

PLAN TO PLATE

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

Volume 4 | July - Sept 24

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

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

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



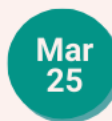
New quarterly tracker from KAM



Nat Rep sample of UK adults (+18)



Latest wave of research conducted



Upcoming waves this year



At NFS, we're excited to partner with KAM on the "Plan to Plate" report, which showcases crucial drinking and dining trends shaping the hospitality industry.

In a world where personal technology is revolutionising every aspect of our lives, it's only fitting that dining experiences evolve alongside. Today's guests expect more than just good food—they anticipate a seamless blend of technology enhancing every moment of their journey, from selecting a venue to savouring the final course.

If we're committed to crafting superior experiences, digital guest engagement must be at the forefront of our strategy. This isn't just about keeping up; it's about inspiring guests to visit more frequently and enjoy each experience more fully.

This report gets to the very essence of how engagement technology can transform the entire hospitality industry, providing invaluable insights into key trends at every stage of the customer journey—from planning to plating and beyond. It's an indispensable resource for those aiming to stay ahead in this vibrant market

Chris Cartmell, CCO, NFS Hospitality



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.

KAM



Source: KAM x NFS Plan to Plate Tracker (Sept 2024)

Executive summary.



Data from the latest quarterly release of PLAN TO PLATE shows that consumer confidence has increased since the previous quarter. With the largest increases in confidence seen by males and those aged 18-34. However, we are still seeing similar short-term impacts on consumer behaviours, with 41% 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. The 18-34-year-old market also significantly over-indexes in the behaviour of going out less frequently but spending more money on those occasions.

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, 34% of customers said they would have visited pubs, bars and restaurants more often, in the last 3 months, if the quality of staff were improved.

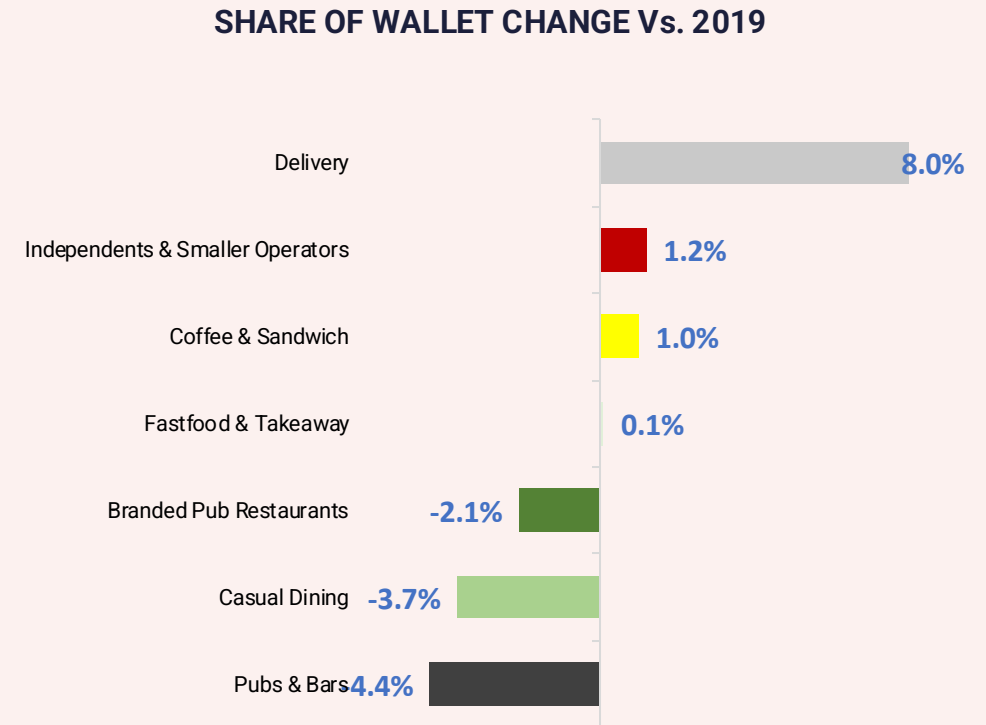
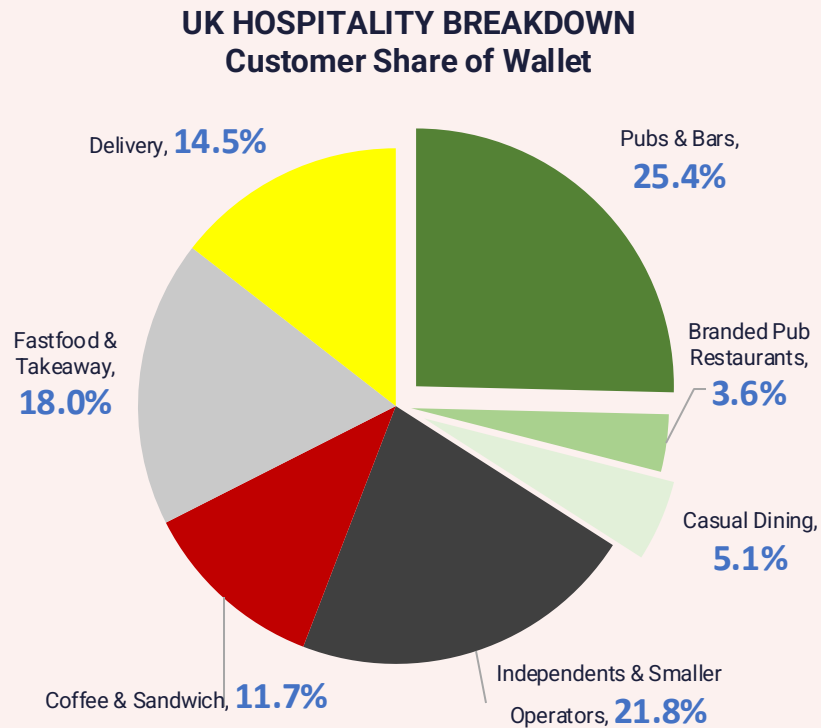
Loyalty remains a key metric for many operators. 28% of customers currently participate in a pub, bar or restaurant loyalty scheme, for the period of Jul-Sep 24,. Getting loyalty schemes right in venue could result in 42% of customers visiting more often than they currently do, according to this latest research.



Blake Gladman, Strategy & Insight Director, KAM

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...



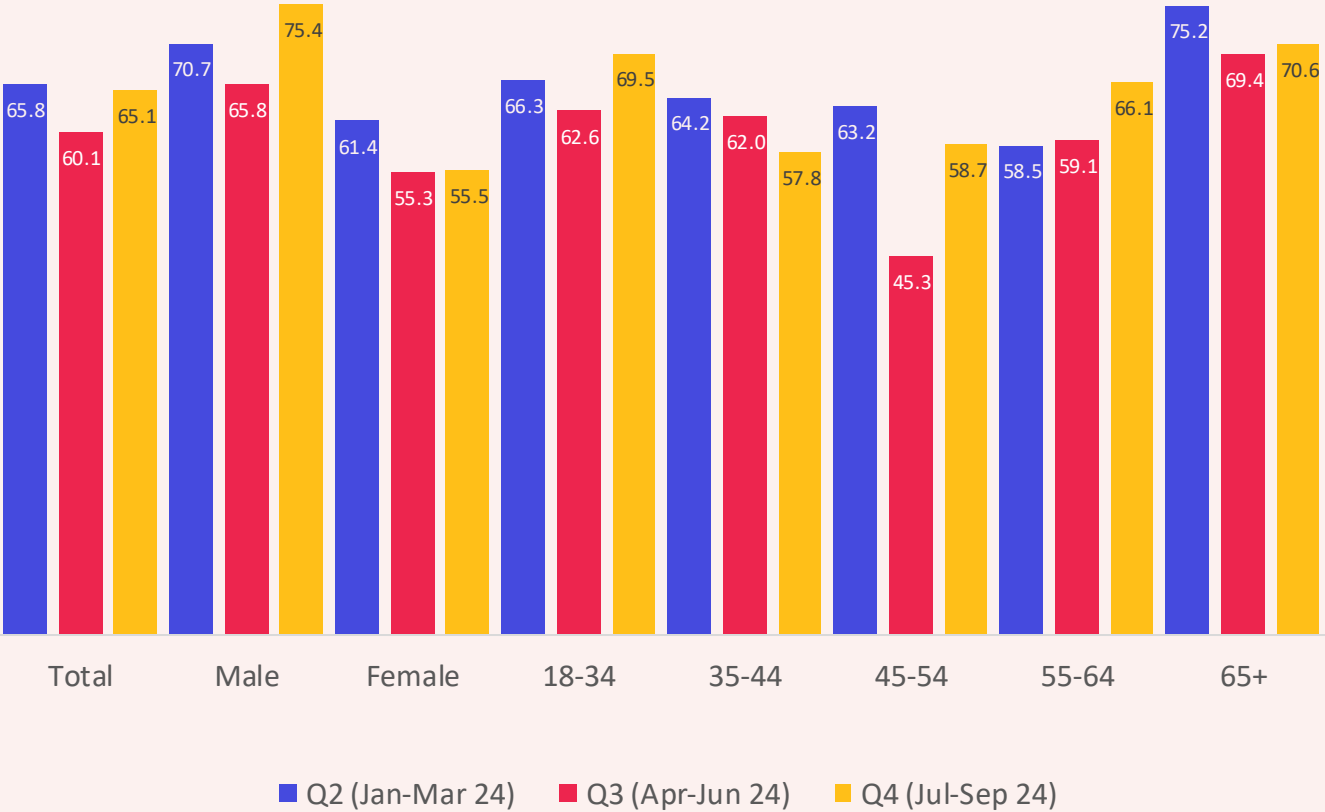
KAM Hospitality Consumer Confidence Index.

Introducing the new KAM Hospitality
Consumer Confidence Index.

Based on the following consumer question:

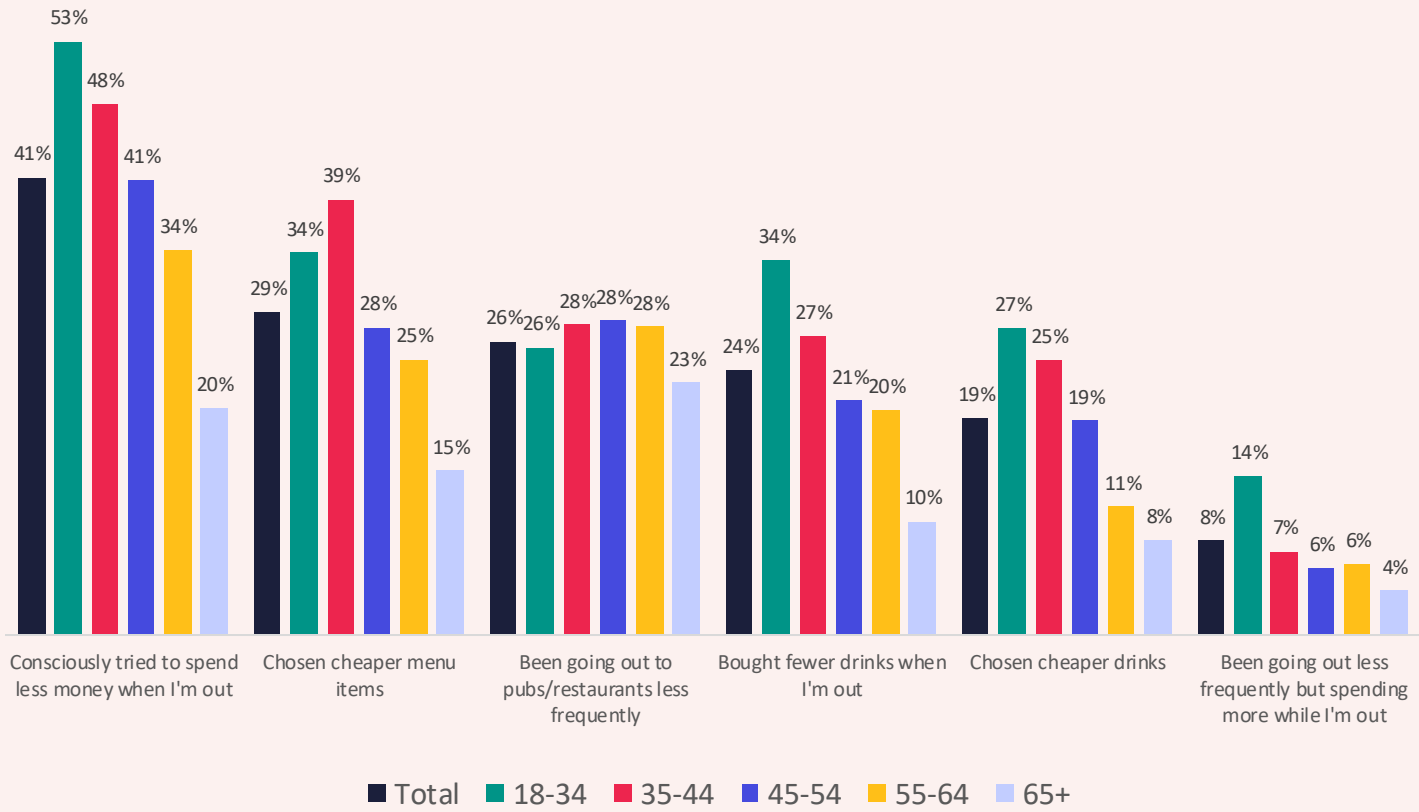
Q. Thinking about the next 3 months ahead, how confident are you that you will have money to spend on going out to pubs, bars and restaurants as often as you would want to?

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.



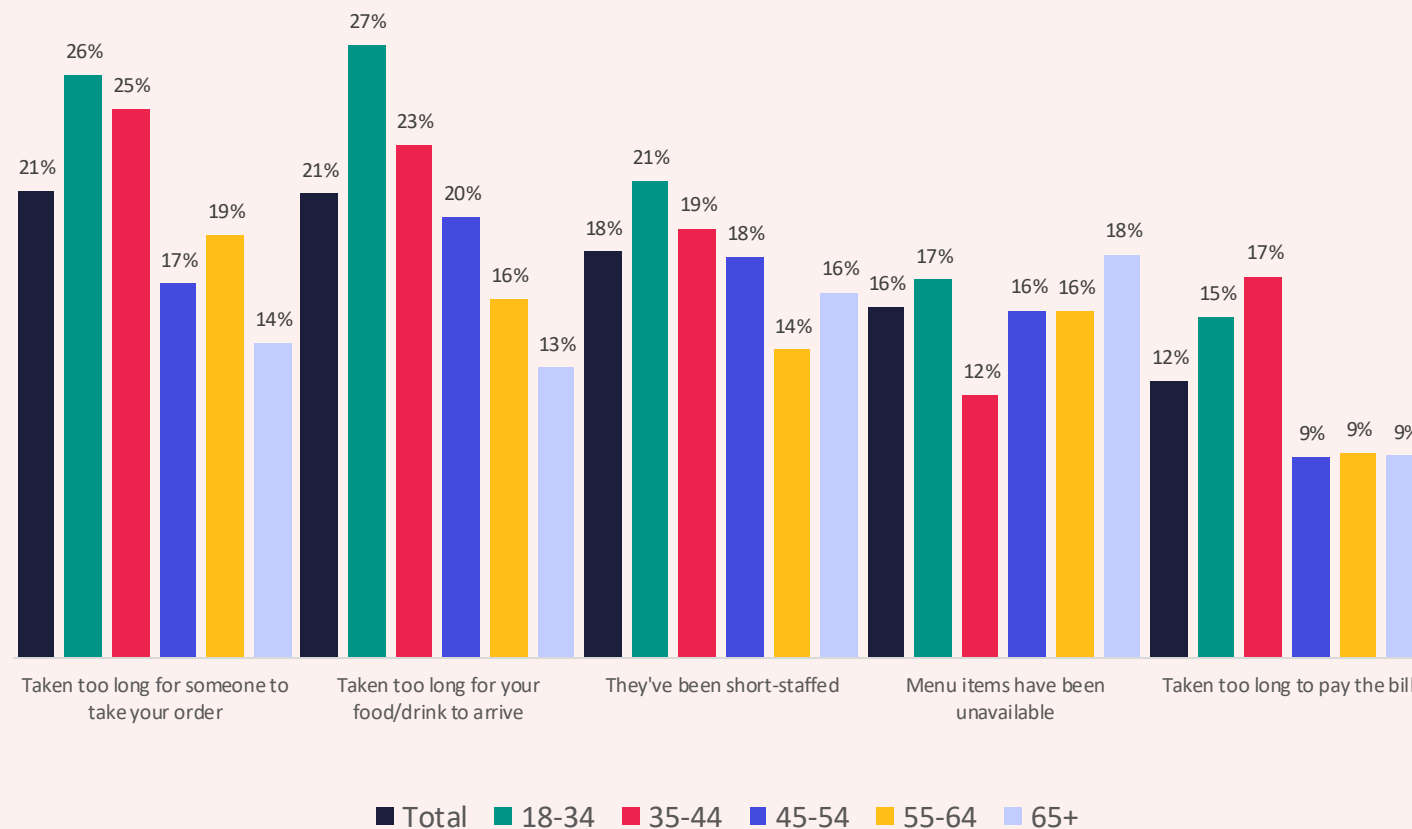
Short-term changes in consumer behaviours.

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?



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?





The Customer Journey

1 Evaluation

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

2 Influences

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

3 Engagement

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

Customer Factors

4 Need State

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?

6 Time

How much time have I got to spend here?

