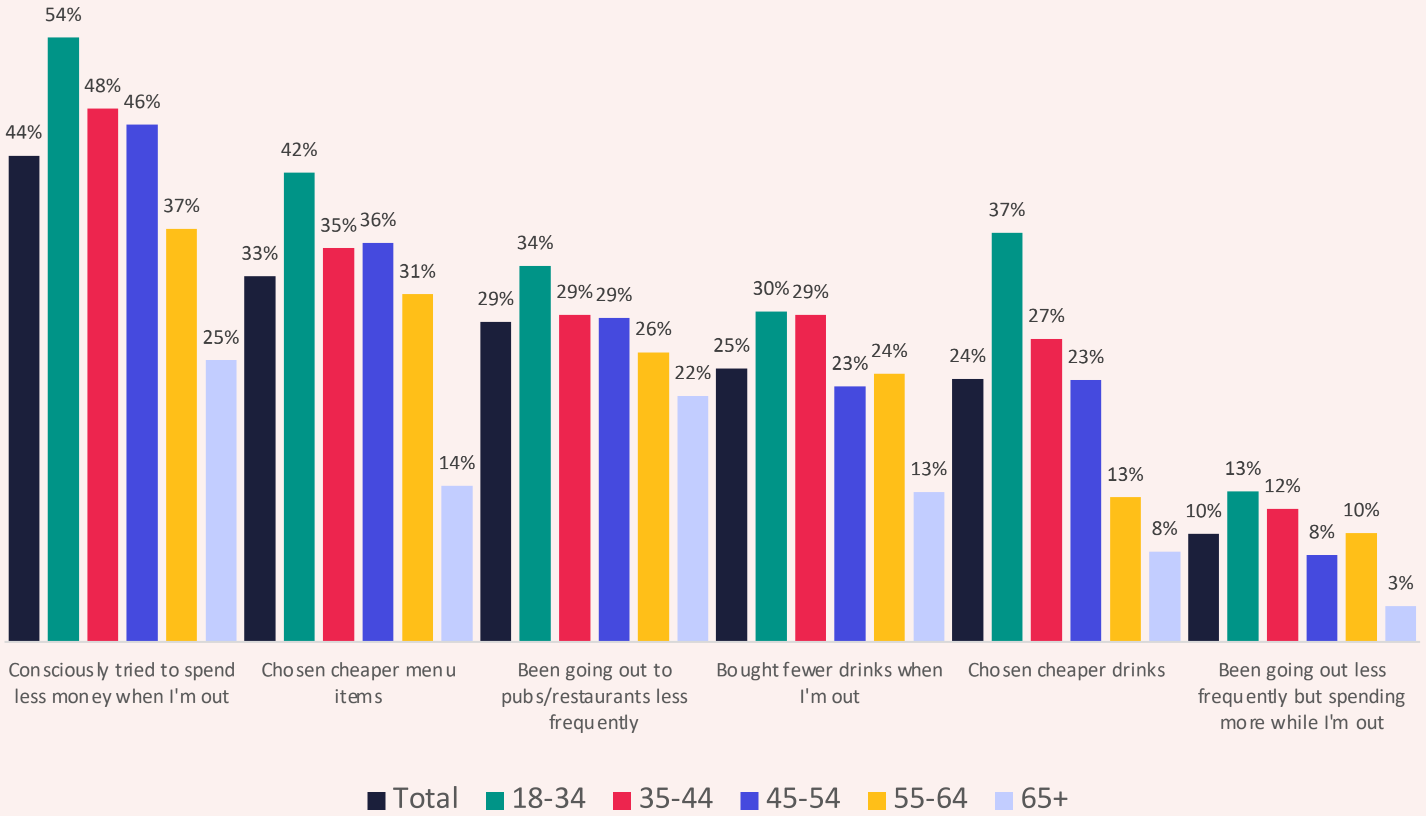
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

Short-term changes in consumer behaviours.

Have the recent rises in costs meant that UK consumers have made any short-term changes when visiting pubs/restaurants in the last 3 months?

Price has clearly become a bigger driver of behaviour over the last 3 months, with nearly half of those surveyed saying they've consciously tried to spend less money when they're out, and 1-in-3/1-in-4 saying they are choosing cheaper food and/or drink items as a direct result.



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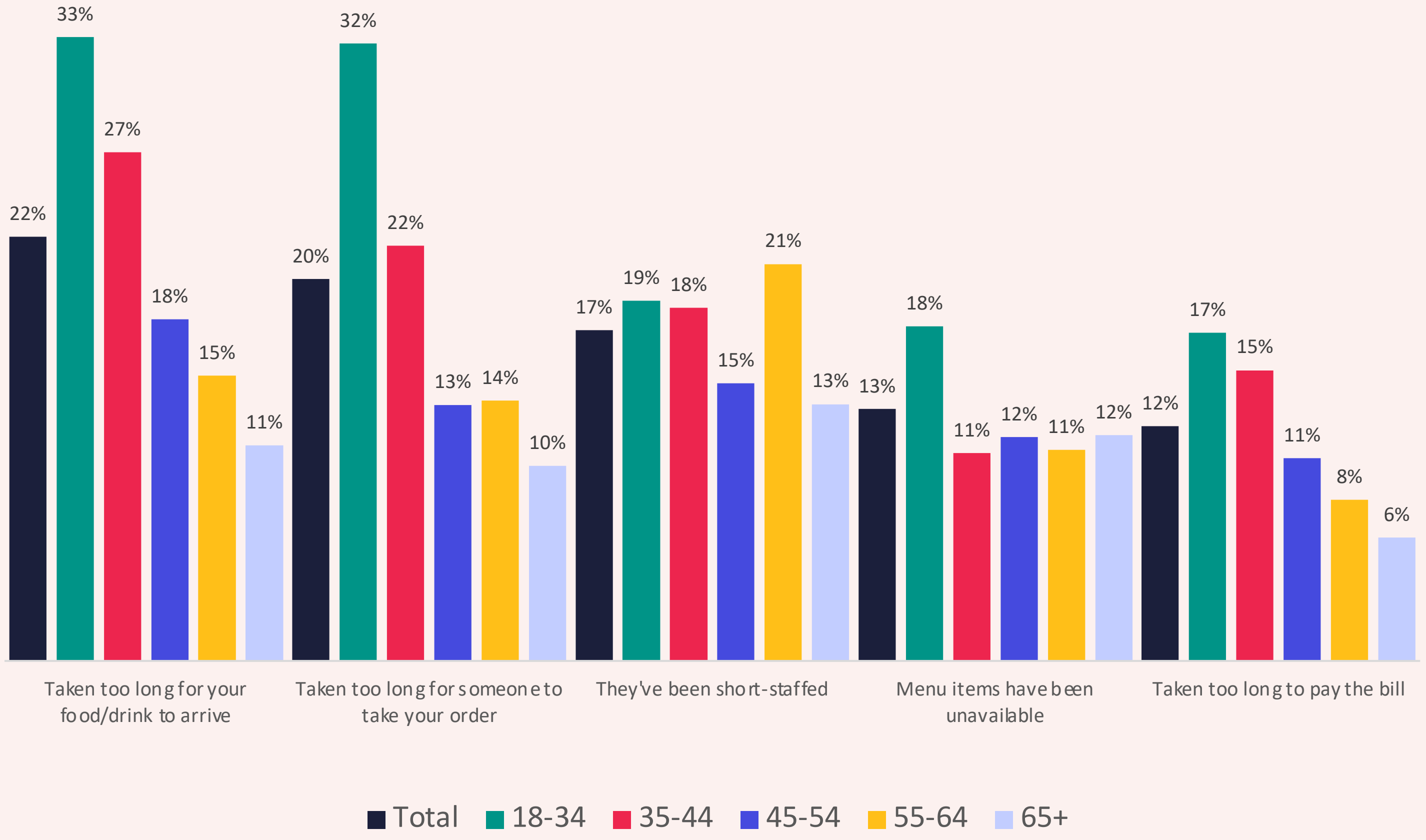
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

Consumers' hospitality pain points in the last 3 months.

Which of the following have happened to consumers when visiting a restaurant or pub/bar in the last three months?

Speed of service (taking too long for someone to take an order and then also taking too long for said orders to arrive) appears to have been causing the biggest frustrations with consumers visiting pubs, bars and restaurants in the last 3 months.



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

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PLAN TO PLATE.

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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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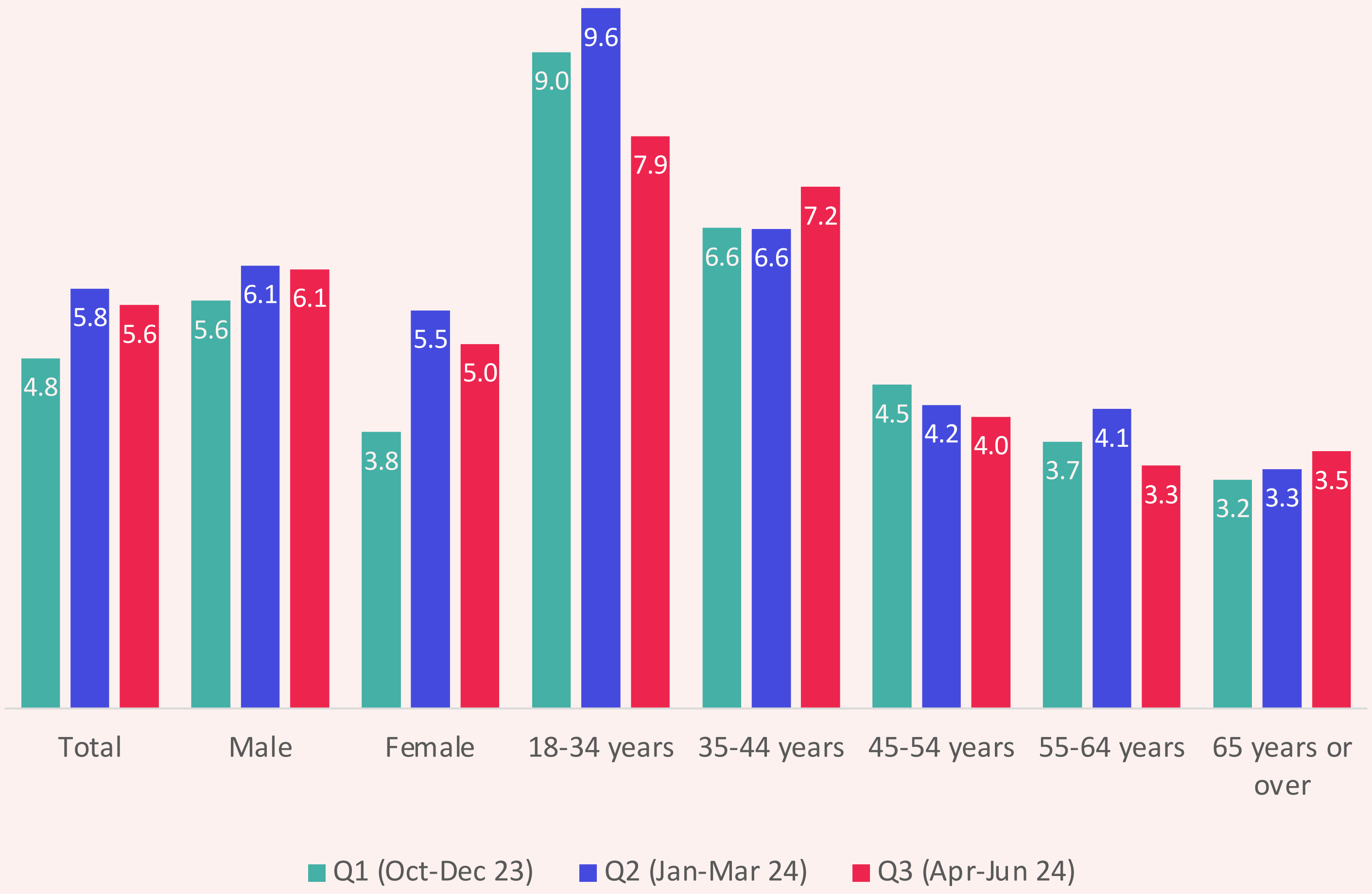
Visit frequency to UK pubs, bars and restaurants.

Average visit frequency per month

The average UK adult (+18), visited a pub, bar, or restaurant, for food and/or drinks, 5.6 times per month, for the period Apr-Jun, with highest visit frequency for males and 18-34s. However, 18-34s have seen a decrease vs the previous 3-month period and there has been an increase for 35-44s.

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



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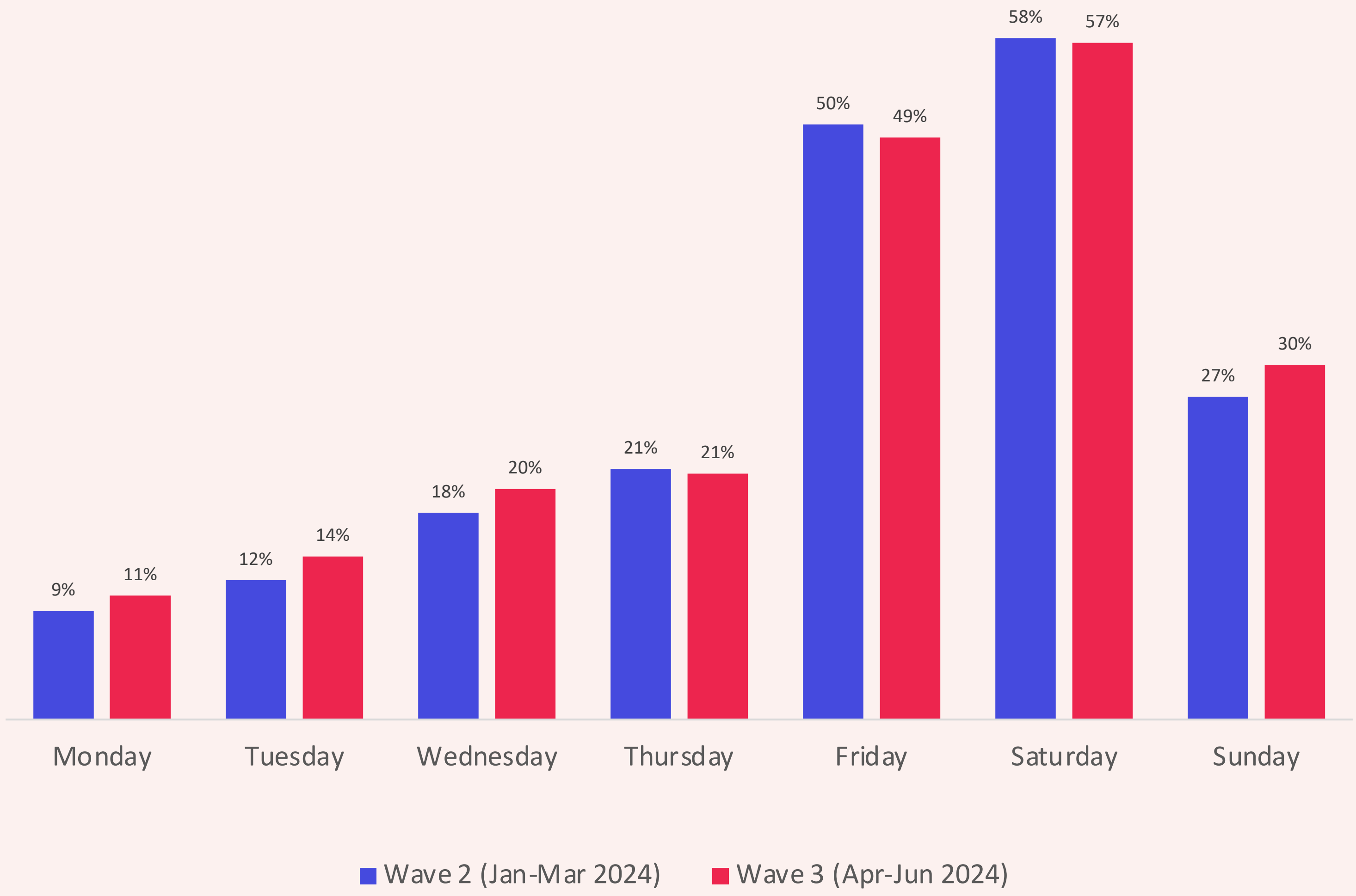
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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

Friday and Saturday are the most popular days of the week. There has been little change as we move into the warmer months although Sunday has become slightly more prominent. We see the weekdays also being popular with 55+ and Friday particularly popular with 18-34s.

