

## Super-size deals keep the nation eating out, says Horizons

**The UK's restaurant,** hotel and pub operators are using an imaginative range of marketing techniques to keep the nation's diners eating out including variations on 'meal deal' offers, ensuring they offer something for everyone, exotic-sounding dishes, familiar retail brands, and by labelling more dishes with health claims and details of food provenance.

New Menurama research from foodservice analyst Horizons, which analyses menus from 100 high street foodservice brands, reveals deals such as 'Italian car owners eat for free on Thursdays' at Revolution, 'curry & pint night for £4.99' at Hungry Horse, and 'all you can eat' for £7.75 at Whitbread's Table Table.

Some offers encourage diners to trade up to bigger portions such as Marston's 'go large for £1' on its carvery, 'go large on your chips for 35p' at Beefeater, 'add an extra egg' on gammon & chips at Punch Taverns, 'add a dessert for £2' at Pizza Hut or 'upgrade to an 8oz steak for £1' at Miller & Carter.

The research shows that retail brands are becoming more commonplace on menus, particularly in pubs, as operators seek to sell familiar products that give consumers quality assurance. Examples include Heinz Baked Beans (Little Chef), Ben & Jerry's (Gourmet Burger Kitchen), Häagen-Dazs (Gusto), Yeo Valley Organic Yogurt (Premier Inn) and Mövenpick ice cream (Exchange Bar & Grill).

Operators are also making more use of provenance-related labelling such as 'rope-grown British mussels' and 'organic Shetland salmon', while terms such as 'farm assured', 'line-caught' and 'locally grown' as well as health-related claims such as 'nutritional balance', and '5-a-day' are becoming more common. Chef & Brewer's menu, for example, has a 'superfood salad' dressed with pumpkin seeds and beetroot or pomegranate dressing. The Orchid pub company offers a roasted half of chicken with chips and a superfood salad, while Giraffe's menu has an 'ultimate superfood rude health muesli', a wheat-free, organic blend of oats, rye, quinoa and barley flakes with chopped dried fruits and wild berries.

Exotic-sounding dishes are appearing more frequently on menus too, as chains attempt to offer customers something new. Pub chain Varsity, for example, has a dish called 'dirty dog's dinner' (served in a dog bowl!) and vodka chilli cherry tomato pasta, Blubeckers sells chips with Bloody Mary Ketchup, Scream has Quorn and Chianti lasagne while Las Iguanas has brie and papaya quesadilla.

The research, unveiled yesterday at Horizons' first Annual Briefing at Coutts & Co in London, found that while menus may be getting more adventurous, prices are rising. Over the past 12 months the average cost of a starter has risen 8% to £5.27, a main course has increased 1.4% to £8.98 and the price of a dessert has gone up 11.9% to £4.53.

Since January 2009 the price of a three-course pub meal has risen 6% from £14.85 to £15.74, a restaurant meal is up 5.1% from £19.48 to £20.47, while the average cost of a hotel meal has risen 6.6% over the past 12 months, from £26.45 to £28.20. In some restaurants the price of optional service charge has been raised from 10% to 12.5%.

Menurama also reveals something of a return to nostalgia, with a growing number of dishes being described as slow-cooked or roasted. Porridge has also made a comeback. Frankie & Benny's, Little Chef, Eat, Starbucks and Browns are all selling porridge while Pret A Manger sells pots of porridge plain, with honey or with compote. Prices range from 99p to £3.50. 'Porridge has made a remarkable reappearance over the past year, it has really gained in popularity. But it's the perfect breakfast option - cheap to make, nutritious, healthy and filling,' commented Horizons' managing director Peter Backman.

Mini desserts are another new high street trend, giving diners a taste of several desserts or enabling them to share. Ha Ha Bar & Grill, for example, has a trio of mini desserts with a mini lemon tart, chocolate fondant and a shot of blackcurrant and lemon mousse for £5.95. Likewise, Greene King-owned Hardy's House offers a 'mini hot pudding trio' including chocolate and orange, zesty lemon and treacle sponge pudding costing £3.49.

At the Annual Briefing Investec chief economist Philip Shaw said that while the UK was now in a period of recovery, it would take

until 2012 for the country to recover its previous levels of GDP. Post election fiscal policy could also constrain the pace of recovery, as a VAT rise and tax increases were highly likely.

Horizons' managing director Peter Backman forecast that the eating out market would grow over the next 18 months, but only modestly, rising an estimated £850m to a new value of £42.8bn and that it was unlikely to reach levels of 2008 until the end of 2011.

‘Despite uncertainty about the economy and the election outcome, consumers are still eating out, although they are clearly spending less than they did. Operators are going to have to perform better than customers expect in order to improve trading,’ said Backman.

‘However, the Olympic Games in 2012 could bring an additional £145m in revenue to the hospitality sector,’ he added.

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## EDITOR'S NOTE

### About Horizons

Horizons is an analyst and specialist information consultancy for the foodservice and hospitality sector. Its manager director, Peter Backman, is an expert on the structure and dynamics of the foodservice sector, and its supply chain, in the UK and across Europe. He has been involved in foodservice, as an analyst, researcher and consultant, for almost 30 years.

Horizons helps its clients make better business decisions by providing accurate and detailed information about the foodservice market, its trends, and opportunities. The company provides consultancy services, workshops and statistical information based on its model of the sector and database of key accounts across Europe. The company recently acquired the QuickBite (consumer research) and Menurama (menu tracking) services, adding further depth to its statistical knowledge of the sector.

The company's clients includes Compass and Whitbread, suppliers such as 3663, Brakes, Cadbury, Coca-Cola, Procter & Gamble and Electrolux, investors JP Morgan and Goldman Sachs and trade associations such as the British Hospitality Association and the Food and Drink Federation. Horizons' views have been sought by organisations such as the Bank of England, the Department for Culture Media and Sport and the Department for Environment, Food and Rural Affairs.

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