7 Party Size

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

Tools of Influence

8 Point of Sale

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

9 Staff

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

10 Menu

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

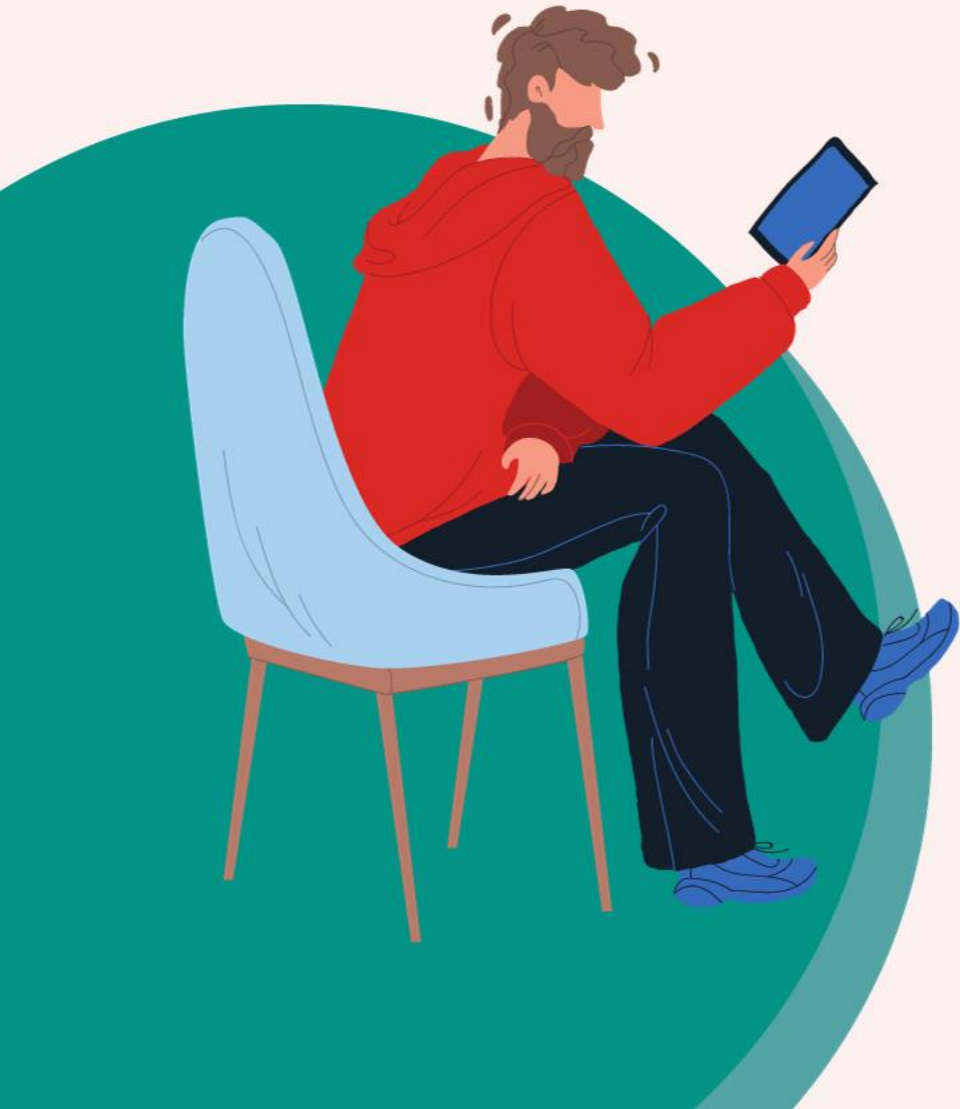
11 Technology

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

12 Loyalty

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

PLAN TO PLATE.



Evaluation

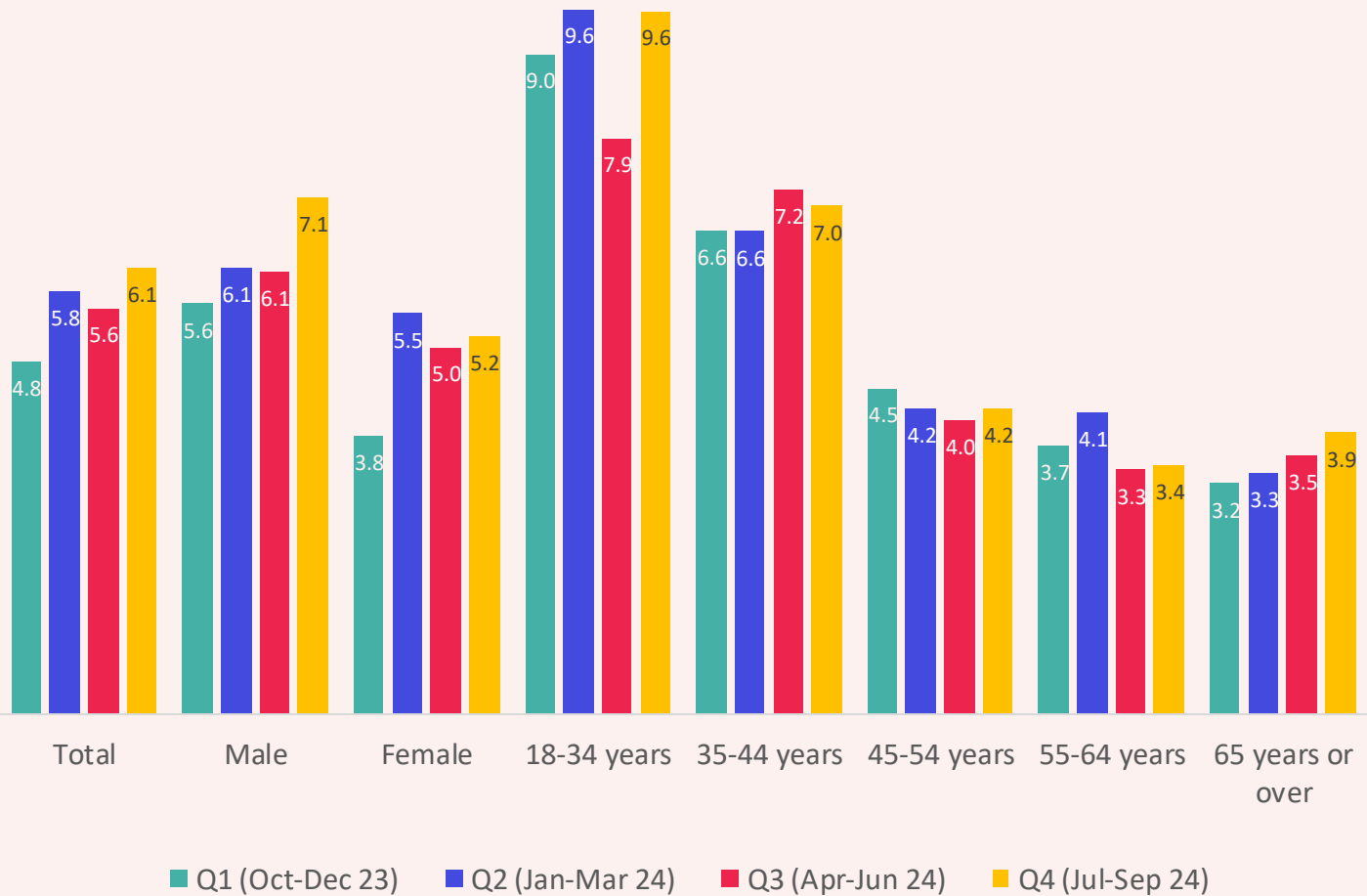
Understanding how customers decide on which venues to eat & drink out at and how we can impact their decision process.

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, 6.1 times per month, for the period Jul-Sep, with highest visit frequency for males and 18-34s.

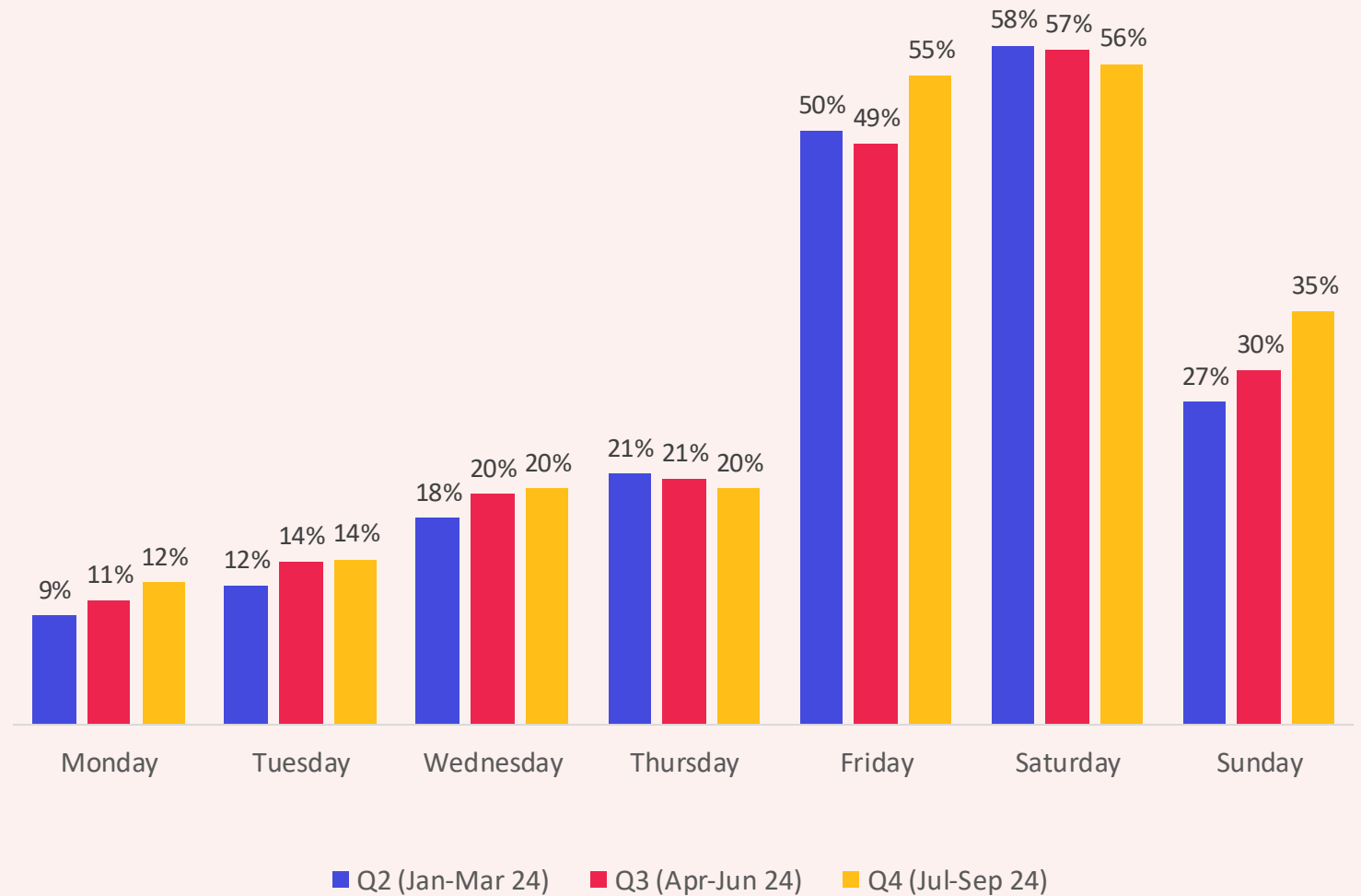
Q. How often have you been out for food and/or drinks in pubs, bars and restaurants in the last 3 months?



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

Friday and Saturday are the most popular days of the week. Sunday has become slightly more prominent.

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

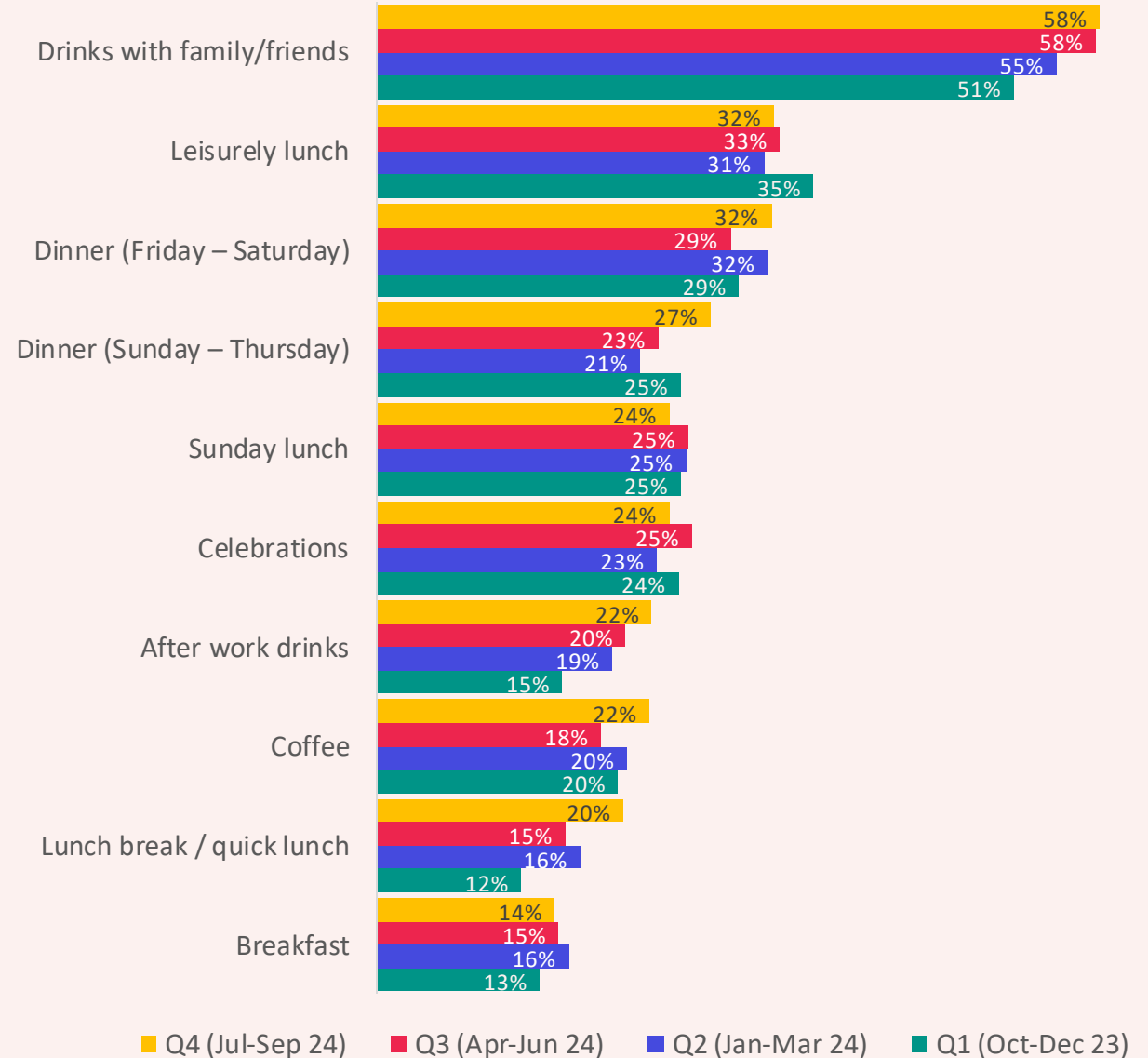


Top occasions for visiting pubs, bars and restaurants.

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, leisurely lunches and dinners are the most popular occasions

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

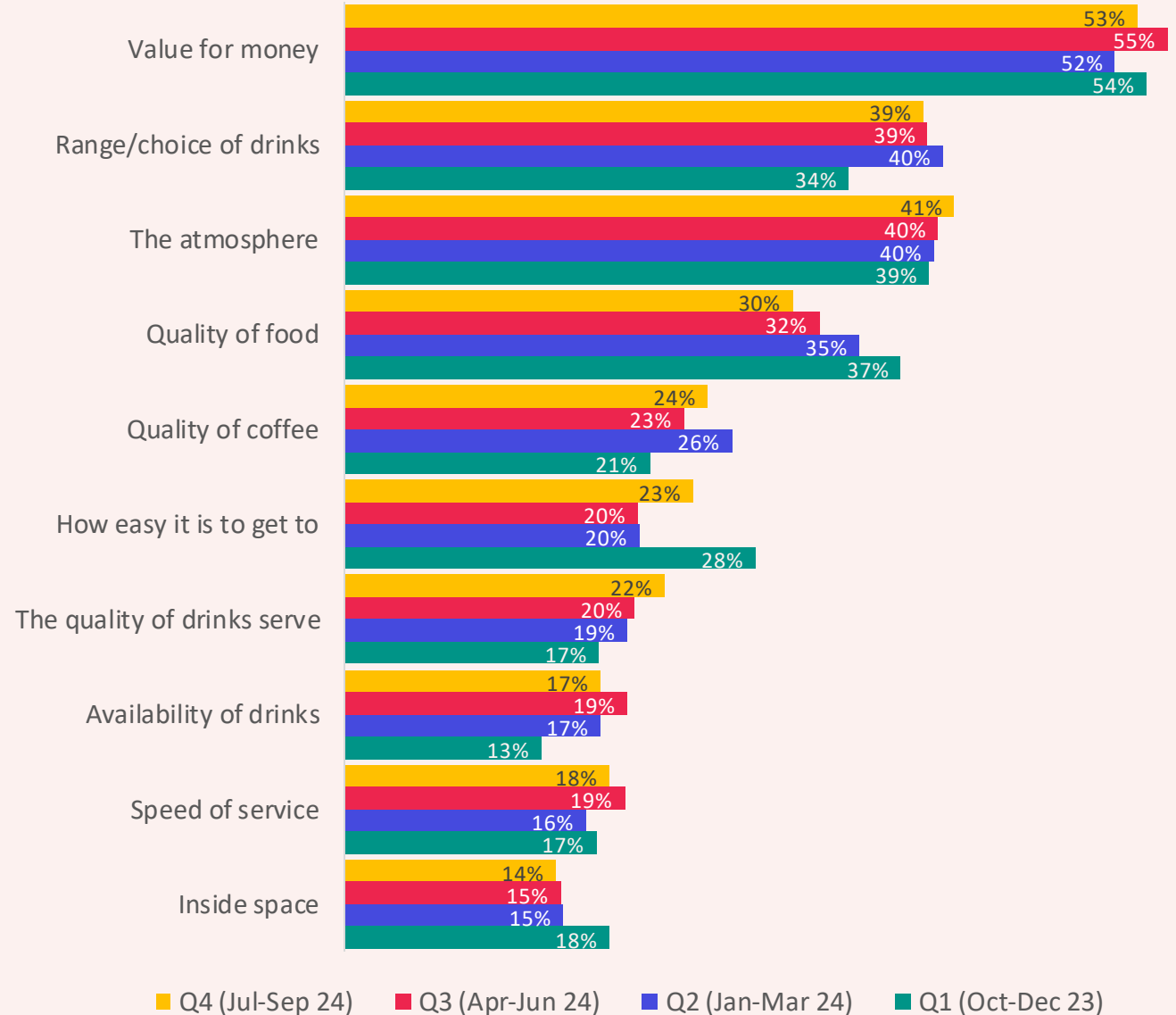


Most important factors when choosing where to go for 'drinks'.