Q. What day(s) of the week do you most go out to eat / drink at a pub, bar or restaurant?



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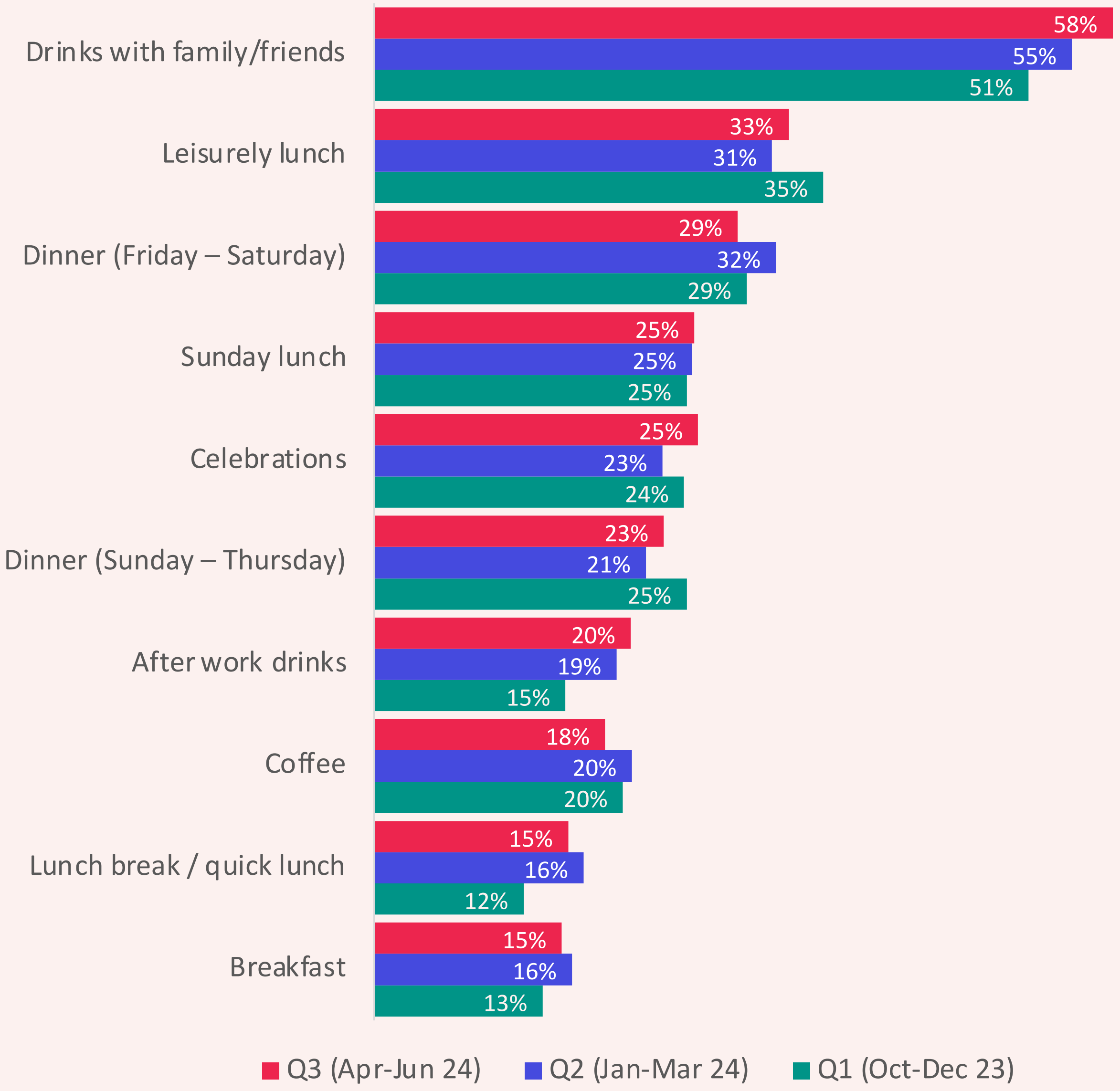
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

Top occasions for visiting pubs, bars and restaurants.

These are the top 10 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 previously been the most popular occasions, but a leisurely lunch has increased from 3rd to 2nd as the most popular occasions 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?

Just top 10 shown, for full breakdown please refer to online dashboard

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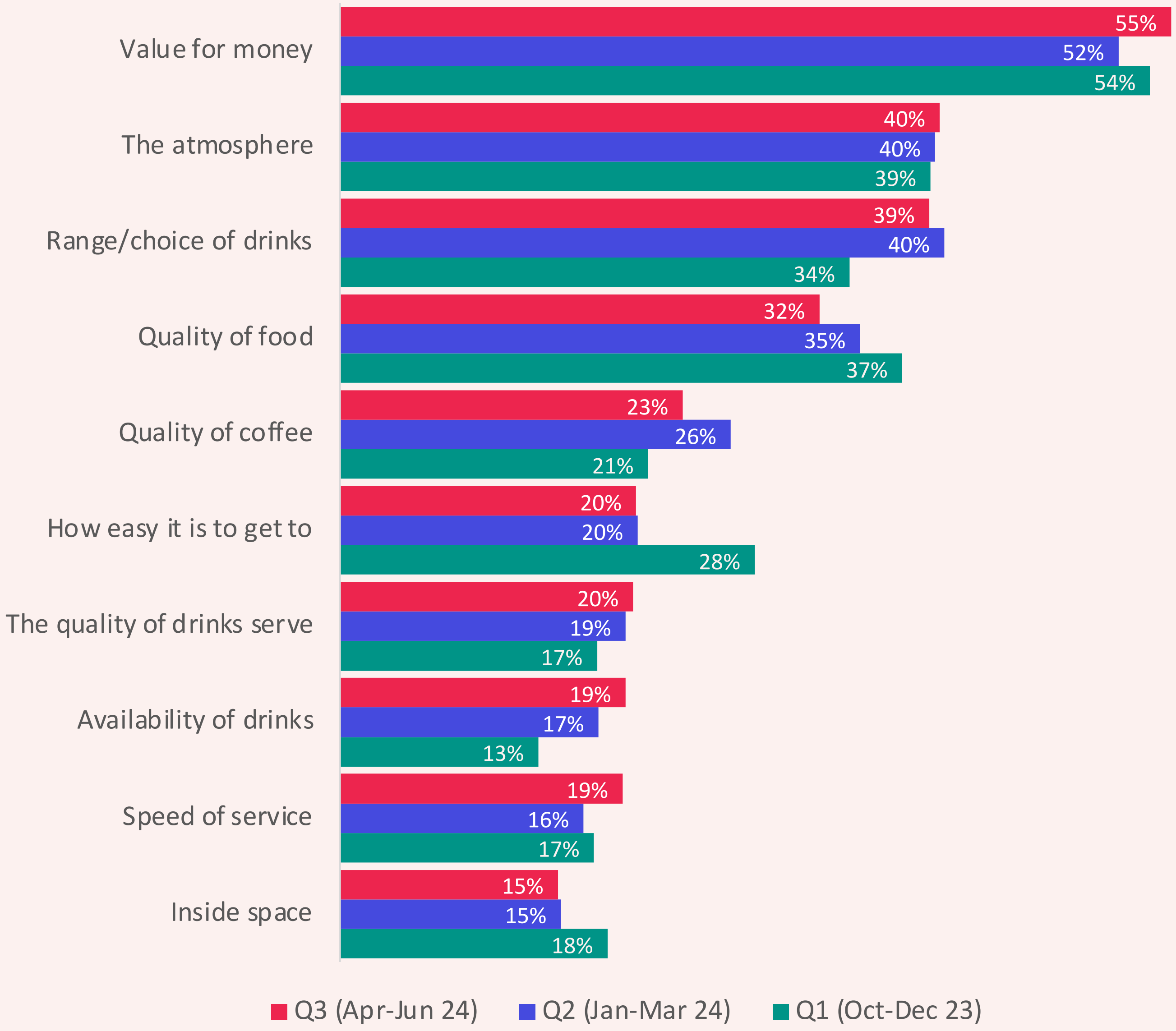
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

Most important factors when choosing where to go for ‘drinks’.

These are the top 10 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 by some distance. The quality of food as a factor when going out for drinks dropped once again, potentially as people are more likely to go out for only drinks. Demand for low & no options, although not in the top 10, continues to increase. Quality of coffee also dropped, perhaps driven by seasonal demand.

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

Just top 10 shown, for full breakdown please refer to online dashboard



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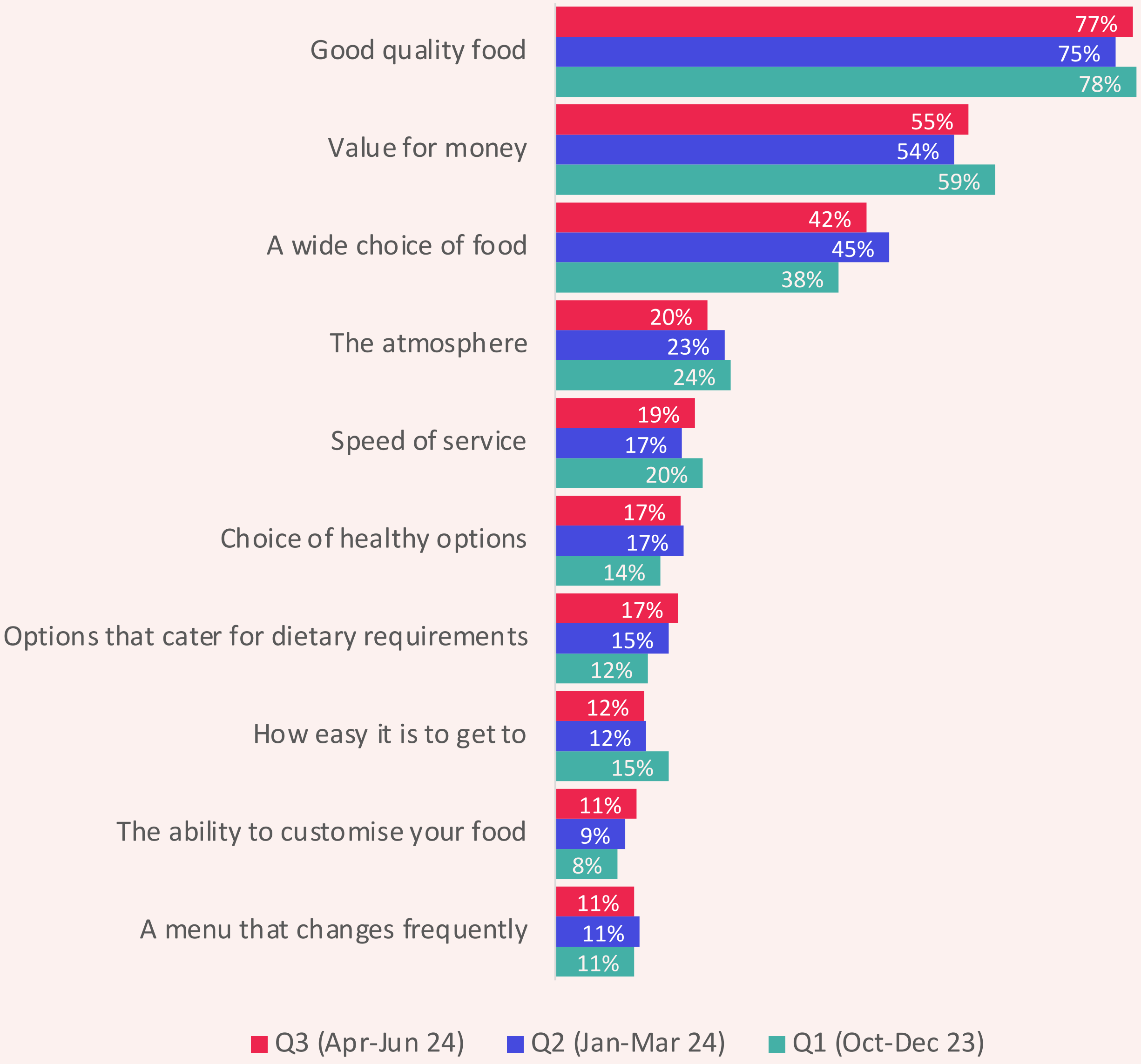
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

Most important factors when choosing where to go for ‘food’.

These are the top 10 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. Once again, there is an increase in importance of dishes that cater for dietary needs and healthier options are still higher than at the end of 2023, suggesting that customers are increasingly looking for hospitality venues to help them change their eating habits.

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

Just top 10 shown, for full breakdown please refer to online dashboard



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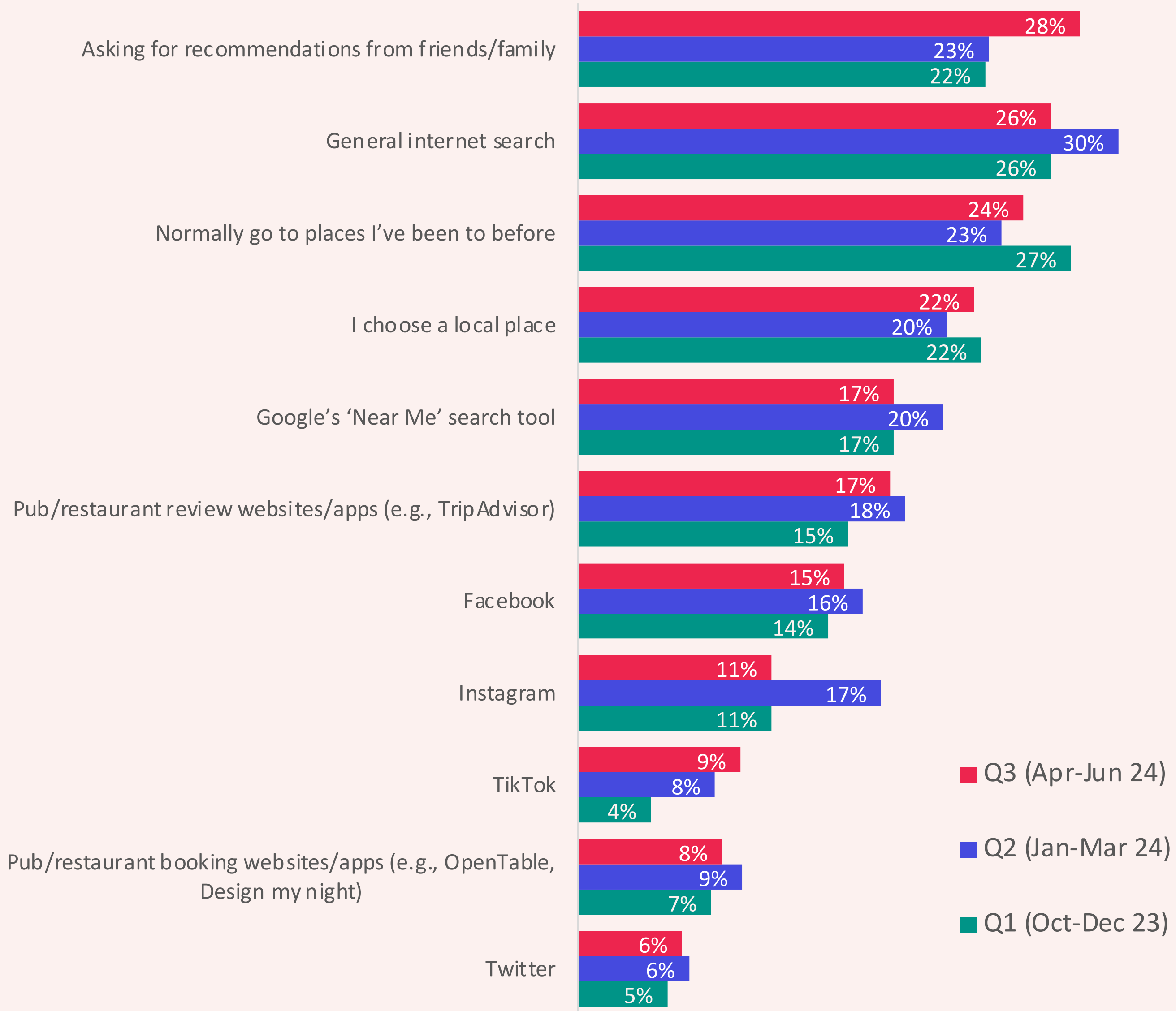
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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?

