

WEEKLY BRIEFING REPORT

Week ending 4 December 2022

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Peter
Backman.





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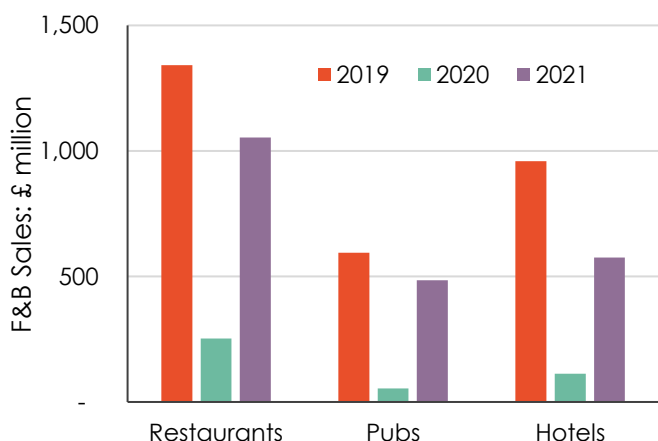
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The numbers

Christmas is arriving – but not, it seems to me, as fast as it usually does. Decorations are out, sort of, in high streets, but in my part of the world anyway, there's no Slade, no Band Aid yet.

Restaurants, pubs, hotels are looking at their forward bookings and hoping that more people turn up than have already booked.

December F&B trading - the last 3 years



Source: Peter Backman

To get some idea of the importance of Christmas consider the average pub which, in past times, could expect to take 26% more in December on food sales than in an average month; restaurants were not far behind at 25%, and hotels could expect 8% more for sales of food than in an average month.

Quick service outlets, which are less a destination for festive celebrations, see December sales as similar to those in an 'average' month. And all other sectors can expect less business in December than in an 'average' month. There are a variety of reasons for this: fewer people at work means less

business for B&I, similarly fewer meal occasions, because of school holidays, reduces the importance of Christmas for the education sector. Meanwhile much of the leisure sector, dependent on fine weather see less business than normal in December.

But Christmas is the focus for restaurants, pubs, and hotels. And each of these sectors has had little to cheer over the past couple of covid-impacted years. December trading in 2020 was 15% of the 2019 level, and even in 2021 it was only 73%. This reduced level of business caused severe cash flow problems for many operators who were nevertheless kept afloat through government support (furlough, CBILS etc) and, for restaurants, the opportunity to provide delivered meals.

This year, such support is much less in evidence and operators must be hoping for good sales, as always, at Christmas to fill their coffers and compensate for the slow trading in the new year. But will customers be spending their money in December? I'm rather pessimistic about it. You can read more about this in my [Monthly Briefing Report](#) published last week.

My insight

Lying flat on the pavement, in a pool of blood with a broken nose is not necessarily a time for contemplating the value of serenity, and the role of time, in the planning of running a restaurant. And yet that's the outcome of what happened to me a couple of weeks ago. Let me explain.

First, the context. I was walking along Curzon Street in Mayfair late one afternoon. I tripped over a raised paving stone. As luck would have it, I was spotted by three police officers - Keesha, Patrick, and Sebastian - who picked me up, and then carefully sat me down against the wall of a shop. They took their time asking me pertinent questions and then bandaged my head to stop the copious flood of blood. They called for Christos, the paramedic, and then the ambulance. And along the way, being police officers, they identified the CCTV camera, confirmed that the footage of my fall was available, and gave me details for obtaining it later. It was all organised and I felt as though I was part of a process which provided time, and which despite my condition, was in a sense serene.

In the ambulance, the medic, Andrew took my blood pressure and fussed over my wounds. He too was organised and part of a process. We even had time to talk about the inequities of the US health care system (Andrew has very strong views on this).

And so we arrived at A&E. Suffice to say I was booked in at five thirty in the afternoon and I left at two in the morning. What follows is not a polemic against the NHS; I am just reporting what I saw at this one location, on this one occasion. I have nothing but praise for Rosalynn and Howard and their many colleagues who looked after me, scanned me, took my blood pressure, questioned me, and gave me comfort. But the time was agonisingly slow – not helped by a glitch in the software that was supposed to transmit the image from my scan, twenty metres down the corridor, to the doctor. It could have been delivered by hand, but some software provider had got itself inserted into the system and made such a solution impossible.

There were no updates, there was no information and no food. There were mis-entries (at one time the computer thought I was called Bacon and another time it was Blackman). Everything was slow – and then it was fast – there was no serenity and no time for the medics to take stock. Slow and steady would have been good. But it was slow and totally uneven. I am sure there were procedures, but they were hidden by continuous changes, to-ing and fro-ing, and unforeseen problems. It was inefficient, and above all it lacked process.

So, for unfortunate reasons, I had cause to come into contact with three arms of our public services, the police, the ambulance service, and hospital A&E. Some worked fantastically well – and, clearly, process was at work. And some just didn't work well.

All of this led me to contemplate the value of thinking processes through – before they happen – ensuring that the unanticipated is expected so that when the unexpected occurs the system can cope. And this is, of course, totally relevant in, say, a restaurant – whether back of house or front of house - where the unexpected always occurs. It is vital to have systems that anticipate and provide everyone involved with the time to cope seamlessly and flawlessly. So that all the customer sees is serenity.

(And should you be interested, I am now fully recovered. Thank you: the medics and the police)

The rest of this Weekly Briefing Report provides a summary of the news in the past week:

News in the past week

Restaurants

- Fazenda LfL sales in October-November rose 11% versus 2019
- 7Bone Burger Co acquired out of administration

QSR

- Esquires UK sales for the half year to end September rose 20% versus 2021
- EG Group foodservice operations saw sales rise 21.3% in the three months to end September versus 2021

Pubs

- Marston's LfL sales in managed pubs rose 6.8% in the year to start October versus 2021

Hotels

- Travelodge sales rose 22.7% in the first three quarters of 2022 versus 2019

Leisure

- PureGym reports LfL sales rose 8% in the quarter to end September versus 2021

Staff Catering

- Lexington customers to be able to buy from Sessions

Delivery Offers in the Week

- Deliveroo: Up to 25% off on Cyber Monday Meal Deals!
- Uber Eats: Get 40% off your next 5 orders