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.

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



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..

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

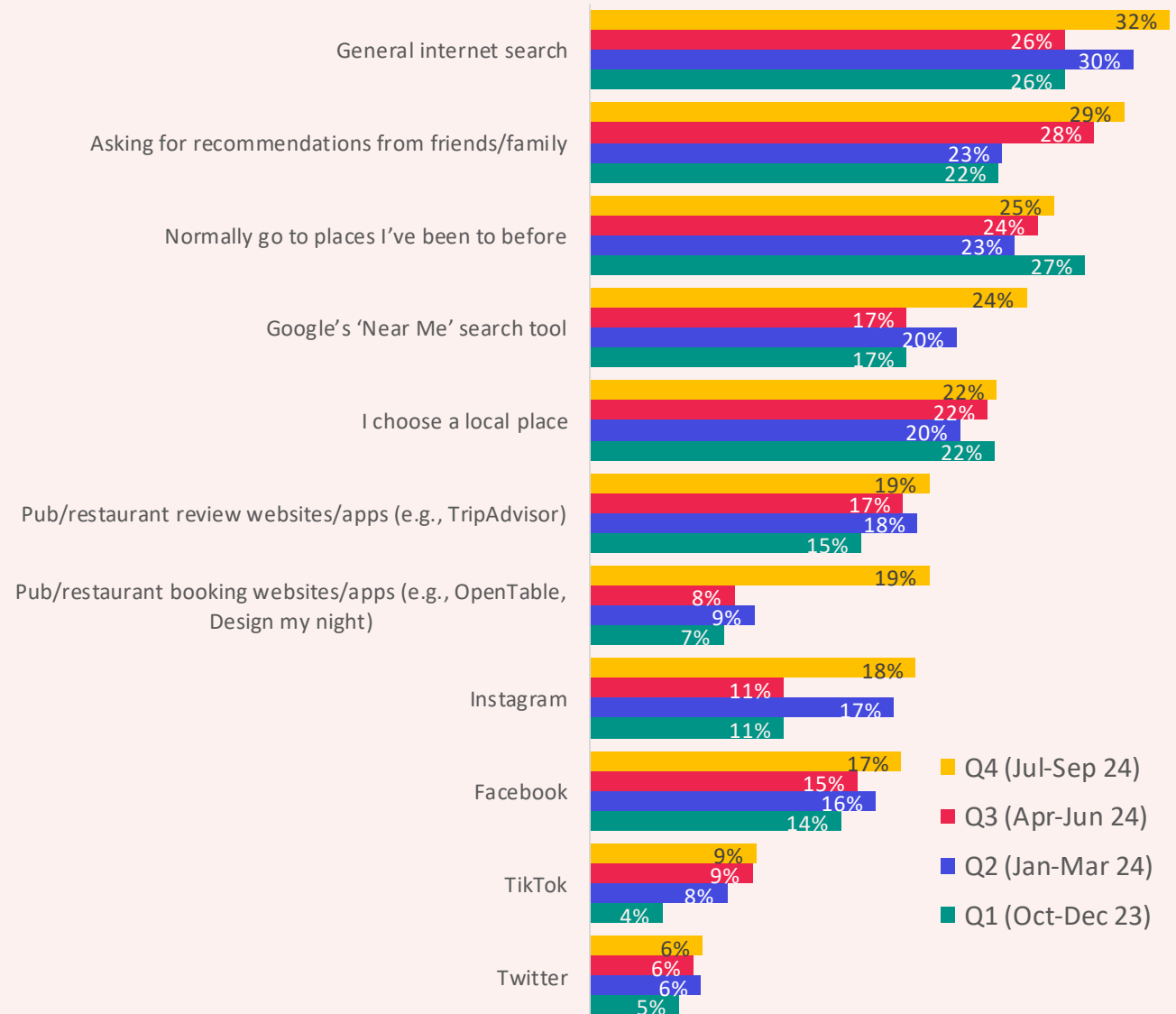


■ Q4 (Jul-Sep 24) ■ Q3 (Apr-Jun 24) ■ Q2 (Jan-Mar 24) ■ Q1 (Oct-Dec 23)

Pre-visit customer research and discovery.

These are the top 10 sources of information that customers used to help them find and/or choose a pub, bar or restaurant in the last 3 months (for the period Jul-Sep 24), with 'general internet search' being the number one choice.

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?



PLAN TO PLATE.



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.)?

NEED STATE

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

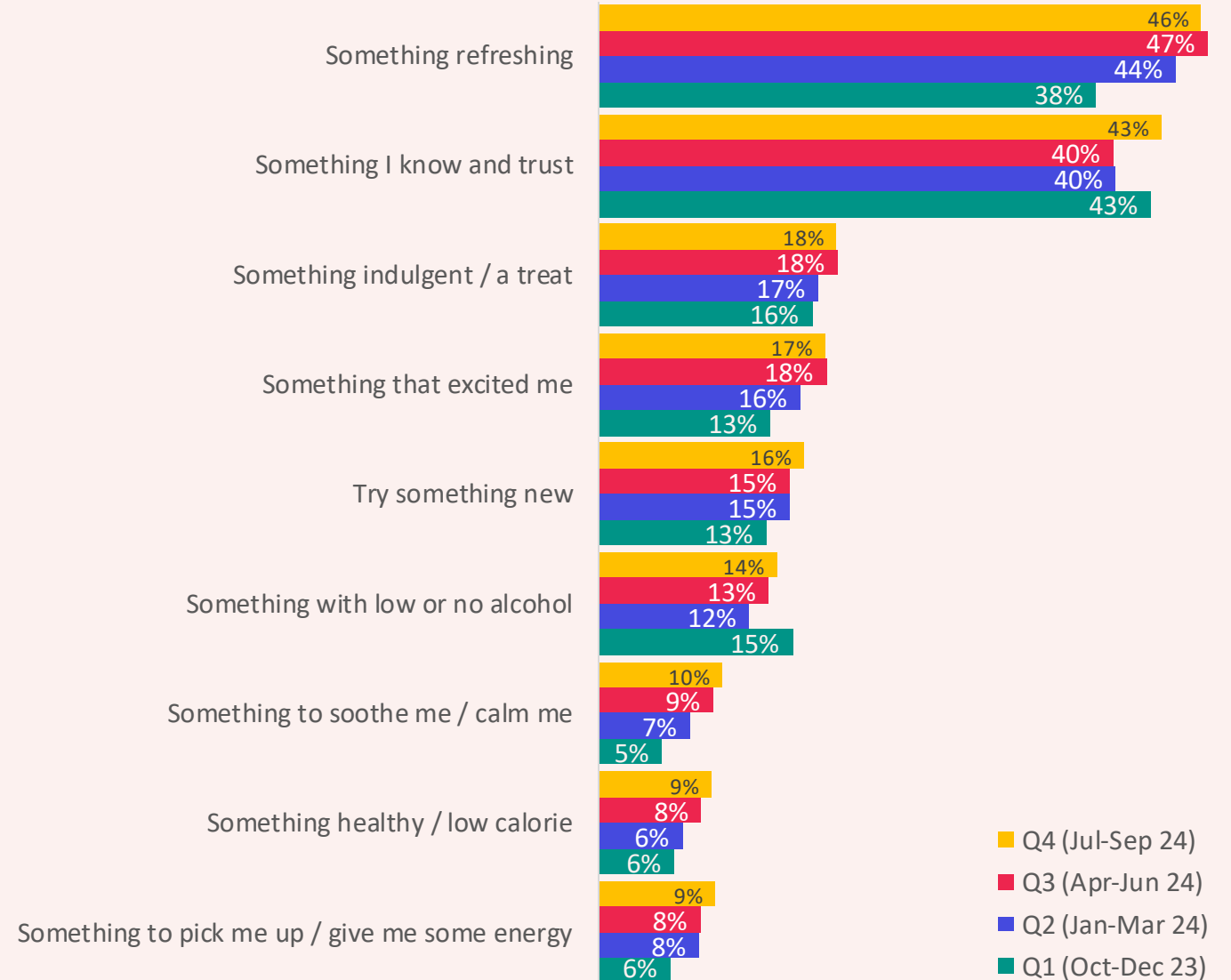


The top need states influencing customer decisions when ordering drinks.

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

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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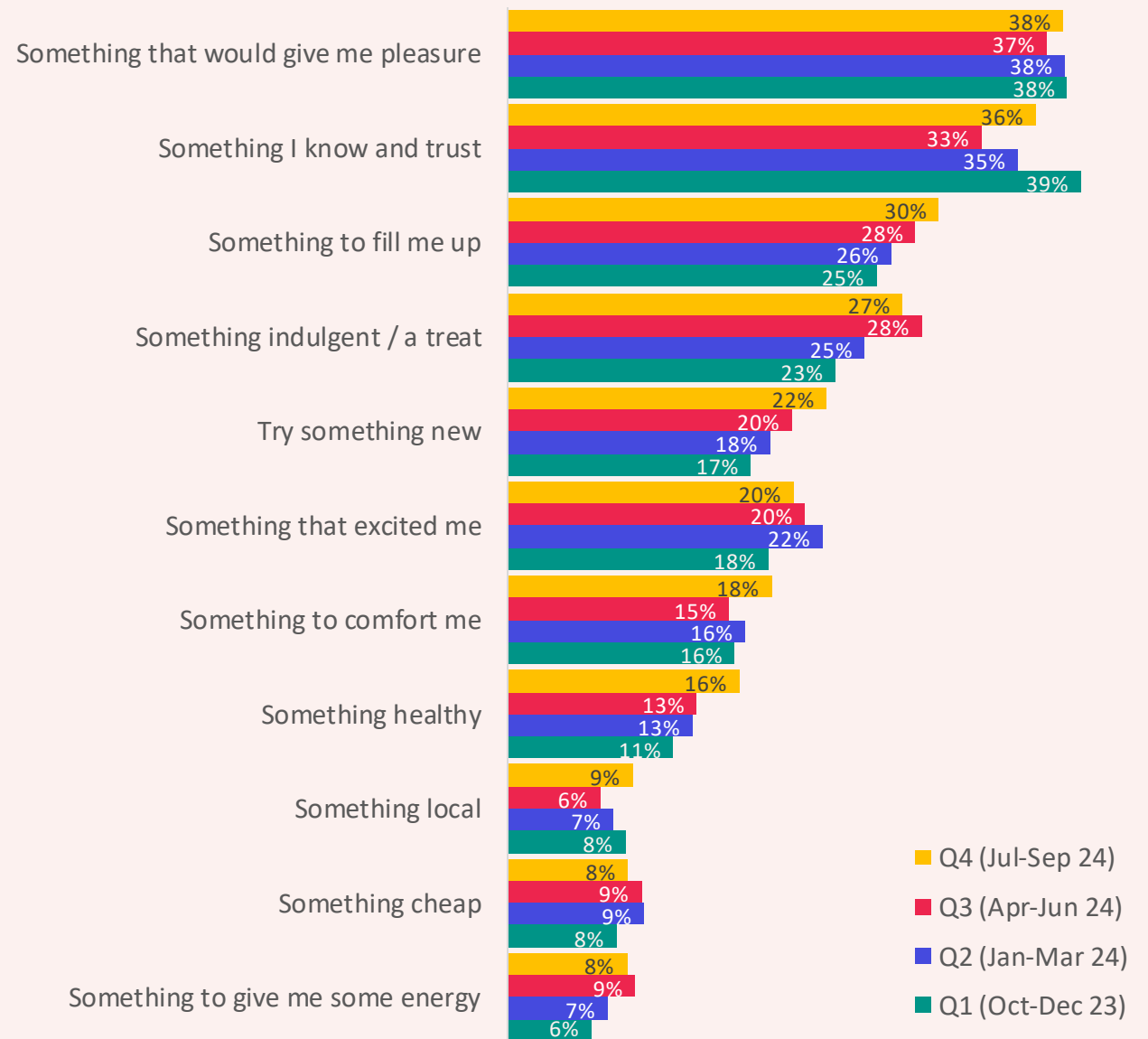


The top need states influencing customer decisions when ordering food.

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

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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BUDGET

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



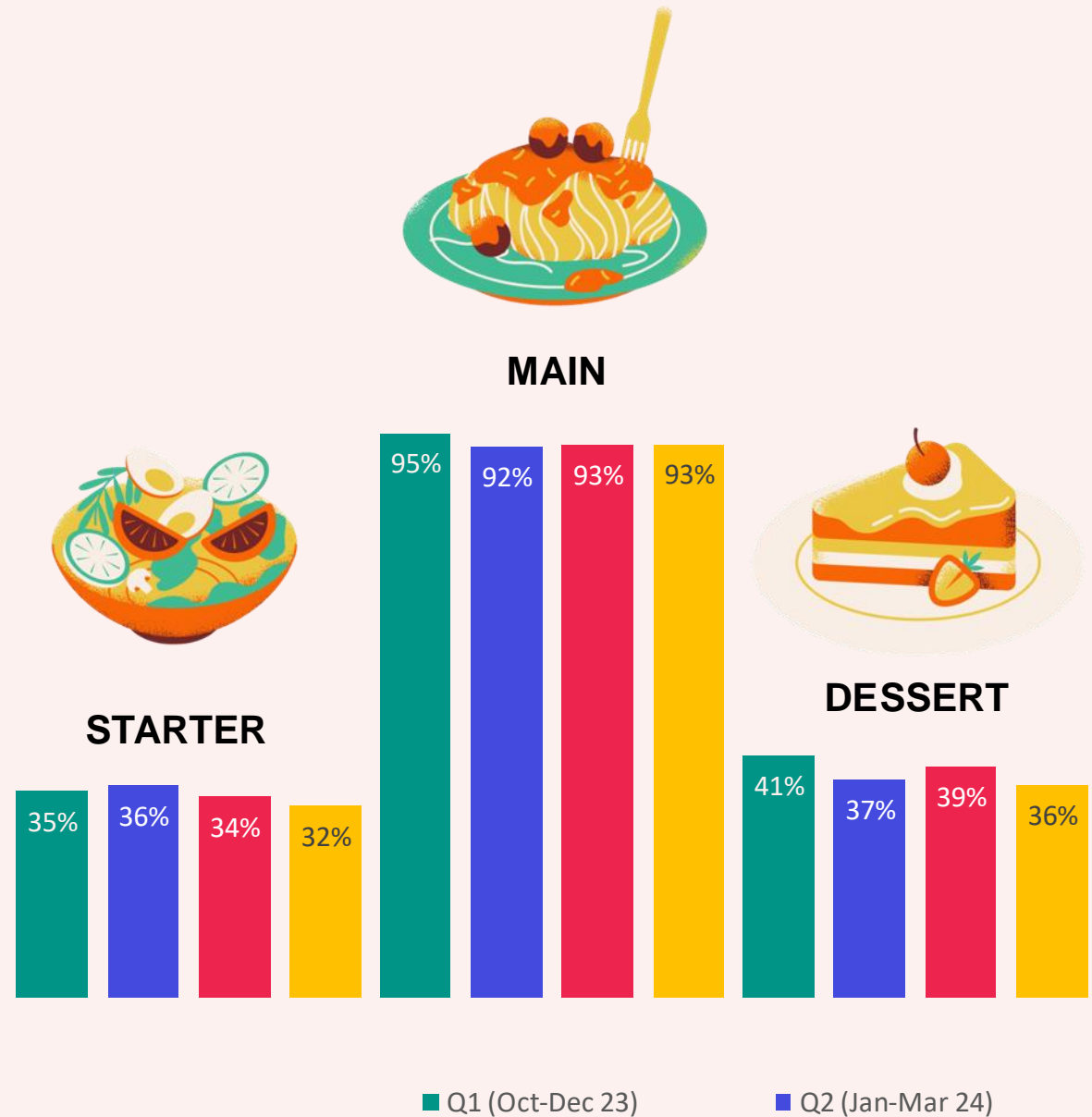
Number of courses customers are ordering when dining in pubs, bars and restaurants.