Recommendations from friends and family was the biggest riser from Q2 to Q3, becoming the most used source of information, surpassing 'general internet search'. Instagram declined considerably back to Q1 levels while TikTok grew once again, perhaps indicating a shift in the importance of certain social media channels.

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?



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

Evaluation

- The average UK adult (+18), claimed they visited a pub, bar, or restaurant, for food and/or drinks, 5.6 times/per month in the period Apr-Jun 2024. A decrease from 5.8 times in the previous quarter, with only higher visit frequency for 35-44s and 65+s compared to the previous 3-month period.

- Drinks with friends and family remains the most popular occasion, with leisurely lunch surpassing dinner (Friday-Saturday) as the next most popular occasion. While dinner (Friday-Saturday) dropped 3pts, dinner (Sunday – Thursday) increased 4pts.

- Value for money was number 1 in the decision hierarchy by some distance. The quality of food as a factor when going out for drinks dropped once again, potentially as people are more likely to go out for only drinks. Demand for low & no options, although not in the top 10, continues to increase. Quality of coffee also dropped, perhaps driven by seasonal demand.

- Quality is, by far, the number one driver for choice of venue when eating out. Once again, there is an increase in importance of dishes that cater for dietary needs and healthier options are still higher than at the end of 2023, suggesting that customers are increasingly looking for hospitality venues to help them change their habits.

- Recommendations from friends and family was the biggest riser from Q2 to Q3, becoming the most used source of information, surpassing 'general internet search'. Instagram declined considerably back to Q1 levels while TikTok grew once again, perhaps indicating a shift in the importance of certain social media channels.

Influences

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

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

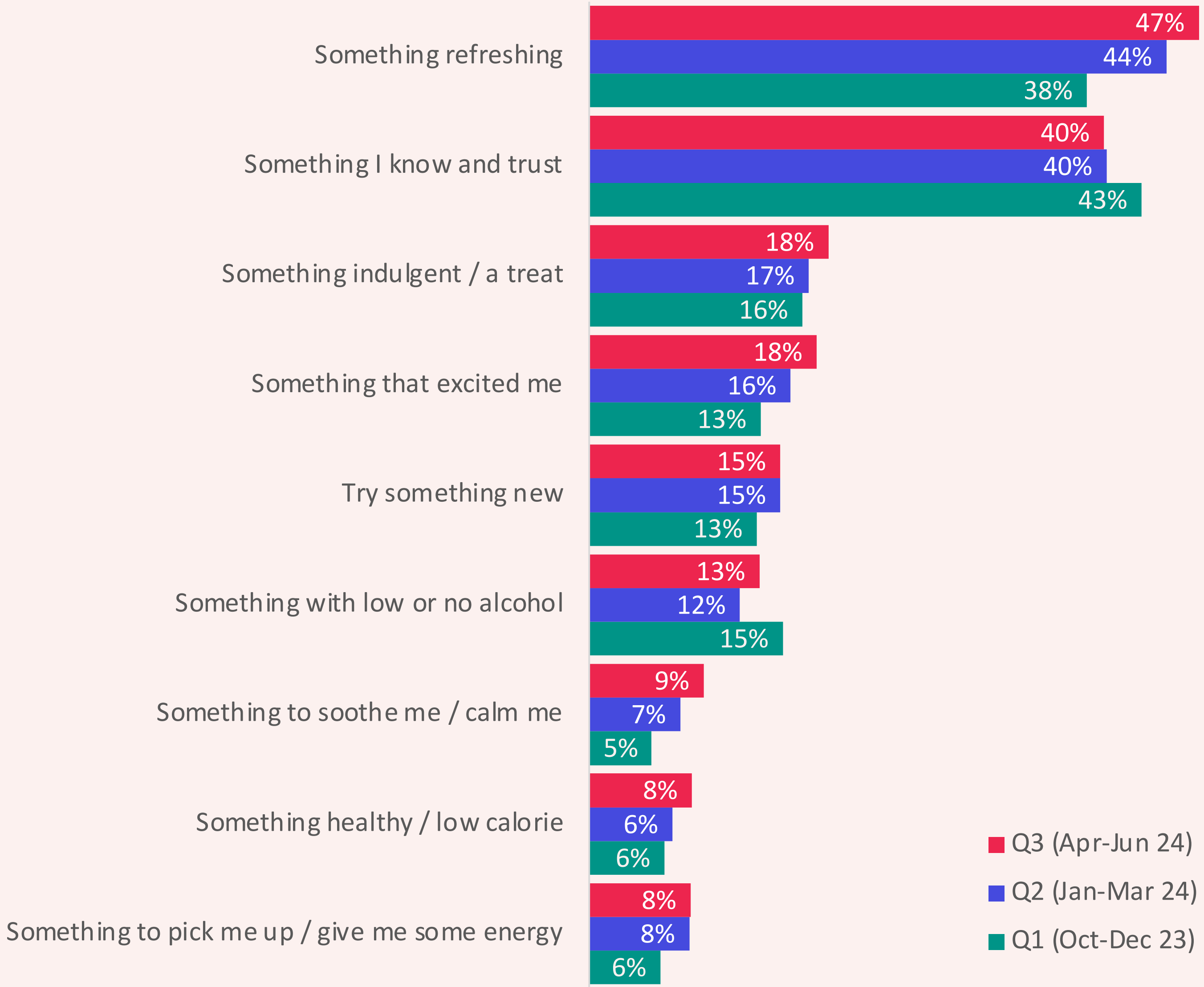
What do I want (food and/or drink) and what needs am I attempting to satisfy?

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' continues to be the top influencing factor for this current period, presumably due to the slightly warmer weather.

Functional elements to drinks that give energy, soothe or are lower in calories have all grown in importance.



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

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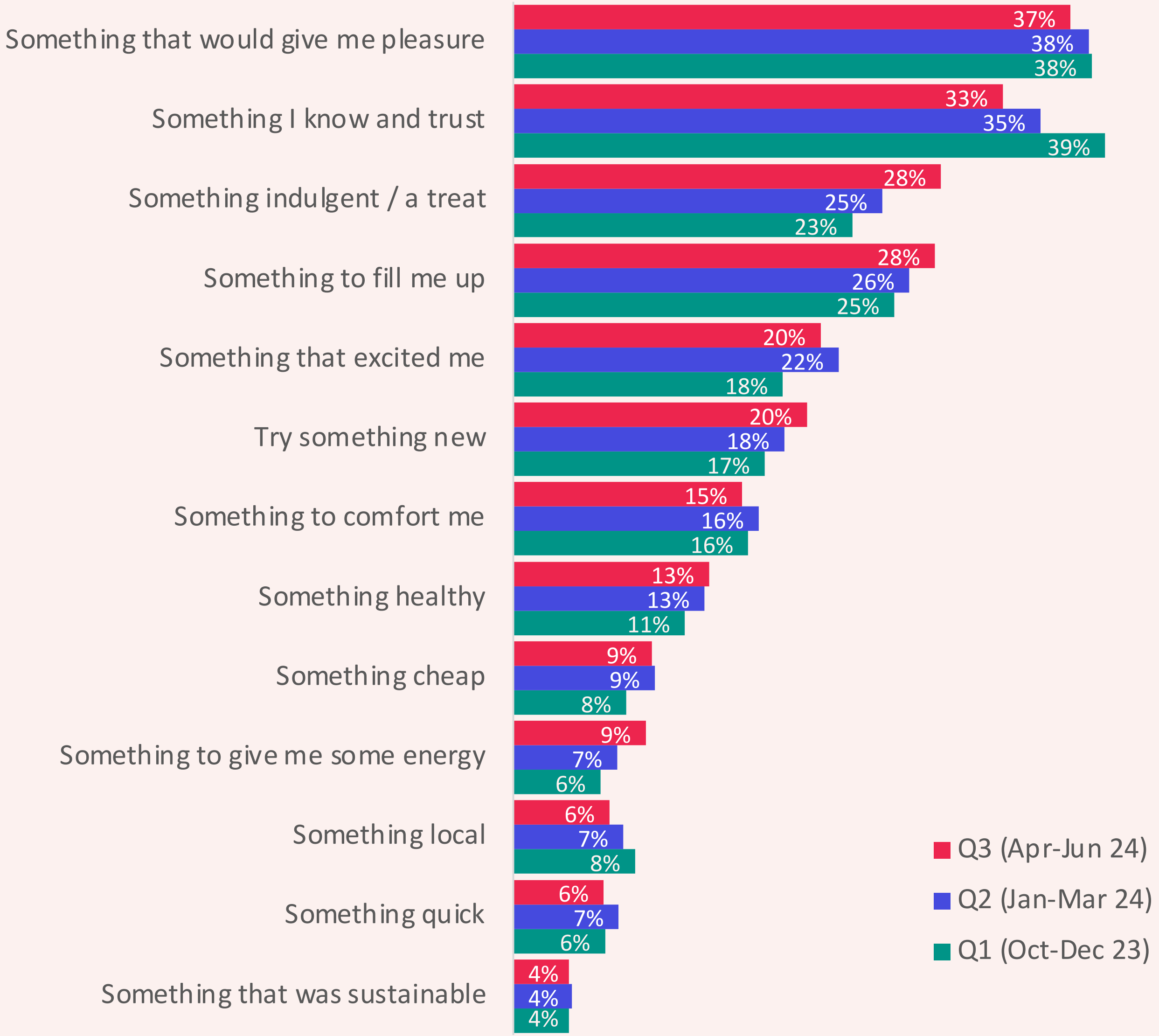
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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’ remains no.1. ‘Something I know and trust’ drops for consecutive periods while ‘try something new’ increases for a consecutive period, suggesting people are becoming more adventurous when ordering food- or at least want something they wouldn’t cook at home

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?



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

BUDGET

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

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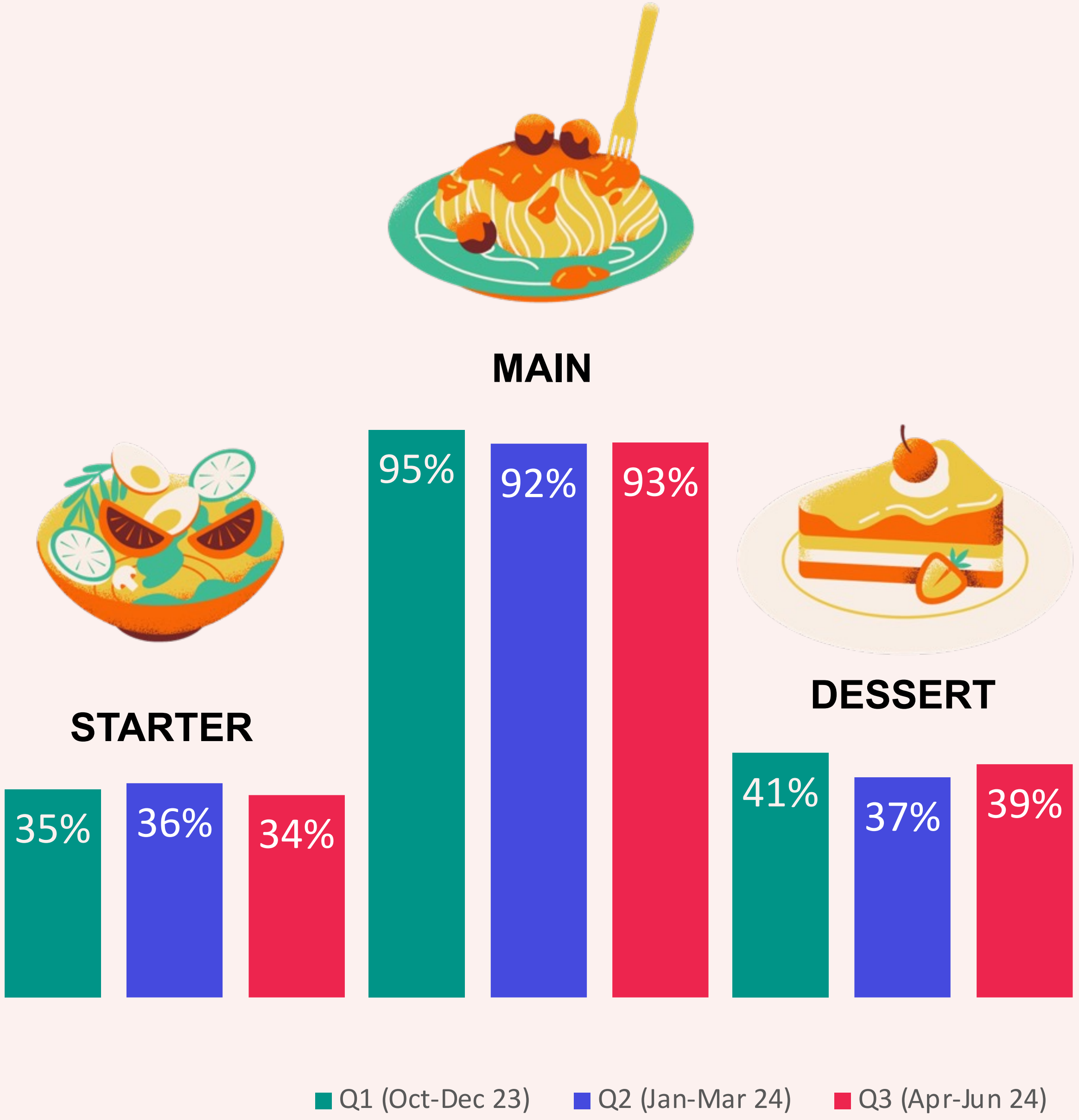
Number of courses customers are ordering when dining in pubs, bars and restaurants.

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 increased to 1.7 (compared to 1.6 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?

