KAM

PLAN TO PLATE

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

Volume 5 | Feb-April 25

Introducing the 'Plan to Plate' consumer tracker from KAM

Every six months, 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 May 2025, analysing consumer behaviour for the period Feb-April 25, from a sample size of 1,000 nationally representative UK adults (18+)

1/2
Bi-annual tracker from KAM

1,000
Nat Rep sample of UK adults (+18)

May
Latest wave of research conducted

Nov 25
Upcoming waves this year

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.

Executive summary.

"

The *Plan to Plate* report by KAM (Feb–Apr 2025) analyses UK hospitality consumer behaviour from planning to post-visit engagement. Based on a nationally representative sample of 1,000 adults, it tracks visit frequency, decision drivers, and emerging trends.

UK adults visited pubs, bars, and restaurants an average of 5.7 times per month, with Fridays and Saturdays as peak days. Food quality is the top driver for venue choice, followed by atmosphere, value, and location for drinks. Digital discovery dominates, with internet searches and Google Maps as the most common tools for finding venues, while menus and social media play significant supporting roles.

In-venue, menu descriptions, especially phrases such as *local*, *fresh*, and *seasonal* are influence customer choices more than price. While less than half of customers reported receiving staff recommendations, most are open to them, suggesting untapped potential for upselling. Technology adoption is growing, with over 50% of guests using QR codes or digital screens for browsing menus, ordering, and payments. Loyalty program engagement remains limited, though those involved are significantly influenced to return.

Overall, the report highlights cautious yet resilient consumer confidence, emphasizing opportunities for operators to leverage digital tools, staff influence, and loyalty schemes to boost engagement and drive repeat visits.

Blake Gladman, Strategy & Insight Director, KAM

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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.

Legend:
- V2 (Jan-Mar 24)
- V3 (Apr-Jun 24)
- V4 (Jul-Sep 24)
- V5 (Feb-Apr 25)

Category	V2 (Jan-Mar 24)	V3 (Apr-Jun 24)	V4 (Jul-Sep 24)	V5 (Feb-Apr 25)
Total	66	60	65	83
Male	71	66	75	87
Female	61	55	56	80
18-34	66	63	69	94
35-44	64	62	58	83
45-54	63	45	59	75
55-64	59	59	66	78
65+	75	69	71	84
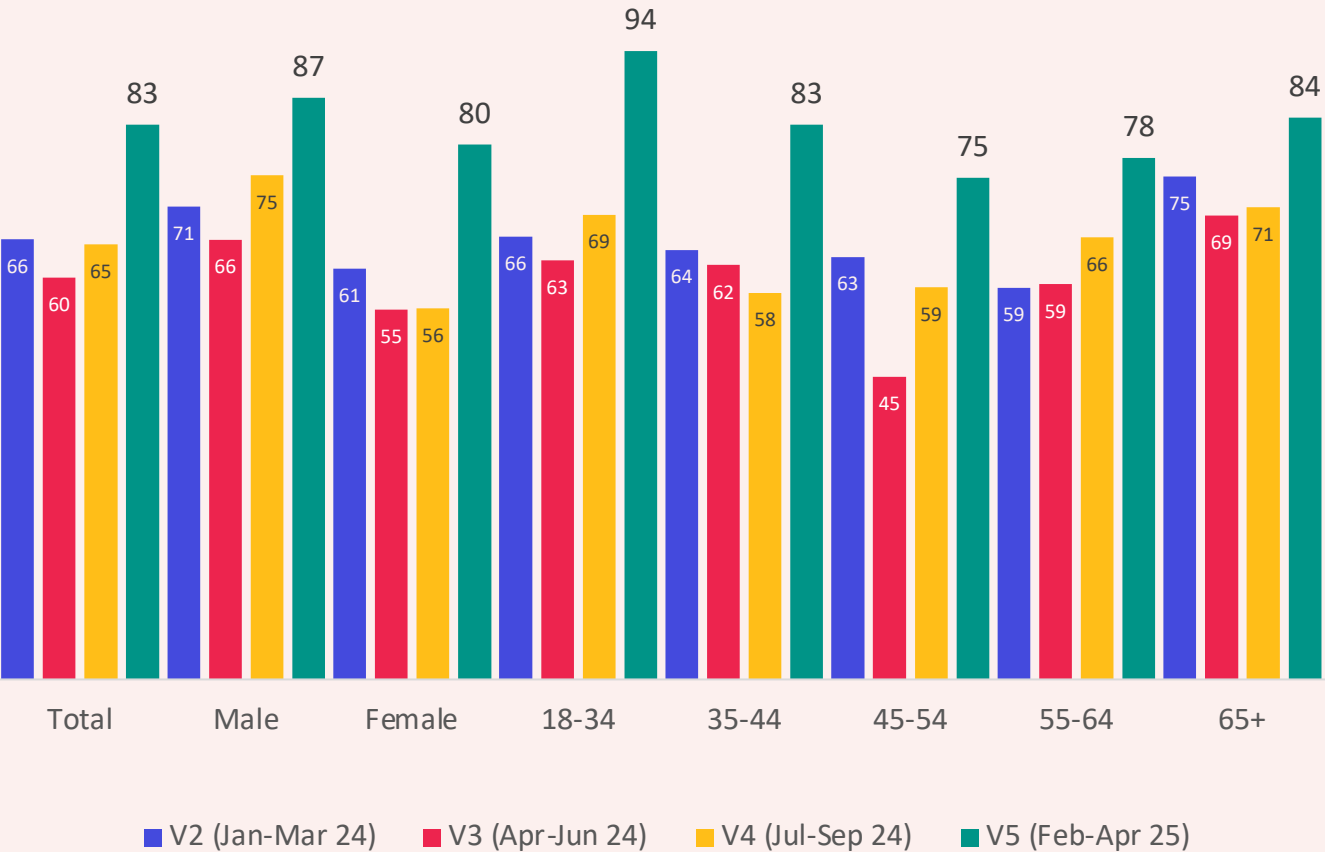
Short-term changes in consumer behaviours.

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?

Consciously tried to spend less money when I'm out
- Total: 39%
- 18-34: 45%
- 35-44: 42%
- 45-54: 42%
- 55-64: 37%
- 65+: 29%

Chosen cheaper menu items
- Total: 28%
- 18-34: 40%
- 35-44: 34%
- 45-54: 31%
- 55-64: 23%
- 65+: 14%

Been going out to pubs/restaurants less frequently
- Total: 24%
- 18-34: 27%
- 35-44: 26%
- 45-54: 29%
- 55-64: 22%
- 65+: 16%

Bought fewer drinks when I'm out
- Total: 22%
- 18-34: 31%
- 35-44: 30%
- 45-54: 24%
- 55-64: 15%
- 65+: 13%

Chosen cheaper drinks
- Total: 19%
- 18-34: 28%
- 35-44: 28%
- 45-54: 27%
- 55-64: 9%
- 65+: 6%

Been going out less frequently but spending more while I'm out
- Total: 9%
- 18-34: 16%
- 35-44: 8%
- 45-54: 9%
- 55-64: 6%
- 65+: 4%

Legend: Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+

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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?

Taken too long for someone to take your order
- Total: 20%
- 18-34: 32%
- 35-44: 23%
- 45-54: 16%
- 55-64: 15%
- 65+: 13%

Taken too long for your food/drink to arrive
- Total: 19%
- 18-34: 31%
- 35-44: 18%
- 45-54: 15%
- 55-64: 13%
- 65+: 16%

They've been short-staffed
- Total: 16%
- 18-34: 16%
- 35-44: 12%
- 45-54: 15%
- 55-64: 19%
- 65+: 17%

Menu items have been unavailable
- Total: 15%
- 18-34: 13%
- 35-44: 13%
- 45-54: 17%
- 55-64: 13%
- 65+: 18%

Taken too long to pay the bill
- Total: 12%
- 18-34: 18%
- 35-44: 15%
- 45-54: 13%
- 55-64: 9%
- 65+: 7%

Legend: Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+

Consumer social occasions in growth/decline

Breakdown of whether they have spent more, less or the same amount of time doing the following, in the last 3 months, than usual

Occasion	More	The same	Less
Socialising with friends AT HOME	19%	53%	18%
In a restaurant	17%	60%	22%
In a pub/bar	16%	59%	20%
Playing sports/exercising WITH FRIENDS	14%	41%	13%
In a coffee shop/café	14%	55%	23%
At a cinema	10%	49%	23%
In a night club	7%	27%	13%
At the theatre	7%	42%	24%

■ More ■ The same ■ Less

Q Have you spent more, less or the same amount of time doing the following, in the last 3 months, than usual?

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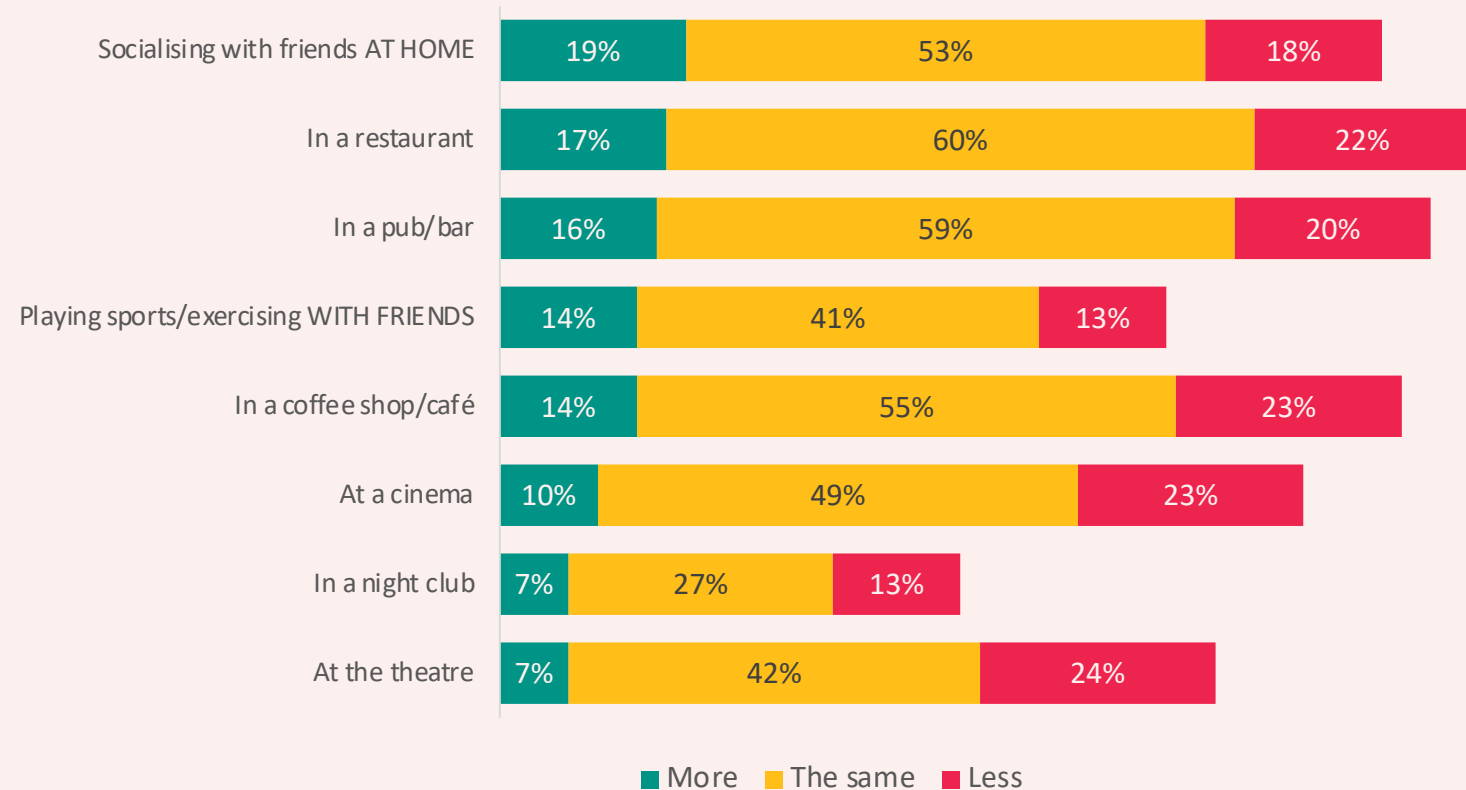
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The Customer Journey

1 Evaluation

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

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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

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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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Evaluation

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

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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, 5.7 times per month, for the period Feb-Apr 25, with highest visit frequency for males and 18-34s.
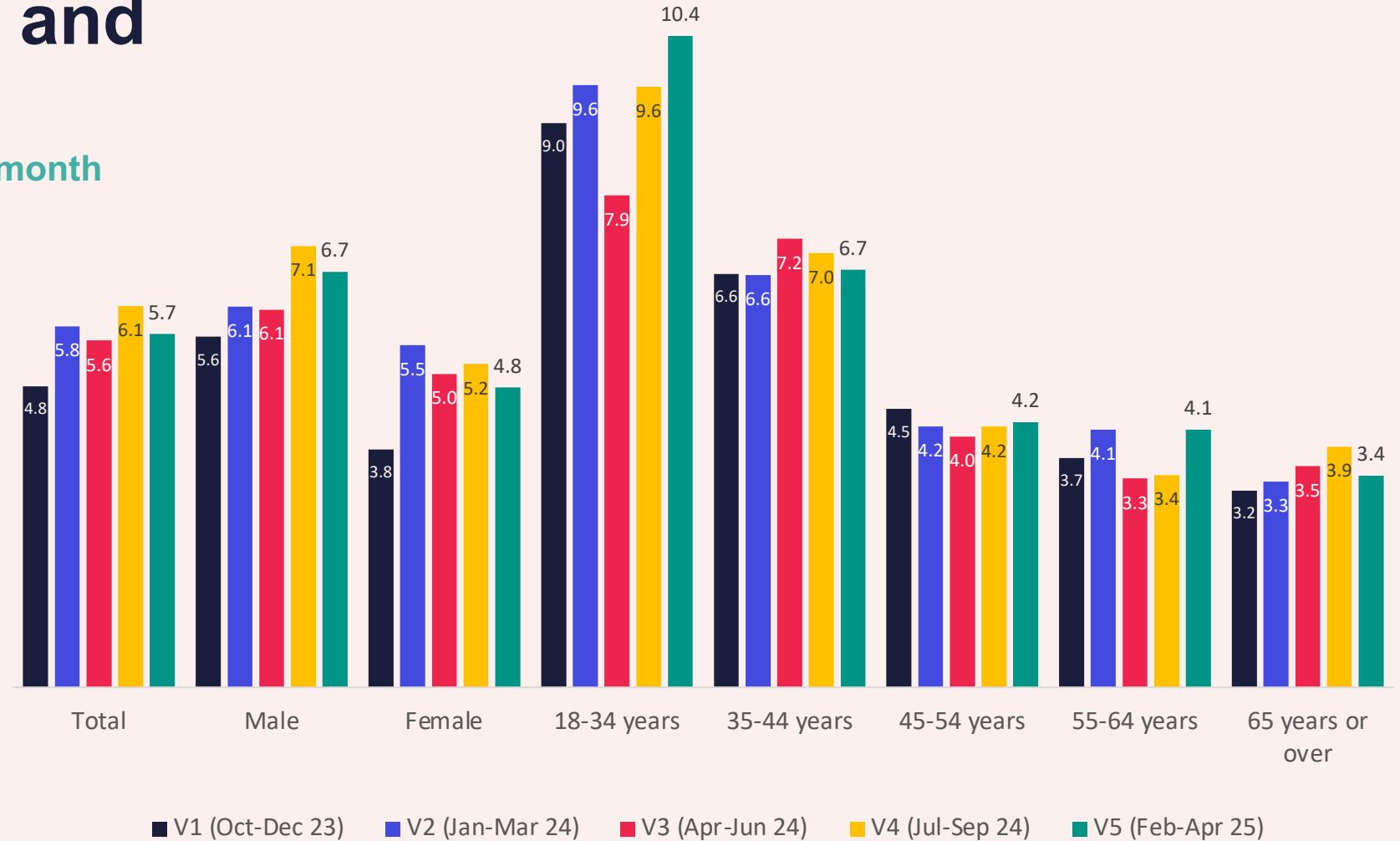
Q. How often have you been out for food and/or drinks in pubs, bars and restaurants in the last 3 months?