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. Both starters and desserts have seen general trends of decline since tracking started back in Oct 23. **The average number of courses decreased to 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?

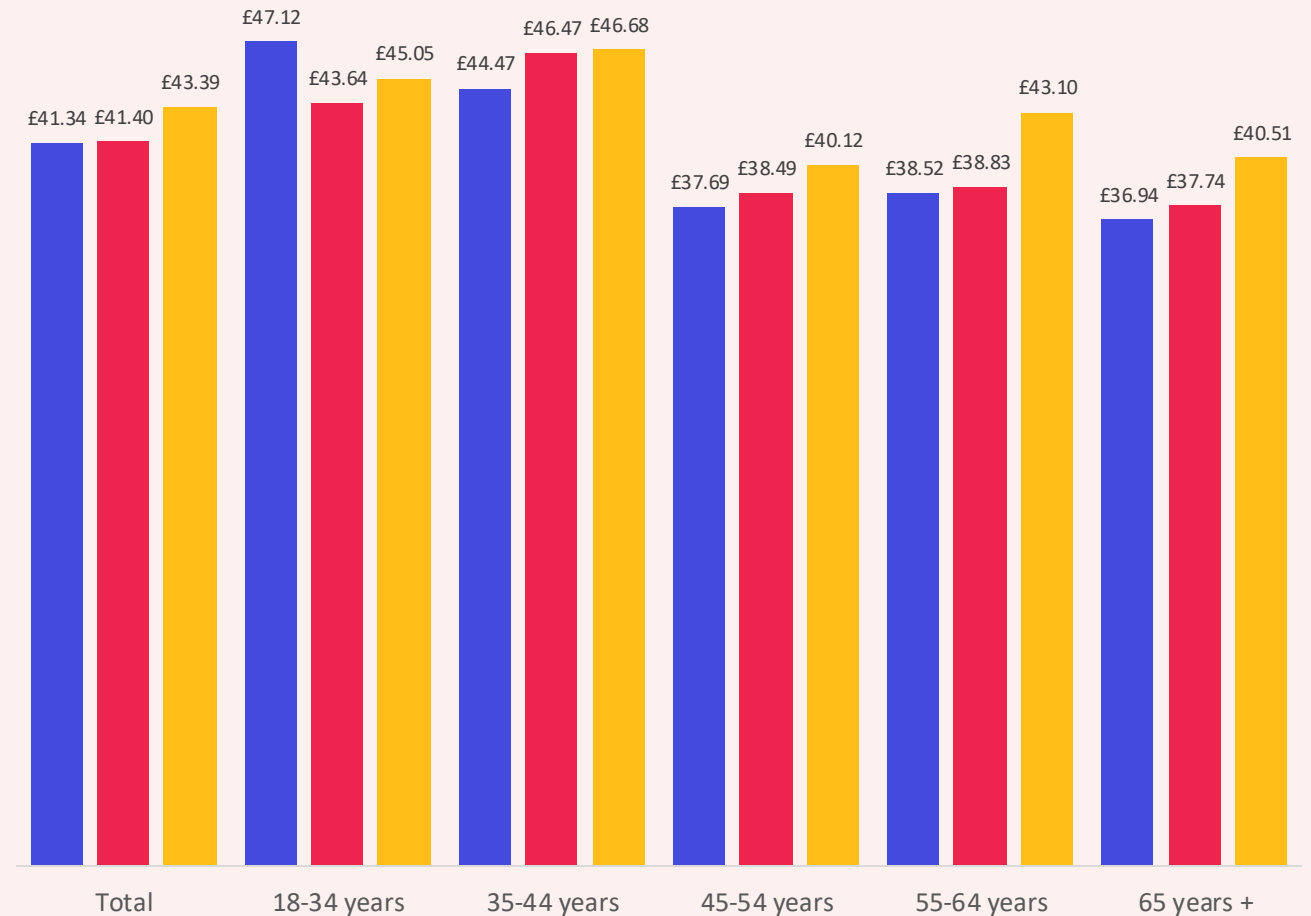
KAM



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.



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

■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)

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TIME

How much time have I
got to spend here?

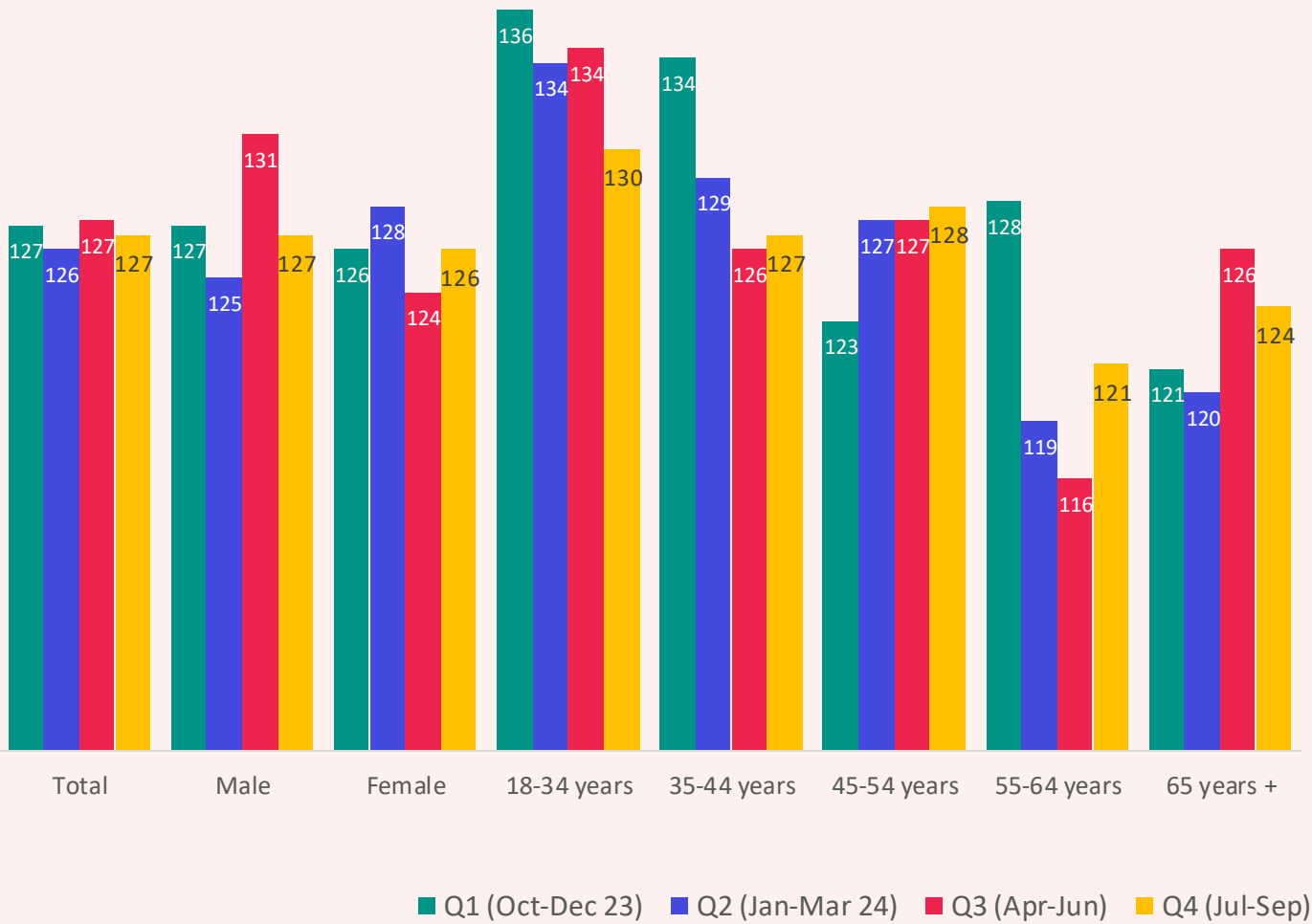


Average customer time spent, per visit, in pubs, bars and restaurants.

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-month 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.)?

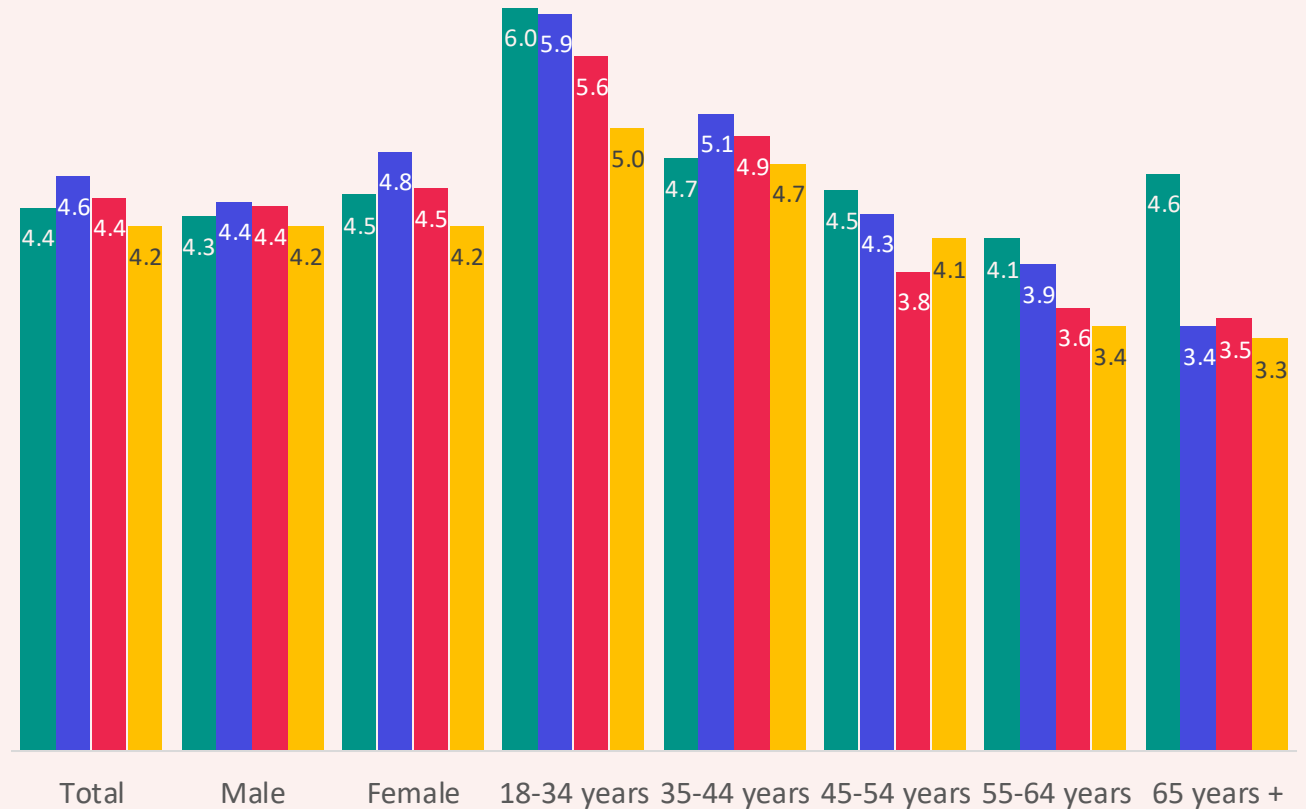


Average party size when visiting pubs, bars and restaurants.

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.

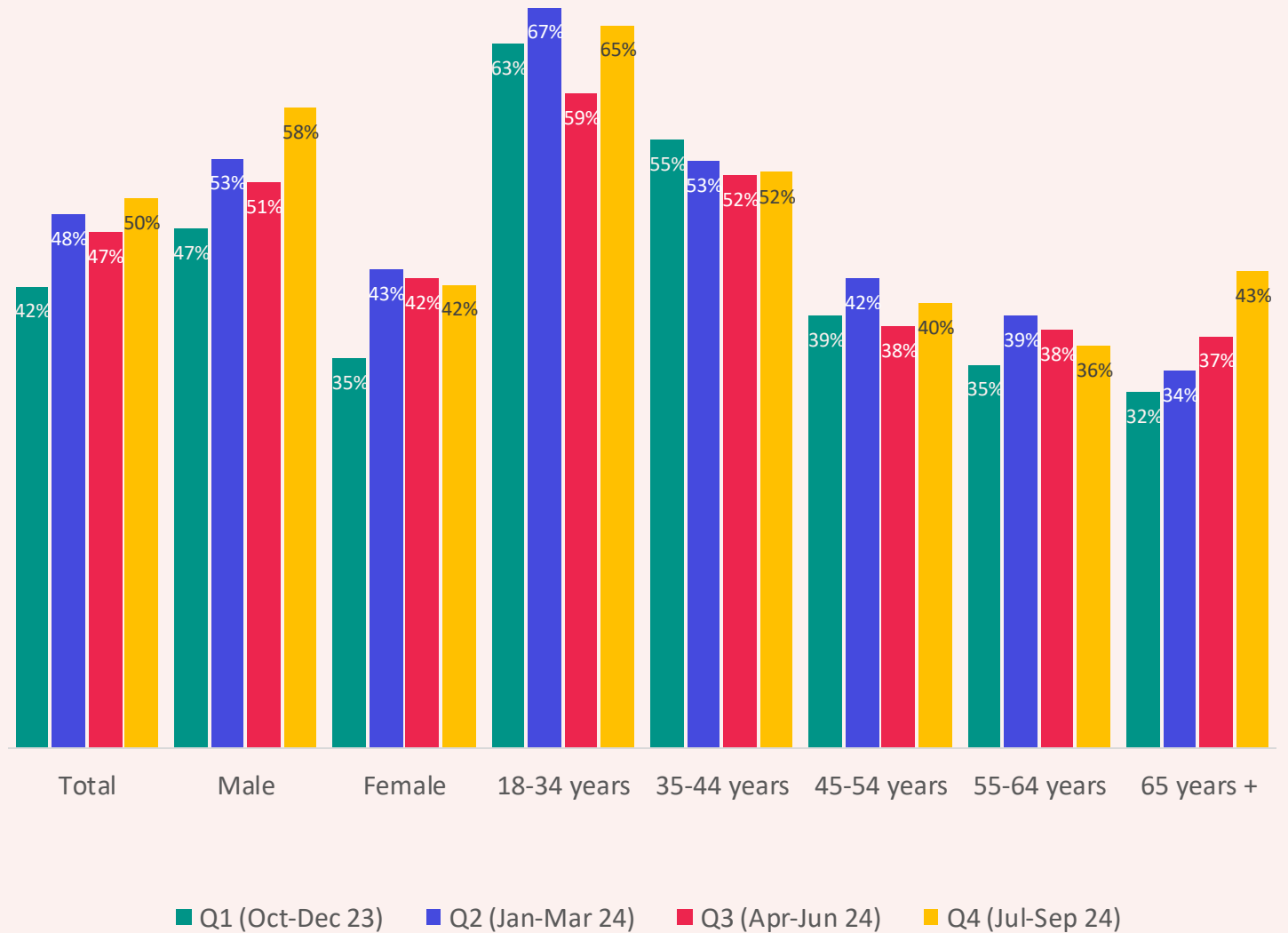
Q. Thinking now about your last visit to a pub, bar or restaurant, how many other people were with you? (including yourself)



■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)

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.



PLAN TO PLATE.



Engagement

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

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 behaviour.



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.

POINT OF SALE

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

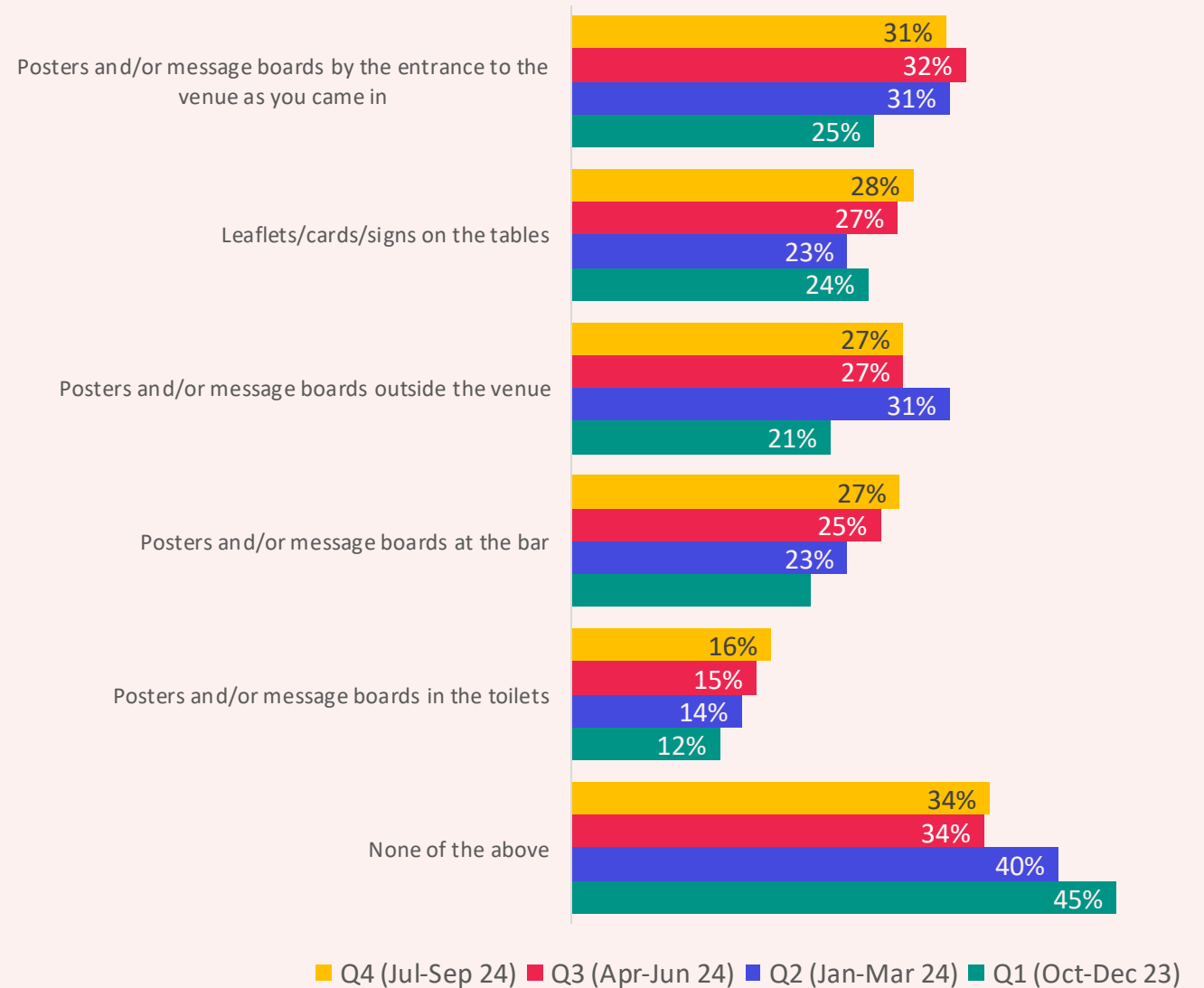


**GET IT
NOW!**

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

Based on their last visit to a pub, bar or restaurant (within the last 3 months),

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



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.