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

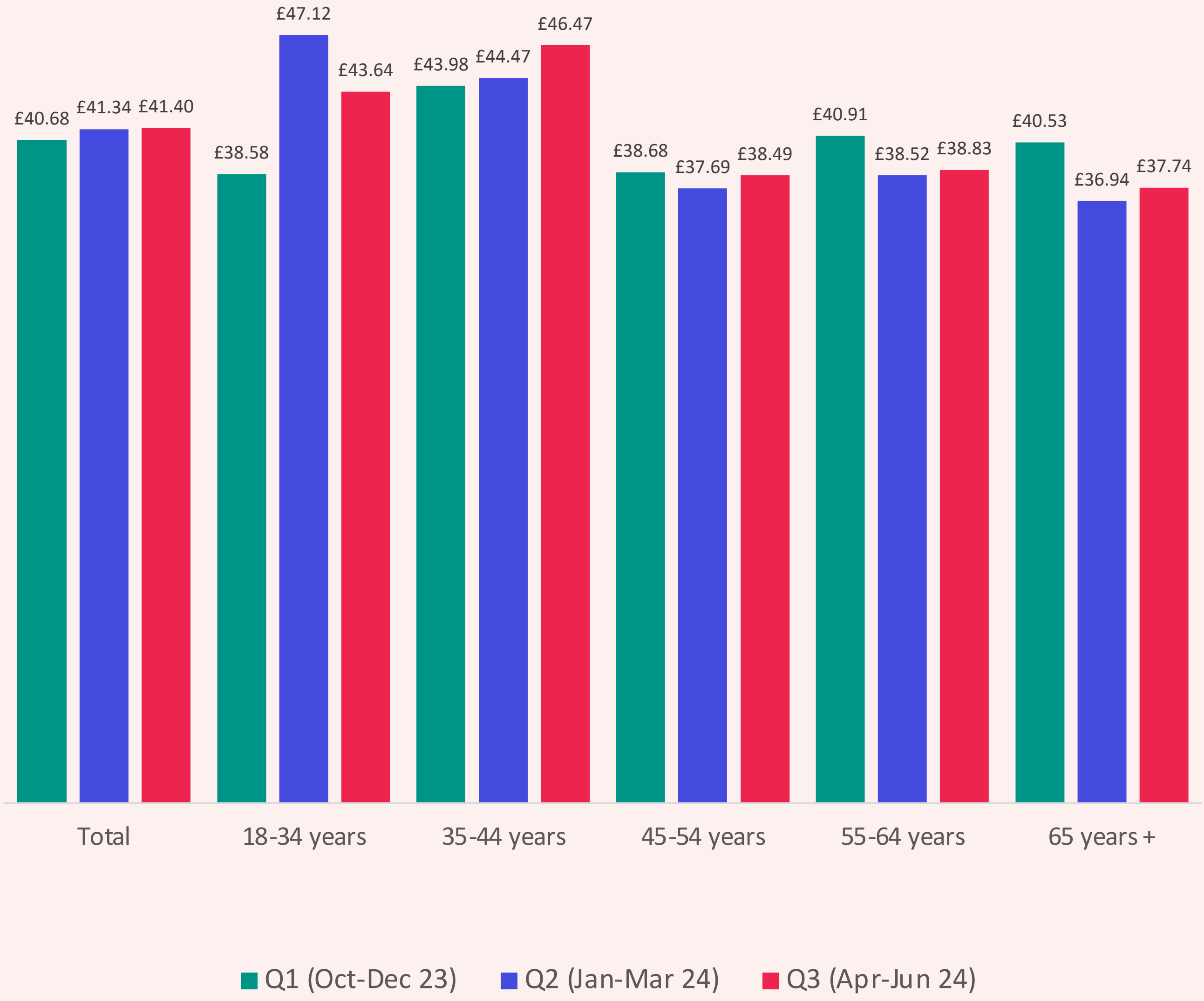
Average customer spend ‘personally’ on food and/or drinks in pubs, bars and restaurants.

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 remained at a similar level to the previous period, with a decrease in spend from the 18-34 age group offset by the 35-44 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?



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

TIME

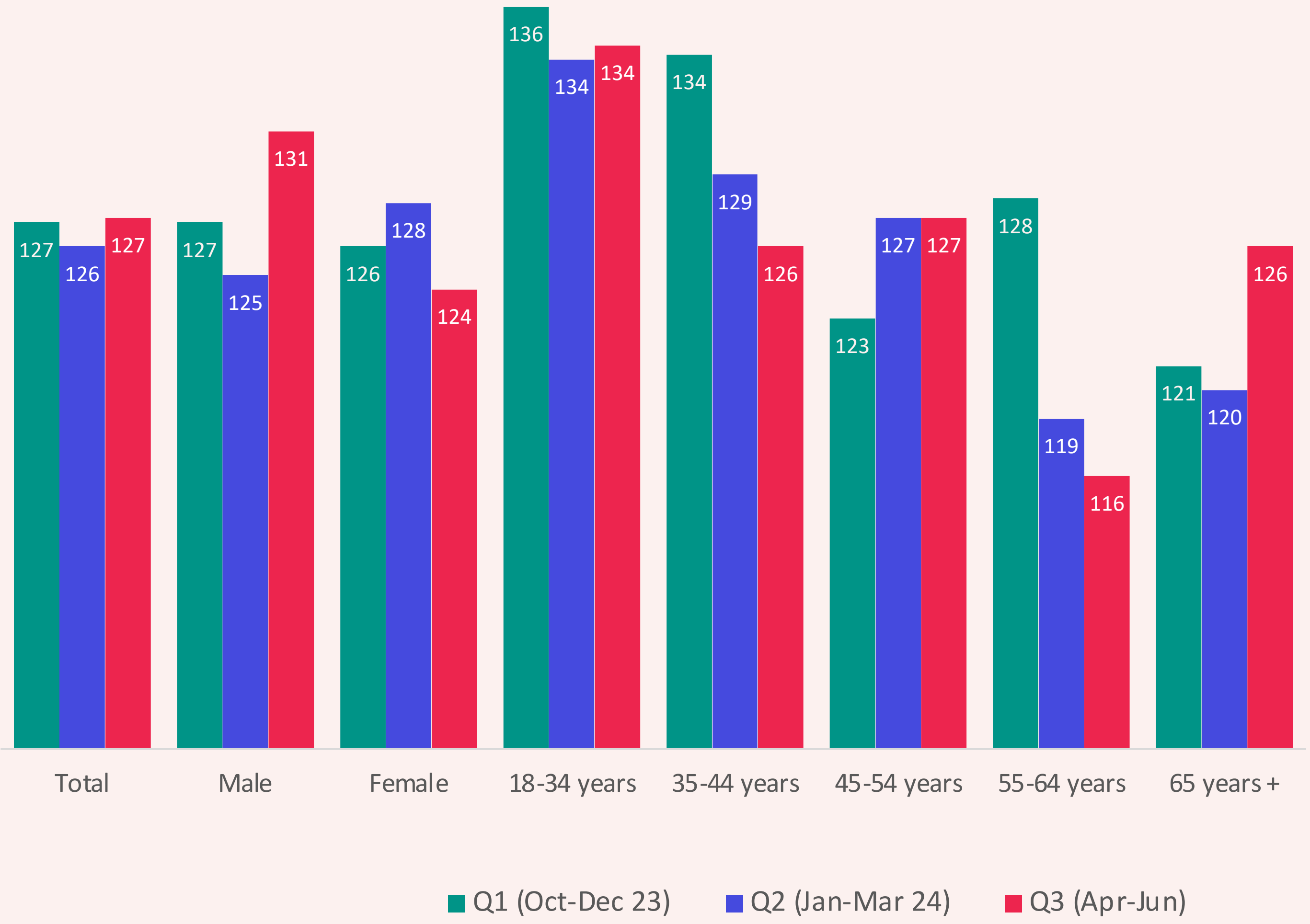
How much time have I got to spend here?

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?



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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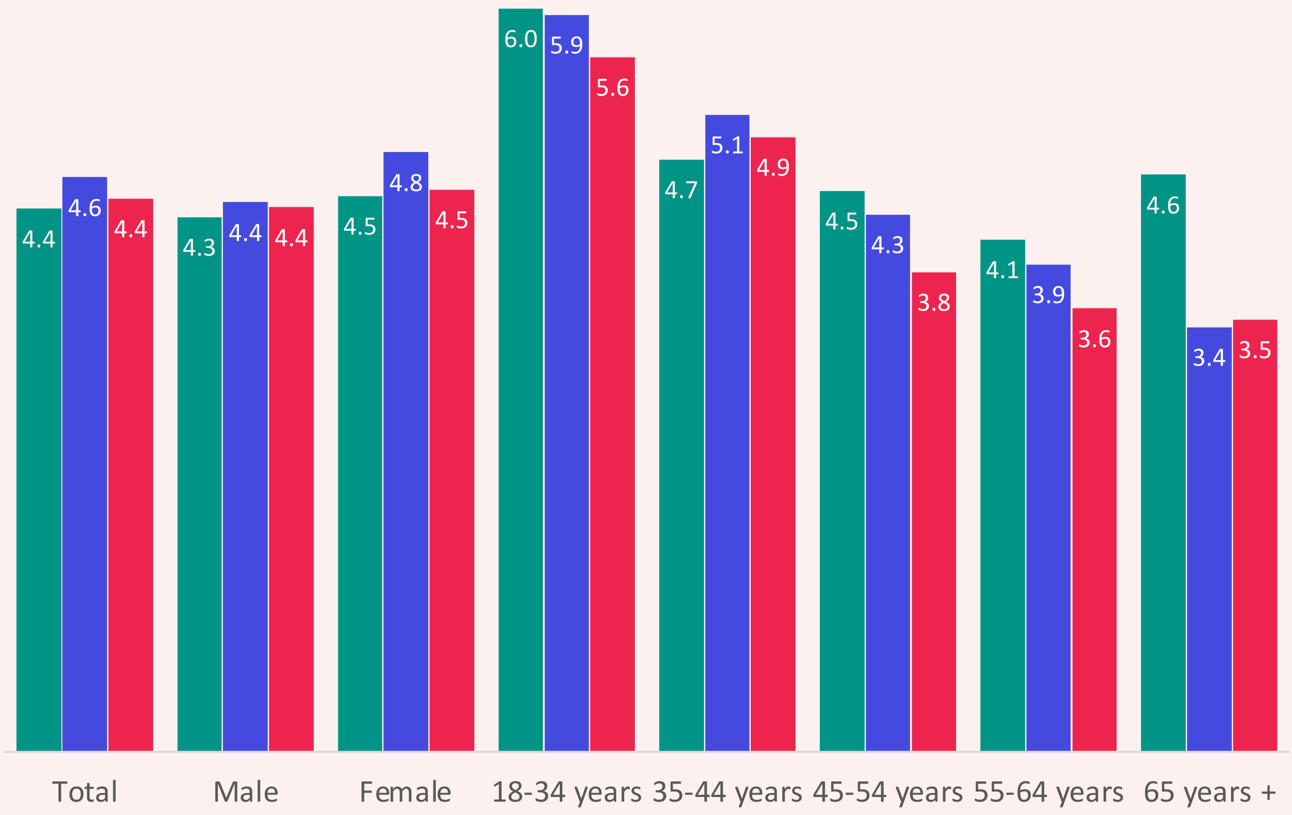
Average party size when visiting pubs, bars and restaurants.

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), but the average party size has slightly declined.

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



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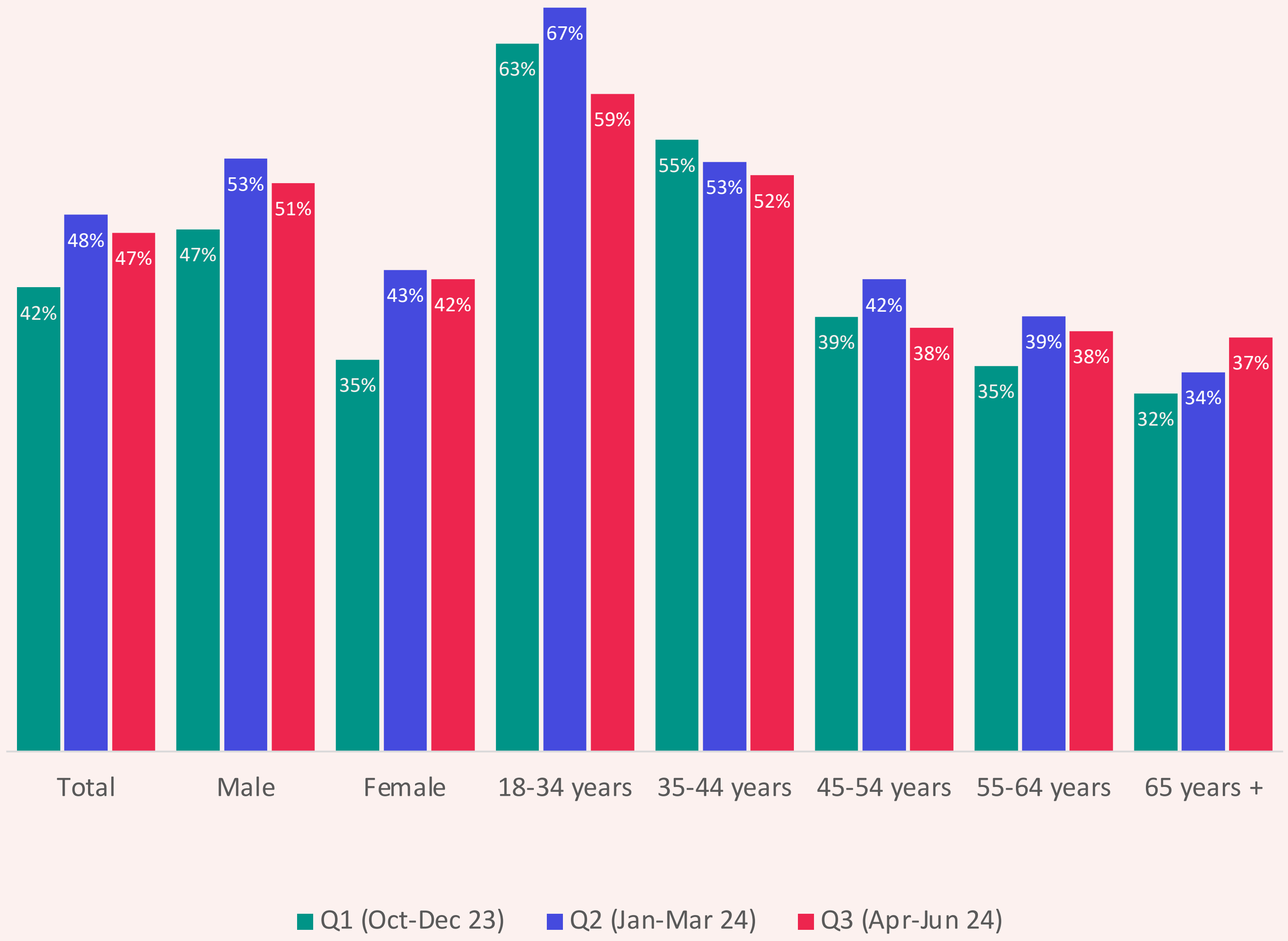
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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.



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

Influences

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- ‘Something refreshing’ continues to be the top influencing factor for this current period, presumably due to the slightly warmer weather. Functional elements to drinks that give energy, soothe or are lower calorie have all grown in importance.

- ‘Something that would give me pleasure’ remains no.1. ‘Something I know and trust’ drops for consecutive periods while ‘try something new’ increases for consecutive period, suggesting people are becoming more adventurous when ordering food or choosing meals they wouldn’t cook at home.

- Just over 1 in 3 had a starter, with slightly more (2 in 5) having a pudding. The average number of courses increased to 1.7 (compared to 1.6 in the previous period).

- Average spend has remained at a similar level to the previous period (+£0.06), with a decrease in spend from the 18-34 age group offset by the 35-44 age group.

- The dwell time, on their last visit to a pub, bar or restaurant, in the period Apr-June 24, was 127 minutes, a slight increase from 126 minutes in Q2.

- The average party size, on their last visit to a pub, bar or restaurant, in the period Apr-Jun 24, was 4.4 people, down from 4.6 people in Q2.

- Apr-Jun 24 saw a decrease in the amount of customers visiting pubs, bars and restaurants at least once a week, down from 48% to 47% but still a large increase on the 42% in Q1.

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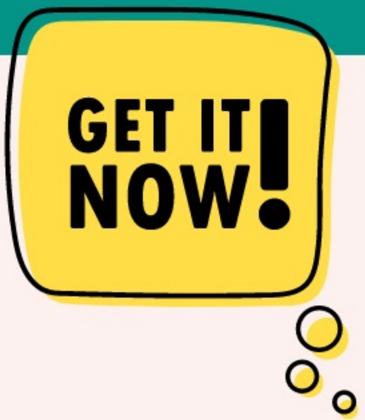
WHAT TOOLS DO WE HAVE AT OUR DISPOSAL TO INFLUENCE THE CUSTOMER IN VENUE?