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years or over
V1 (Oct-Dec 23)	4.8	5.6	3.8	9.0	6.6	4.5	3.7	3.2
V2 (Jan-Mar 24)	5.8	6.1	5.5	9.6	6.6	4.2	4.1	3.3
V3 (Apr-Jun 24)	5.6	6.1	5.0	7.9	7.2	4.0	3.3	3.5
V4 (Jul-Sep 24)	6.1	7.1	5.2	9.6	7.0	4.2	3.4	3.9
V5 (Feb-Apr 25)	5.7	6.7	4.8	10.4	6.7	4.2	4.1	3.4

■ V1 (Oct-Dec 23) ■ V2 (Jan-Mar 24) ■ V3 (Apr-Jun 24) ■ V4 (Jul-Sep 24) ■ V5 (Feb-Apr 25)

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

Friday and Saturday are the most popular days of the week.
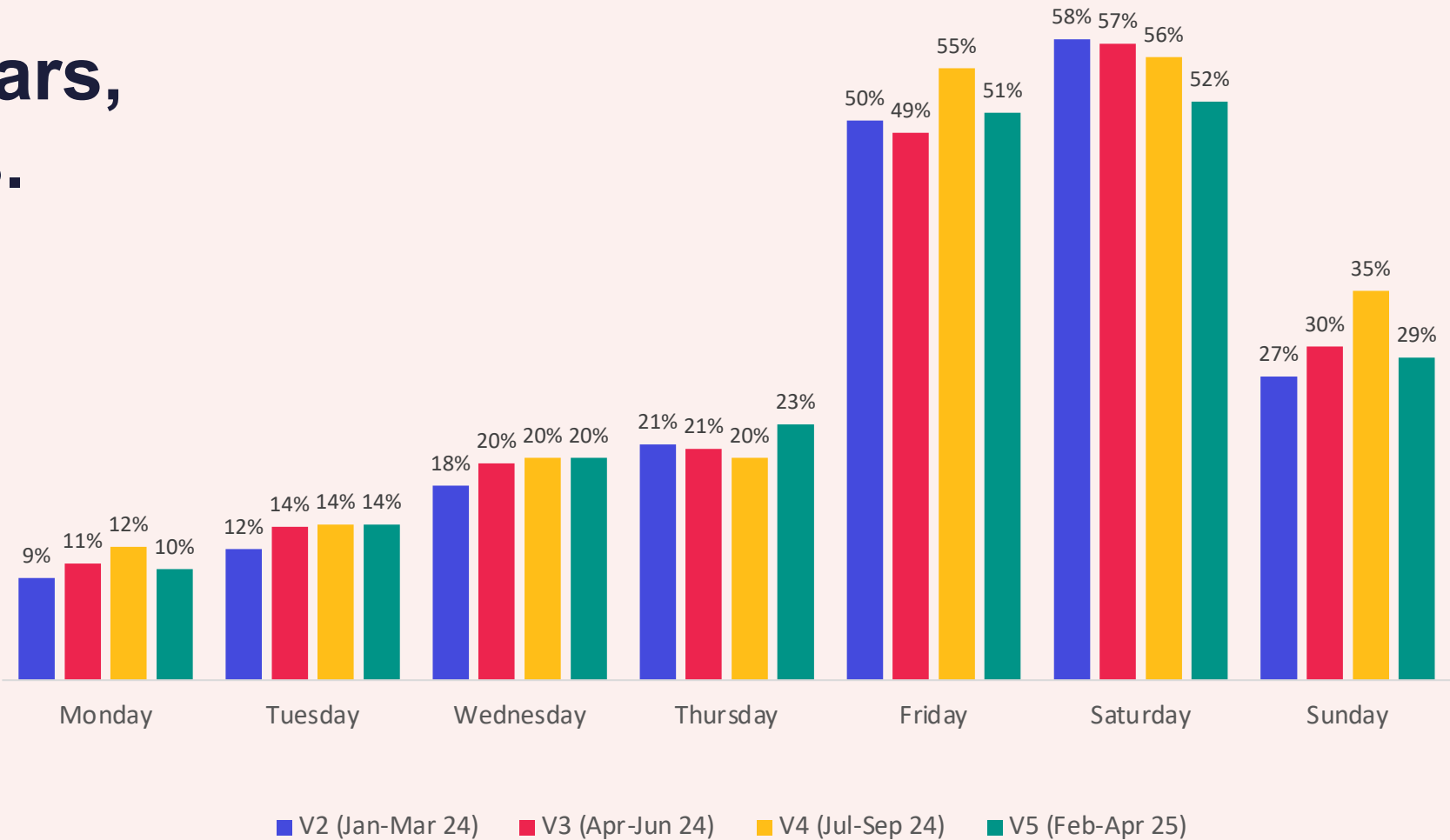
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
V2 (Jan-Mar 24)	9%	12%	18%	21%	50%	58%	27%
V3 (Apr-Jun 24)	11%	14%	20%	21%	49%	57%	30%
V4 (Jul-Sep 24)	12%	14%	20%	20%	55%	56%	35%
V5 (Feb-Apr 25)	10%	14%	20%	23%	51%	52%	29%

■ V2 (Jan-Mar 24) ■ V3 (Apr-Jun 24) ■ V4 (Jul-Sep 24) ■ V5 (Feb-Apr 25)
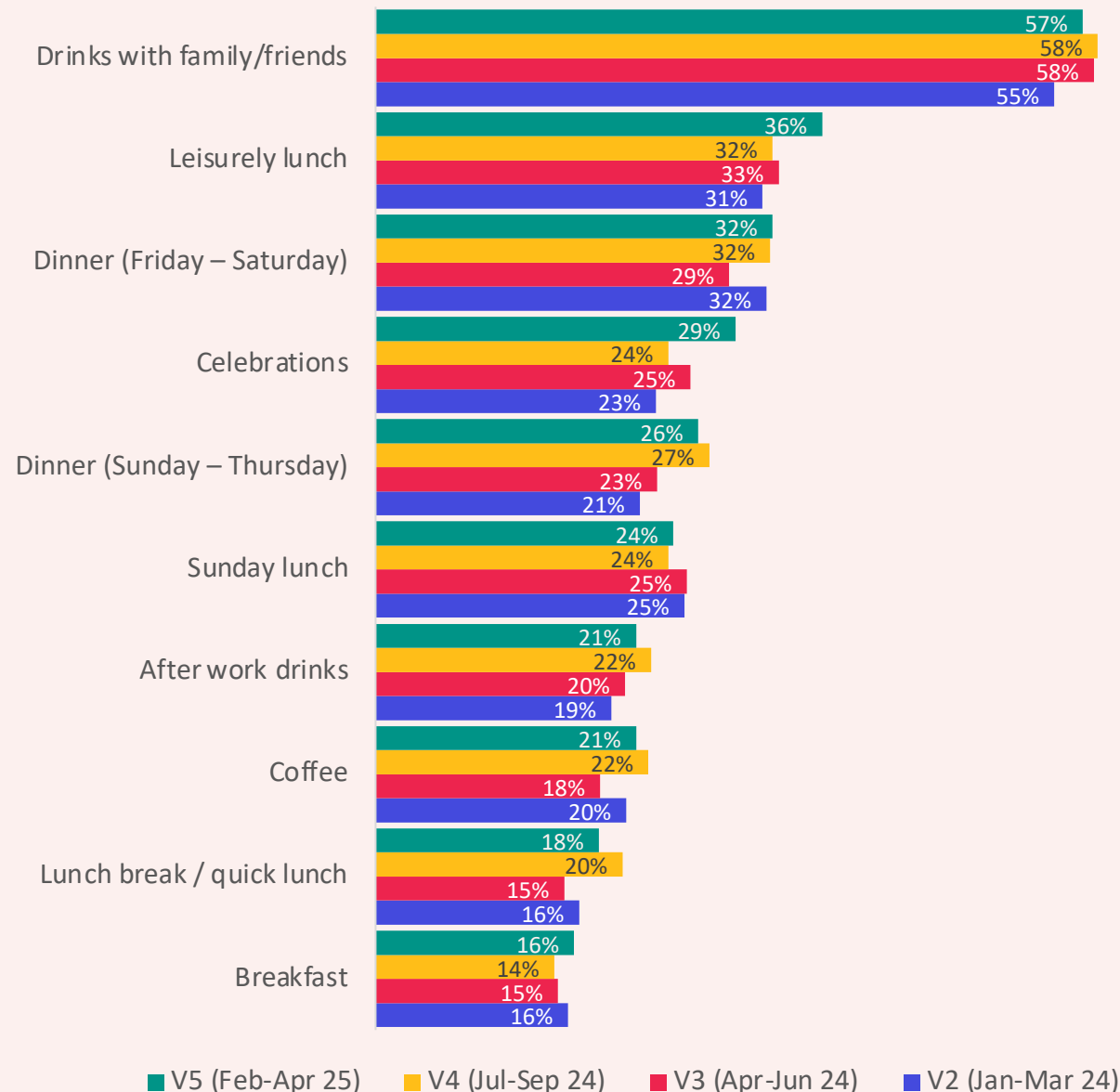
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Top occasions for visiting pubs, bars and restaurants.

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

Drinks with family/friends
- 57%
- 58%
- 58%
- 55%

Leisurely lunch
- 36%
- 32%
- 33%
- 31%

Dinner (Friday – Saturday)
- 32%
- 32%
- 29%
- 32%

Celebrations
- 29%
- 24%
- 25%
- 23%

Dinner (Sunday – Thursday)
- 26%
- 27%
- 23%
- 21%

Sunday lunch
- 24%
- 24%
- 25%
- 25%

After work drinks
- 21%
- 22%
- 20%
- 19%

Coffee
- 21%
- 22%
- 18%
- 20%

Lunch break / quick lunch
- 18%
- 20%
- 15%
- 16%

Breakfast
- 16%
- 14%
- 15%
- 16%

■ V5 (Feb-Apr 25)   ■ V4 (Jul-Sep 24)   ■ V3 (Apr-Jun 24)   ■ V2 (Jan-Mar 24)

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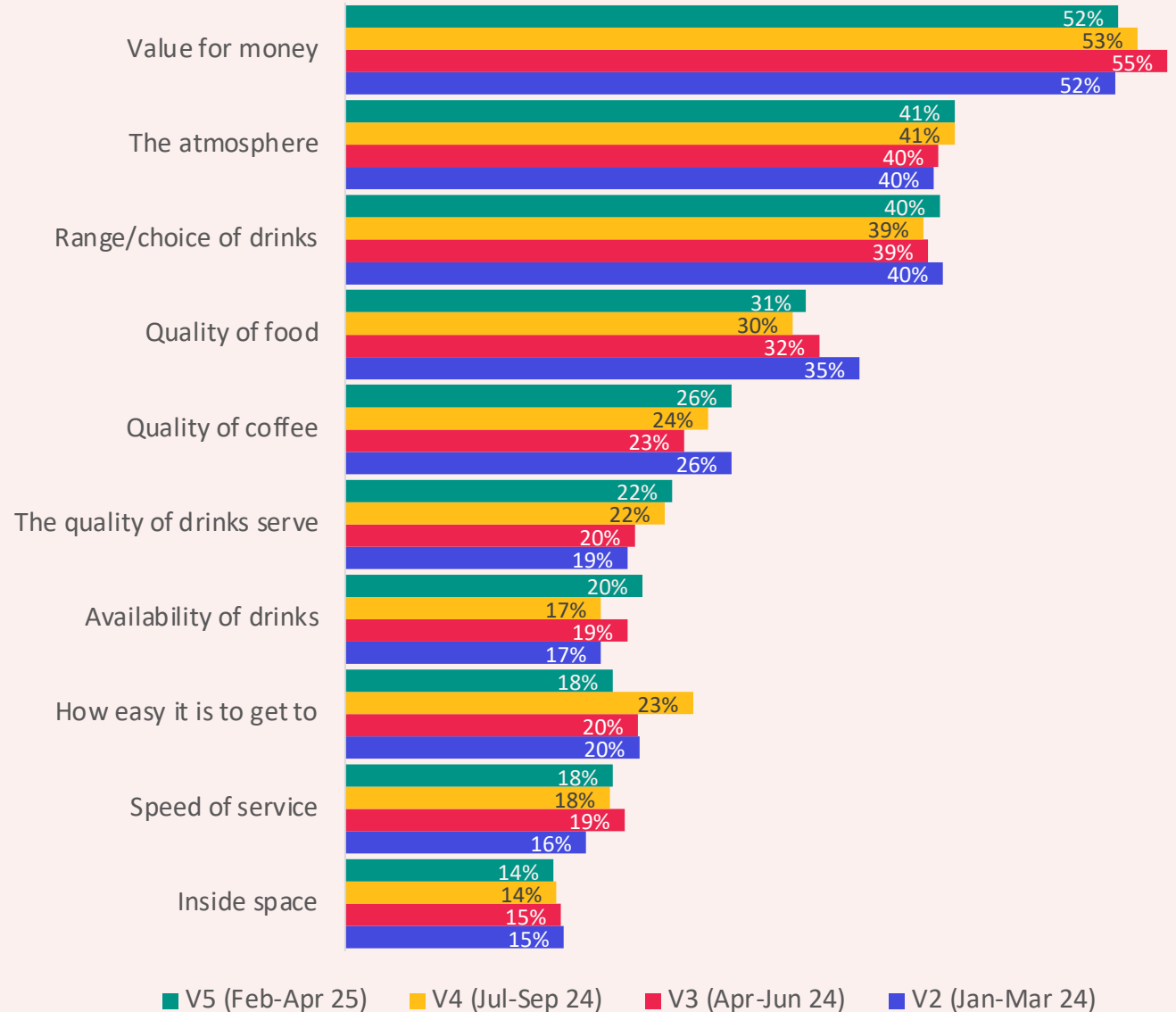*Source: KAM Plan to Plate Tracker (May 2025)*

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

Factor	V5 (Feb-Apr 25)	V4 (Jul-Sep 24)	V3 (Apr-Jun 24)	V2 (Jan-Mar 24)
Value for money	52%	53%	55%	52%
The atmosphere	41%	41%	40%	40%
Range/choice of drinks	40%	39%	39%	40%
Quality of food	31%	30%	32%	35%
Quality of coffee	26%	24%	23%	26%
The quality of drinks serve	22%	22%	20%	19%
Availability of drinks	20%	17%	19%	17%
How easy it is to get to	18%	23%	20%	20%
Speed of service	18%	18%	19%	16%
Inside space	14%	14%	15%	15%

■ V5 (Feb-Apr 25)   ■ V4 (Jul-Sep 24)   ■ V3 (Apr-Jun 24)   ■ V2 (Jan-Mar 24)
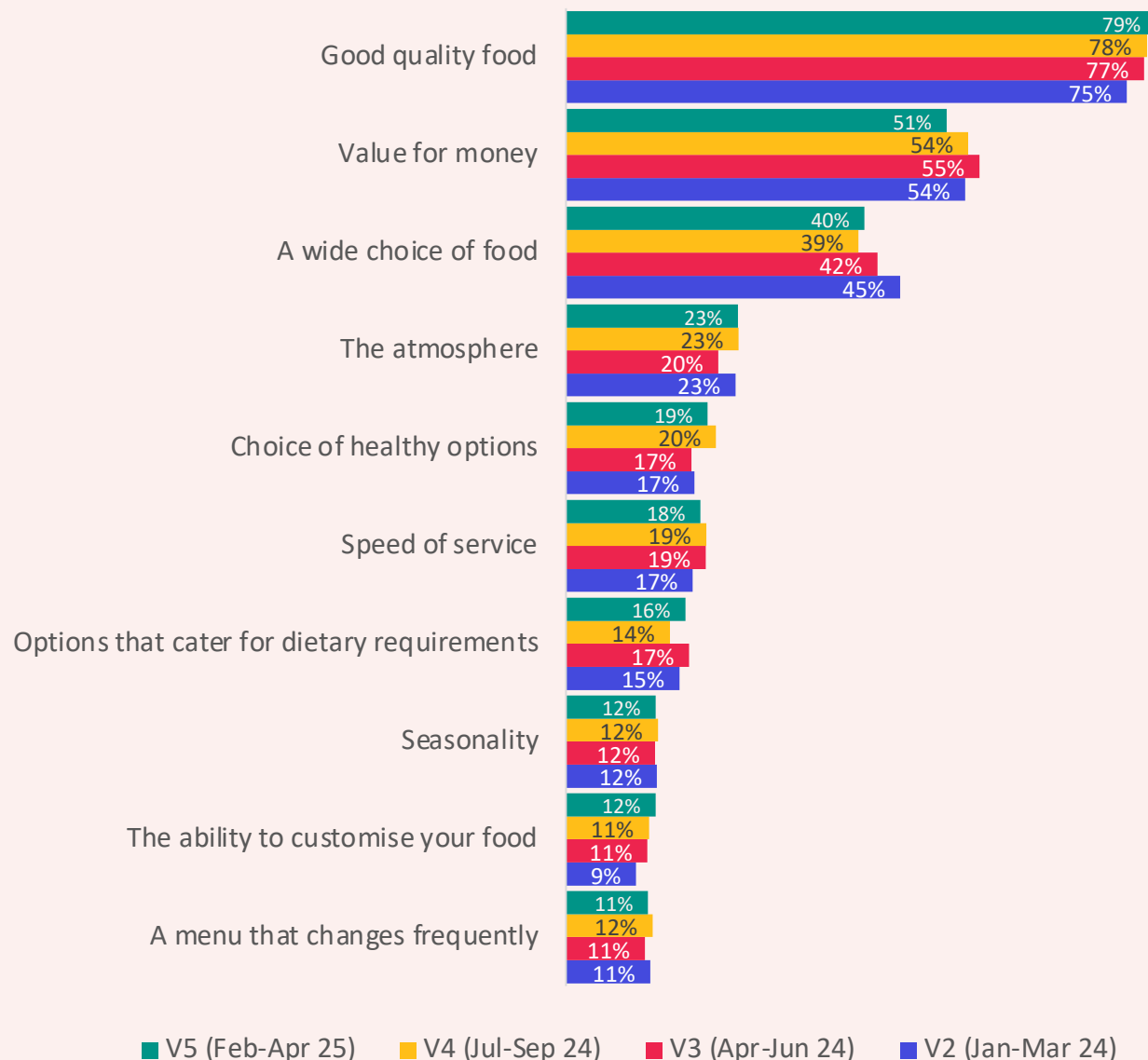
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Most important factors when choosing where to go for 'food'.