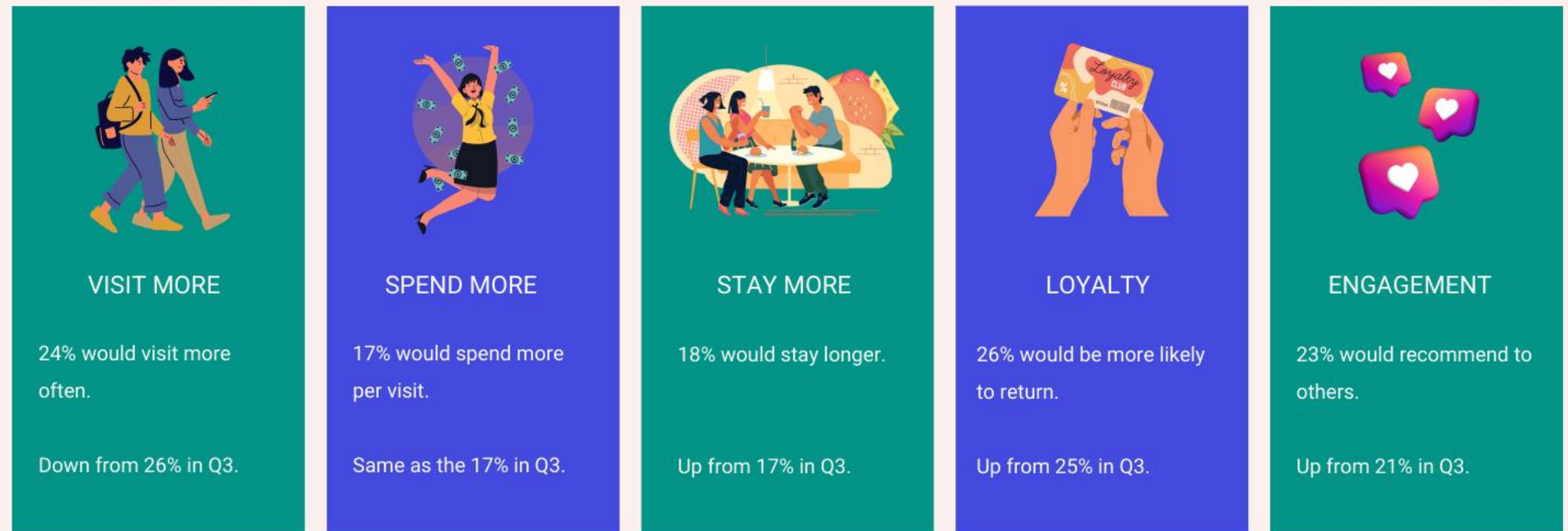
Q. Would you say that you 'actively' look out for any of the following information when you are inside a pub, bar or restaurant?

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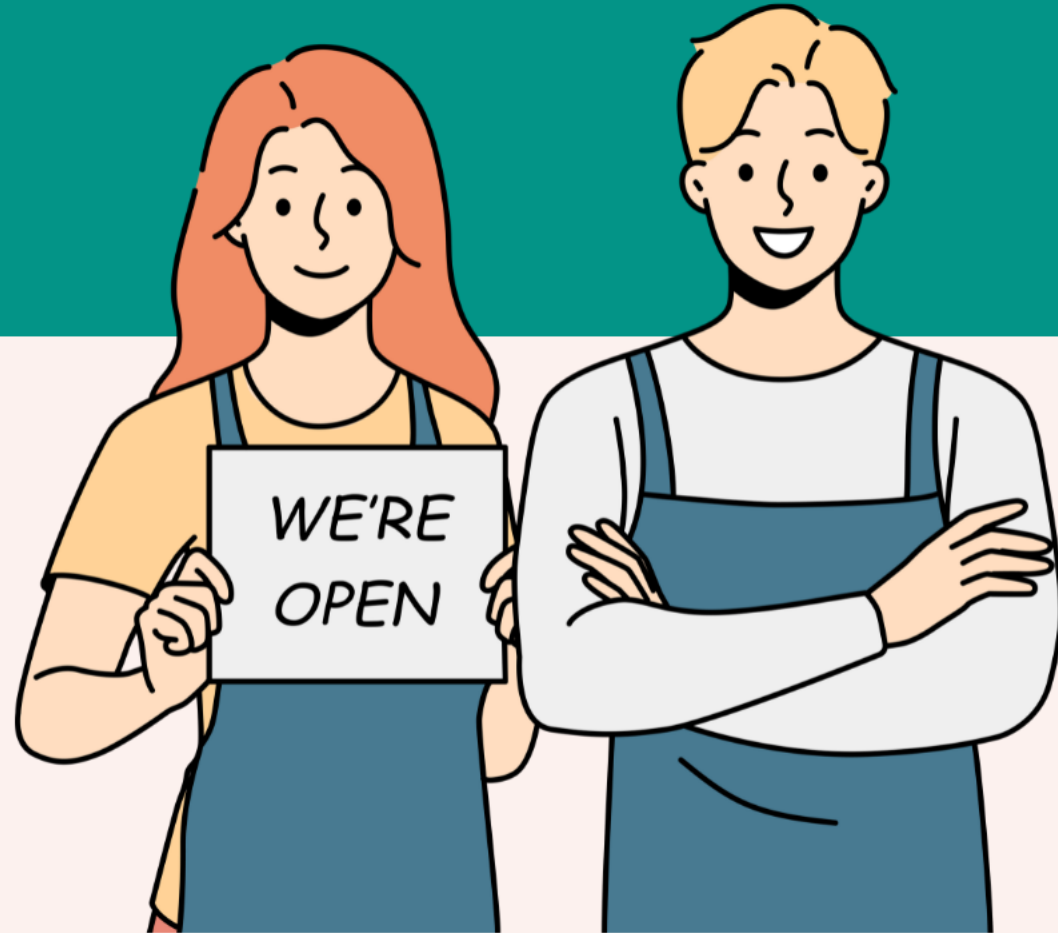
BENEFITS OF GETTING POS RIGHT FOR THE CUSTOMER.

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?



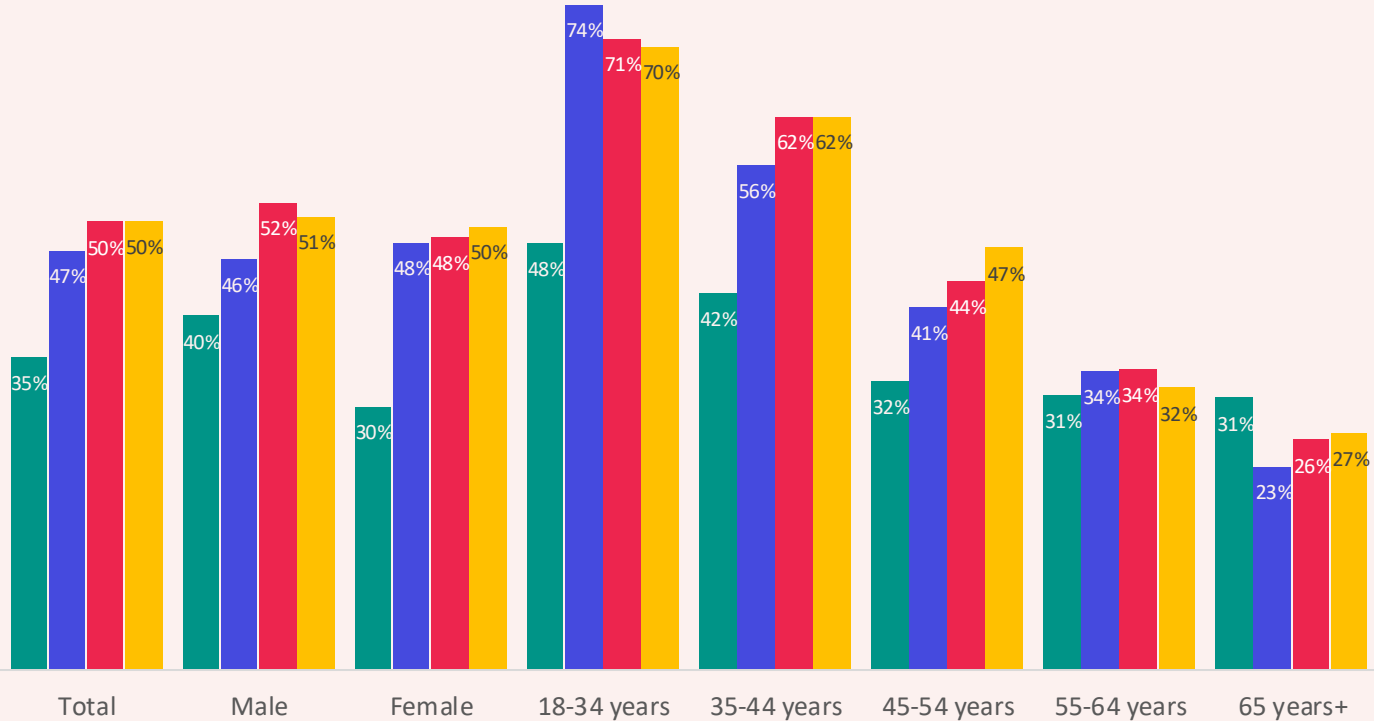
STAFF

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.

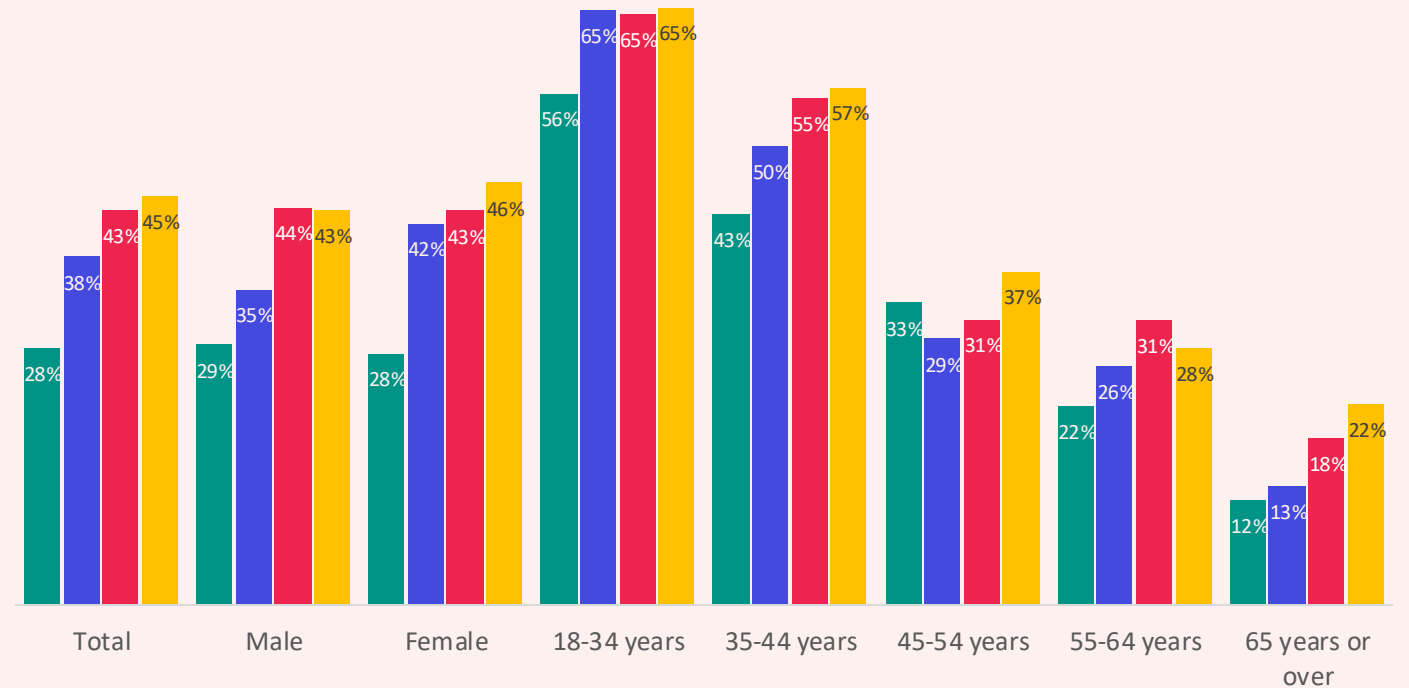


Q. In the last 3 months, have any staff in pubs, bars and restaurants (you've visited) try to recommend certain food and/or drinks to you?

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)

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.

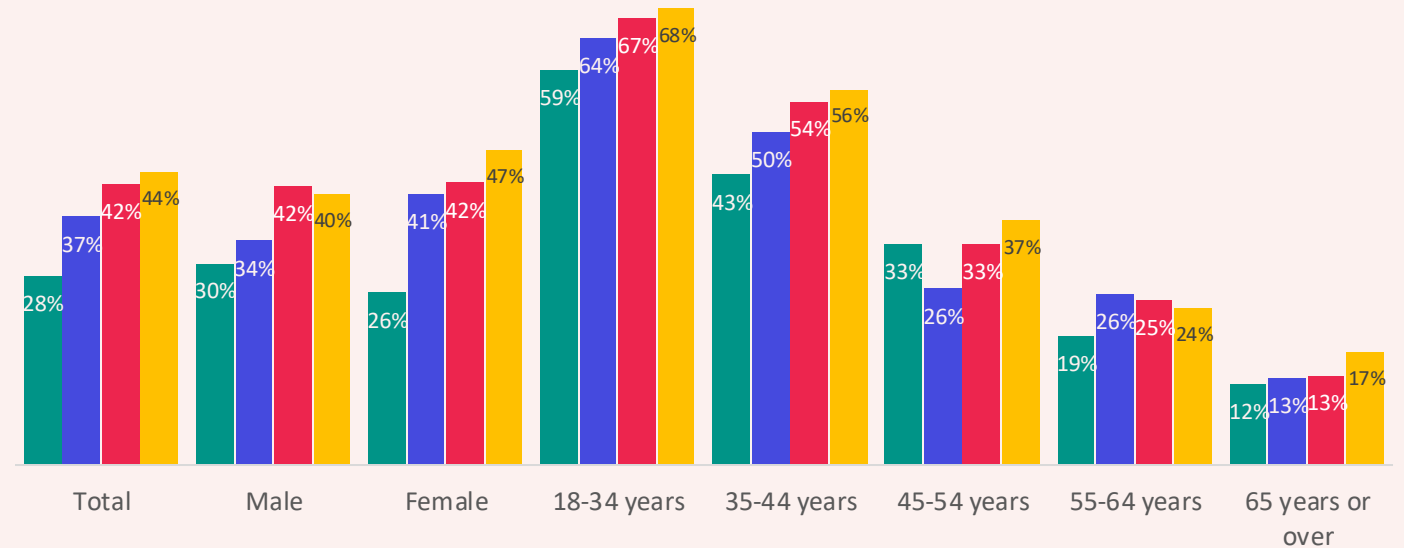


Q. If staff in pubs, bars and restaurants (that you've visited in the last 3 months) had recommended certain **food** to you - how likely would you have been to go with their recommendations?

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)

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.