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.

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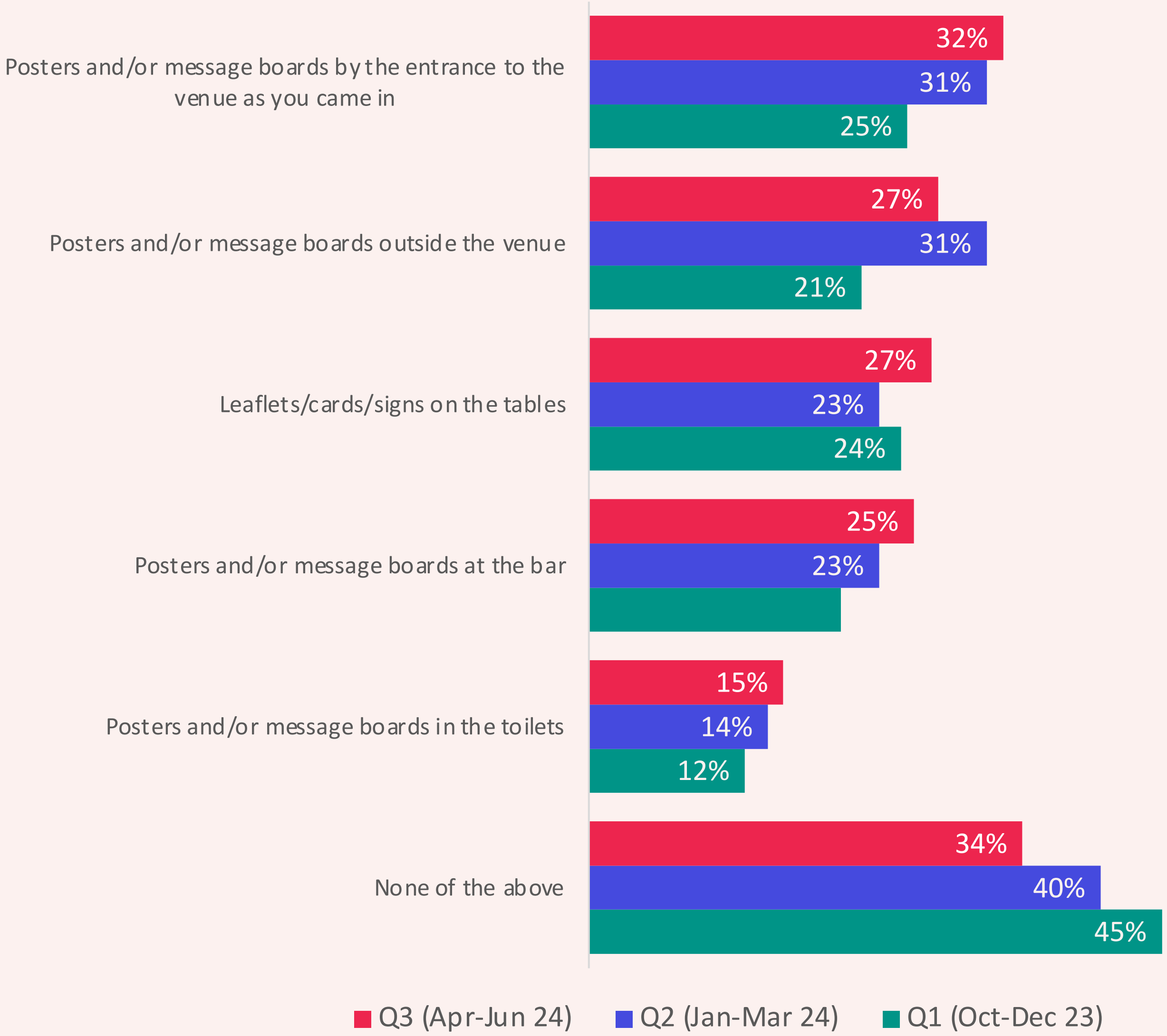
What POS was noticed by customers when visiting pubs, bars and restaurants?

Based on 'last visit' for within the period

66% of customers noticed some form of POS on their last visit to a pub, bar or restaurant (within the last 3 months), up from 60% in the previous period. With a summer of sport and more events taking place, this might have led to a greater awareness of POS.

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?



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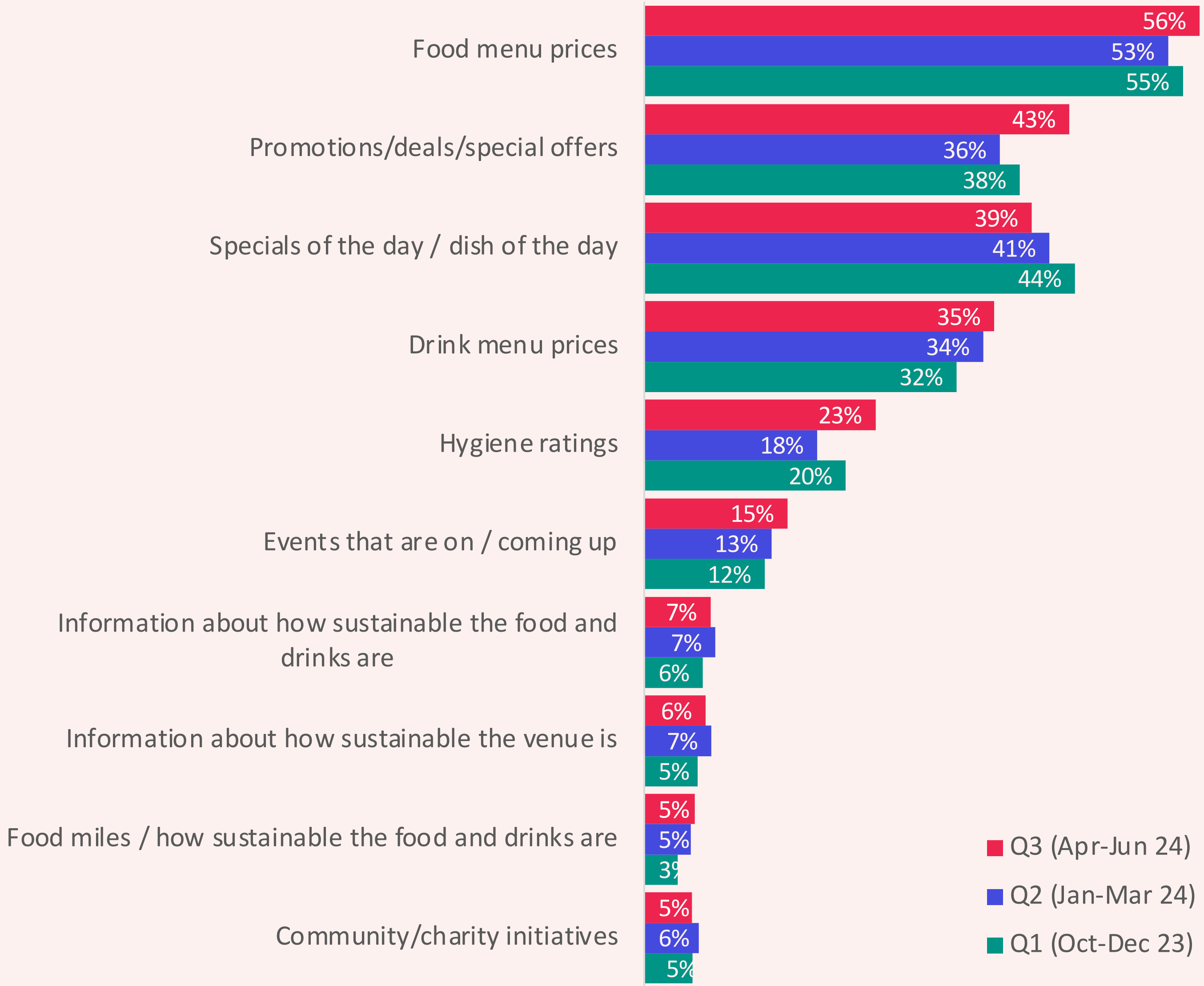
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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.

Customers appear to primarily be on the lookout for a good offer and a fair price.



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

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Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 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

26% would visit more often.

Up from 16% in Q2.

SPEND MORE

17% would spend more per visit.

Up from 16% in Q2.

STAY MORE

17% would stay longer.

Up from 15% in Q2.

LOYALTY

25% would be more likely to return.

Up from 17% in Q2.

ENGAGEMENT

21% would recommend to others.

Same as Q2.

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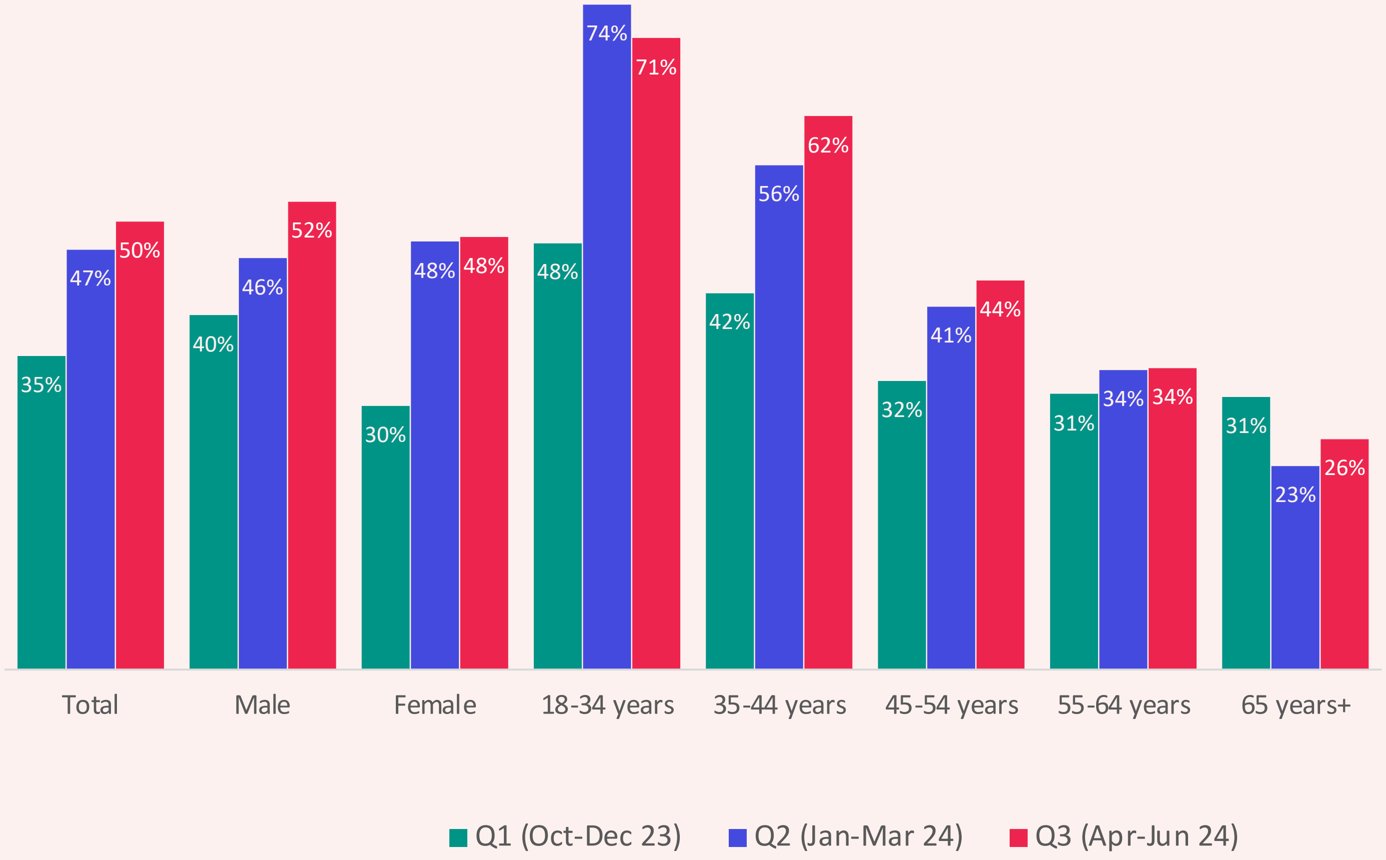
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

STAFF

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

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?

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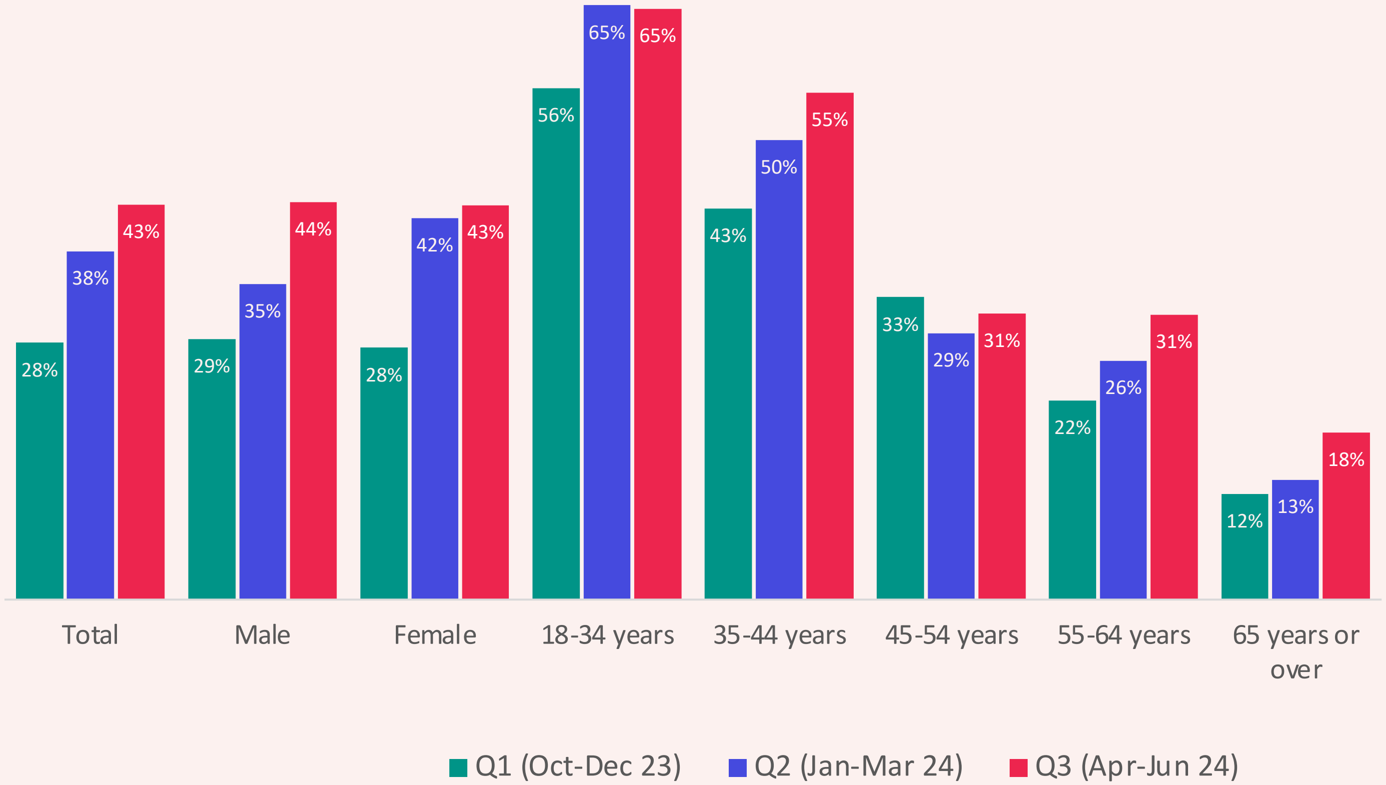
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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?