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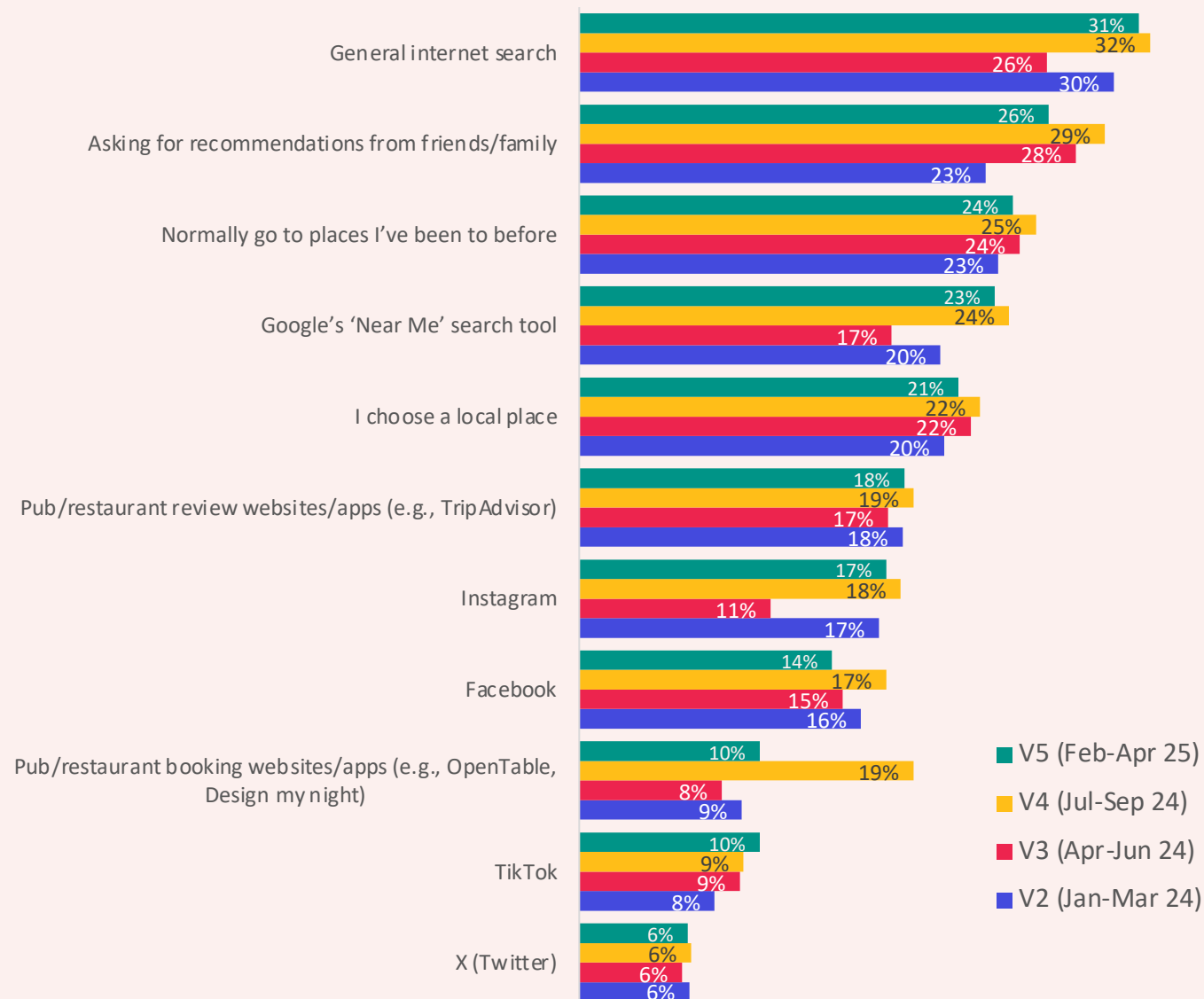
Just top 10 shown, for full breakdown please refer to online dashboard

Factor	V5 (Feb-Apr 25)	V4 (Jul-Sep 24)	V3 (Apr-Jun 24)	V2 (Jan-Mar 24)
Good quality food	79%	78%	77%	75%
Value for money	51%	54%	55%	54%
A wide choice of food	40%	39%	42%	45%
The atmosphere	23%	23%	20%	23%
Choice of healthy options	19%	20%	17%	17%
Speed of service	18%	19%	19%	17%
Options that cater for dietary requirements	16%	14%	17%	15%
Seasonality	12%	12%	12%	12%
The ability to customise your food	12%	11%	11%	9%
A menu that changes frequently	11%	12%	11%	11%

■ V5 (Feb-Apr 25) ■ V4 (Jul-Sep 24) ■ V3 (Apr-Jun 24) ■ V2 (Jan-Mar 24)

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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 Feb-Apr 25), with 'general internet search' being the number one choice.

General internet search
- 31%
- 32%
- 26%
- 30%

Asking for recommendations from friends/family
- 26%
- 29%
- 28%
- 23%

Normally go to places I've been to before
- 24%
- 25%
- 24%
- 23%

Google's 'Near Me' search tool
- 23%
- 24%
- 17%
- 20%

I choose a local place
- 21%
- 22%
- 22%
- 20%

Pub/restaurant review websites/apps (e.g., TripAdvisor)
- 18%
- 19%
- 17%
- 18%

Instagram
- 17%
- 18%
- 11%
- 17%

Facebook
- 14%
- 17%
- 15%
- 16%

Pub/restaurant booking websites/apps (e.g., OpenTable, Design my night)
- 10%
- 19%
- 8%
- 9%

TikTok
- 10%
- 9%
- 9%
- 8%

X (Twitter)
- 6%
- 6%
- 6%
- 6%

Legend:
- V5 (Feb-Apr 25)
- V4 (Jul-Sep 24)
- V3 (Apr-Jun 24)
- V2 (Jan-Mar 24)

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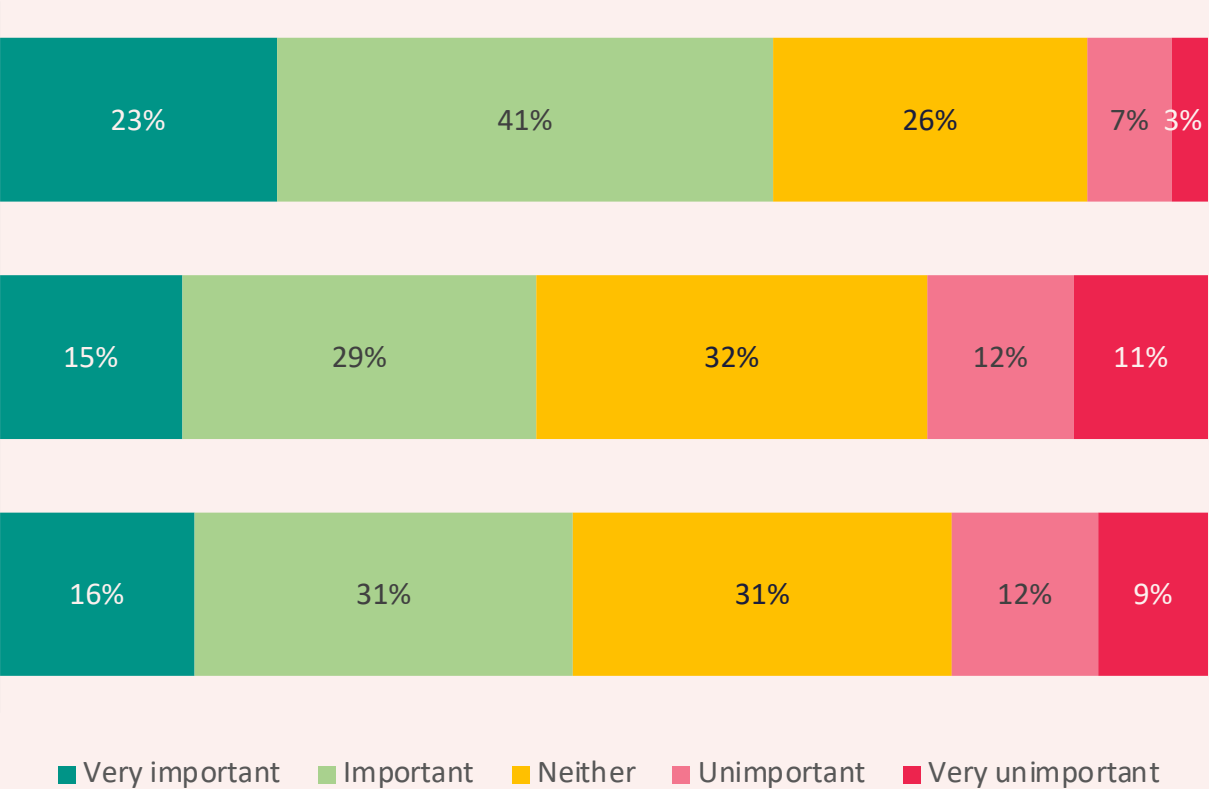
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Influences

We have the ability to 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.)?
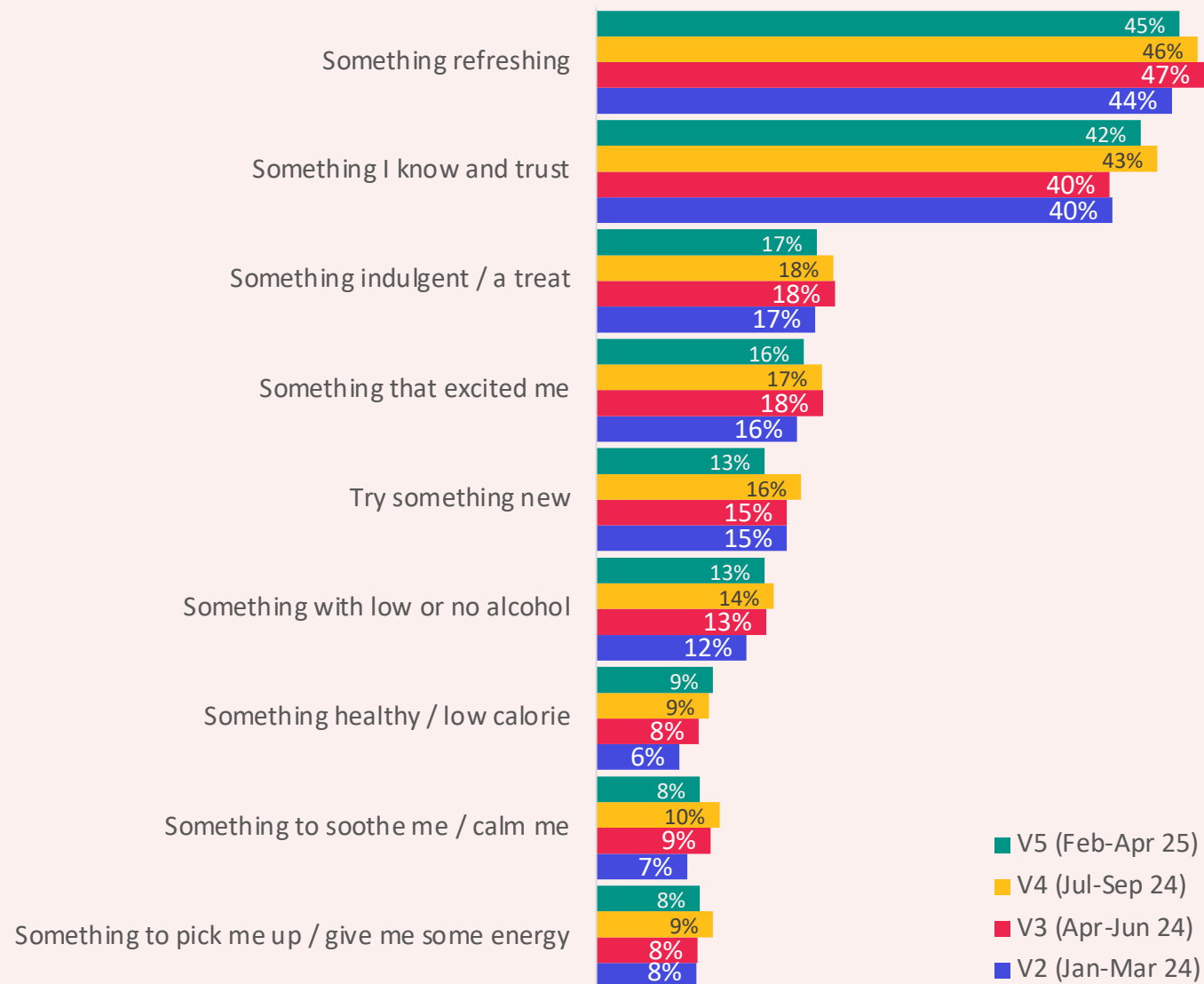
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NEED STATE

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

Something refreshing
- 45%
- 46%
- 47%
- 44%

Something I know and trust
- 42%
- 43%
- 40%
- 40%

Something indulgent / a treat
- 17%
- 18%
- 18%
- 17%

Something that excited me
- 16%
- 17%
- 18%
- 16%

Try something new
- 13%
- 16%
- 15%
- 15%

Something with low or no alcohol
- 13%
- 14%
- 13%
- 12%

Something healthy / low calorie
- 9%
- 9%
- 8%
- 6%

Something to soothe me / calm me
- 8%
- 10%
- 9%
- 7%

Something to pick me up / give me some energy
- 8%
- 9%
- 8%
- 8%

- V5 (Feb-Apr 25)
- V4 (Jul-Sep 24)
- V3 (Apr-Jun 24)
- V2 (Jan-Mar 24)

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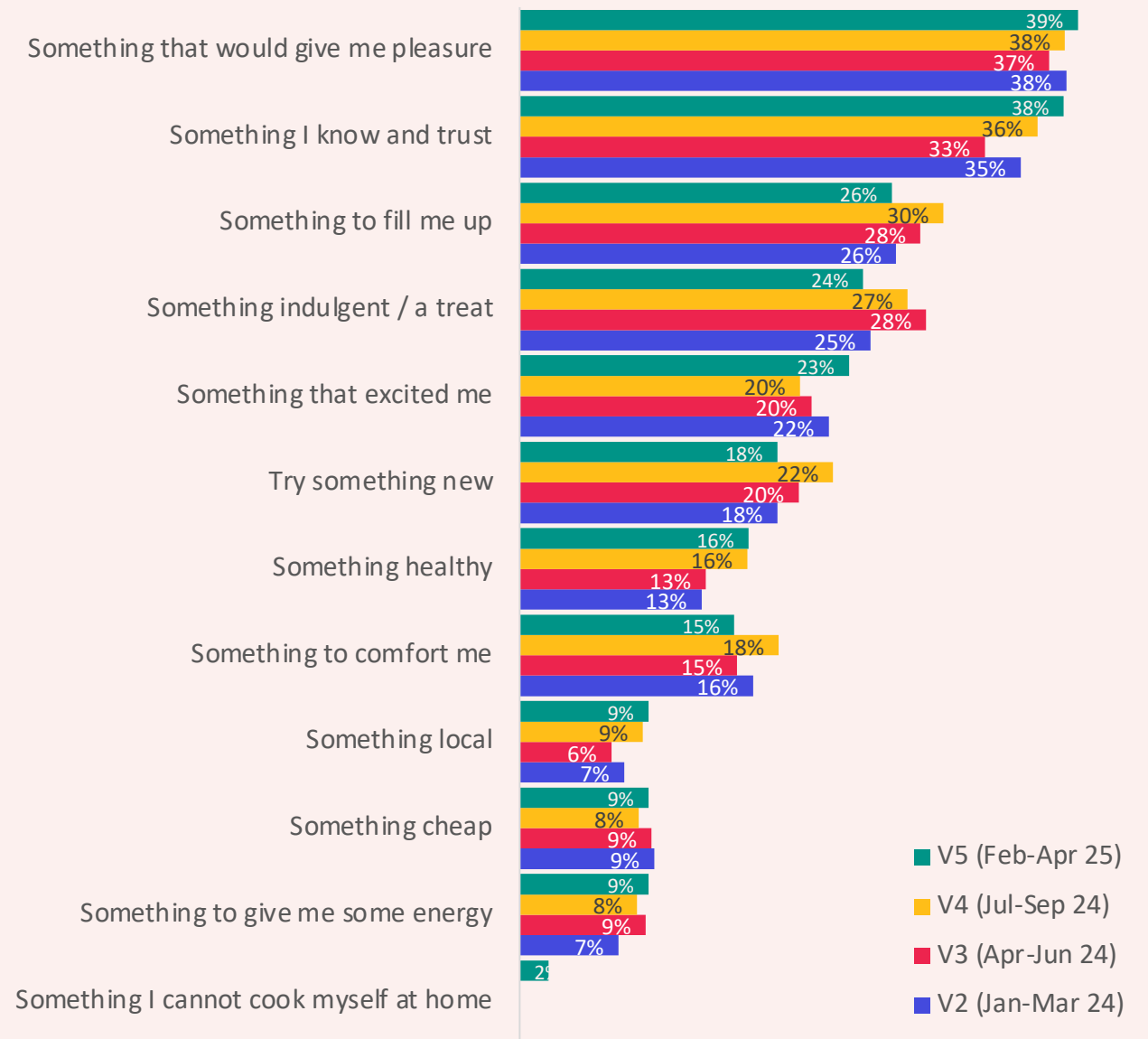
Q. Thinking now about the last time you ordered **some food** in a pub, bar or restaurant, which of the following 'needs' were influencing your decision on what you had?