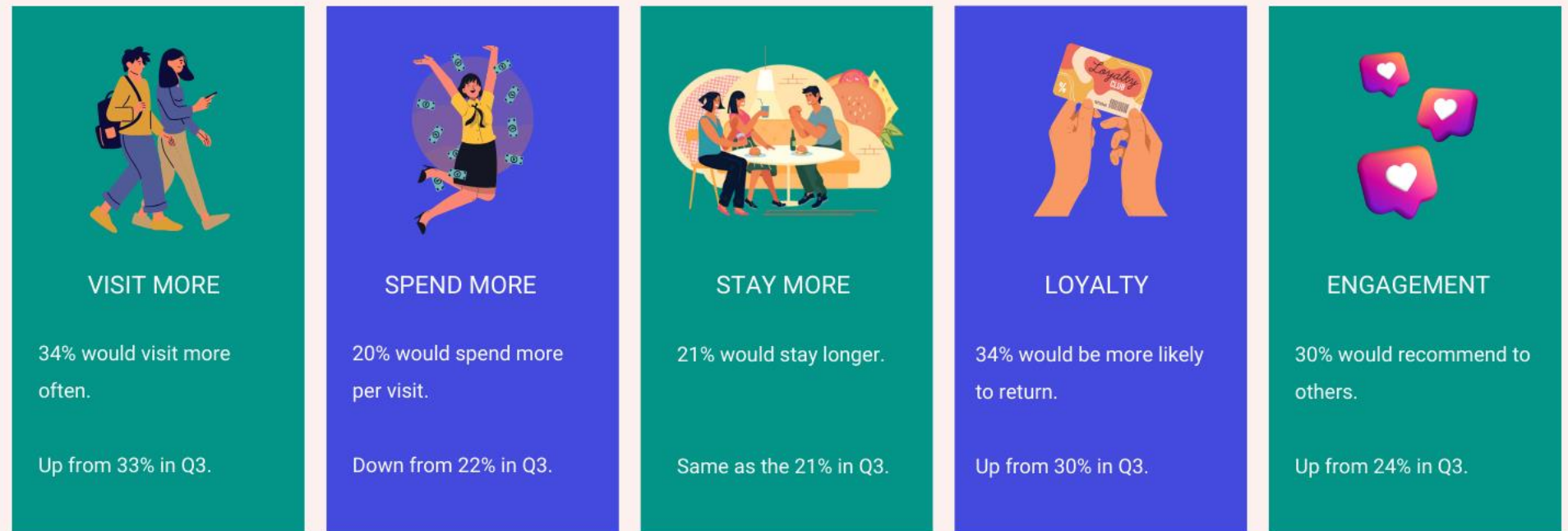


Q. If staff in pubs, bars and restaurants (that you've visited in the last 3 months) had recommended certain ****drinks**** to you - how likely would you have been to go with their recommendations?

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)

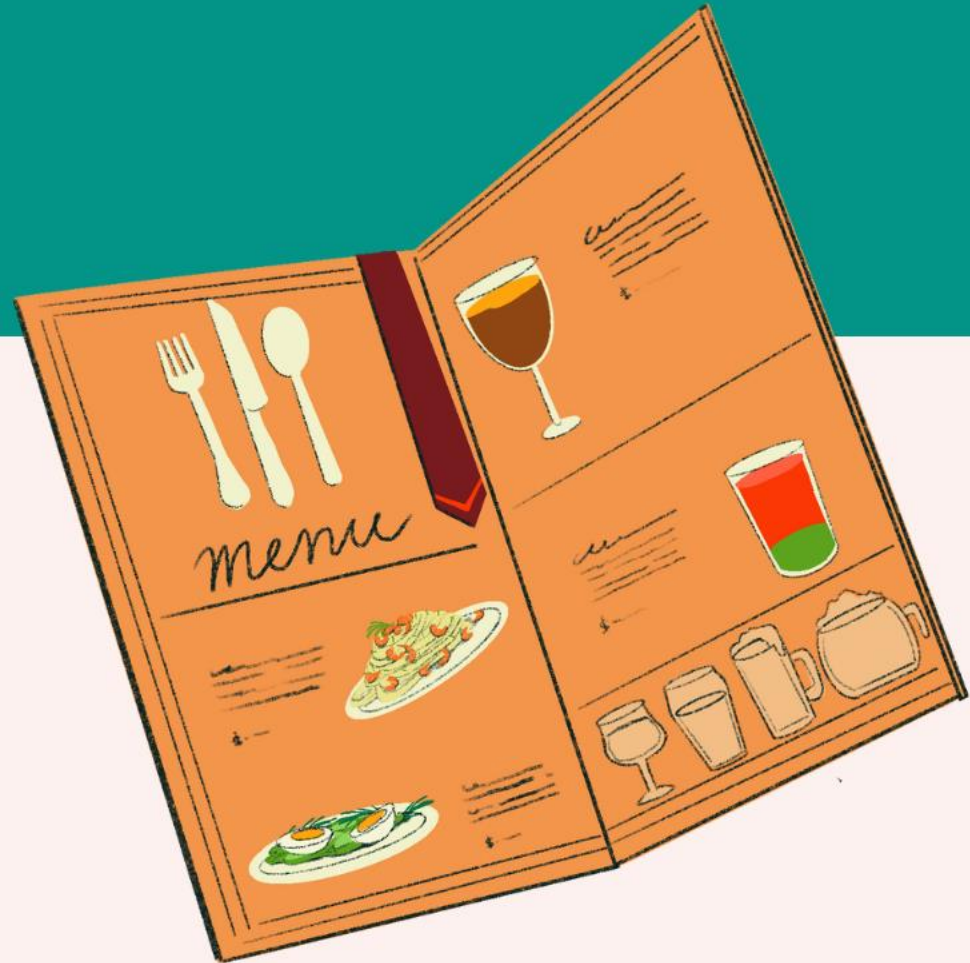
BENEFITS OF GETTING STAFF ENGAGEMENT RIGHT FOR THE CUSTOMER.

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?



MENUS

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



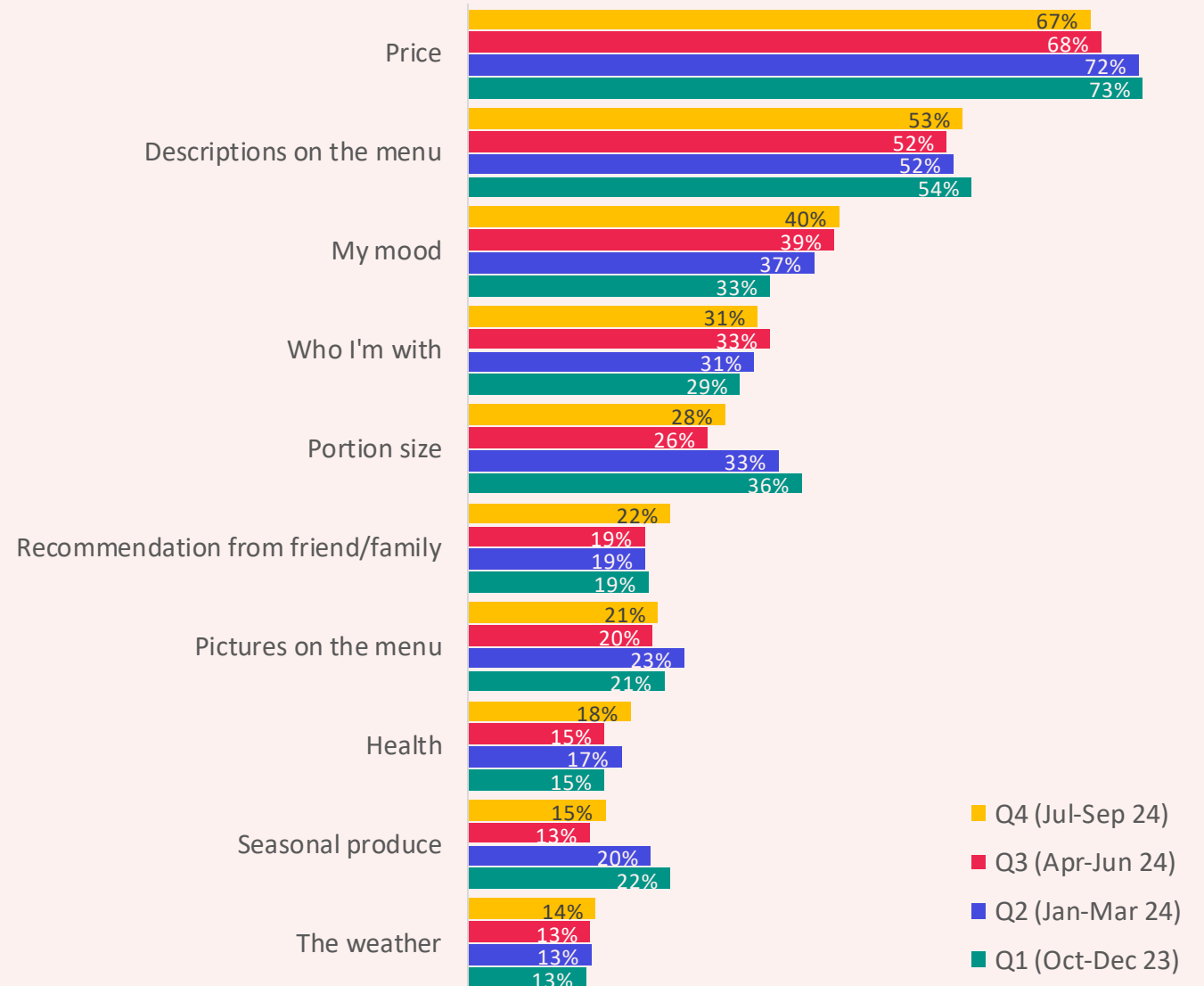
The top factors which influence customer choice of food when ordering in pubs, bars and restaurants.

Outside of price, it's descriptions on the menu that are the biggest influence of customer choice. Price has been steadily falling, however, as the main driver of 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

KAM

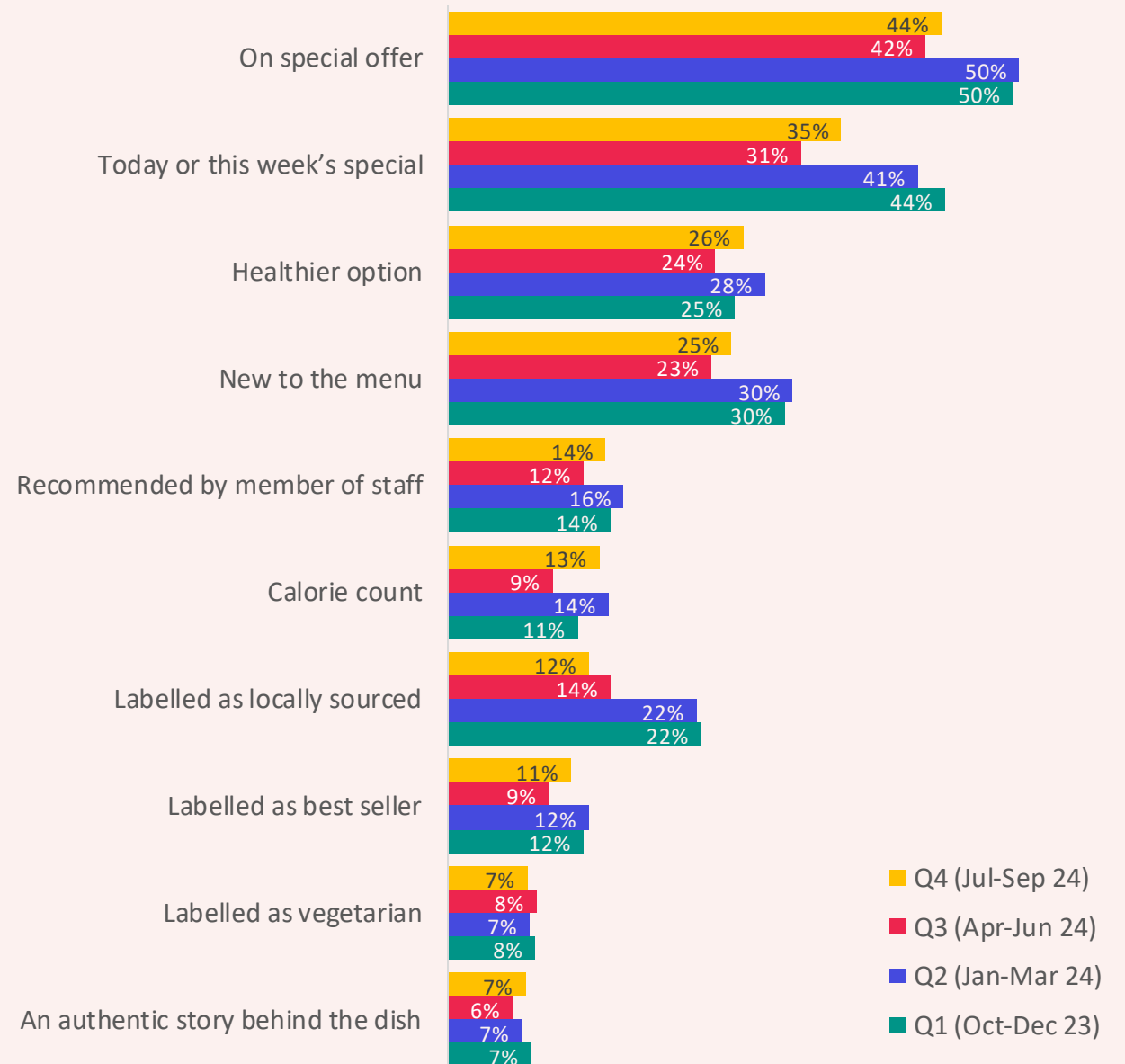


The top menu attributes which would influence a customer's order when in a pub, bar or restaurant.

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.

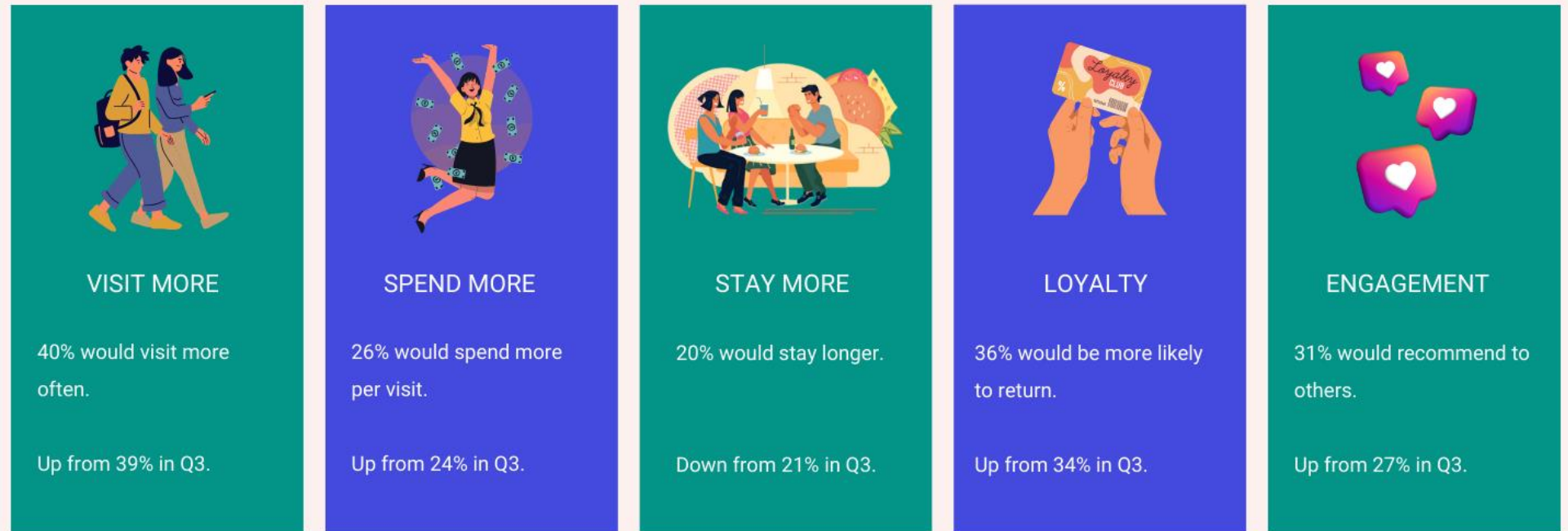
Q. Which of the following that, if flagged against dishes on a food menu, would encourage you to order it?

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



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?