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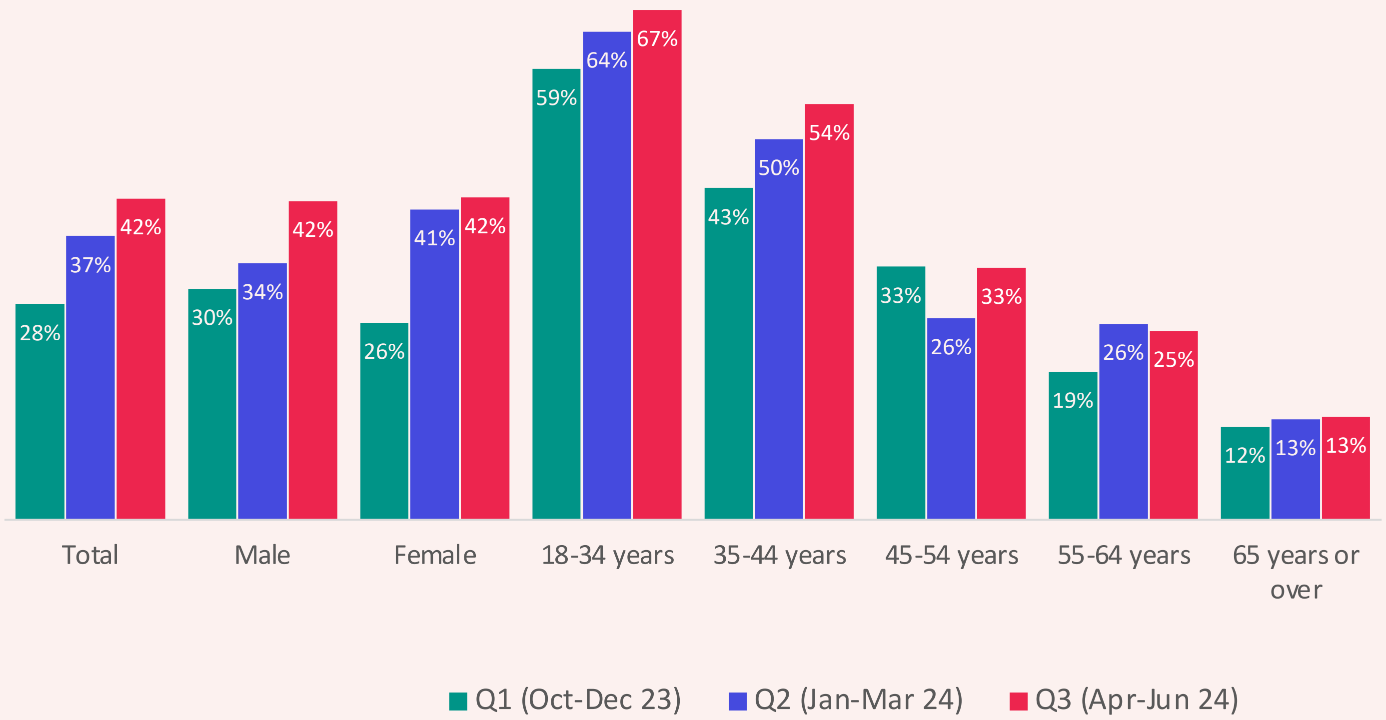
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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.



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

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

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

33% would visit more often.

Up from 30% in Q2.

SPEND MORE

22% would spend more per visit.

Down from 23% in Q2.

STAY MORE

21% would stay longer.

Same as Q2.

LOYALTY

30% would be more likely to return.

Up from 29% in Q2.

ENGAGEMENT

24% would recommend to others.

Up from 20% in Q2.

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

MENUS

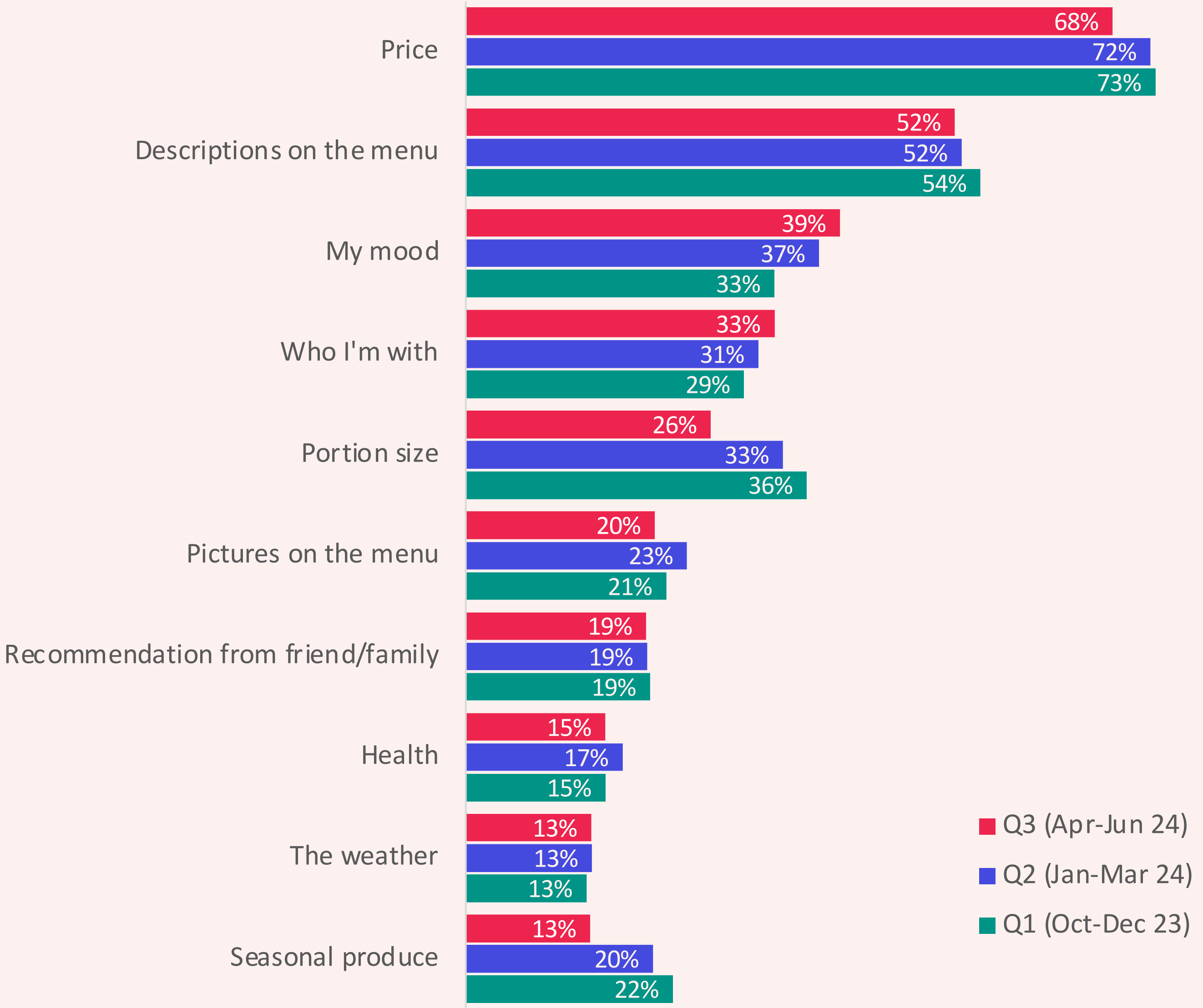
The importance of the food and drink menus - informing and influencing.

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.

Q. Which of the following would influence your choice of food when ordering in venues such as pubs, bars and restaurants?

Just top 10 shown, for full breakdown please refer to online dashboard



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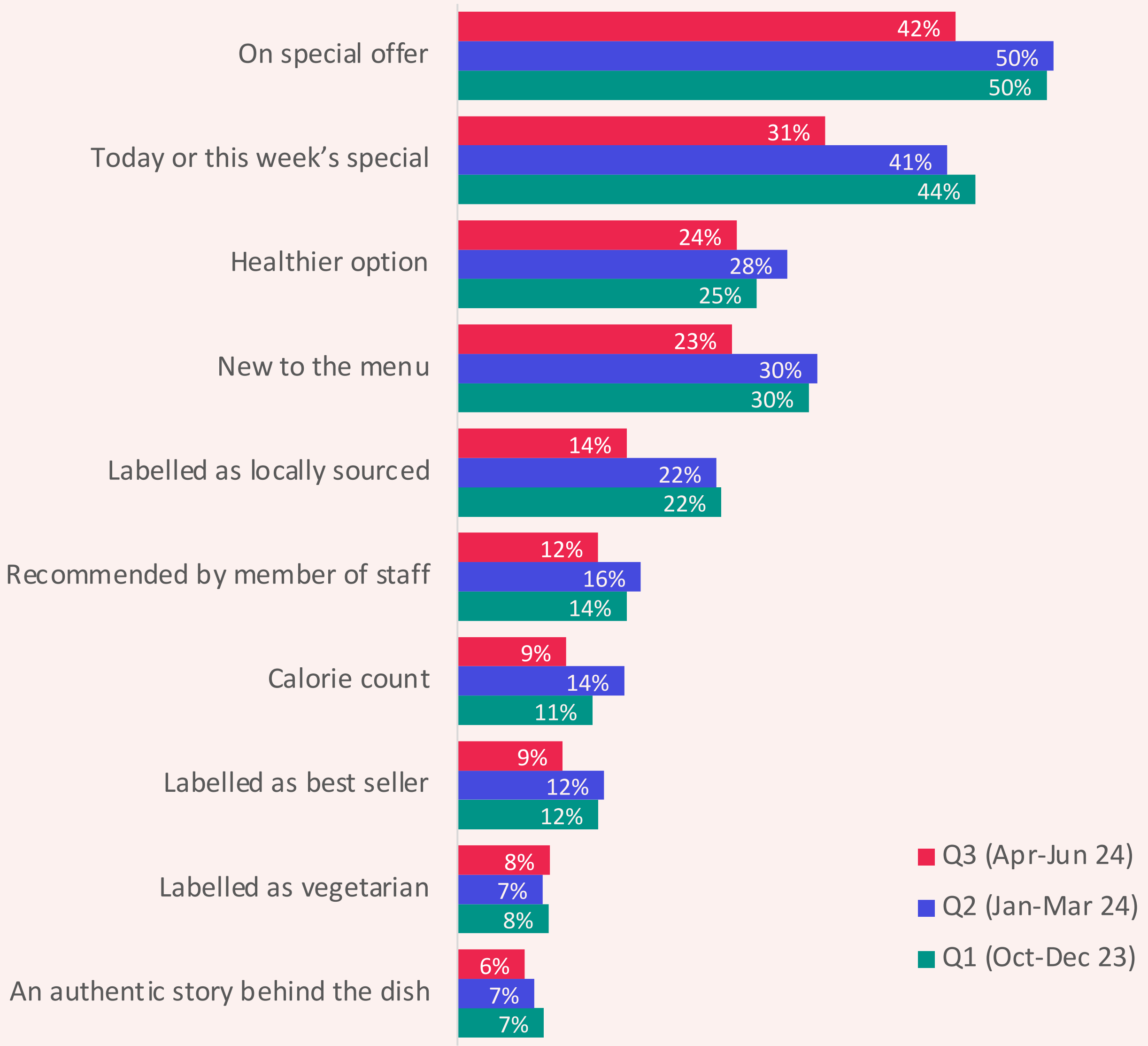
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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?

Just top 10 shown, for full breakdown please refer to online dashboard



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

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

39% would visit more often.

Up from 34% in Q2.

SPEND MORE

24% would spend more per visit.

Up from 23% in Q2.

STAY MORE

21% would stay longer.

Same as Q2.

LOYALTY

34% would be more likely to return.

Up from 28% in Q2.

ENGAGEMENT

27% would recommend to others.

Up from 20% in Q2.

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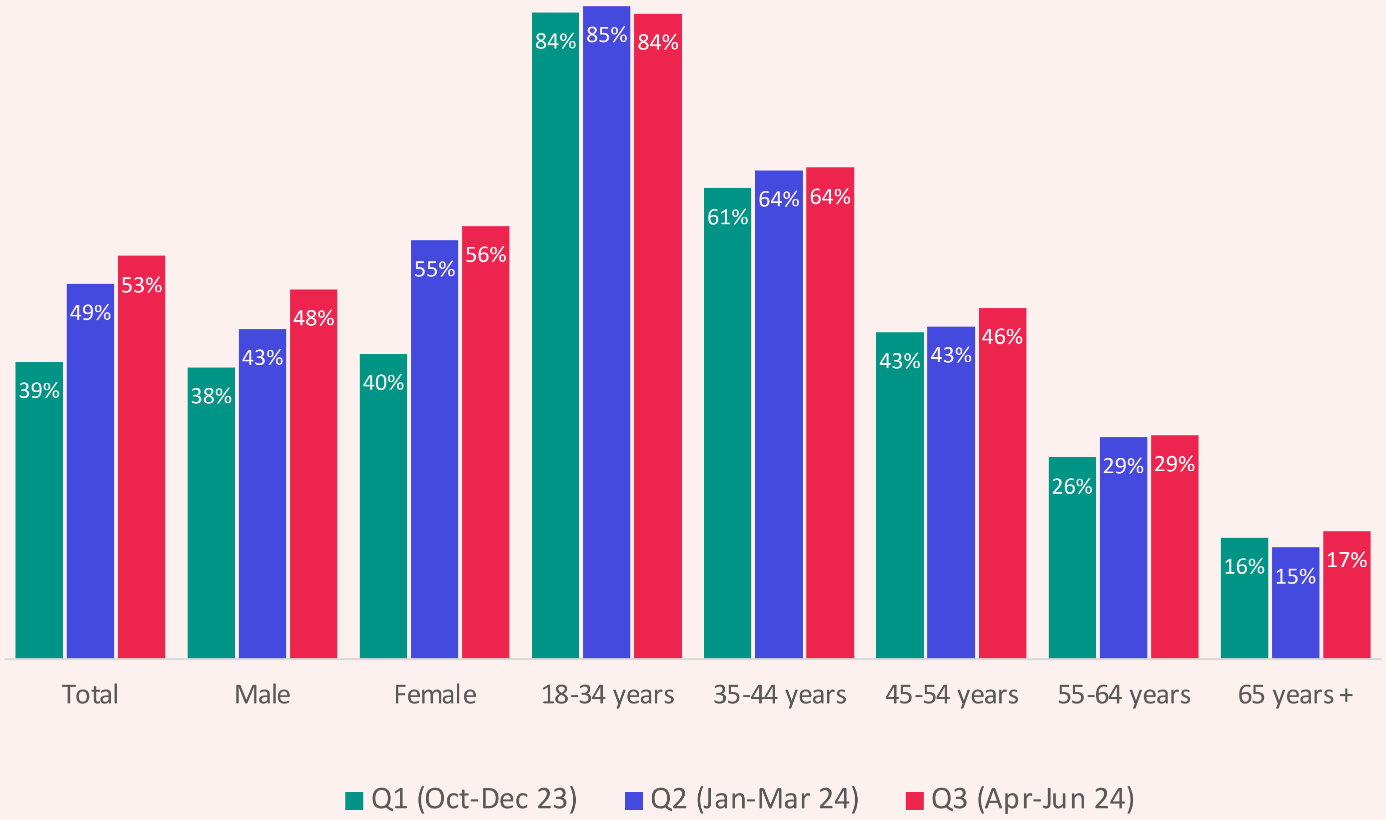
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

TECHNOLOGY

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

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.



