

Pub Food Pub Food in Focus

The first of a new quarterly series putting food trends in managed pubs under the microscope, courtesy of Horizons

How have they managed that?

Consumer intentions

In March 1,000 people were asked: Thinking about the year ahead, would you say you are likely to eat out more, less or about the same as you did this year?

- 4% said they would eat out more often in the coming year than they had in 2008
- 63% said they would eat out as often
- 32% said they would eat out less often

We asked consumers, how much they last spent on a meal in a pub. The results compared with the previous three years were:

• March 2009:	£13.50
• March 2008:	£17.10
• March 2007:	£13.90
• March 2006:	£12.30

Source: QuickBite



Price changes in the top six pub dishes

Average price and price change Sep 08 – Jan 09

Burger	£6.67	-12p
Pizza	£7.34	-3p
Chicken breast	£6.92	-4p
Fish & chips	£6.77	-15p
Sunday lunch	£7.46	-38p
Sirloin steak	£10.81	-24p

Source: Menurama



Deals

There has been a significant rise in the percentage of operators offering adult and child meal deals on menus to attract cash-strapped and price-savvy consumers.

% of operators offering meal deals (excluding children's dishes):

Jan 2008:	12.5%
Jul 2008:	18.8%
Jan 2009:	32.3%

Source: Menurama

New dishes

This is a selection of new dishes launched by pubs between August 2008 and February 2009, with menu description and average price

Boerie Burger

Barracuda Group/Smith & Jones
All burgers are served with chips and a rocket and Parmesan garnish, drizzled with a balsamic dressing. £6.95

Grilled Halloumi and Red Pepper Skewer (V)

Orchid Pub Company/Modern British
Served on toasted Greek pitta bread with rocket, dressed in an olive oil and balsamic reduction. £4.50

Confit Of Duck & Butterbean Cassoulet

Greene King/Wayside Inns
Slow-cooked tender leg of duck served on a green lentil, butterbean & seared cherry tomato cassoulet £9.50

Salmon & Broccoli Fishcake Salad

Town & City Pub Company/Yates's
Flakes of salmon and broccoli, in a light breadcrumb coating, served with mixed leaves, tomato, cucumber and tartare sauce. £5.35

Chicken & Prosciutto Ham Tostada

Bay Restaurant Group/Slug and Lettuce
Toasted soft flour tortilla, topped with melted Cheddar cheese, char-grilled chicken, prosciutto ham, sun-blushed red pepper tapenade and basil & pine nut pesto, with seasonal salad leaves, melted mozzarella and Parmesan. £7.80

Beef & Coriander Burger With Organic Goat's Cheese & Peppers

Mitchells & Butlers/All Bar One
With fries & tomato salsa. We make our beef



and lamb burgers in our kitchens everyday, using fresh ingredients. £8.45

Posh Bacon & Eggs

Mitchells & Butlers/Scream & Goose
Two grilled 4oz gammon chops served with two fried eggs, peas and chips on the side. £4.75

Salt Beef Baguette

Marston's/Pitcher & Piano
Classic Brick Lane-style with creamed horseradish and gherkins. All available with a gluten-free bread alternative. Served with chips. £6.95

Beef & Oyster Pudding

Mitchells & Butlers/O'Neill's
Served with peas and either colcannon or chips and a rich gravy. £7.20

Source: Menurama



View from Horizons

By Peter Backman, director, Horizons

The food offer in the pub sector is becoming ever more important, but competition is hotting up from restaurants, fast food and take-aways, all of whom are facing challenging market conditions.

The two key weapons in the armoury are price and appeal. Pubs have done well on the price front, holding their prices down more while still launching innovative products.

Pubs have also worked hard on appeal, with factors such as ethical sourcing still important to consumers despite the pressure on their wallets.

Nevertheless, over the past year, pubs have suffered more than other sectors; numbers of meals served were down by 12 per cent comparing the first quarter of this year with the same quarter in 2008. But managed pubs only fell by three per cent, which compares well with the seven per cent fall in the restaurant sector.

About Horizons

Horizons enables its clients to make better business decisions, by providing the most accurate information about the foodservice sector. The company provides many specialised services: Menurama, QuickBite, market statistics and much more, online, in hard copy and in person.

For further details visit www.horizonsforsuccess.com, email info@horizonsforsuccess.com or phone 020 8349 0162

Head to Head: Beefeater v Harvester

Course	Average UK Price Jan 2009		Price Difference	Percentage Difference
	Harvester	Beefeater		
Starter	£2.99	£3.98	£0.99	33.1%
Main Course	£8.24	£9.82	£1.58	19.2%
Dessert	£3.56	£3.94	£0.38	10.7%

NB: Excludes dishes appearing as meal deals or on children's menus. Beefeater prices are more expensive across the three courses shown
Source: Menurama

Heavyweight promotions are different:

- Beefeater promotes meal deals across the board – one course for £5.95, two for £7.95, three for £9.95
- Harvester promotes higher cost dishes – for example Harvester Select Premium dishes are heavily promoted at an average of a £1 more than other dishes in the relevant menu sections.

Differences in important selling messages:

- Beefeater publicises the 'home of chargrilling' and emphasises the many new dishes on offer
- Harvester plays on its healthy eating options, using special symbols to highlight lower in fat and calories, and by offering unlimited free salads with every meal.

Similar menu ethnicity:

- Beefeater dishes tend towards traditional English grills, steaks, roasts and American burgers with a sprinkle of other cuisines such as Chicken Tikka skewers, Quesadilla wrap, Koftas & Chimi Churi Spiral Pasta
- Harvester also has an assortment of steaks, roasts and burgers with 'Flamed Chicken' spit-roasted dishes replacing Beefeater's chargrilled options. American dishes dominate (Caribbean Curry, Bourbon BBQ Glazed Spitroast, Plantation Platter) but little evidence of other world cuisines.

Pricing

Over the past six months, pubs have been less keen than restaurants and hotels to increase prices across starters, main courses and desserts.

Average menu price increases August 2008 to February 2009

Pubs:	0.6%
Restaurants:	1.2%
Hotels:	2.9%

Beefeater (average main course increase of 79p) and JD Wetherspoon (average increase 77p) show the largest price increases across pub brands over the past year.

Source: Menurama

Dishes

Chicken remains ahead of beef as the primary meat constituent of new dishes – but fish/seafood heads the list.

Protein as % of all menu items in pubs

Fish/Seafood:	24%
Chicken:	20%
Beef:	18%
Pork:	5%
Lamb:	5%
Mixed/Unspecified:	15%

In pubs, veggie burgers slide significantly in occurrence while chicken-based dishes are the biggest growers.

Change in numbers of dishes in the six months to February 2009

Veggie burgers:	-2.2%
Chicken dishes:	+4.5%

Source: Menurama



Brands

Some pub operators continued to heavily promote product brands:

- Spirit Group's Family pubs (HP sauces, Heinz, Quorn)
- JD Wetherspoon (Heinz Baked Beans, Lavazza coffee, McCain, Tilda rice)

Source: Menurama