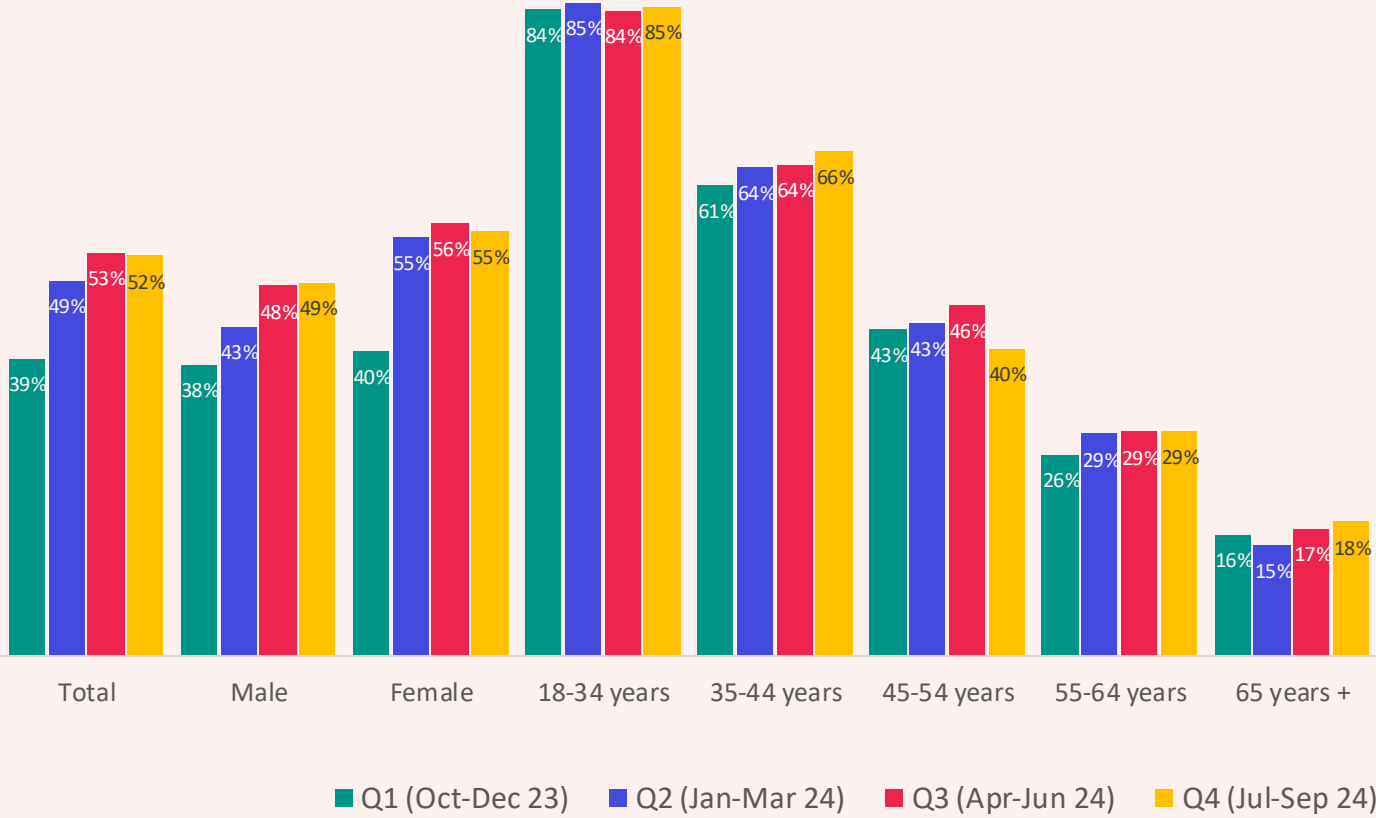
TECHNOLOGY

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.

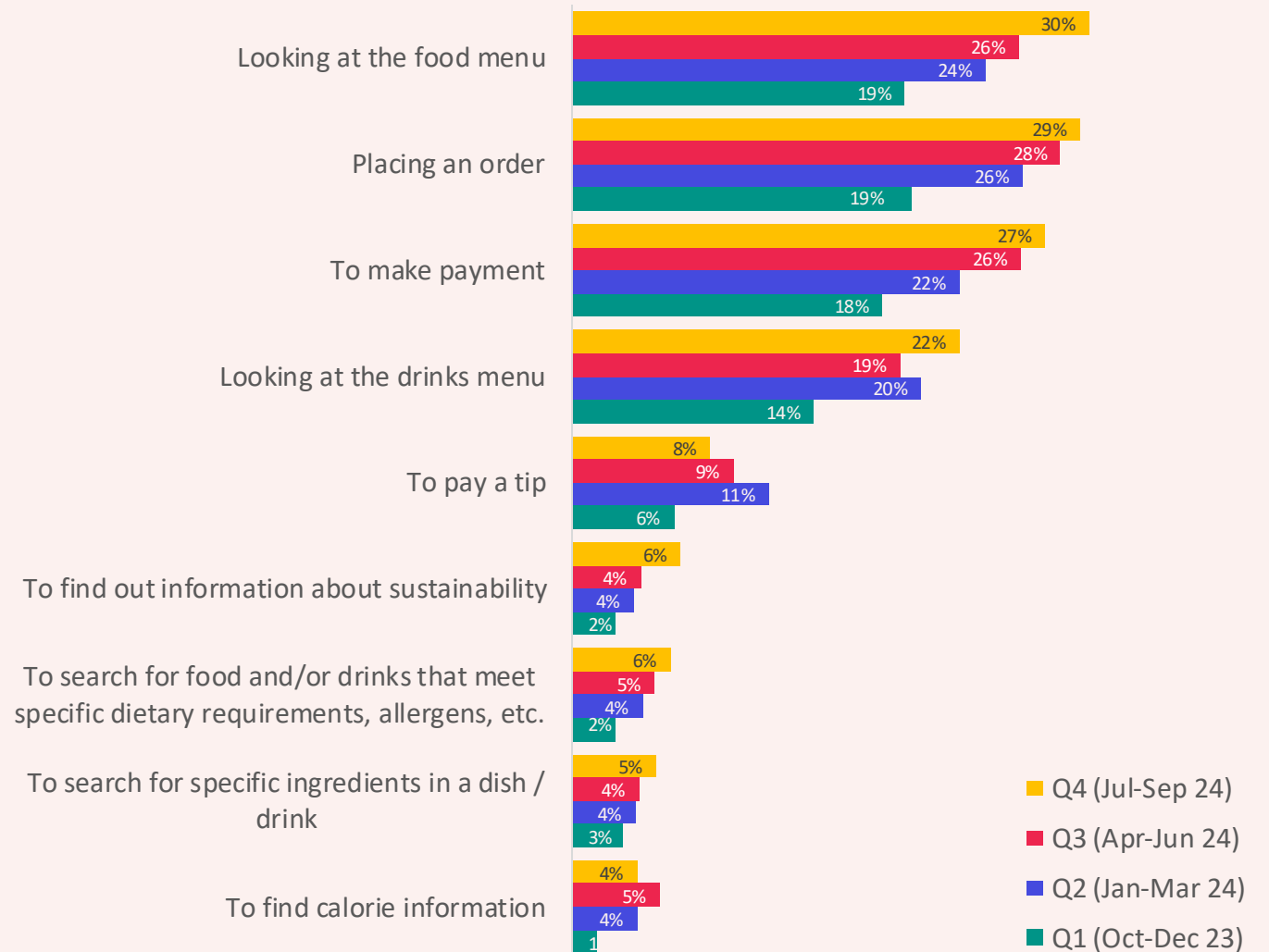


Q. In the last 3 months have you used a QR code or digital screen in a pub, bar or restaurant for any of the following? % who selected at least once option

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

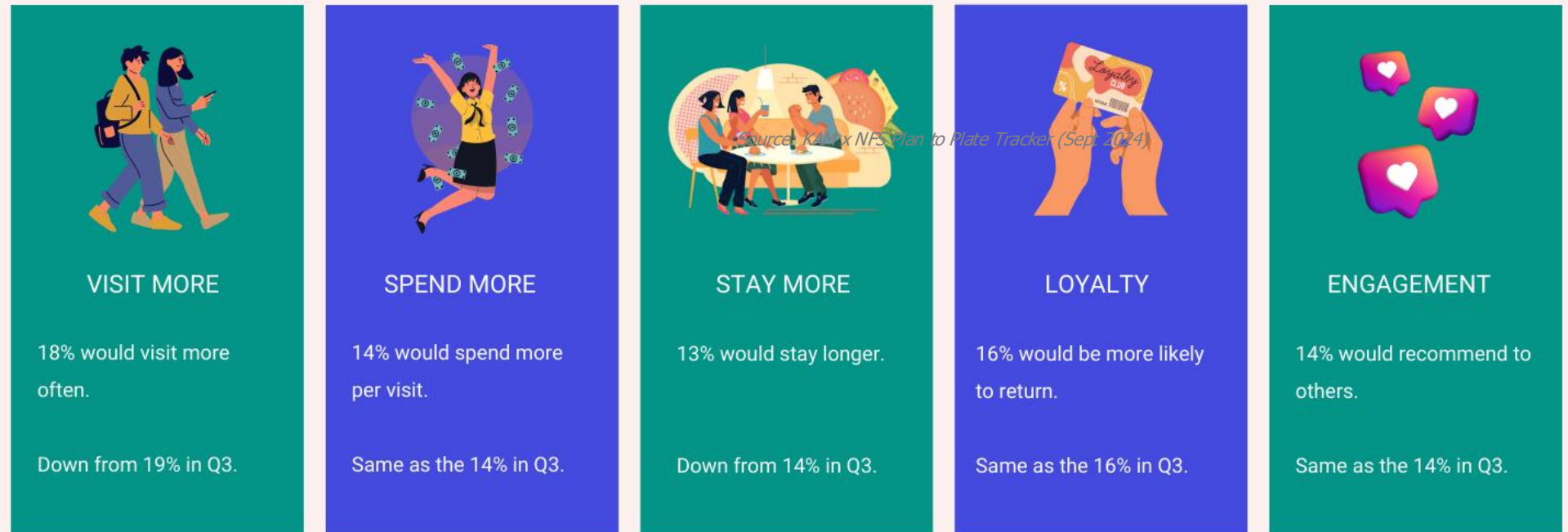
Placing an order, looking at the food menu and making payments are the top 3 actions that customers have used QR codes for in the last 3 months.

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?



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?



LOYALTY

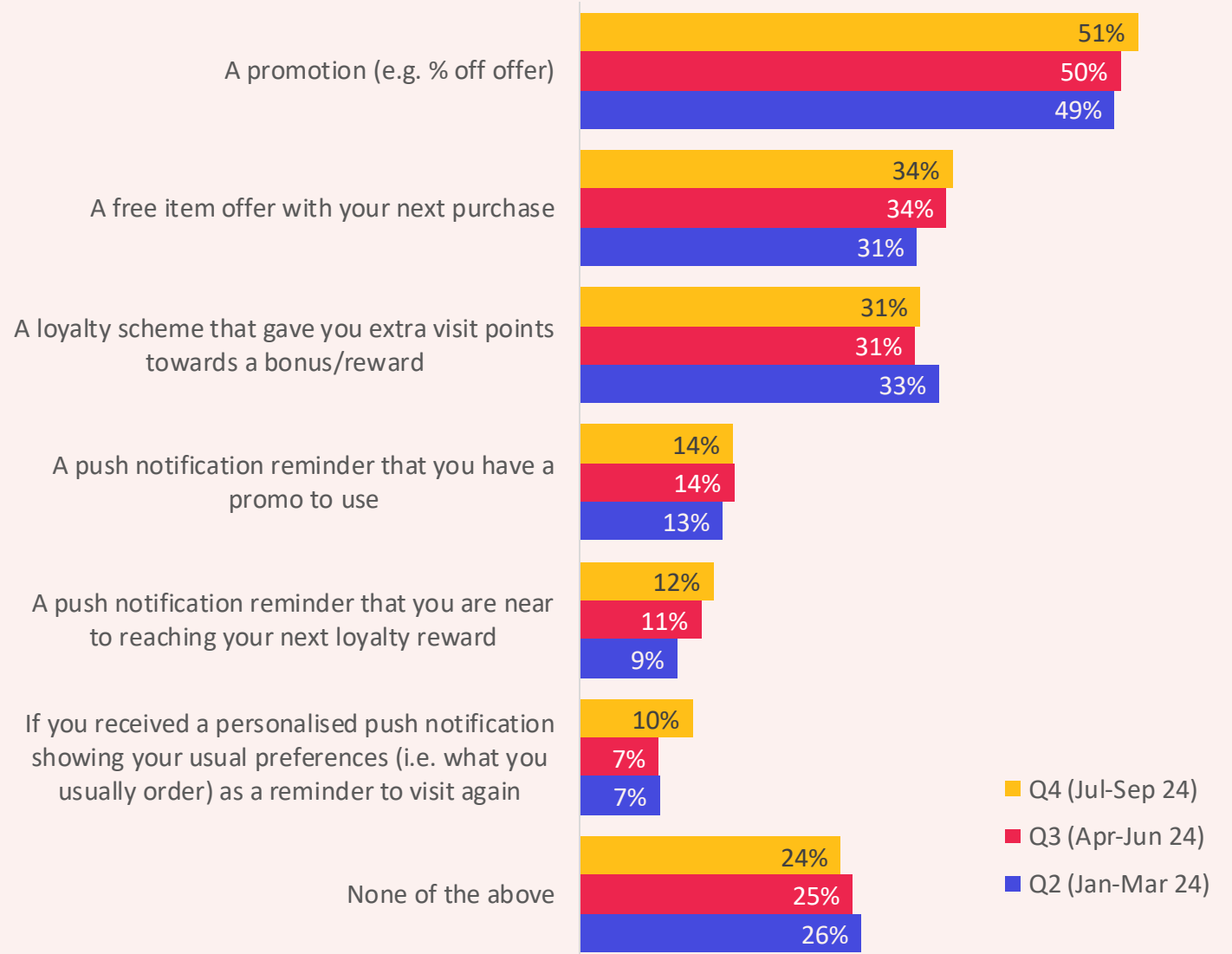
Encouraging customers to leave reviews and the role of loyalty schemes in driving footfall to venues.



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

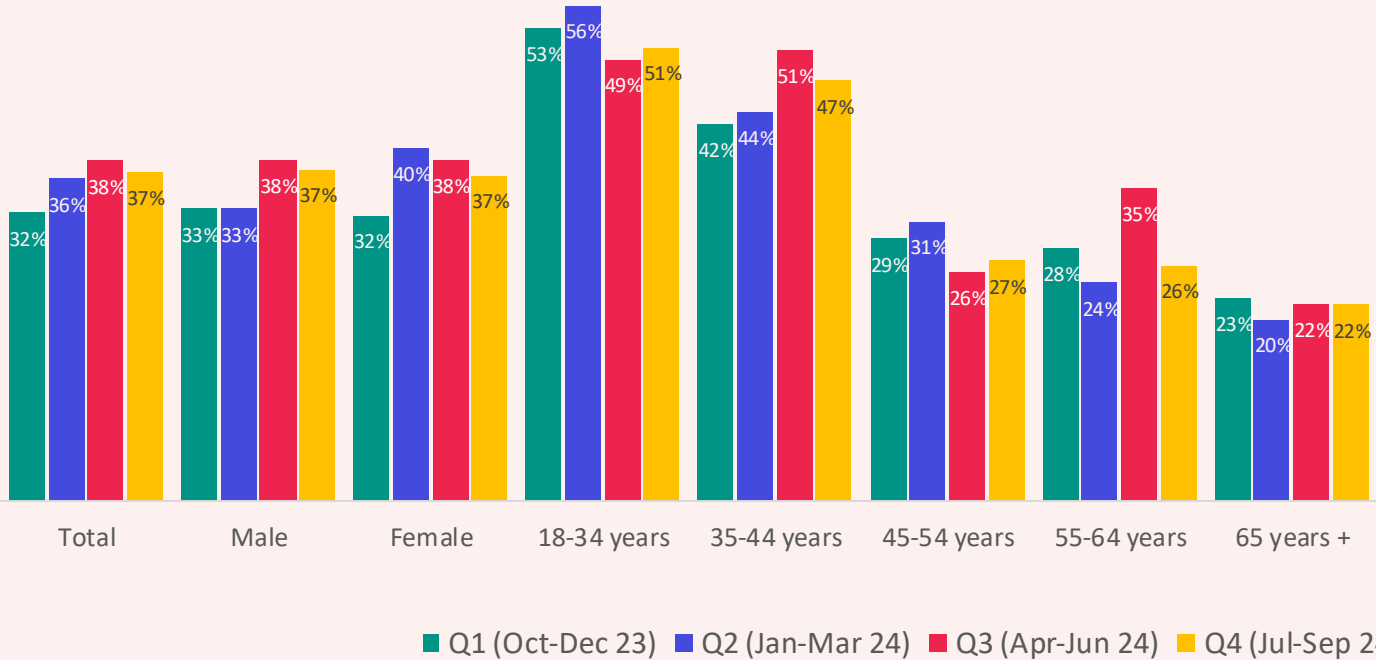
3 in 4 customers would be influenced by some type of promotion or reward, in terms of driving an incremental visit to a venue.

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?



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

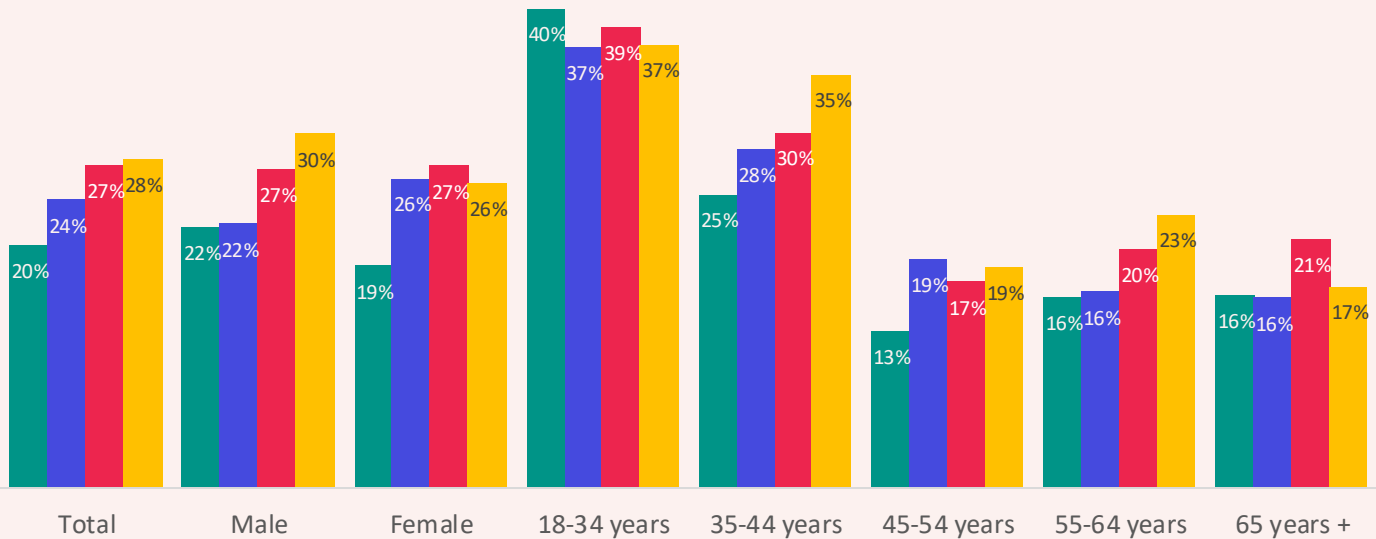
Breakdown, by demographic, of the % of customers who HAVE LEFT a review after visiting a pub, bar, or restaurant within the 3-month period.