Q. In the last 3 months have you used a QR code or digital screen in a pub, bar or restaurant for any of the following? % who selected at least once option

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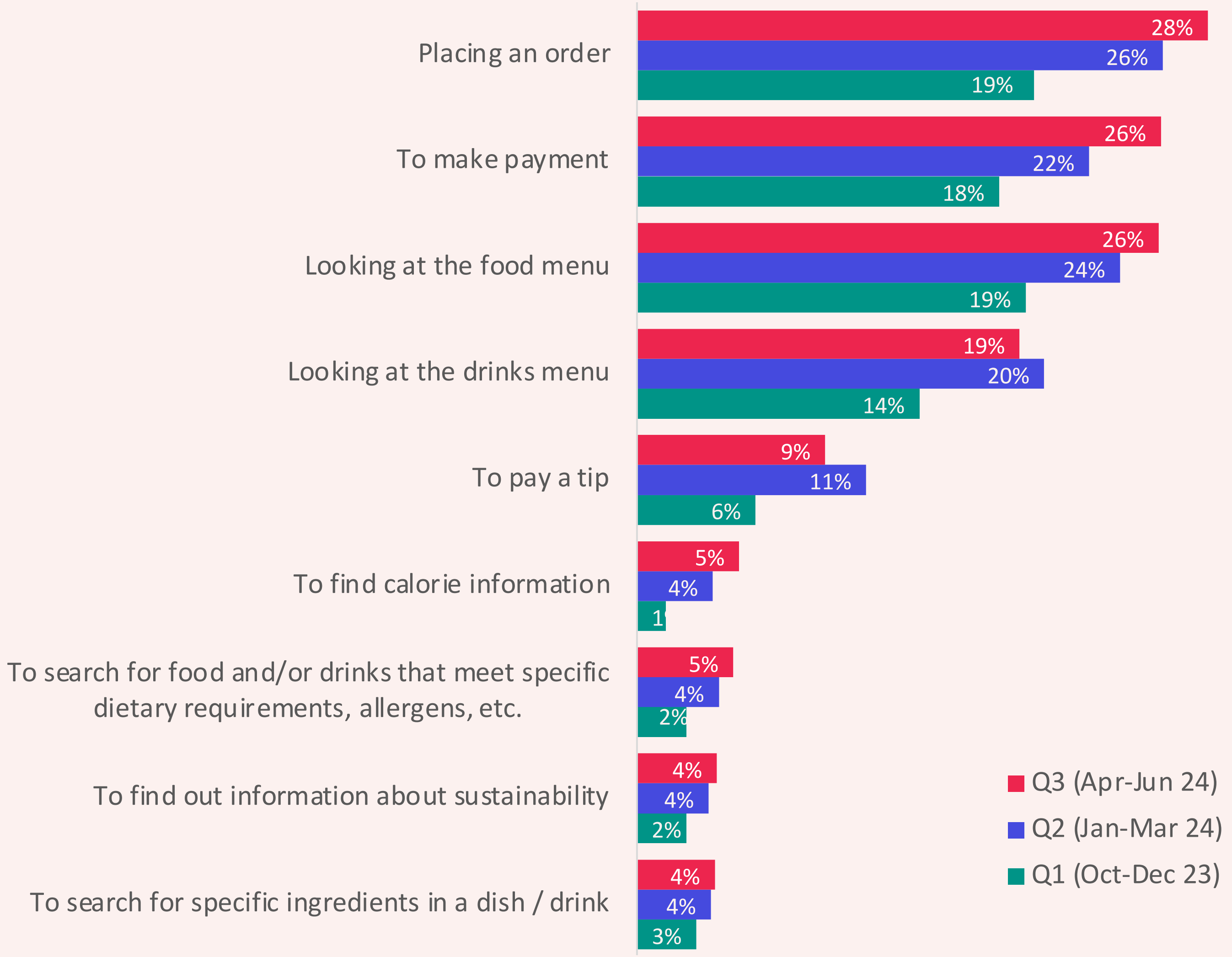
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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.

Q. In the last 3 months have you used a QR code or digital screen in a pub, bar or restaurant for any of the following?

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

BENEFITS OF GETTING THE USE OF QR CODES AND 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

19% would visit more often.

Up from 18% in Q2.

SPEND MORE

14% would spend more per visit.

Down from 16% in Q2.

STAY MORE

14% would stay longer.

Down from 15% in Q2.

LOYALTY

16% would be more likely to return.

Up from 15% in Q2.

ENGAGEMENT

14% would recommend to others.

Up from 8% in Q2.

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

Engagement

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- 66% of customers noticed some form of POS on their last visit to a pub, bar or restaurant (within the last 3 months), up from 60% in the previous period and 55% in Q1. With a summer of sport and more events taking place, this might have led to a greater awareness of POS.
- 50% of customers said staff have tried to recommend certain foods and/or drinks over the past 3 months, up from 47% in Q2 and 35% in Q1. The likelihood of going with food and drink recommendations has increased significantly over the last 6 months so it is something venues should look to do more, particularly with younger age groups.
- Outside of price, it's descriptions on the menu that are the biggest influence of customer choice.
- 53% 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 49% in the previous quarter and 39% in Q1. As expected, it is the 18-34s age group who are most likely to have used them (84%).
- Placing an order, making payments and looking at the food menu 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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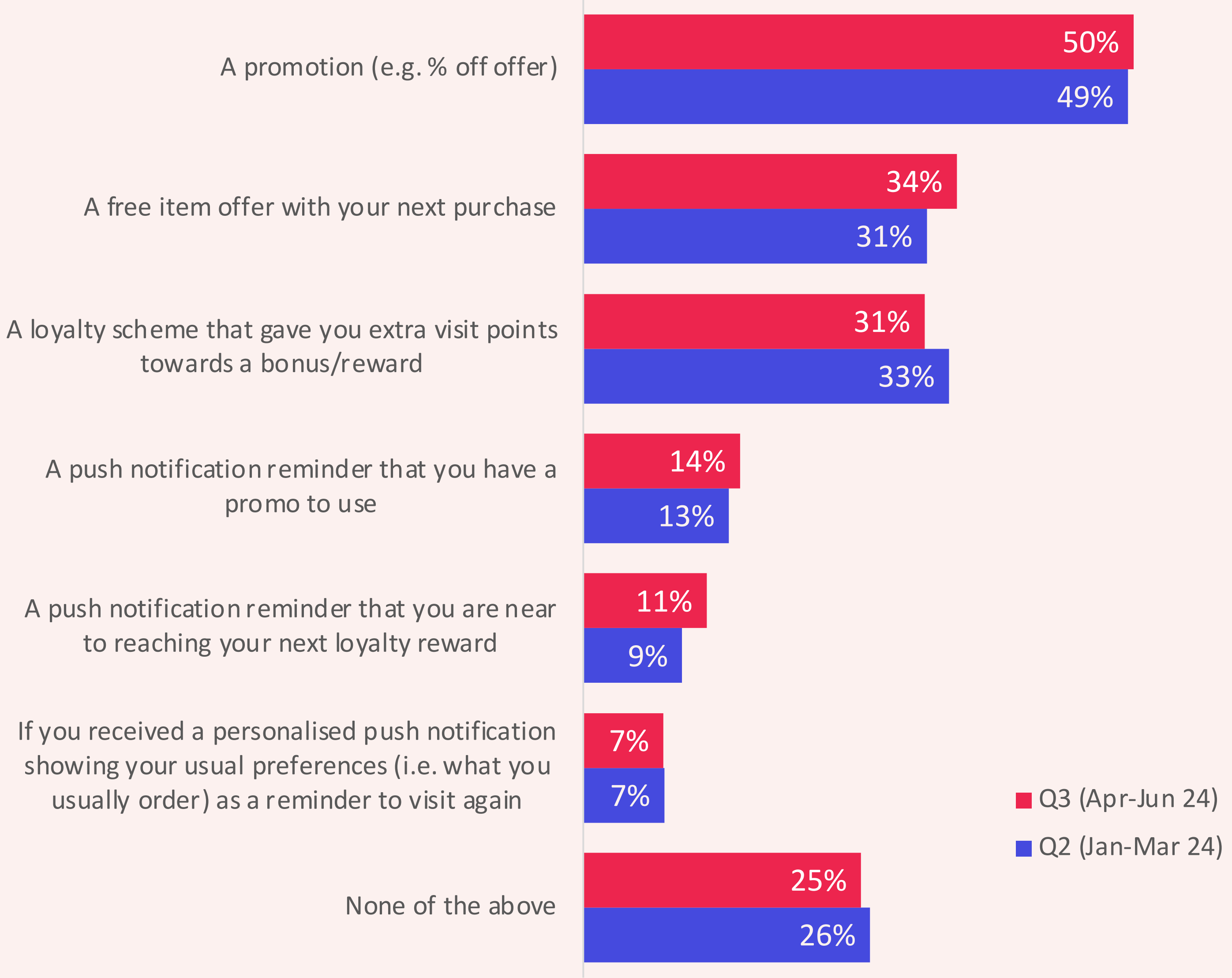
Influencing an additional customer visit to a pub, bar or restaurant

3 in 4 customers would be influenced 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?

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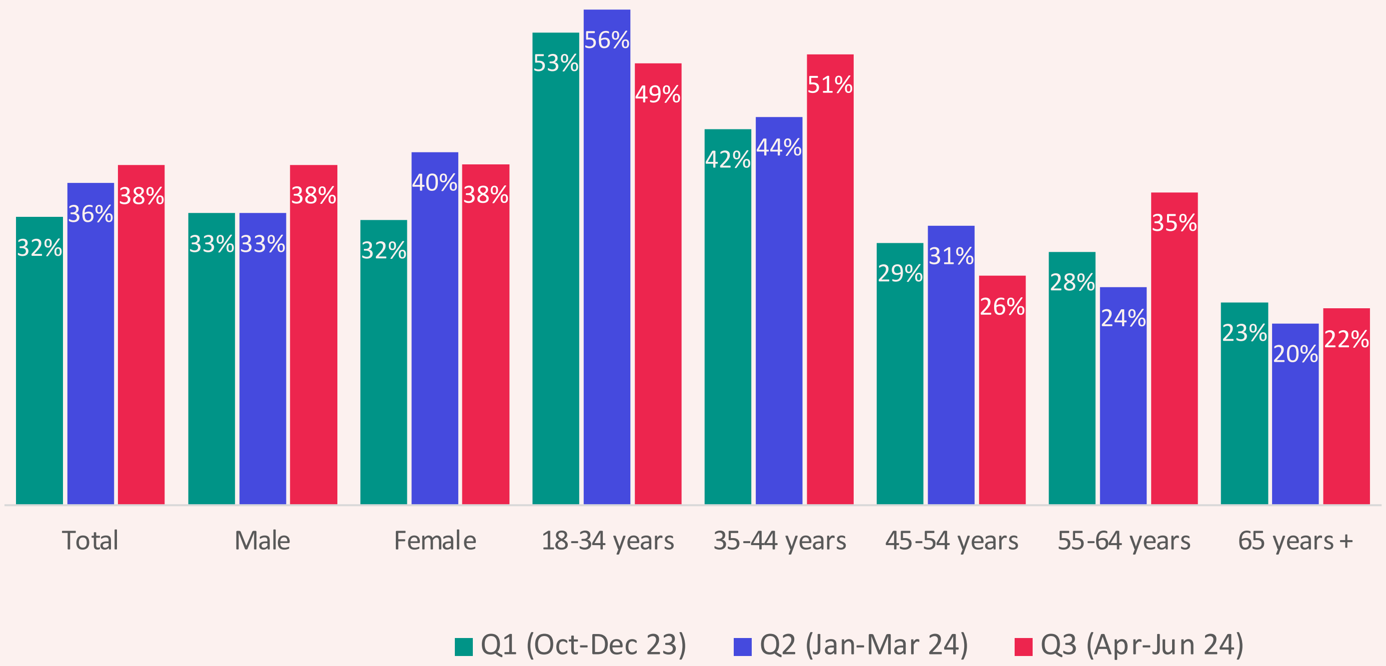
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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?

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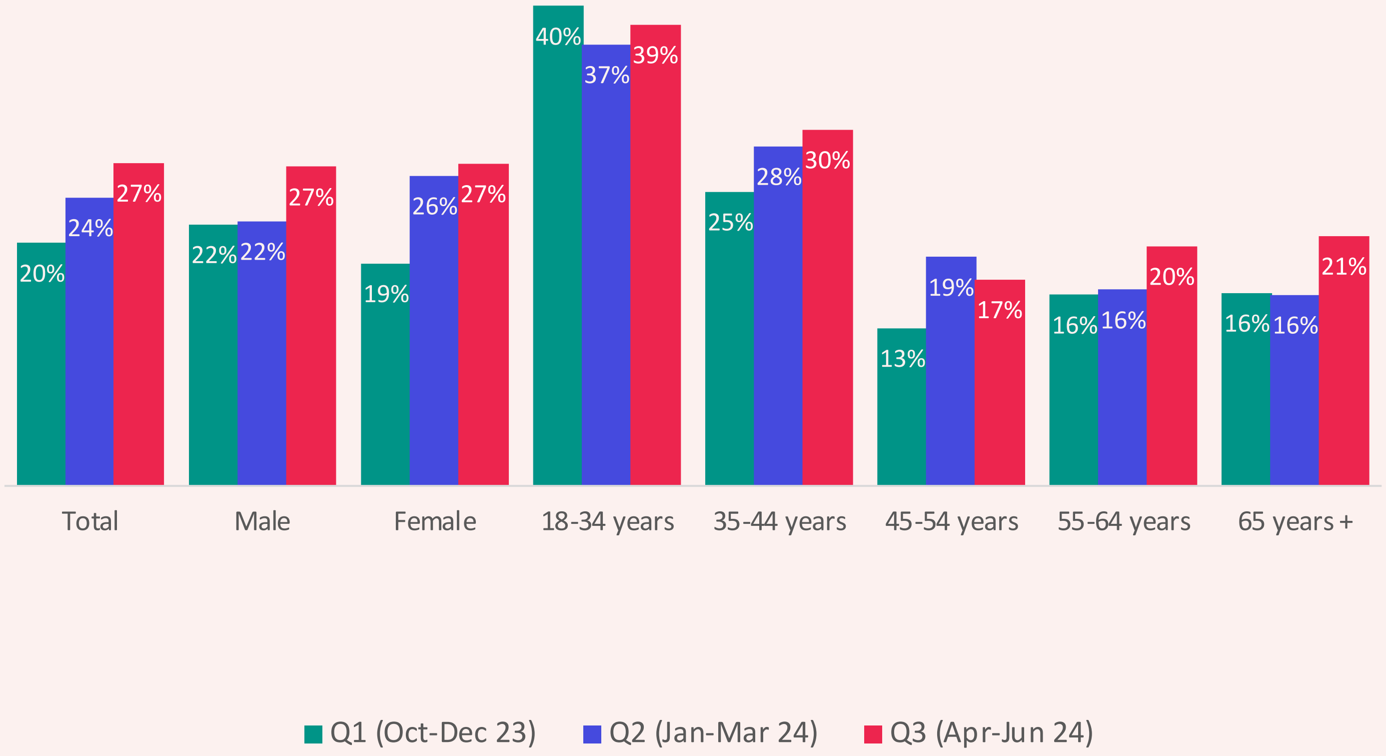
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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. Participation in loyalty schemes is up from 24% to 27% since the previous quarter, driven by an increase from those in participation from the older age groups.



Q Are you part of any pub, bar or restaurants loyalty schemes?