Need state	V5 (Feb-Apr 25)	V4 (Jul-Sep 24)	V3 (Apr-Jun 24)	V2 (Jan-Mar 24)
Something that would give me pleasure	39%	38%	37%	38%
Something I know and trust	38%	36%	33%	35%
Something to fill me up	26%	30%	28%	26%
Something indulgent / a treat	24%	27%	28%	25%
Something that excited me	23%	20%	20%	22%
Try something new	18%	22%	20%	18%
Something healthy	16%	16%	13%	13%
Something to comfort me	15%	18%	15%	16%
Something local	9%	9%	6%	7%
Something cheap	9%	8%	9%	9%
Something to give me some energy	9%	8%	9%	7%
Something I cannot cook myself at home	2%			

■ V5 (Feb-Apr 25)
■ V4 (Jul-Sep 24)
■ V3 (Apr-Jun 24)
■ V2 (Jan-Mar 24)

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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.. **The average number of courses increased to 1.7 (compared to 1.6 in the previous period).**

MAIN

STARTER

DESSERT

	Starter	Main	Dessert
V2 (Jan-Mar 24)	36%	92%	37%
V3 (Apr-Jun 24)	34%	93%	39%
V4 (Jul-Sep 24)	32%	93%	36%
V5 (Feb-Apr 25)	35%	94%	38%

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

■ V2 (Jan-Mar 24)　■ V3 (Apr-Jun 24)　■ V4 (Jul-Sep 24)　■ V5 (Feb-Apr 25)

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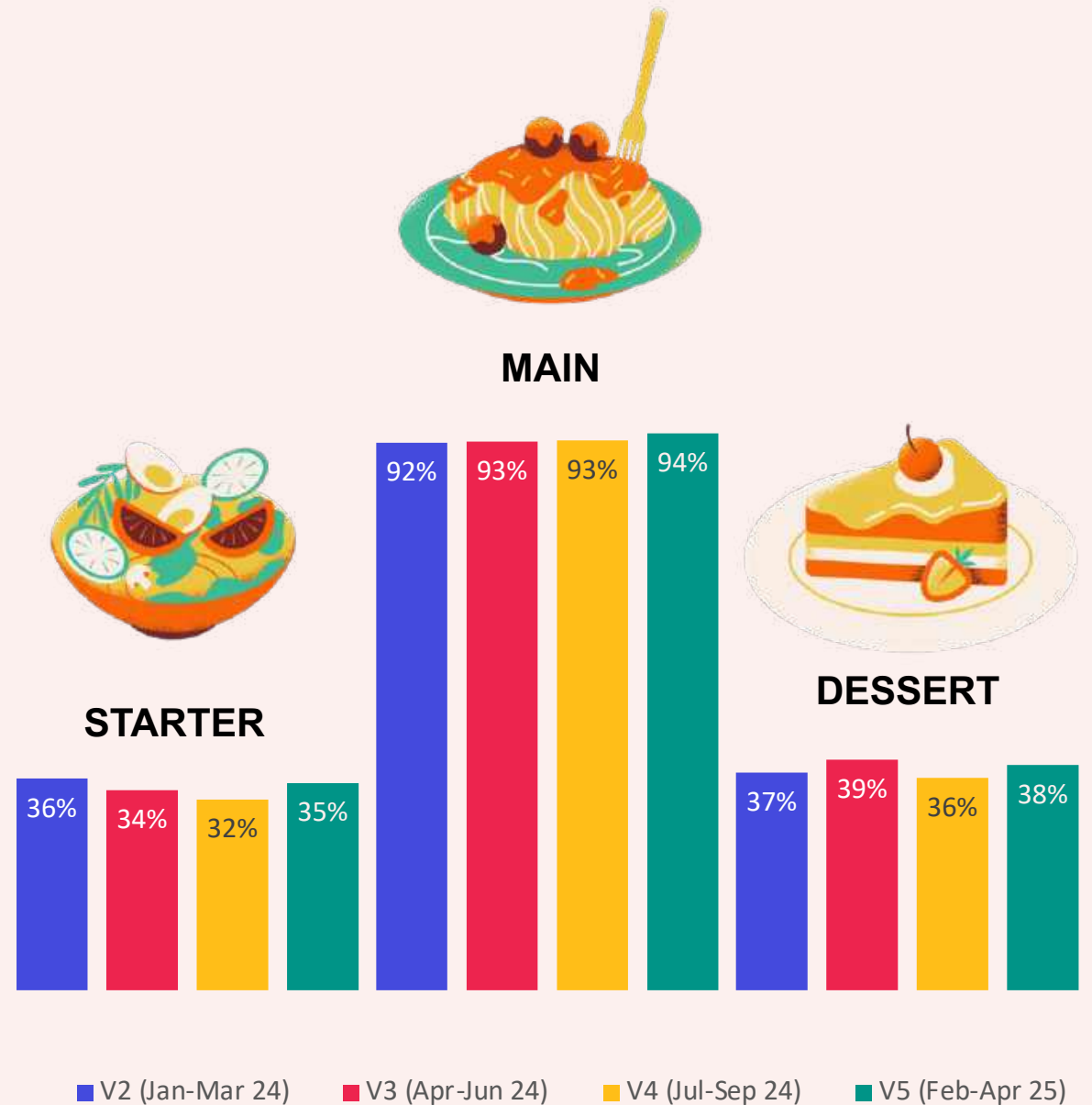
Average customer spend 'personally' on food and/or drinks in pubs, bars and restaurants.

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.

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

	Total	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
V3 (Apr-Jun 24)	£41.40	£43.64	£46.47	£38.49	£38.83	£37.74
V4 (Jul-Sep 24)	£43.39	£45.05	£46.68	£40.12	£43.10	£40.51
V5 (Feb-Apr 25)	£44.00	£49.50	£51.70	£48.50	£40.60	£37.00

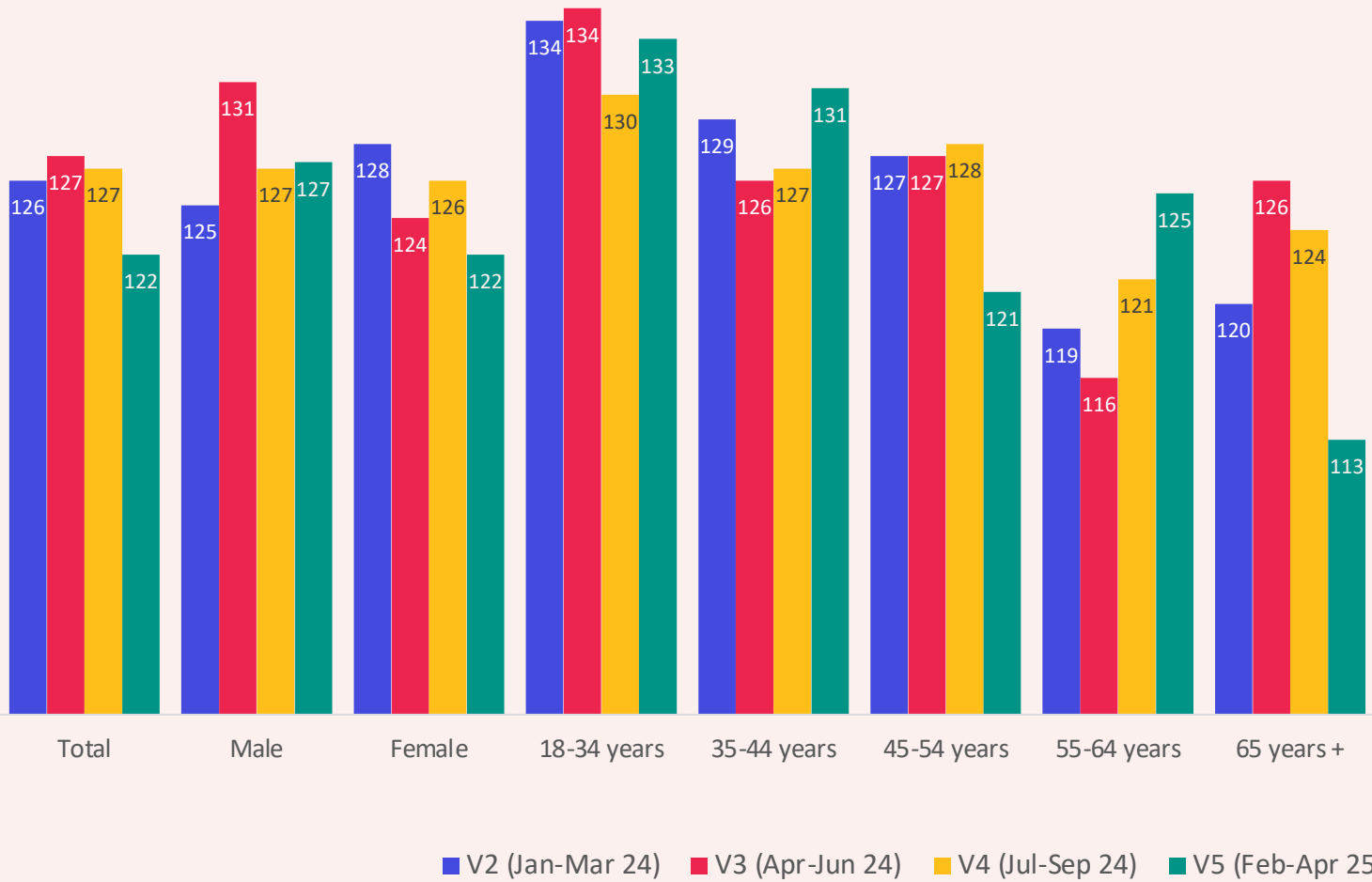■ V3 (Apr-Jun 24) ■ V4 (Jul-Sep 24) ■ V5 (Feb-Apr 25)

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TIME

How much time have I got to spend here?

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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-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?

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
V2 (Jan-Mar 24)	126	125	128	134	129	127	119	120
V3 (Apr-Jun 24)	127	131	124	134	126	127	116	126
V4 (Jul-Sep 24)	127	127	126	130	127	128	121	124
V5 (Feb-Apr 25)	122	127	122	133	131	121	125	113

V2 (Jan-Mar 24)   **V3 (Apr-Jun 24)**   **V4 (Jul-Sep 24)**   **V5 (Feb-Apr 25)**
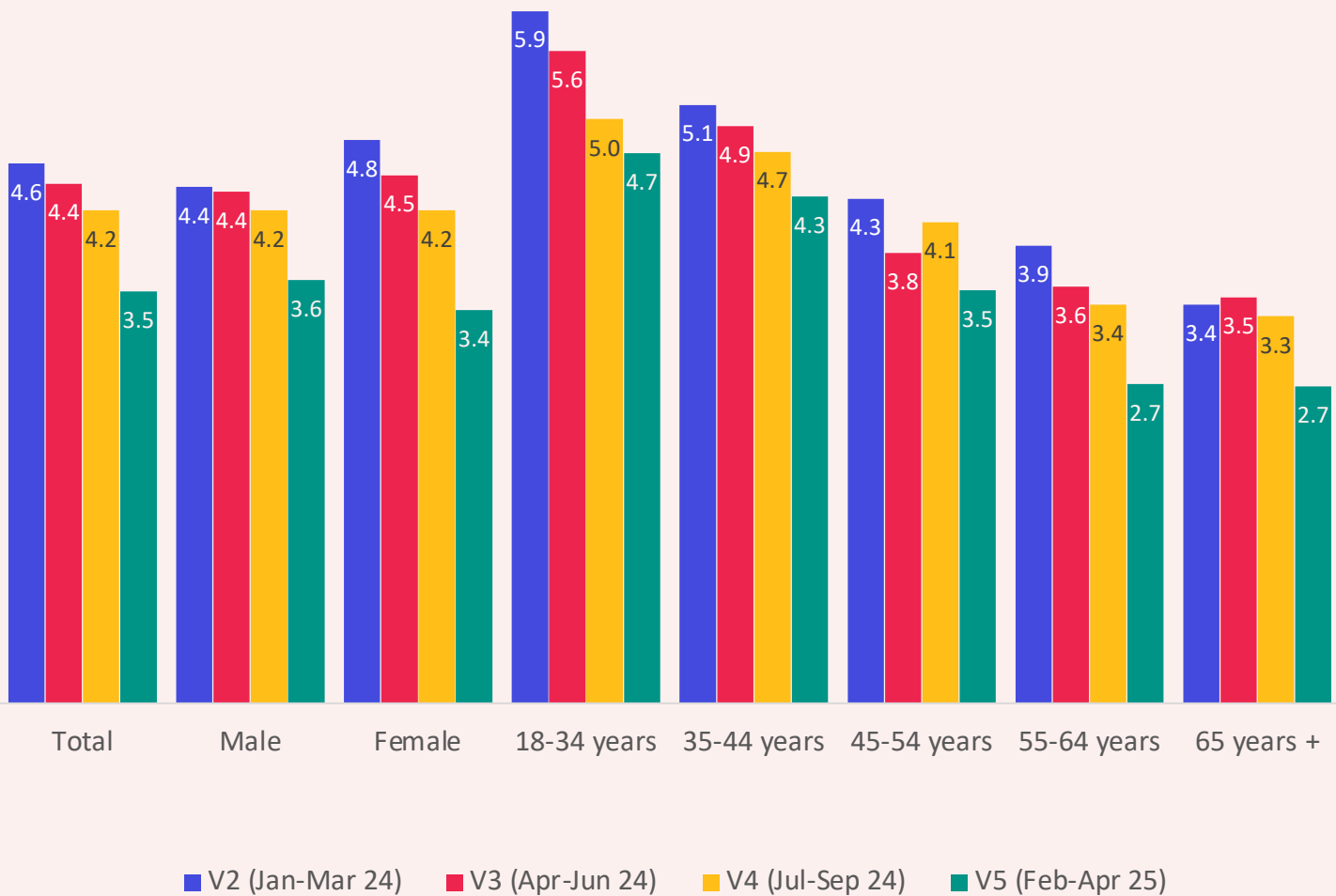
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PARTY SIZE & COMPOSITION