Q. Have you ever left a review of a pub, bar or restaurant that you've visited in the last 3 months?

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.



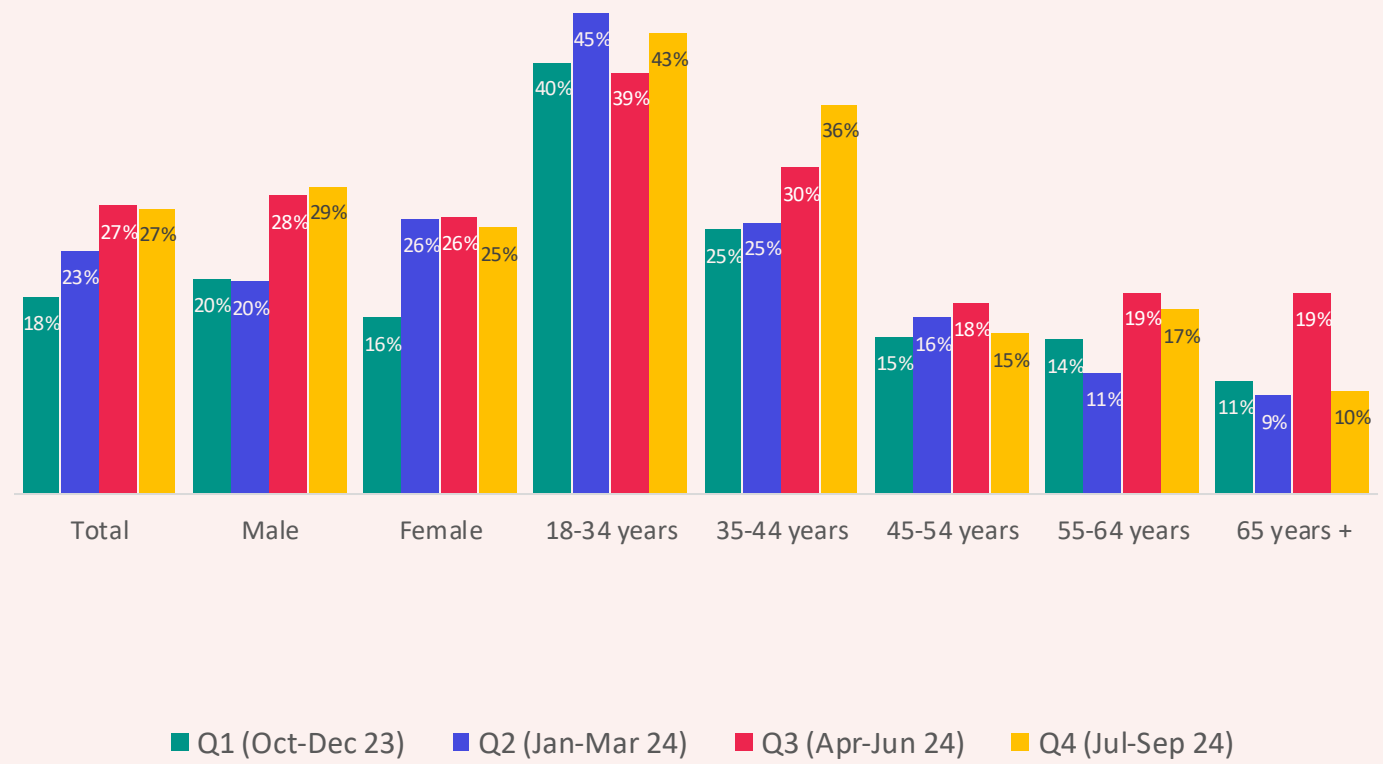
Q Are you part of any pub, bar or restaurants loyalty schemes?

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)



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.

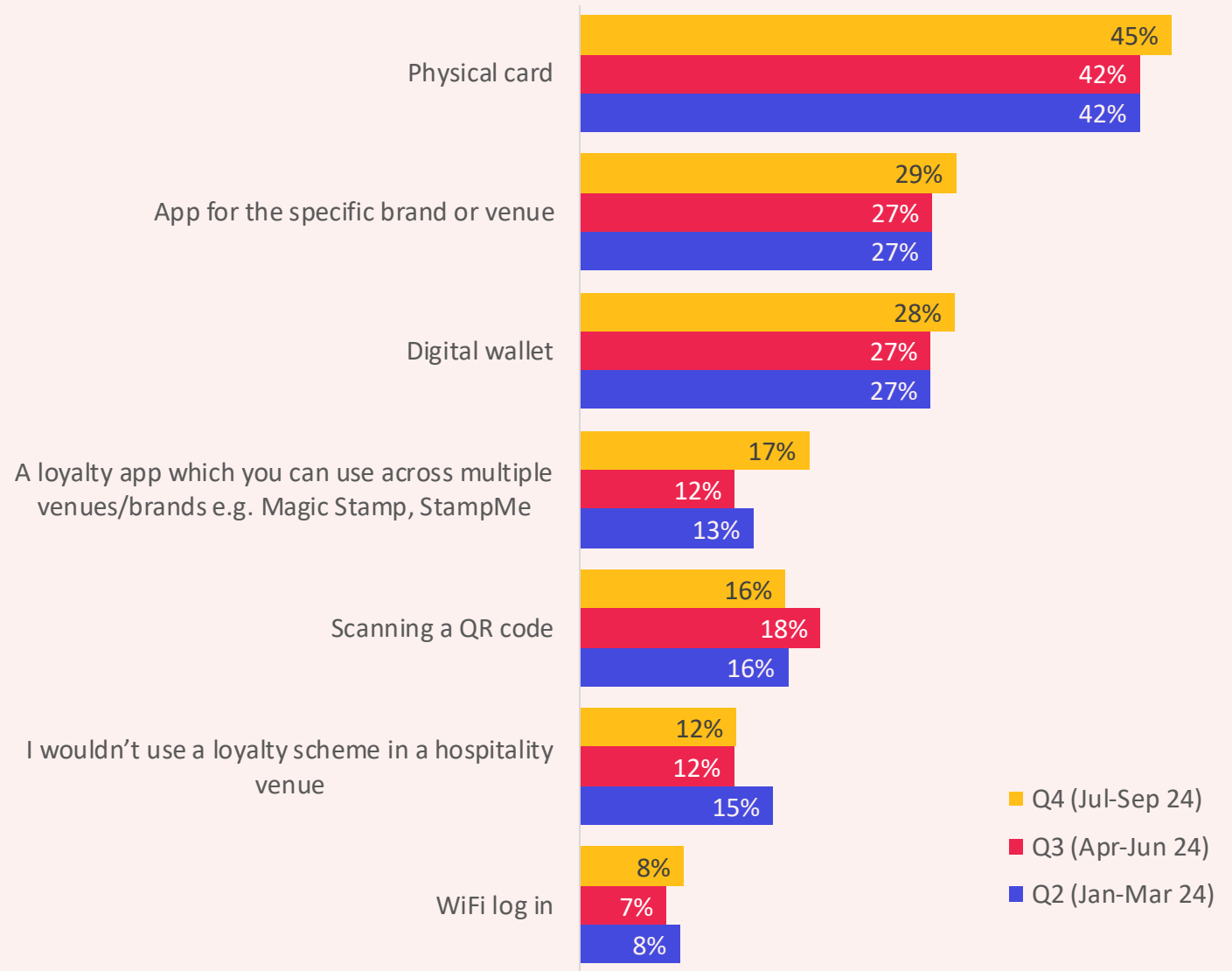


Q Has a loyalty scheme influenced you to visit a specific pub, bar or restaurant in the last 3 months?

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

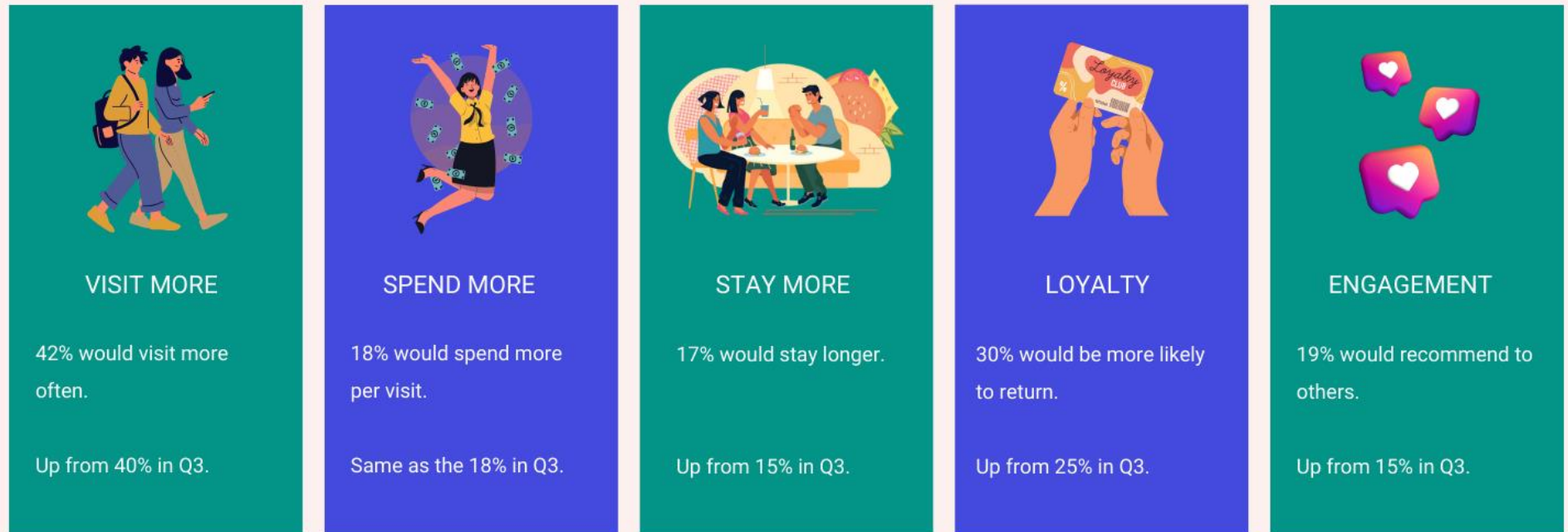
88% of customers would use a loyalty scheme if it was available. The most popular method of collecting points and/or rewards is through a physical card, followed by apps/digital wallets.

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



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?



PLAN TO PLATE.



Summary

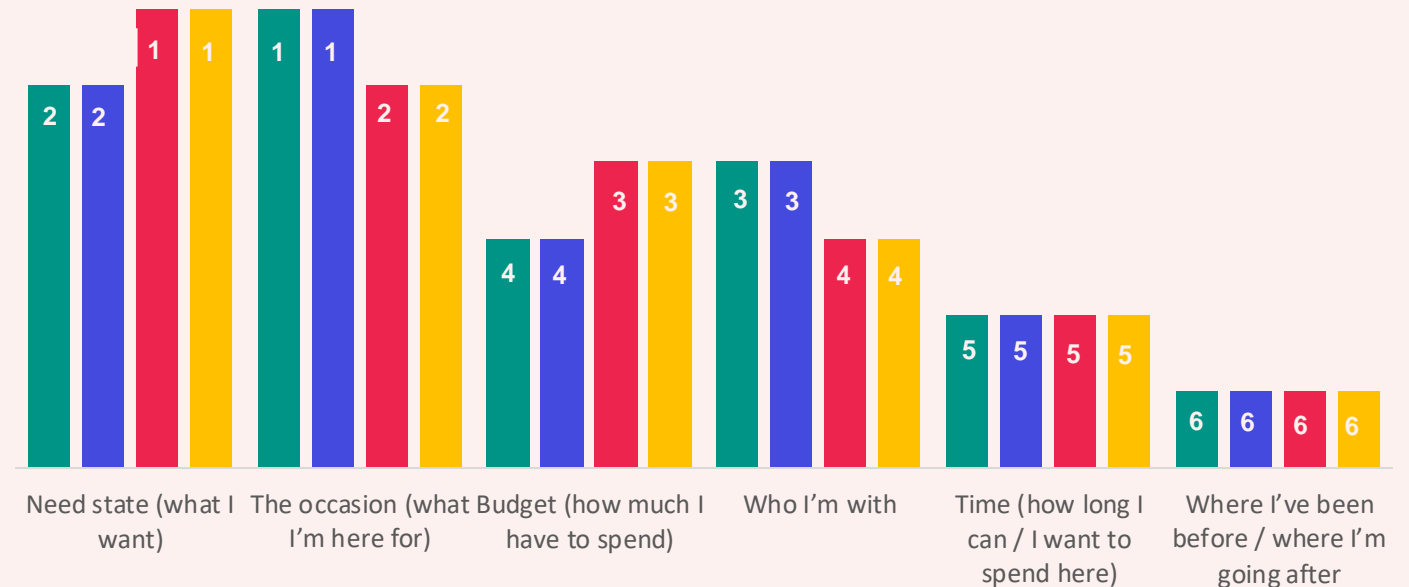
Which influences have been most impactful, and which in-venue tools have been most effective in the last 3 months?

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.

The need state (what I want) is the biggest influence on in-venue behaviour.

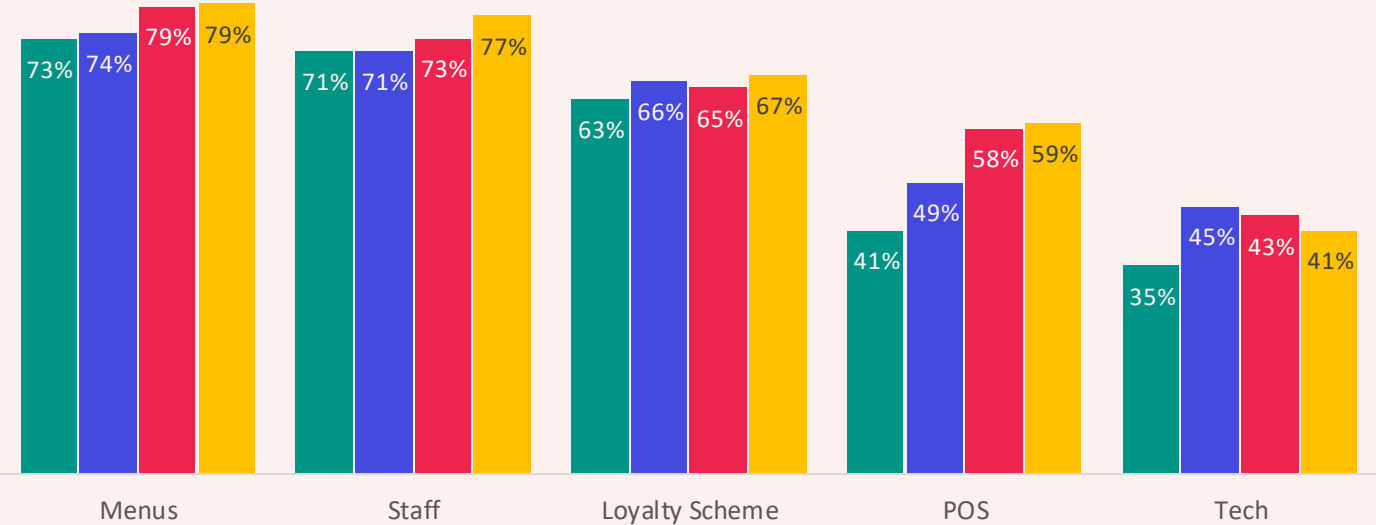
Q When your in a pub, bar or restaurant, please rank the following in order of which are most likely to influence what you choose to order?



■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)

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)

■ Q1 (Oct-Dec 23) ■ Q2 (Jan-Mar 24) ■ Q3 (Apr-Jun 24) ■ Q4 (Jul-Sep 24)

PLAN TO PLATE.



- The average UK adult (+18), claimed they visited a pub, bar, or restaurant, for food and/or drinks, 6.1 times/per month in the period Apr-Jun 2024. An increase from 5.6 times in the previous quarter.
- Friday and Saturday are the most popular days of the week to visit pubs, bars and restaurants. Sunday has become slightly more prominent.
- Customers' main motivation, when in venue, in this 3-month period has been the need state (what I want), ahead of the occasion.
- Drinks with friends and family remains the most popular occasion, with leisurely lunches and dinners as the next largest occasions.
- Menus remain most impactful in-venue tool of the last 3 months (period between Jul-Sep 24), with customers telling us that if pubs, bars and restaurants improved their food and drink menus it would encourage 40% of them to visit more often and 26% to spend more per visit.. Staff have also been very effective and increased compared to the previous period – 34% of customers would be more loyal to a venue if the quality of staff improved and 30% would be more likely to recommend said venue to friends and family.
- Both starters and desserts have seen general trends of decline since tracking started back in Oct 23. The average number of courses decreased to 1.6 (compared to 1.7 in the previous period).
- Finally, outside of price, it's descriptions on the menu that are the biggest influence of customer choice. Price has been steadily falling, however, as the main driver of choice.

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