

# WEEKLY BRIEFING REPORT

**Week ending 9 July 2023**

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## My insight

It's early July and, as always for the last 40 years, it's the time of the Cateys at London's Grosvenor House Hotel (and for the small minority of you who don't know what I'm talking about, the Cateys is the premier awards ceremony for the UK hospitality industry – its Oscars).

The guests are drawn from an extensive, eclectic mix of organisations – I sat next to the General Manager of the Dorchester and a senior manager from Argyll and Bute Council.

However, it's not their differences I want to highlight, but their similarities. It was a black tie event – everybody was specially dressed for the occasion. They were longstanding professionals in their respective parts of the hospitality industry having been through formal training at college, then various managements schemes, before moving up to significant management roles. The companies represented were mainly large corporations. Chefs were centre stage because they are aspirational role models. And there was a goodly sprinkling of people from overseas – mainly Europe.

Overall I'd call the style of attendee 'smooth and solid; professional'.

A couple of weeks before that I was delighted to attend a networking event with people from the casual dining sector, from fast casual operations, from pubs. The dress code was nominally business casual – in practice, more or less anything comfortable – sweaters, chinos, trainers that sort of thing. The people were entrepreneurs – many had arrived at the sector through routes as diverse as property development and tech development. Large corporations were noticeable by their absence. There was no hierarchy. It was overwhelmingly British.

I'd call the style 'fast and entrepreneurial; agile'.

What ties these 'professional' and 'agile' styles together is that they all serve food – and enjoy doing it. They mix men and women – giving senior roles to both genders. There are of course many other ties too, but as I think I've shown they are of very different styles.

And on reflecting on this, it seems that 'foodservice' or 'hospitality' can be divided into two parts – the 'professional' and the 'agile'.

Both have their strengths; and although they have their similarities, they also represent distinctive styles – and that suggests that there are really two types of foodservice business: the 'professional' and the 'agile'.

## The numbers

Let's take it easy and enjoy some leisure time – all 7 hours and 38 minutes of it each day.

The ONS, who have been carrying out a survey of what people do with their time on a minute by minute basis, have published their latest round of results on the topic.

We Brits spend about 40% of our time – eight and a half hours a day – sleeping. We spend almost as much time on the other leisure activities – cycling, playing team sports, reading to our children and much else – as we do on sleeping. Add in those hours and we send over sixteen hours a day on leisure and sleeping.

The rest is devoted to work, washing, cleaning, travelling – and eating, snacking, drinking, and preparing food. In fact we spend over two hours on this last set of activities – that's 14% of our time when we're not sleeping.

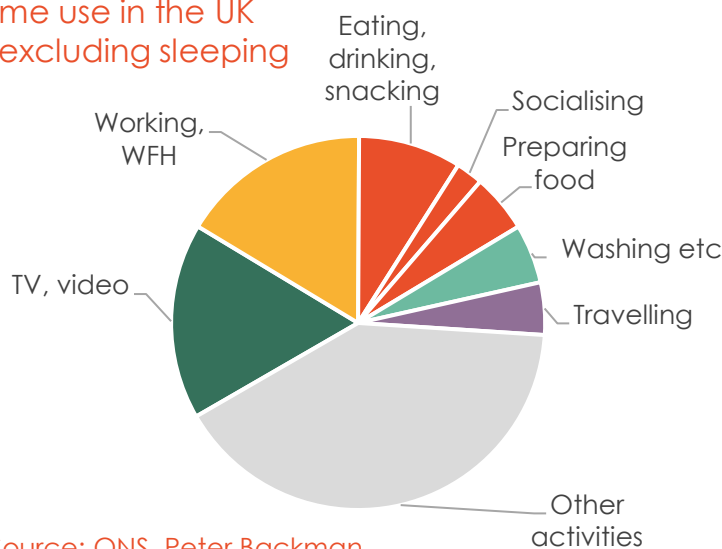
Now what strikes me about this last figure is how small it is; in other words how little time we devote to eating and drinking. Factor in that most meals are not eaten out of home, and the amount of time we spend as a society on eating out is even smaller. Even adding in the amount of time we spend on socialising (less than 25 minutes a day) – and assuming that all of this is spent socialising

over food (which it isn't) we can just about make the case that we spend an hour and three quarters each day on eating, drinking, and socialising.

If we exclude the fifteen minutes spent on drinking each day (because most drinking is not spent in conjunction with eating), we spend just two and a half hours on eating.

Now, assuming that a meal eaten out of home takes quite a bit longer than a meal eaten at home (with travelling, it can easily take four times as long) the amount of time that we make available for eating out is very limited.

### Time use in the UK - excluding sleeping



Source: ONS, Peter Backman

I won't bore you with the maths but on the assumptions above, it's just about possible to see that, on average, we Brits eat one meal (including snacks) out every couple of days. That comes out at about 12 billion meals a year in total – and encouragingly that is the figure (allowing for annual increments) I have been quoting for the last ten or more years.

Given the very limited time available for eating out, it's amazing that the industry is as large and vibrant as it is.

And that says to me that a way – perhaps the best way - to increase the size of the market is to persuade customers to spend more of their time experiencing it.

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

## News in the past week

### Pubs

- Loungers LfL sales rose 17.6% in the year to end April 2023 versus 2019
- Young's LfL sales rose 6.8% in the quarter to end June versus prior year; organic sales rose 8.3%

### Leisure

- Empire Cinemas goes into administration



Don't miss the latest episode of **The Delivery Prophets** podcast, from theDelivery.World together with Aviko, featuring special guest Chris Baggott, co-founder and CEO of Cluster Truck, as they delve into the forces shaping the restaurant and delivery industry. Gain valuable insights into the challenges faced by delivery riders and drivers, and discover Cluster Truck's holistic approach to enhancing the driver experience in the gig economy. Tune in now to explore their transformative insights and revolutionize your perspective on delivery and technology in the restaurant industry.