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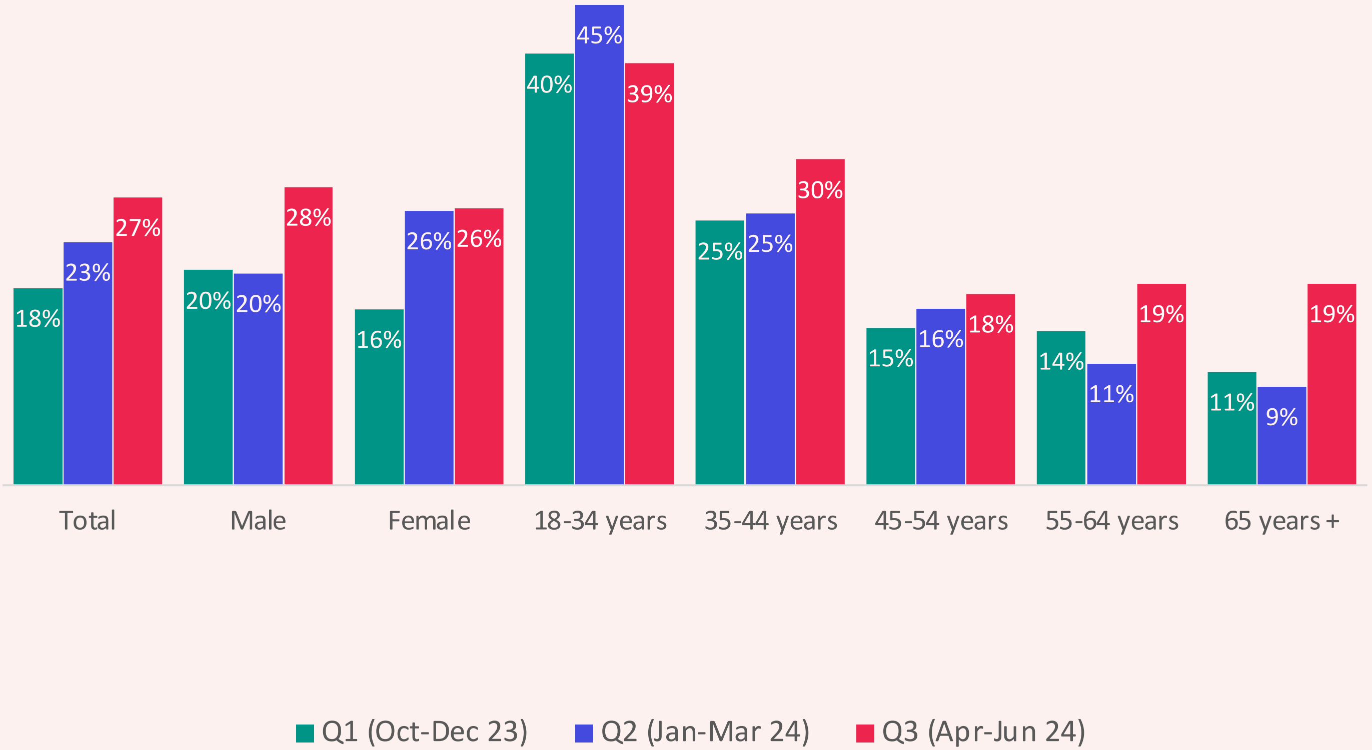
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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 23% to 27%.



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

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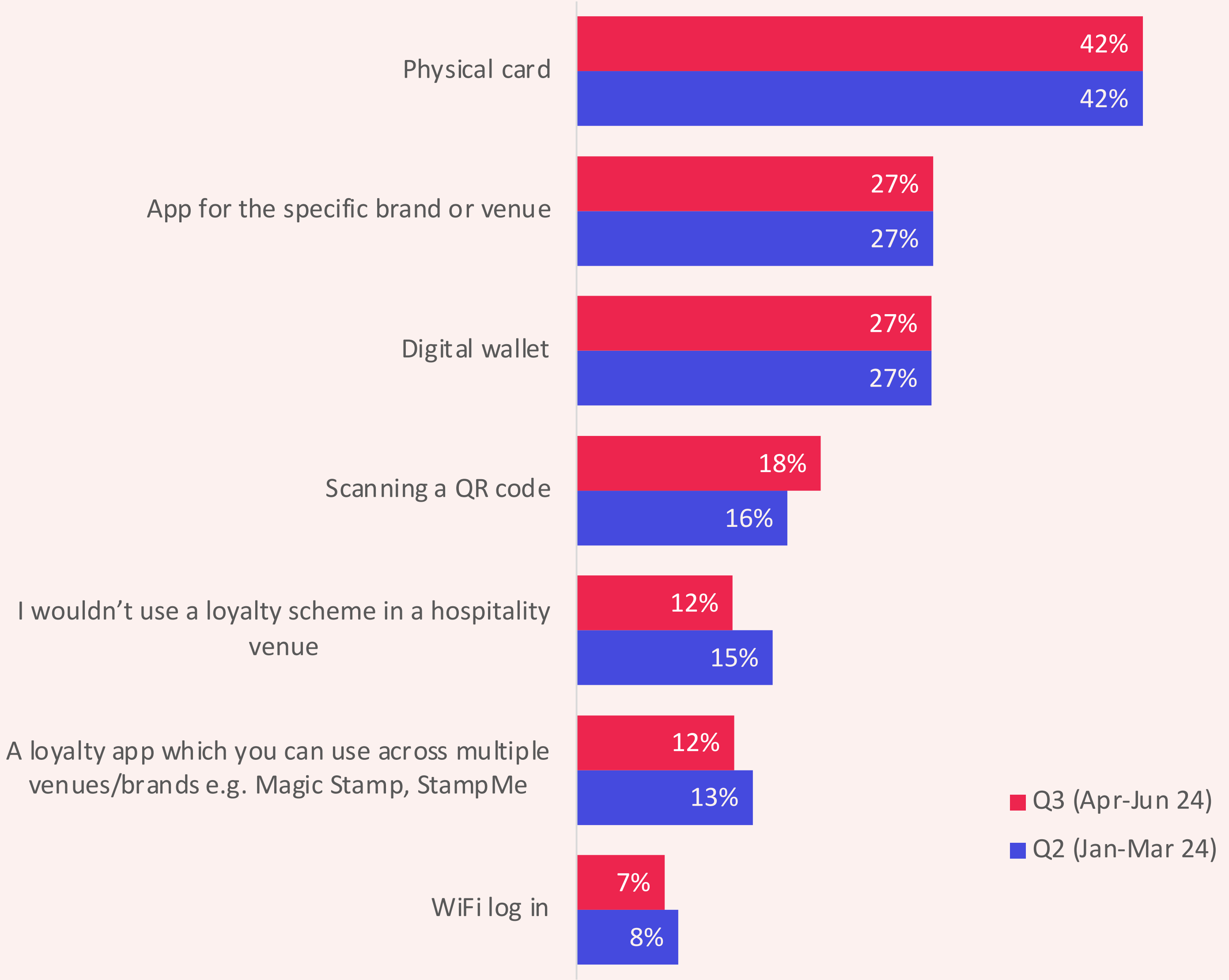
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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

88% 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?



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

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

40% would visit more often.

Down from 41% in Q2.

SPEND MORE

18% would spend more per visit.

Down from 21% in Q2.

STAY MORE

15% would stay longer.

Down from 17% in Q2.

LOYALTY

25% would be more likely to return.

Up from 23% in Q2.

ENGAGEMENT

15% would recommend to others.

Down from 19% in Q2.

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

Loyalty

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- 27% of customers currently participate in a pub, bar or restaurant loyalty scheme, for the period of Apr-Jun 24, compared to 24% in the previous quarter and 20% in Q1, indicating the concept is on the rise.

- Not only are they becoming more prominent, but loyalty schemes are also becoming more influential. A loyalty scheme has influenced 27% of customers to visit a particular pub, bar or restaurant in the last 3 months. This is up from 23% in the previous quarter and 18% in Q1.

- 42% would prefer to collect points and rewards through a physical card, while app and digital wallet both sit behind on 27%. Perhaps there is app fatigue with the amount that many already have on their smartphone.

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Summary

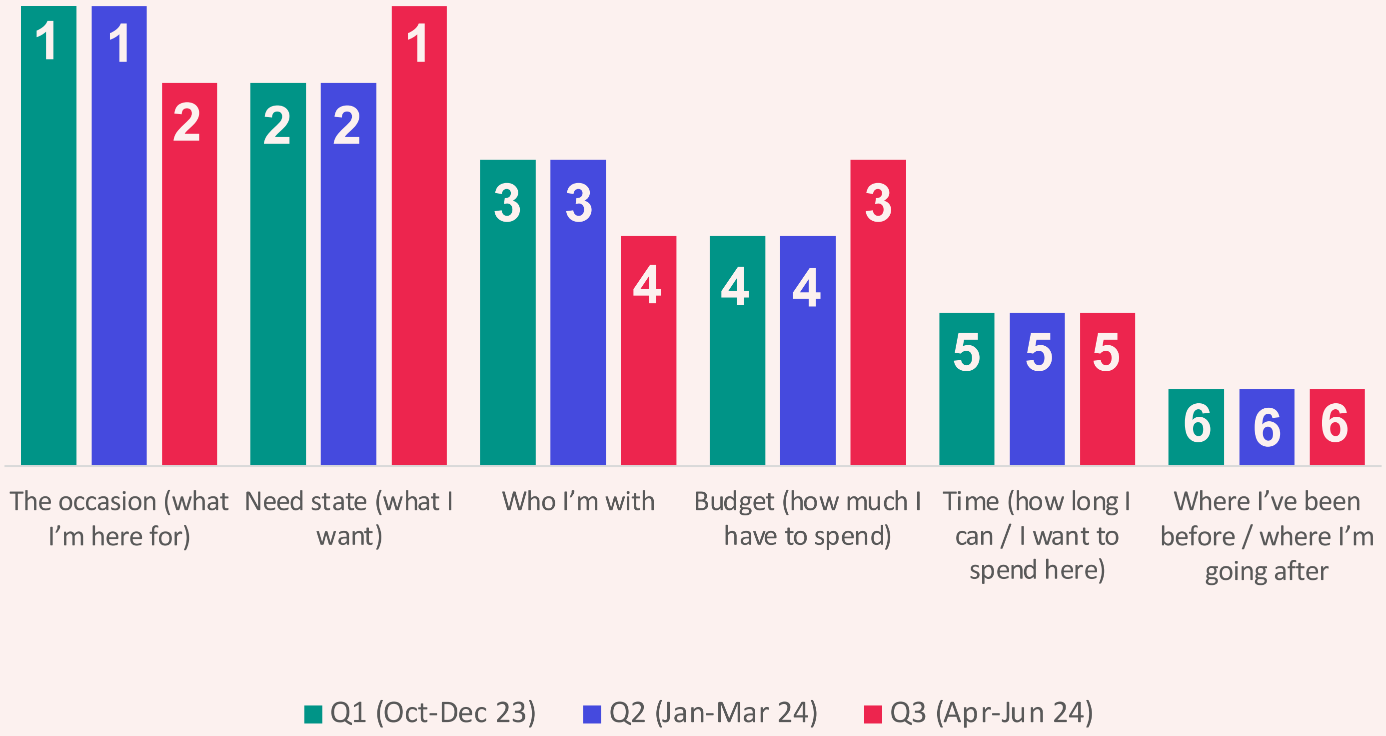
Which influences have been most impactful, and which in-venue tools have been most effective in the last 3 months?

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.

In this latest period, the need state (what I want) has moved slightly ahead of the occasion, and budget has also grown in comparative importance.

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?



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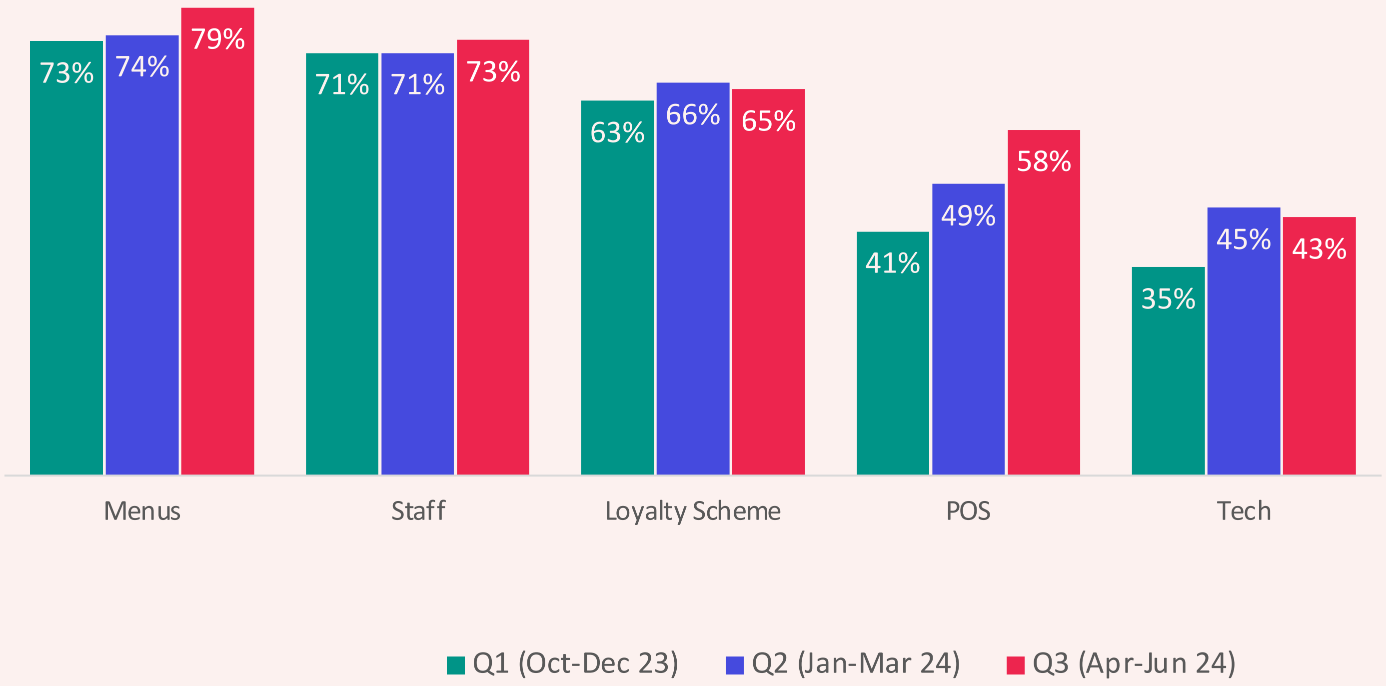
Source: KAM x Paytronix Plan to Plate 2023 Tracker (June 2024)

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.



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

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- The average UK adult (+18), claimed they visited a pub, bar, or restaurant, for food and/or drinks, 5.6 times/per month in the period Apr-Jun 2024. A decrease from 5.8 times in the previous quarter, with only higher visit frequency for 35-44s and 65+s compared to the previous 3-month period.

- Friday and Saturday are the most popular days of the week to visit pubs, bars and restaurants. There has been little change as we move into the warmer months although Sunday has become slightly more prominent. We see the weekdays also being popular with 55+, with Friday particularly popular with 18-34s.

- Customers' main motivation, when in venue, in this 3-month period has been the need state (what I want), which has moved slightly ahead of the occasion. 'Budget' has also grown in comparative importance, up to 3rd in rank surpassing 'who I'm with'.

- Drinks with friends and family remains the most popular occasion, with leisurely lunch surpassing dinner (Friday-Saturday) as the next most popular occasion. While dinner (Friday-Saturday) dropped 3pts, dinner (Sunday – Thursday) increased 4pts.

- Menus remain most impactful in-venue tool of the last 3 months (period between Apr-Jun 24), with customers telling us that if pubs, bars and restaurants improved their food and drink menus it would encourage 39% of them to visit more often and 24% to spend more per visit. 34% would also be more likely to come back for a repeat visit and it would encourage 27% 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 and increased compared to the previous period. Once again, we've also seen a significant increase in the effectiveness of POS in driving customer interactions since the last quarter, up to 58% compared with 41% in Q1.

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

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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