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.
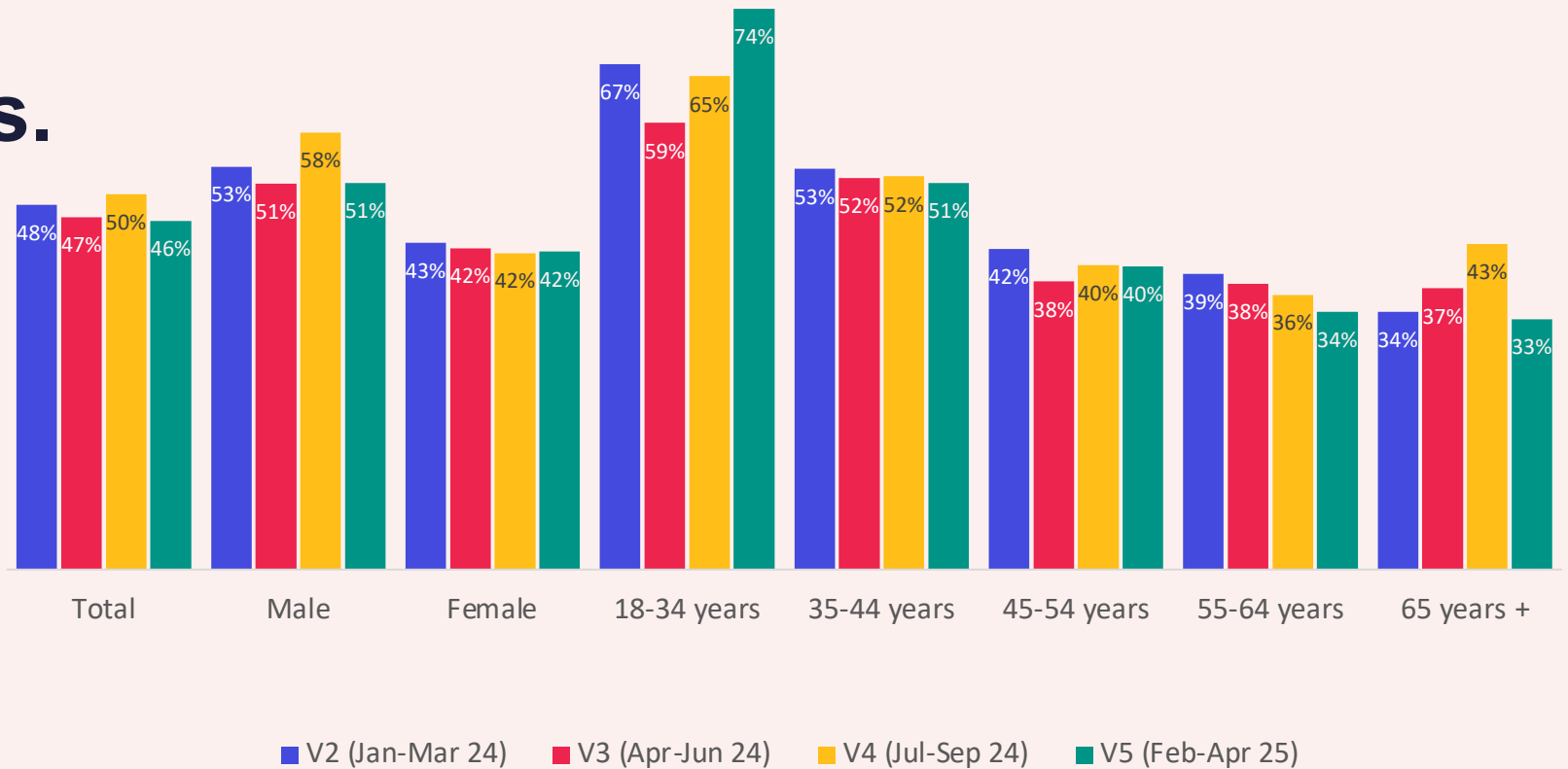

Category	V2 (Jan-Mar 24)	V3 (Apr-Jun 24)	V4 (Jul-Sep 24)	V5 (Feb-Apr 25)
Total	4.6	4.4	4.2	3.5
Male	4.4	4.4	4.2	3.6
Female	4.8	4.5	4.2	3.4
18-34 years	5.9	5.6	5.0	4.7
35-44 years	5.1	4.9	4.7	4.3
45-54 years	4.3	3.8	4.1	3.5
55-64 years	3.9	3.6	3.4	2.7
65 years +	3.4	3.5	3.3	2.7

Legend: ■ V2 (Jan-Mar 24) ■ V3 (Apr-Jun 24) ■ V4 (Jul-Sep 24) ■ V5 (Feb-Apr 25)

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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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.

Category	V2 (Jan-Mar 24)	V3 (Apr-Jun 24)	V4 (Jul-Sep 24)	V5 (Feb-Apr 25)
Total	48%	47%	50%	46%
Male	53%	51%	58%	51%
Female	43%	42%	42%	42%
18-34 years	67%	59%	65%	74%
35-44 years	53%	52%	52%	51%
45-54 years	42%	38%	40%	40%
55-64 years	39%	38%	36%	34%
65 years +	34%	37%	43%	33%

Legend:
- V2 (Jan-Mar 24)
- V3 (Apr-Jun 24)
- V4 (Jul-Sep 24)
- V5 (Feb-Apr 25)

KAM

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.

KAM

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.

KAM

POINT OF SALE

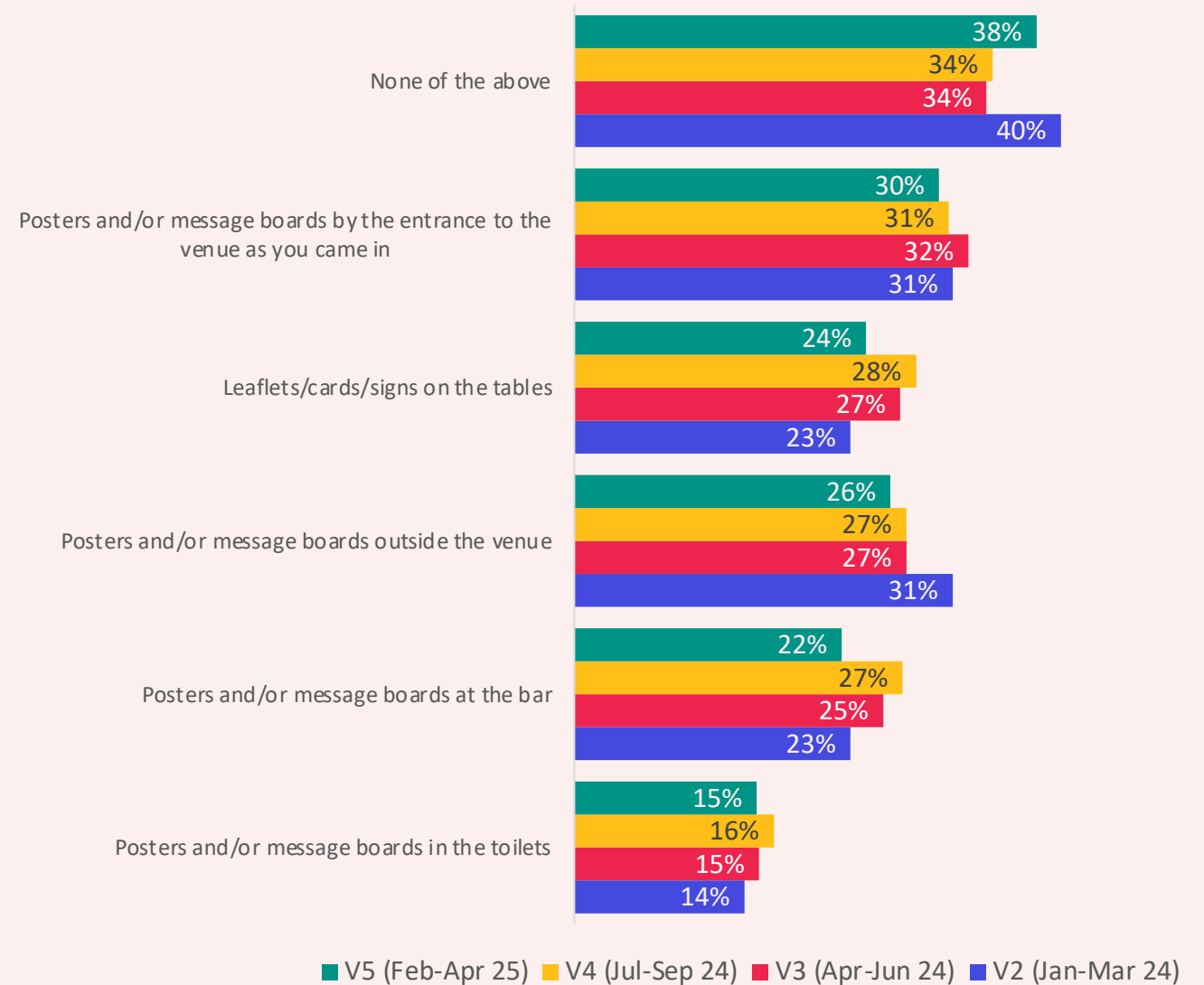The impact of varying point-of-sale messaging on customer behaviour.

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

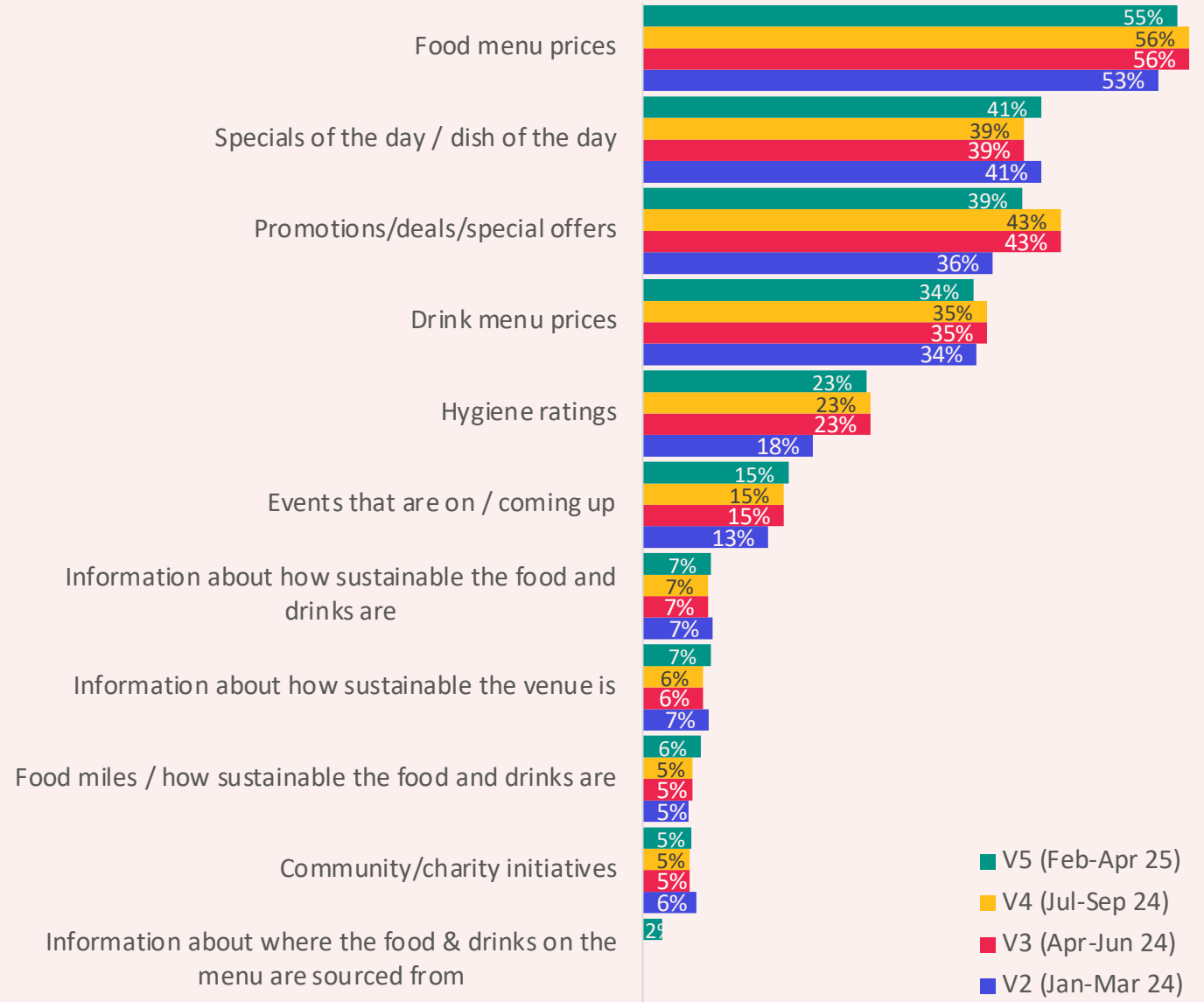Based on their last visit to a pub, bar or restaurant (within the last 3 months),

None of the above
- 38%
- 34%
- 34%
- 40%

Posters and/or message boards by the entrance to the venue as you came in
- 30%
- 31%
- 32%
- 31%

Leaflets/cards/signs on the tables
- 24%
- 28%
- 27%
- 23%

Posters and/or message boards outside the venue
- 26%
- 27%
- 27%
- 31%

Posters and/or message boards at the bar
- 22%
- 27%
- 25%
- 23%

Posters and/or message boards in the toilets
- 15%
- 16%
- 15%
- 14%

Legend: ■ V5 (Feb-Apr 25) ■ V4 (Jul-Sep 24) ■ V3 (Apr-Jun 24) ■ V2 (Jan-Mar 24)

KAM

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
- 55%
- 56%
- 56%
- 53%

Specials of the day / dish of the day
- 41%
- 39%
- 39%
- 41%

Promotions/deals/special offers
- 39%
- 43%
- 43%
- 36%

Drink menu prices
- 34%
- 35%
- 35%
- 34%

Hygiene ratings
- 23%
- 23%
- 23%
- 18%

Events that are on / coming up
- 15%
- 15%
- 15%
- 13%

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

Information about how sustainable the venue is
- 7%
- 6%
- 6%
- 7%

Food miles / how sustainable the food and drinks are
- 6%
- 5%
- 5%
- 5%

Community/charity initiatives
- 5%
- 5%
- 5%
- 6%

Information about where the food & drinks on the menu are sourced from
- 2%

Legend:
- V5 (Feb-Apr 25)
- V4 (Jul-Sep 24)
- V3 (Apr-Jun 24)
- V2 (Jan-Mar 24)

KAM

Source: KAM Plan to Plate Tracker (May 2025)

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

22% would visit more often.

Down from 24% in previous wave.

SPEND MORE

19% would spend more per visit.

Up from 17% in previous wave.

STAY MORE

16% would stay longer.

Down from 18% in previous wave.

LOYALTY

24% would be more likely to return.

Down from 26% in previous wave.

ENGAGEMENT

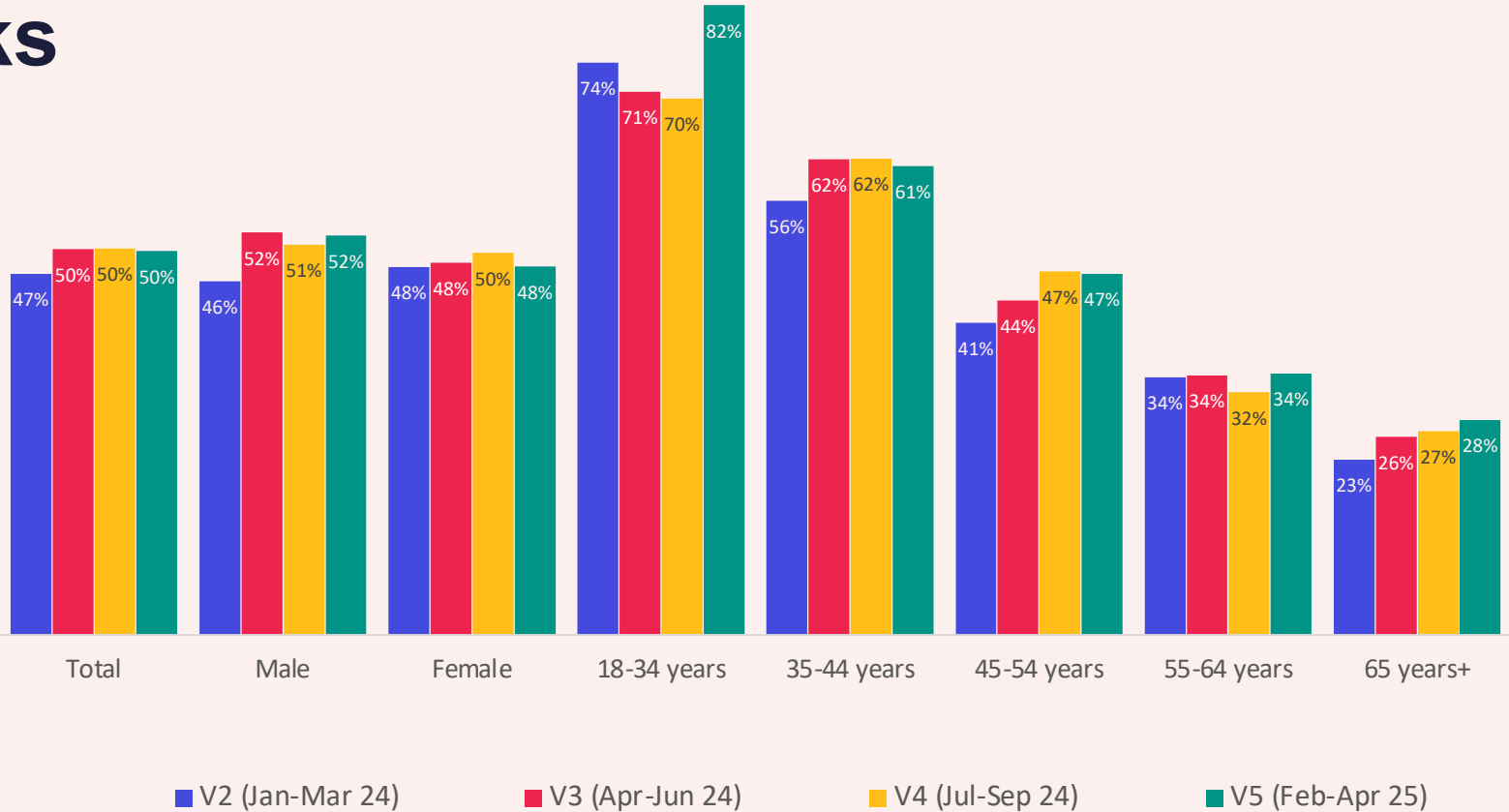20% would recommend to others.

