

Pub Catering - UK - May 2012

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"There is no doubt that pubs have to work harder to keep up with trends in the wider eating out market in order to stem the decline in visitor numbers. Actively chasing footfall is a must which can be approached through strategies such as targeting specific consumer groups more directly, widening service channels (eg takeaways) and/or re-igniting a 'want to buy' mentality in diners by tapping into contemporary 'theatrical' tableware trends."

– Helena Spicer, Senior Foodservice Analyst

In this report we answer the key questions:

- What role can highlighting their food offer play in helping pubs to counteract declining visitor numbers?
- How can pubs position themselves as offering added value without adding to their bottom lines?
- How can pubs leverage variety to compete with in-home retail products?
- How can handheld food capitalise on the opportunities of sporting events such as Euro 2012 and the London 2012 Olympics?

Although the overall pub market has continued to contract, it is expected to level out going forward with CAMRA reporting that the rate of outlet closure has reduced from around 28 a week in 2010 to 12 a week in 2012. Catering has increased its share of overall pub revenues as operators look to mitigate the downturn in visitor numbers. However, although food inflation and VAT increases in recent years have helped to offset the fact that 17% of regular pub diners have been cutting back on the amount they spend on food in pubs to a certain extent, the reliance on value promotions and discounting has eroded the value of the pub catering market marginally in 2011. Major events in 2012 such as Euro 2012 and the London 2012 Olympics should benefit the pub catering market as long as operators are proactive in chasing footfall, and as a result the market is expected to slowly return to tangible growth going forward.

Pub catering is defined to cover meals of any kind sold in public houses, with the exclusion of any drinks and also excluding packaged snack products (eg crisps, nuts, pork scratchings).

Licensed restaurants are excluded from Mintel's definition of pub-restaurants, as are hotels for which drinks form only a part of the overall business. Other premises, which may have full on-licences but are not generally open to the public, including licensed clubs, a variety of leisure venues and college bars are also excluded.

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