You don’t need a conference like Peach 2020 to tell you how tough it is out there in Britain’s eating and drinking-out market. Restaurants, pubs and bars have been buffeted by seriously ferocious headwinds in 2017, testing the mettle of every brand, concept and company – big and small, start-up and established corporate.

The challenges are well known. The cost of property, people and food have all risen this year, squeezing margins and denting business confidence even further – as witnessed by the latest results from the CGA Business Confidence Survey, which were exclusively revealed at the start of the conference.

Competition has not let up either, with ambitious newcomers still keen to come into the market and offer consumers something different and exciting – and making sales growth for the rest hard to come by. And casting a shadow over it all is, of course, Brexit. It’s enough to make even the most seasoned operator a little despondent.

But the mood was far from downbeat. As the winners of the evening’s Hero & Icon Awards demonstrated, this remains a innovative, vibrant and richly diverse industry to work in. For businesses with the right offer at the right price, sales are there to be won – because, as the conference audience was reminded, the public continues to eat and drink out. Frequency of visits, as the CGA BrandTrack research reveals, may not be increasing, but neither is it falling – and many people, especially younger generations, say they are preparing to spend more on their out of home experiences.

The big challenge is getting those people to come to you and keep them coming back again and again.

As well as providing ideas and inspiration for standing out from the crowd and making operations the very best they can be, a central ambition of this year’s Peach 2020 was to give a heads-up on what’s coming down the track – the new challenges and opportunities just over the horizon, whether they be legislation, technology, consumer habits or new trends coming from across the Atlantic. This year’s speakers covered all that.

Putting all that into the everyday context of running hospitality businesses were some of the sharpest minds in the business. John Vincent, Leon co-founder and one of our sector’s great champions, shared his story of brand building and roll-out, while our panel of industry leaders - Oakman Inns’ Peter Borg-Neal, Living Ventures’ managing director Paul Moran, Caravan’s Laura Harper-Hinton and Boxpark’s Roger Wade - concluded the conference session with a lively discussion on where the sector and their own businesses are heading.

Budget day turned out to be an ideal time for the industry to come together, to digest challenges and also celebrate achievements. Thank you to all the attendees, sponsors and partners of our conference and awards for making it such a memorable day.
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SAFEGUARDING YOUR BUSINESS

As an employer, it’s your legal duty to check that each individual within your organisation is entitled to work in the UK. The majority of companies perform these checks manually, which is neither reliable nor sustainable. Human error is often a problem because individuals are seldom qualified to make a professional judgement on validating such information.

PeopleSearch is an identity validation database that businesses can use to validate and authenticate ID documents provided to you. With this new service, you can have full confidence that everyone within your estate is entitled to work – safeguarding your full compliance with UK law.

To discover how PeopleSearch can safeguard your business or discuss your requirements, please email PeopleSearch@cpltg.com or phone 0151 650 6910

PeopleSearch is supported by The Association of Licensed Multiple Retailers (ALMR).
1. It’s tough out there…
The wealth of CGA data on show at the Conference flagged up plenty of negatives in the market—like patchy business confidence, depressed consumer spending, rising property, people and food costs and disruption from start-ups. Add in the uncertainty of Brexit and 2018 is shaping up to be another challenging year.

2. …But people are still going out
So far, so gloomy—but CGA research also shows that people are still willing to spend well on their out-of-home eating and drinking if the offer is right. For Millennials in particular—not to mention the generation of Centennials just behind them—eating-out frequency is riding high. The only problem is keeping this fickle demographic loyal.

3. People are brands’ most important assets
The importance of finding and retaining good people was a recurring theme at the Conference. In his popular head-to-head interview with Peter Martin, LEON co-founder John Vincent stressed the need to empower and reward team members, and general managers in particular. Later in the day, the Conference’s panel of leaders showed how much effort is now being poured into recruiting, training and nurturing good team members.

4. The government might be starting to listen
Coming just hours after the Chancellor unveiled his 2017 Budget, leaders at the Conference were fearing another tax raid on the sector—but as the ALMR’s Kate Nicholls pointed out, it all turned out fairly well. With a freeze on alcohol duties, measures to loosen young people’s spending and signs of a Brexit deal to secure EU workers’ rights, for once there were no nasty surprises.

5. Experience is everything
Concepts like Boxpark show that out-of-home eating and drinking is about so much more now than the food on the plate or the drink in the glass. Several leaders pointed out that a value-added experience is not just nice to have now—it’s essential. CGA data backs that up.