Down from 23% in previous wave.

KAM

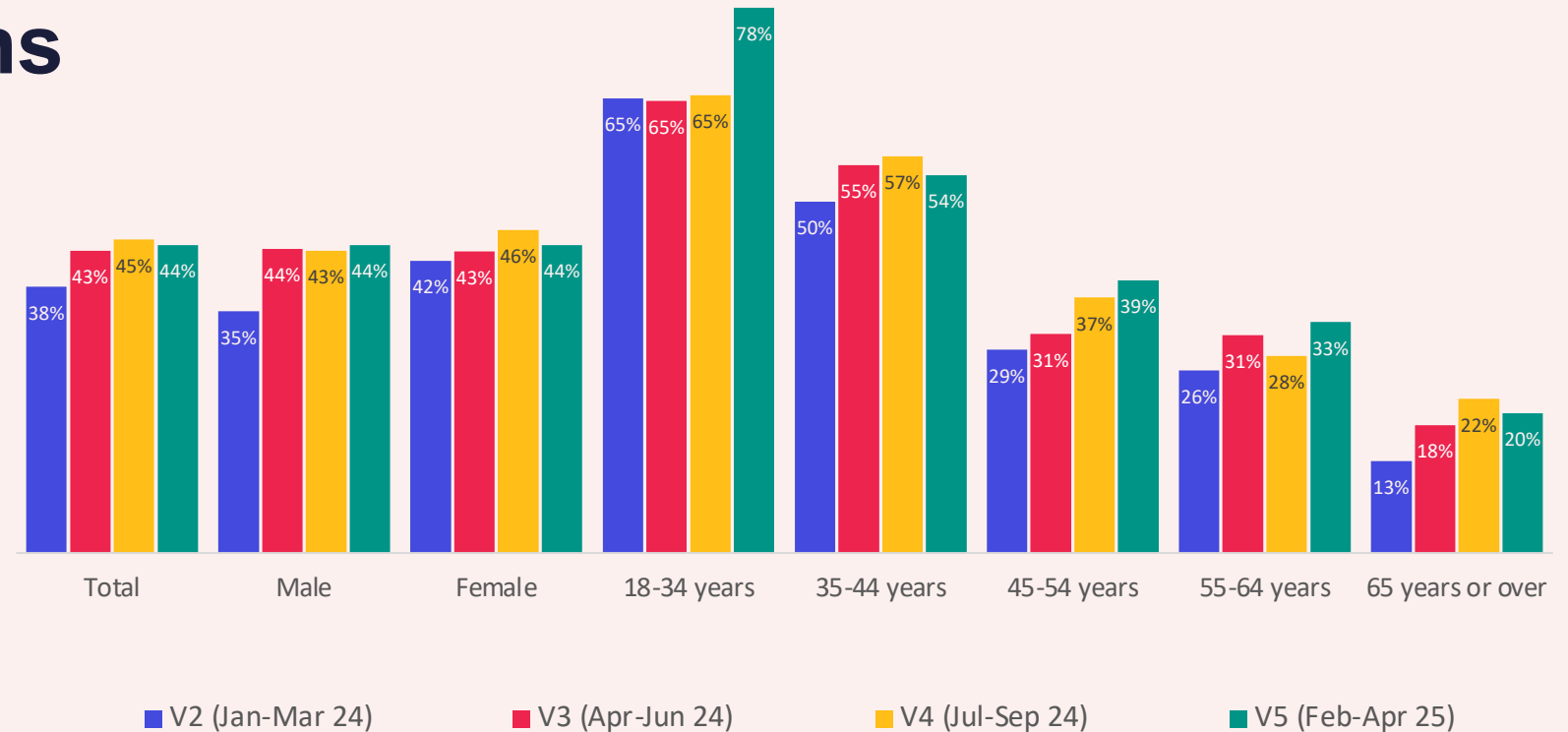# Have staff recommended any food and/or drinks in the last 3 months?

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.

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years+
V2 (Jan-Mar 24)	47%	46%	48%	74%	56%	41%	34%	23%
V3 (Apr-Jun 24)	50%	52%	48%	71%	62%	44%	34%	26%
V4 (Jul-Sep 24)	50%	51%	50%	70%	62%	47%	32%	27%
V5 (Feb-Apr 25)	50%	52%	48%	82%	61%	47%	34%	28%

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?

KAM

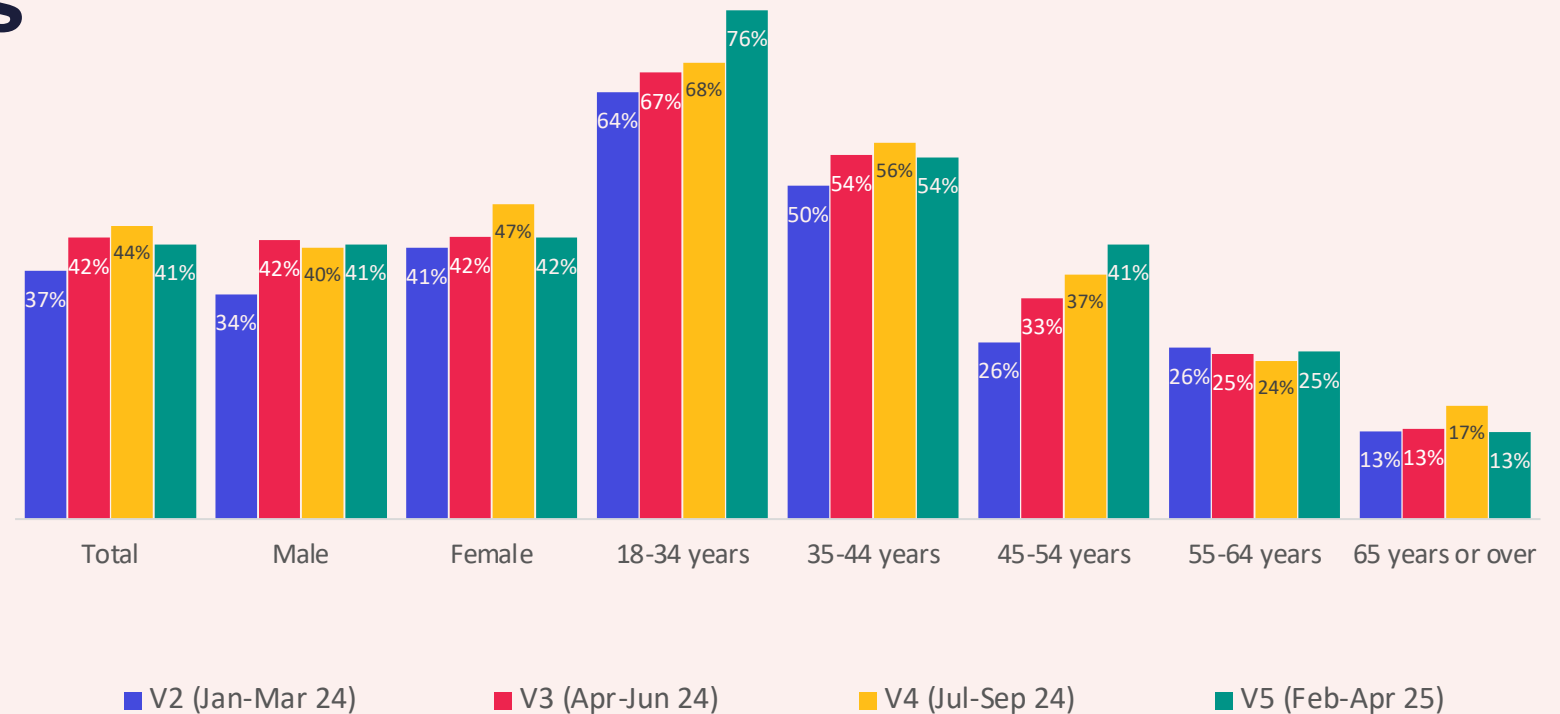# How likely customers are to go with staff recommendations on food.

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.

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years or over
V2 (Jan-Mar 24)	38%	35%	42%	65%	50%	29%	26%	13%
V3 (Apr-Jun 24)	43%	44%	43%	65%	55%	31%	31%	18%
V4 (Jul-Sep 24)	45%	43%	46%	65%	57%	37%	28%	22%
V5 (Feb-Apr 25)	44%	44%	44%	78%	54%	39%	33%	20%

■ V2 (Jan-Mar 24)   ■ V3 (Apr-Jun 24)   ■ V4 (Jul-Sep 24)   ■ V5 (Feb-Apr 25)

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?

KAM

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
V2 (Jan-Mar 24)	37%	34%	41%	64%	50%	26%	26%	13%
V3 (Apr-Jun 24)	42%	42%	42%	67%	54%	33%	25%	13%
V4 (Jul-Sep 24)	44%	40%	47%	68%	56%	37%	24%	17%
V5 (Feb-Apr 25)	41%	41%	42%	76%	54%	41%	25%	13%

■ V2 (Jan-Mar 24) ■ V3 (Apr-Jun 24) ■ V4 (Jul-Sep 24) ■ V5 (Feb-Apr 25)

KAM

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	SPEND MORE	STAY MORE	LOYALTY	ENGAGEMENT
30% would visit more often.	18% would spend more per visit.	21% would stay longer.	33% would be more likely to return.	26% would recommend to others.
Down from 34% in previous wave.	Down from 20% in previous wave.	Level with 21% in previous wave.	Down from 34% in previous wave.	Down from 30% in previous wave.

KAM

MENUS

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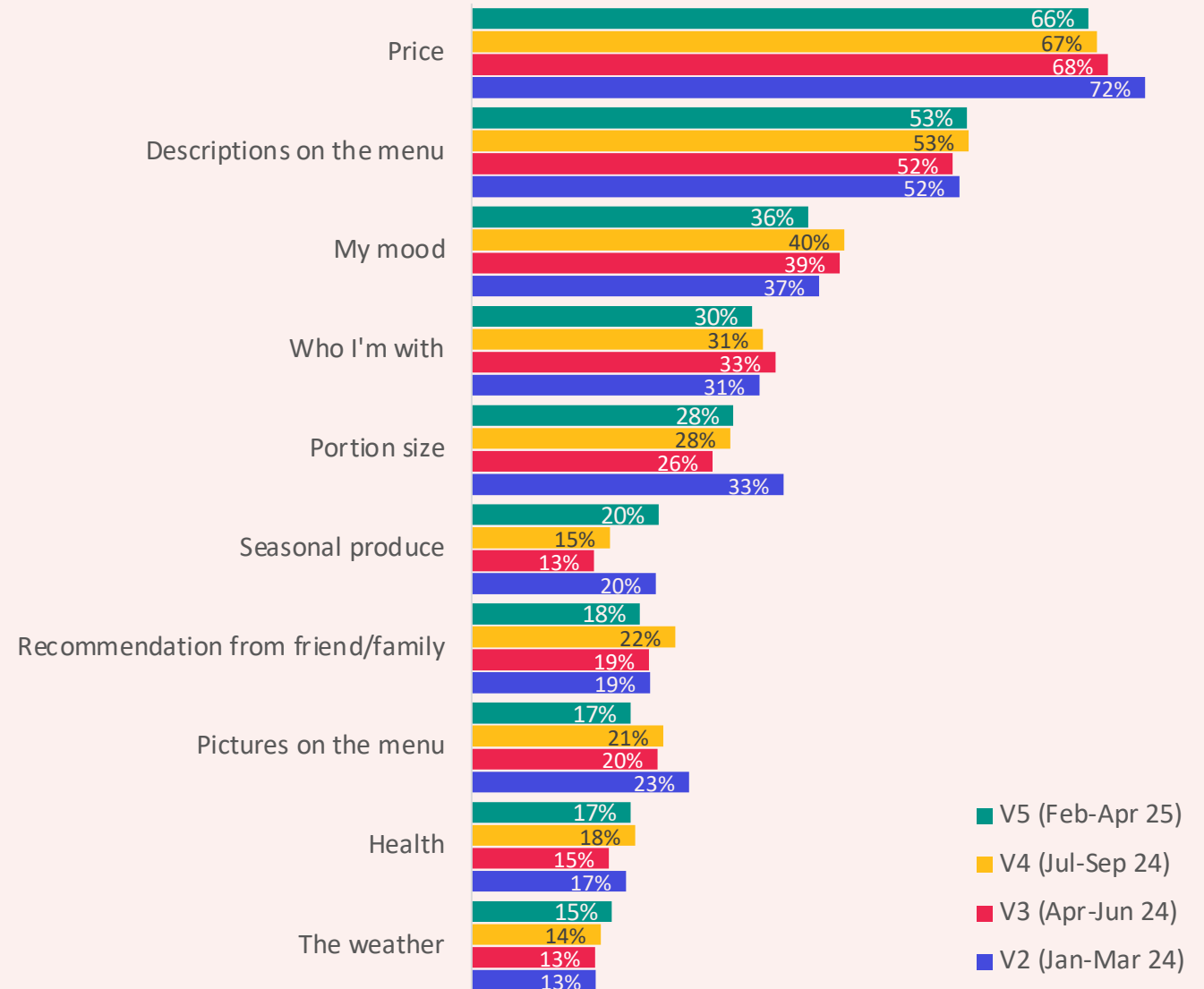
KAM

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.

Price
- 66%
- 67%
- 68%
- 72%

Descriptions on the menu
- 53%
- 53%
- 52%
- 52%

My mood
- 36%
- 40%
- 39%
- 37%

Who I'm with
- 30%
- 31%
- 33%
- 31%

Portion size
- 28%
- 28%
- 26%
- 33%

Seasonal produce
- 20%
- 15%
- 13%
- 20%

Recommendation from friend/family
- 18%
- 22%
- 19%
- 19%

Pictures on the menu
- 17%
- 21%
- 20%
- 23%

Health
- 17%
- 18%
- 15%
- 17%

The weather
- 15%
- 14%
- 13%
- 13%

Legend:
- V5 (Feb-Apr 25)
- V4 (Jul-Sep 24)
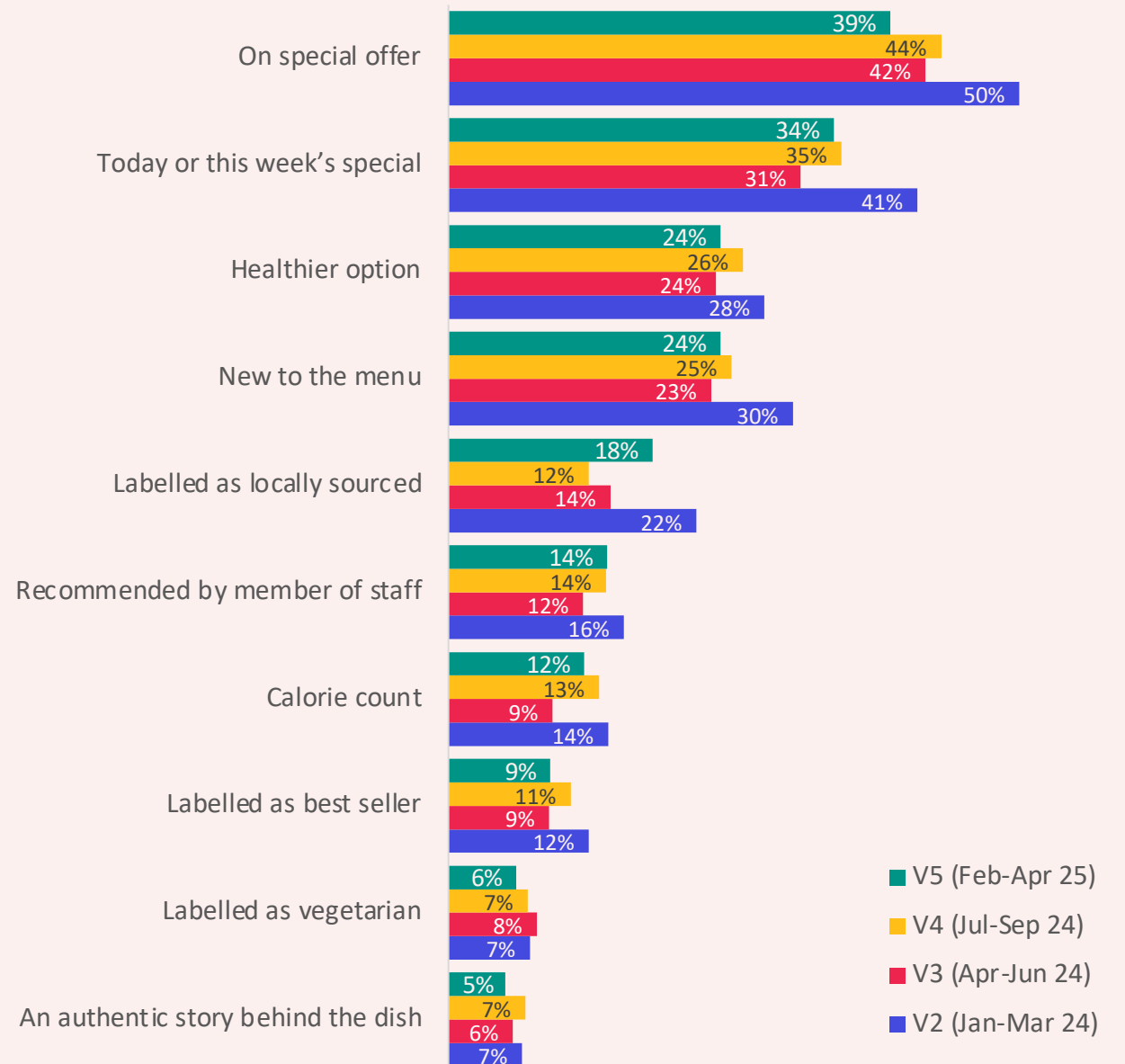- V3 (Apr-Jun 24)
- V2 (Jan-Mar 24)

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.

