



Insight by Zonal, Powered by CGA

Make it personal

How personalisation can deepen consumers' engagement with restaurants, pubs and bars—and what businesses need to do to master it



In partnership with Airship

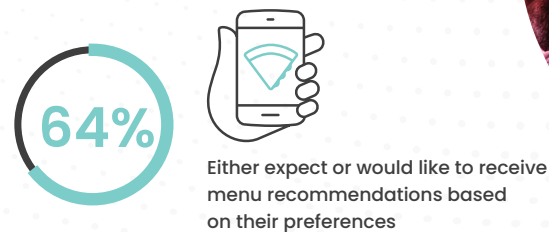
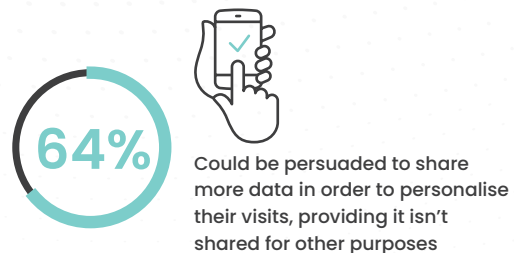
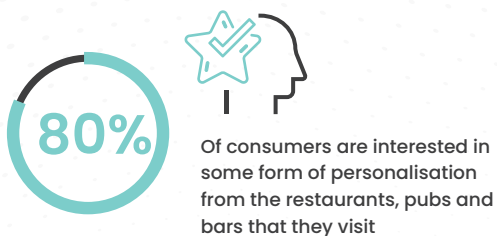


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Personalisation in hospitality:

Key numbers





What consumers want:

Five personalisation priorities

1. Discounts and deals

When asked about ways to personalise their experiences in hospitality, many consumers instinctively think of savings. A third **(33%)** expect tailored discounts and deals as a matter of course, and nearly half **(45%)** think they would be nice to have.

2. Loyalty schemes

Guests in restaurants, pubs and bars also want their custom to be recognised. Over a quarter **(29%)** say they would be interested in a loyalty scheme with rewards that are personalised to their habits and preferences.

3. Updates

While financial incentives are important, personalisation is about much more than money. It can be about convenience too: more than a quarter **(29%)** now expect to receive updates about things like the status and timing of their orders, and another **46%** would welcome them. With people now well accustomed to using ordering apps, tailored updates are becoming integral elements of their experience.

4. Recommendations

The GO Technology survey shows that around a fifth of consumers now expect to receive tailored recommendations **(20%)**, or to be presented with personalised menus that incorporate their favourite dishes and drinks **(19%)**. There is huge latent as well as explicit demand for these personalisations too, with another **44%** and **43%** of consumers respectively regarding them as nice-to-have.

5. VIP perks

Small, unexpected touches are important parts of personalisation strategies as well. For example, one in six **(17%)** consumers would like the ability to sit at a favourite table without having to ask, and some would appreciate celebratory details like balloons on a birthday **(14%)** or personalised greetings from staff when they arrive **(11%)**.

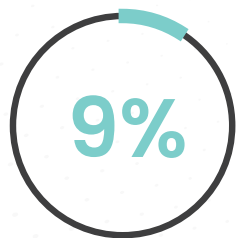
29%

now expect to receive updates about things like the **status and timing of their orders**



The Generation Gap – personalisation and expectations of different generations

Approaches to personalisation in hospitality can vary widely according to age. Fewer than one in ten (**9%**) of those aged 18 to 24 say they have no interest in it—but that number soars to nearly half (**46%**) of people aged 65 or over. Put simply, the older you get the less likely you are to seek personalised experiences, and the less willing you are to share your personal data. Of course, that's not to say older people can't be engaged. It's a case of identifying the right buttons to press for every demographic, and treading carefully when collecting data.



Fewer than one in ten of those aged 18 to 24 say they have **no interest in personalised experiences**





The Gender Divide – the influence of women in personalisation

As with age, there are some interesting splits in attitudes to personalisation by gender. The GO Technology research shows women are more likely to engage with nearly every aspect of personalisation than men: for example, they are 12 percentage points more likely to be interested in both tailored food and drink promotions and customised rewards for loyalty. They significantly over-index on several more personalised options, like the ability to sit in a favourite place **(+4pp)**, celebrations of special occasions **(+7pp)** or recommendations of new or special menu items **(+4pp)**.

This gender split in personalisation is particularly important because previous research has shown that women are more likely than men to take the lead on planning meals and drinks out. Women are also 4 percentage points more likely than men to share the data that makes it possible for venues to action these personalised experiences—which means they are more pre-disposed to marketing. However, they are less inclined—possibly for security reasons—to share details like address and social media identifiers, so brands must be selective in what they ask for.

+4%

Women are 4pp more likely than men to **share the data that makes it possible for venues to action personalised experiences**





Personalisation in London

As is the case in many areas of hospitality, engagement with personalisation can be very different in London to elsewhere in the country. For example, consumers in the capital are less attracted than average to the financial aspects of personalisation like promotions and rewards—but they are interested in tailored eating and drinking experiences. Recommending new menu items, suggesting food and drink pairings and personalising menus by preferences or dietary requirements are three tactics that are much more likely to land with Londoners than those further afield.