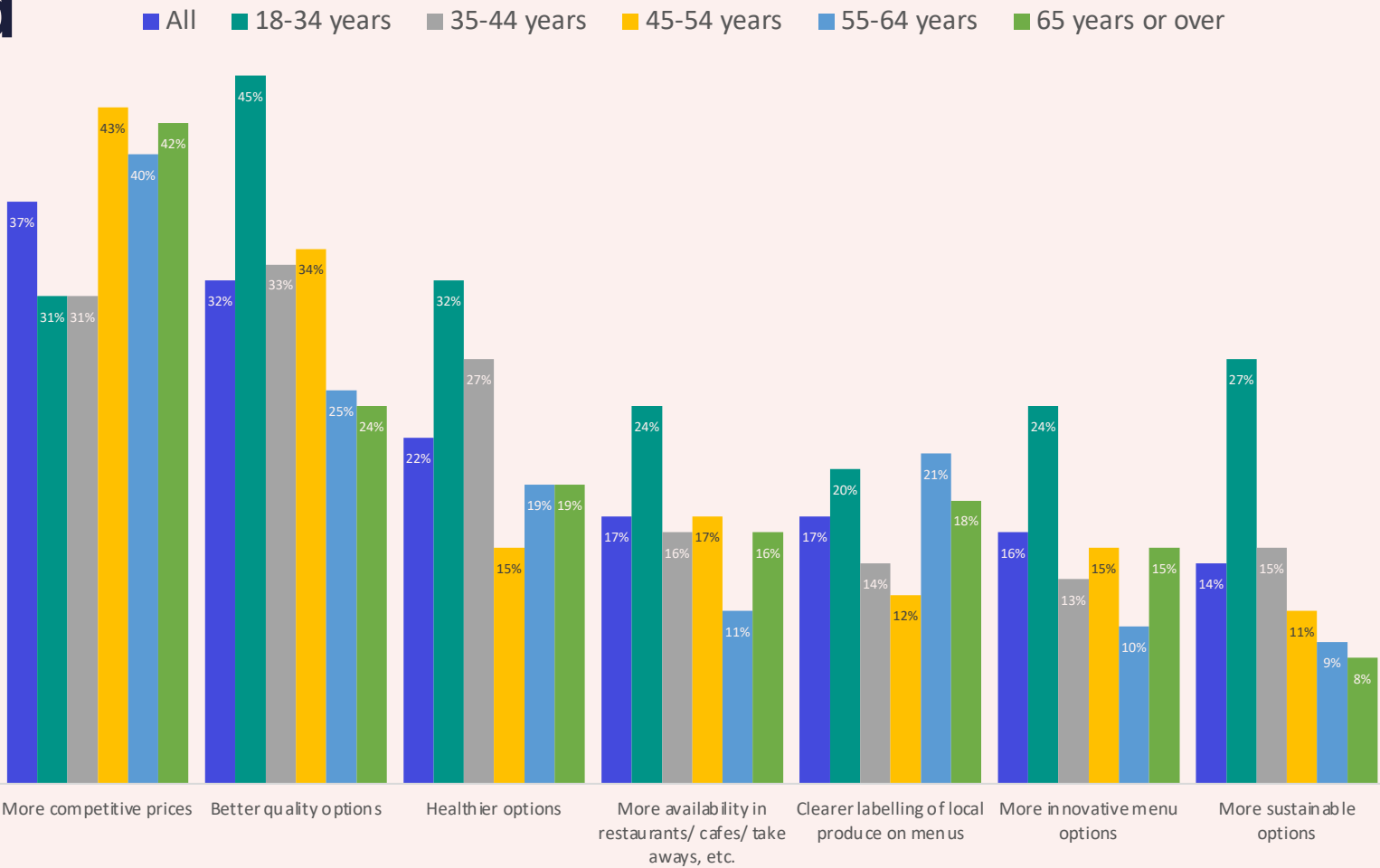Q. Which of the following that, if flagged against dishes on a food menu, would encourage you to order it?

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

On special offer
- 39%
- 44%
- 42%
- 50%

Today or this week's special
- 34%
- 35%
- 31%
- 41%

Healthier option
- 24%
- 26%
- 24%
- 28%

New to the menu
- 24%
- 25%
- 23%
- 30%

Labelled as locally sourced
- 18%
- 12%
- 14%
- 22%

Recommended by member of staff
- 14%
- 14%
- 12%
- 16%

Calorie count
- 12%
- 13%
- 9%
- 14%

Labelled as best seller
- 9%
- 11%
- 9%
- 12%

Labelled as vegetarian
- 6%
- 7%
- 8%
- 7%

An authentic story behind the dish
- 5%
- 7%
- 6%
- 7%

Legend:
- V5 (Feb-Apr 25)
- V4 (Jul-Sep 24)
- V3 (Apr-Jun 24)
- V2 (Jan-Mar 24)

KAM

What would make customers buy more LOCAL food and drink when eating out

Data shows the factors that would most likely influence customers to choose local dishes and local drinks from the menu when eating out.

Legend: All | 18-34 years | 35-44 years | 45-54 years | 55-64 years | 65 years or over

More competitive prices: 37%, 31%, 31%, 43%, 40%, 42%

Better quality options: 32%, 45%, 33%, 34%, 25%, 24%

Healthier options: 22%, 32%, 27%, 15%, 19%, 19%

More availability in restaurants/ cafes/ take aways, etc.: 17%, 24%, 16%, 17%, 11%, 16%

Clearer labelling of local produce on menus: 17%, 20%, 14%, 12%, 21%, 18%

More innovative menu options: 16%, 24%, 13%, 15%, 10%, 15%

More sustainable options: 14%, 27%, 15%, 11%, 9%, 8%

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?
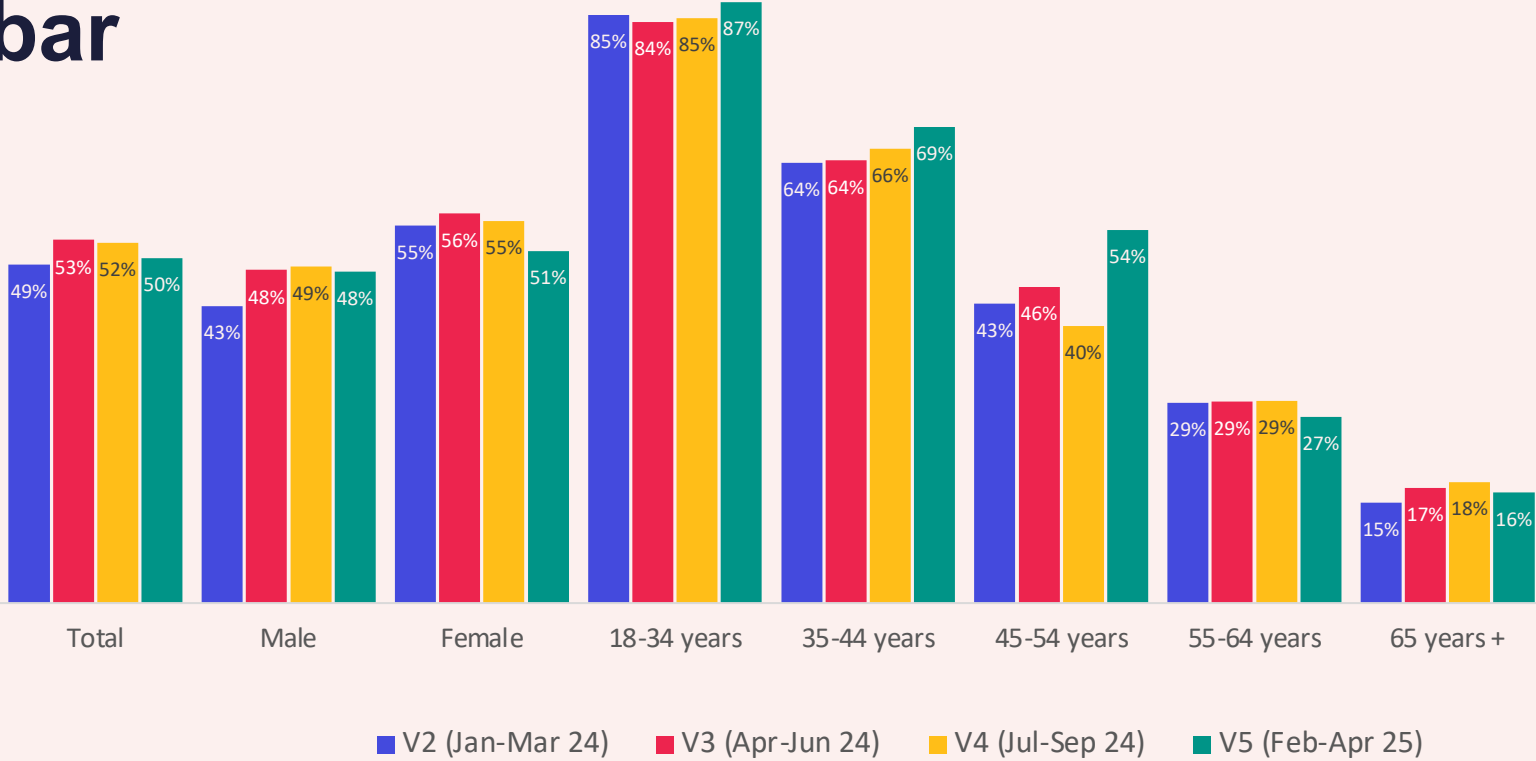
VISIT MORE	SPEND MORE	STAY MORE	LOYALTY	ENGAGEMENT
36% would visit more often.	24% would spend more per visit.	22% would stay longer.	33% would be more likely to return.	27% would recommend to others.
Down from 40% in previous wave.	Down from 26% in previous wave.	Up from 20% in previous wave.	Down from 36% in previous wave.	Level with 27% in previous wave.

KAM

TECHNOLOGY

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

KAM

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.
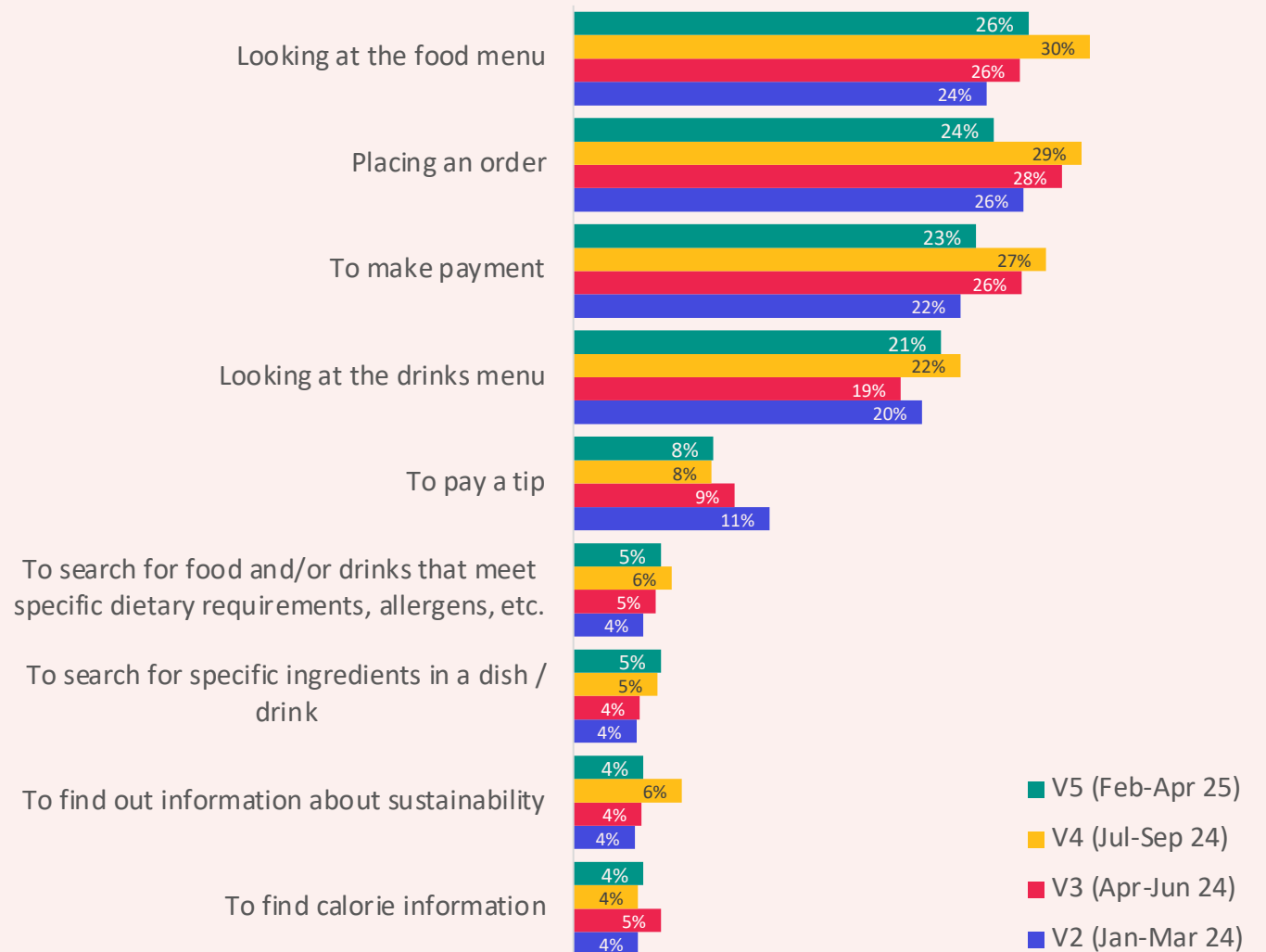
	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
V2 (Jan-Mar 24)	49%	43%	55%	85%	64%	43%	29%	15%
V3 (Apr-Jun 24)	53%	48%	56%	84%	64%	46%	29%	17%
V4 (Jul-Sep 24)	52%	49%	55%	85%	66%	40%	29%	18%
V5 (Feb-Apr 25)	50%	48%	51%	87%	69%	54%	27%	16%

Legend: V2 (Jan-Mar 24) · V3 (Apr-Jun 24) · V4 (Jul-Sep 24) · V5 (Feb-Apr 25)

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.

Looking at the food menu
- 26%
- 30%
- 26%
- 24%

Placing an order
- 24%
- 29%
- 28%
- 26%

To make payment
- 23%
- 27%
- 26%
- 22%

Looking at the drinks menu
- 21%
- 22%
- 19%
- 20%

To pay a tip
- 8%
- 8%
- 9%
- 11%

To search for food and/or drinks that meet specific dietary requirements, allergens, etc.
- 5%
- 6%
- 5%
- 4%

To search for specific ingredients in a dish / drink
- 5%
- 5%
- 4%
- 4%

To find out information about sustainability
- 4%
- 6%
- 4%
- 4%

To find calorie information
- 4%
- 4%
- 5%
- 4%

Legend:
- V5 (Feb-Apr 25)
- V4 (Jul-Sep 24)
- V3 (Apr-Jun 24)
- V2 (Jan-Mar 24)

KAM

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?

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

VISIT MORE

18% would visit more often.

Level with 18% in previous wave.

SPEND MORE

14% would spend more per visit.

Level with 14% in previous wave.

STAY MORE

13% would stay longer.

Down from 14% in previous wave.

LOYALTY

15% would be more likely to return.

Down from 16% in previous wave.

ENGAGEMENT

8% would recommend to others.

Down from 14% in previous wave.