Some of these differences may be explained by familiarity with hospitality and use of technology—both of which tend to be higher in the capital than elsewhere. This means it can be harder to create memorable experiences for Londoners, and harder to make app-based personalisation stand out from the crowd. But for businesses that can harness data to create out-of-the-ordinary visits to venues, there is a great opportunity to build vital loyalty and word of mouth in the ultra-competitive London market.



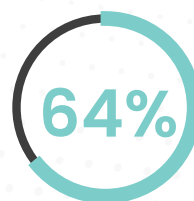
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Getting the data: How to overcome blocks to personalisation

Tailoring experiences in restaurants, pubs and bars depends on good data collection. Without knowing people's preferences, or finding a way to reach them, no business can achieve a successful personalisation strategy.

While many consumers are now well accustomed to sharing their data, others—especially older people—remain reluctant. In fact, one in seven **(15%)** says there is nothing that can be done to make them feel more comfortable about sharing data. But with nearly two in three **(64%)** consumers saying they could be persuaded to share more data, providing it isn't shared for other purposes, reassurances about privacy are crucial.

It's also important to understand the pieces of data that people do and don't like to share. Nearly half **(47%)** are prepared to tell venues about their favourite drinks, and many will supply generic information like birthday **(42%)** and gender **(39%)**. There is slightly more reluctance about sharing things like age **(37%)** and purchase histories **(22%)**, and extreme wariness about giving up identifiable data like home addresses **(11%)** and parental status **(11%)**—especially among women.



nearly two in three consumers say they could be persuaded to **share more data**

In the middle of this hierarchy is perhaps the most important item of data of all: the email address. With fewer than two in five **(37%)** of consumers willing to provide this, venues have to work hard to persuade the remaining majority that it will be worth their while to share their address. To retain people's interest, they must also prove that they can be trusted on security, and to only email people what they want to receive.



How to win: Ten tips for successful personalisation

1. Show the benefits

Consumers can be cynical about sharing their data, and they want to know what they will get in return. Clarity about the personalisation and value that's on offer makes sign-ups easier.

2. Establish trust

Many consumers have at least some misgivings about how their personal information is used, and older ones are particularly wary. Brands need to show they take data security and ethics seriously.

3. Educate

Educating consumers about data protection is the best way to earn trust. Explaining precisely how data will and won't be used is especially important with younger consumers, who will carry their habits through to later life but keep it simple.

4. Put guests in charge

Giving people control over what they share and how it will be used gives them important ownership over personalised experiences.

5. Collect the right data...

It's tempting to gather as much data as possible, but asking people for too much can be off-putting. Focus on collecting the information that will help deliver impactful personalised experiences.

6. ... At the right time

With more than half (**53%**) of those who are happy to provide more data feeling most comfortable doing so before they visit—rather than during (**32%**) or after (**16%**) a visit—the booking stage has become the perfect place to gather information and set up personalised experiences. Ensure that you have a clear call to action for opt-in within that journey.

7. Make it easy

Long and cumbersome processes can wreck data collection. Make the sign-up process simple and people are more likely to engage.

8. Frequency is key

As long as you have context, automated journeys can deliver on your value exchange without overwhelming your teams, be frequent with your messaging, remember, you're fighting Netflix, Amazon and online retailers for the inbox.

9. Use teams as well as tech

Technology unlocks personalisation, but teams deliver it. Tech has to complement rather than replace great delivery, so investing in both is crucial.

10. Measure

Set consumer-centric KPIs to assess the success of personalisation strategies.





The view from CGA

"As we emerge from COVID, it's clear that consumer behaviour has changed in some fundamental ways. As they establish new habits in restaurants, pubs and bars, people expect their brands to treat them as individuals rather than numbers. It means that personalisation is increasingly not just a nice surprise—it's an expected part of a hospitality visit.

"Value is going to be important to the post-COVID consumer, especially at a time when disposable income is squeezed. But as our Go Technology research makes plain, good personalisation goes beyond money: it's about the creation of memorable experiences that show people they are valued. It will be a powerful driver of loyalty and recommendation in 2022 and beyond, and the brands that can deliver it best will have a huge head start on the competition."

Karl Chessell, CGA Business Unit Director - hospitality operators and food, EMEA



The view from Zonal

"At its very heart, hospitality is about providing a personal and bespoke experience for every individual consumer. Traditionally this has been done face-to-face and in-venue but technology now means venues can offer a personalised touch at every stage of the customer journey, enhancing the great customer experiences the industry is always striving for.

"There is perhaps a lack of understanding currently around what a personalised experience might look like. However, our research shows that through clear communication and by offering the right incentives, venues can overcome this and create bespoke experiences that drive sales and encourage loyal and engaged consumers."

Alison Vasey, Group Product Director, Zonal



The view from Airship & Toggle

"Now is the time more than ever to get to know your customer. Personalisation, context of purchase and customer lifetime value are key drivers not only for marketing, but for overall growth. Taking ALL your customers on a journey that represents your brand, that interacts across all the physical and digital touchpoints will deliver engagement. Be clear in your message, concise in your value exchange and keep it simple for your teams!"

Dan Brookman - CEO Airship & Toggle

About the data

This report is based on figures from Zonal and CGA's GO Technology survey, a sample of 5,000 nationally representative British consumers. All figures are taken from the February 2022 edition of the survey.

For further information on GO Technology, please contact info@zonal.co.uk