LOYALTY

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

KAM

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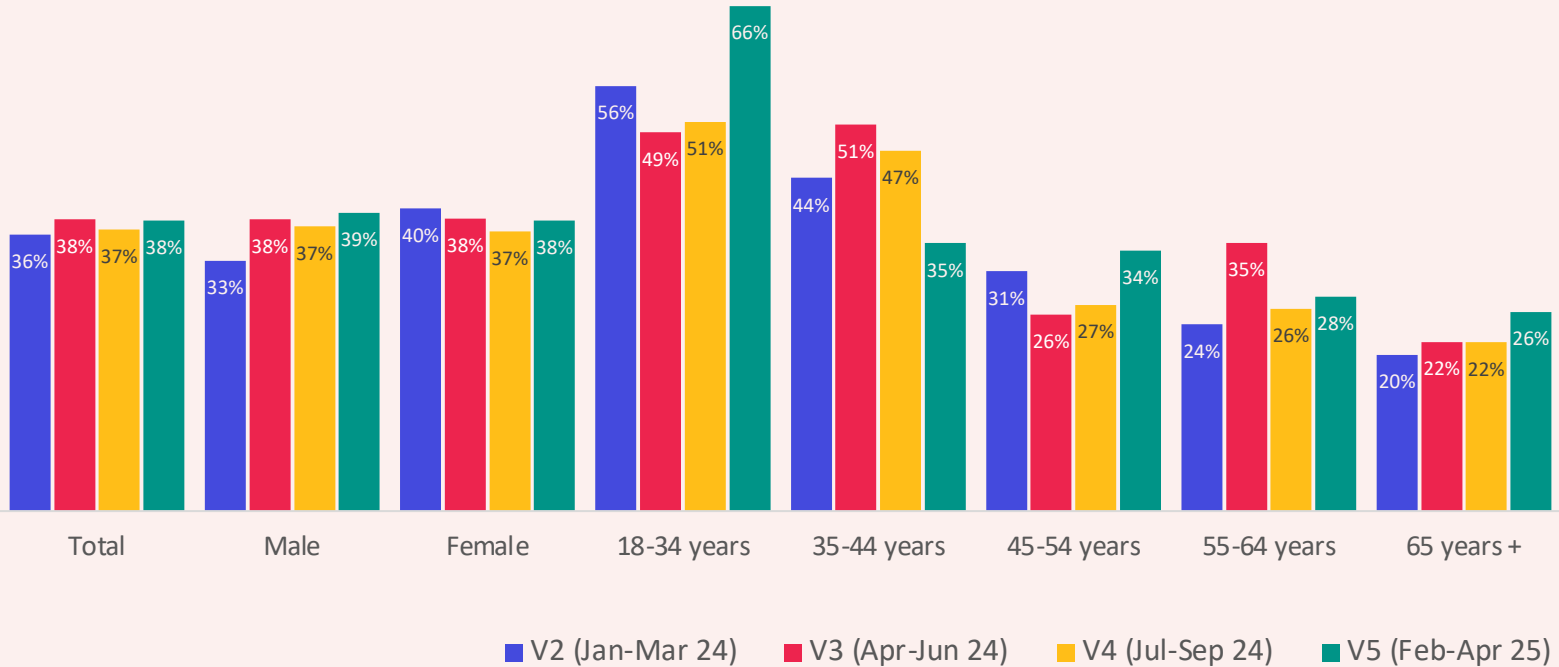
Q. Have you ever left a review of a pub, bar or restaurant that you've visited in the last 3 months?

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
V2 (Jan-Mar 24)	36%	33%	40%	56%	44%	31%	24%	20%
V3 (Apr-Jun 24)	38%	38%	38%	49%	51%	26%	35%	22%
V4 (Jul-Sep 24)	37%	37%	37%	51%	47%	27%	26%	22%
V5 (Feb-Apr 25)	38%	39%	38%	66%	35%	34%	28%	26%

■ V2 (Jan-Mar 24) ■ V3 (Apr-Jun 24) ■ V4 (Jul-Sep 24) ■ V5 (Feb-Apr 25)

KAM

Source: KAM Plan to Plate Tracker (May 2025)

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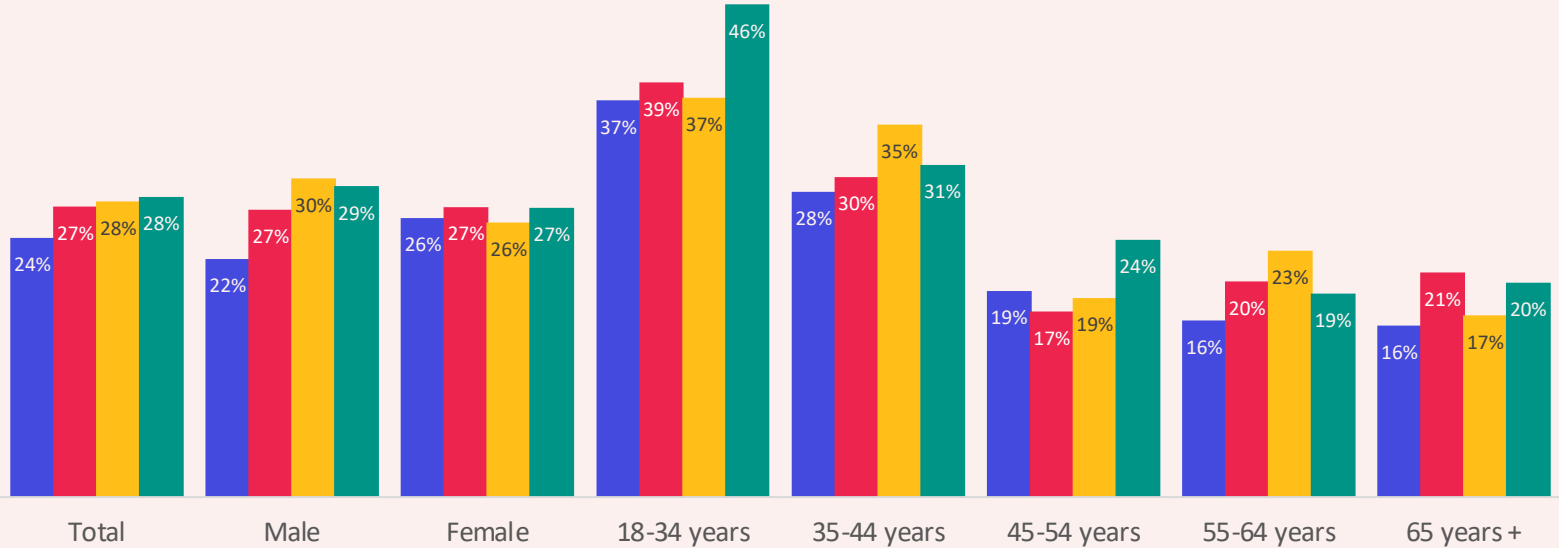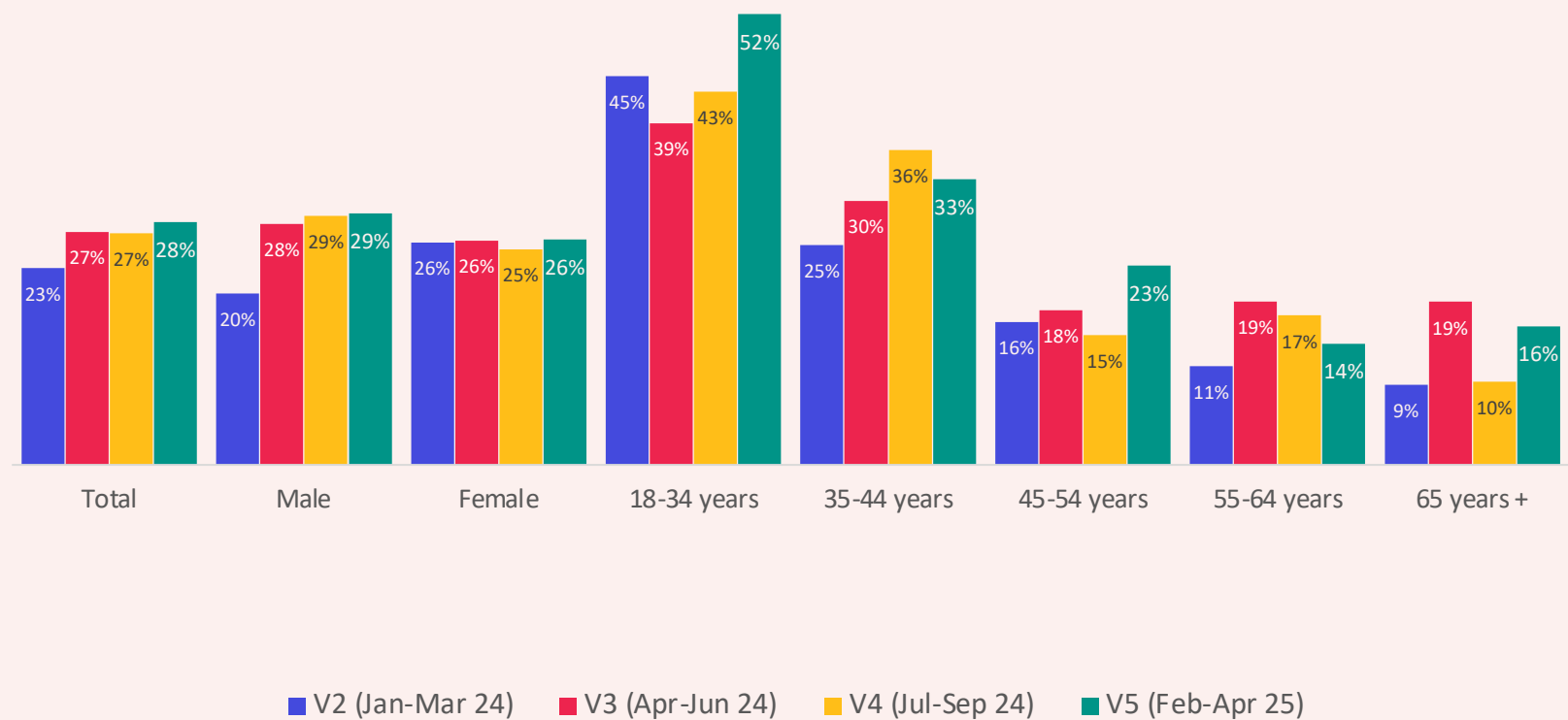
Q Are you part of any pub, bar or restaurants loyalty schemes?

Legend:
- V2 (Jan-Mar 24)
- V3 (Apr-Jun 24)
- V4 (Jul-Sep 24)
- V5 (Feb-Apr 25)

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
V2 (Jan-Mar 24)	24%	22%	26%	37%	28%	19%	16%	16%
V3 (Apr-Jun 24)	27%	27%	27%	39%	30%	17%	20%	21%
V4 (Jul-Sep 24)	28%	30%	26%	37%	35%	19%	23%	17%
V5 (Feb-Apr 25)	28%	29%	27%	46%	31%	24%	19%	20%

KAM

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.
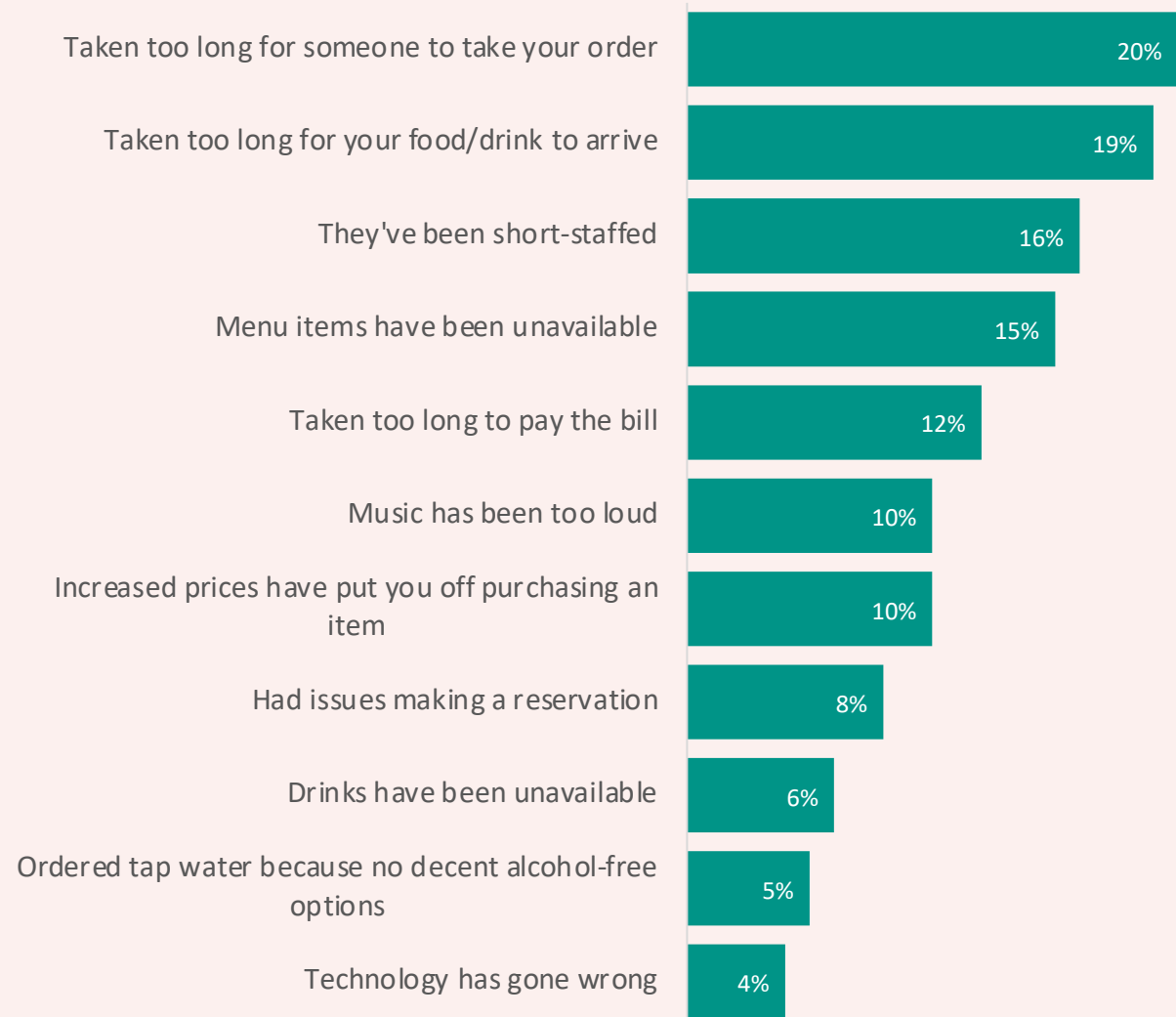

	Total	Male	Female	18-34 years	35-44 years	45-54 years	55-64 years	65 years +
V2 (Jan-Mar 24)	23%	20%	26%	45%	25%	16%	11%	9%
V3 (Apr-Jun 24)	27%	28%	26%	39%	30%	18%	19%	19%
V4 (Jul-Sep 24)	27%	29%	25%	43%	36%	15%	17%	10%
V5 (Feb-Apr 25)	28%	29%	26%	52%	33%	23%	14%	16%

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

■ V2 (Jan-Mar 24) ■ V3 (Apr-Jun 24) ■ V4 (Jul-Sep 24) ■ V5 (Feb-Apr 25)

KAM

Barriers to customer loyalty

These are the top answers given when we asked UK adults what, if any, negative experiences have they encountered when visiting a restaurant or pub/bar in the last 3 months – that might prevent them from returning.

Barrier	V5 (Feb-Apr 25)
Taken too long for someone to take your order	20%
Taken too long for your food/drink to arrive	19%
They've been short-staffed	16%
Menu items have been unavailable	15%
Taken too long to pay the bill	12%
Music has been too loud	10%
Increased prices have put you off purchasing an item	10%
Had issues making a reservation	8%
Drinks have been unavailable	6%
Ordered tap water because no decent alcohol-free options	5%
Technology has gone wrong	4%

■ V5 (Feb-Apr 25)

KAM

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% of consumers would visit more often.

Compared to 40% for the previous wave

SPEND MORE

19% of consumers would spend more per visit.

Up from 18% in the previous wave

STAY MORE

14% of consumers would stay longer.

Down from 15% from the previous wave

LOYALTY

29% of consumers would be more likely to return.

Up from 25% in the previous wave

ENGAGEMENT

17% of consumers would recommend to others.

Up from 15% in the previous wave

KAM

PLAN TO PLATE.

Summary

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

KAM

PLAN TO PLATE.

Consumer confidence is shifting
The new KAM Hospitality Consumer Confidence Index shows a mixed picture. Many are still cautious about spending, but there are signs of resilience.

Visit frequency holding strong
UK adults visited pubs, bars, and restaurants 5.7 times per month on average, with Fridays and Saturdays remaining the most popular.

Top social drivers: quality, atmosphere, and value
When choosing a venue, quality of food and drink leads the way especially for meals. Atmosphere, value, and location are key for drinks.

Discovery and decision-making are digital
General internet searches and Google Maps are now the top tools used to discover venues. Menus and social media also play a critical role.

Menu descriptions drive choices
Menu descriptions influence food choices more than price, with "local," "fresh," and "seasonal" tags boosting appeal.

Staff influence still untapped
Less than half of guests experienced a staff recommendation, yet most are open to them—especially for food.

Tech adoption on the rise
Over 50% of customers have used QR codes or digital screens in venues, mostly to browse menus or place orders.

Loyalty still has room to grow
Just a small proportion are actively engaged in loyalty schemes but those who are say it significantly drives footfall.

KAM

Source: KAM Plan to Plate Tracker (May 2025)

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KAM

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