TEN THINGS WE LEARNED AT PEACH 2020
CGA’s sell-out Peach 2020 Conference and Hero & Icon Awards packed some 400 business leaders into the Brewery on London’s Chiswell Street to debate the big opportunities and challenges, network with friends old and new and celebrate success. To kick off our comprehensive round-up of all the action, here are ten of our top takeaways from the day:

1. Improve profitability.
2. Enhance customer experience.
3. Grow with confidence.

Our partners include:

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6. Technology is everywhere
From improved food production and waste reduction to personalisation and new ways of ordering, technology is infiltrating every corner of the sector. A Conference overview of tech trends from Nadia El Hadery showed how digital solutions can make the supply chain more efficient and the customer experience better. Tech isn’t everything though, and despite all the change, consumers still value the face to face elements of hospitality.

7. Marketers compete on smartphones and social media now
A Conference session from WE ARE Spectacular’s Mark McCulloch showed how marketing in the industry has been utterly revolutionised. Smartphones and social media platforms like Facebook, Instagram and YouTube are where people spend their lives now—so that’s where brands need to go to reach them.

8. Drinks are a differentiator
After waves of pub closures, it is intriguing to find many drinks-led businesses are faring better than food-led ones at the moment. That’s partly because operators have capitalised well on the popularity of craft beer and cocktails. In a Conference session about big drinks trends from the US, CGA’s Alex Martin suggested there was still a long way for these twin trends to run—good news for pubs and bars seeking to stand out from the crowd.

9. We need to stay upbeat
The hospitality sector is nothing if not resilient, and positive mindsets were the order of the day at the 2020 Conference. Despite all the challenges and competition, this remains an ambitious, diverse and pleasurable industry, and several speakers pointed out that there was plenty of room for growth for brands with the right offer at the right price.

10. There are some great brands and people in our sector
If anyone needed more reasons to be cheerful, the Hero & Icon Awards that followed the Conference provided them. From established brands like Wagamama and Nando’s to dynamic new ones like Dishoom and Flat Iron, casual dining is packed with brilliant businesses—while Icon Award recipients Thomasina Miers and Steve Richards show that it is led by outstanding individuals too.

CGA’s Peach 2020 Conference and Hero & Icon Awards were supported by platinum partners Asahi, Bookatable by Michelin, Coca-Cola European Partners, Coffer Corporate Leisure, CPL Online, Diageo, Flyt, Fourth, HGEM, NatWest, WE ARE Spectacular and Zonal; and by network partners Casual Dining Show, Chapman Ventilation, Fishbowl, Reynolds, RSM, Steelite International and Yumpingo.
Industry leaders’ optimism about the market has dipped this year, CGA’s exclusive surveys reveal—but their confidence in their own businesses remains relatively high.

Findings from CGA’s latest Business Confidence Survey presented at the Conference show that only 30% of leaders of restaurant, pub, bar and coffee shop groups are optimistic about general market prospects for the next 12 months—sharply down from 47% in the first quarter of 2017. While confidence about prospects for their own businesses has fallen steeply too, more than half (52%) of leaders still feel optimistic here.

The survey of more than 100 leaders rings more alarm bells with the news that a third (32%) of leaders feel their business’ performance has been below expectations in the last six months—down by five percentage points from May’s survey. That chimes with other CGA research indicating tough trading conditions, including the Coffer Peach Business Tracker showing that like for like sales at leading managed pub and restaurant chains have risen by just 1.3% over the last 12 months.

Those figures don’t spark massive confidence in the immediate future. But they do at least show that eating and drinking out is becoming an engrained habit among millennials—and that is an encouraging sign for the long-term health of the sector. As Peter Martin put it: “Confidence has taken a bit of a hit...but people are still going out to eat and drink.”

CGA stats show that the biggest cause of falling confidence is a triple whammy of cost pressures—on food, people and property.

The latest Business Confidence Survey (see table on page 13) finds that more than three quarters (79%) of leaders have felt the effect of an increase in cost of raw materials—and nearly as many have been impacted by rising business rates (78%) and staff costs (73%). Hikes in these big three input costs are whipping up something of a perfect storm of headwinds for operators, the Conference heard.

CGA’s other sources confirm the scale of the pressures. The CGA Prestige Foodservice Price Index shows how inflation in wholesale foodservice prices has been running in high single figures through most of 2017, with the weak pound driving up the price of food and drink imported from countries selling in euros and dollars. Inevitably, this has had a knock-on effect on consumers.

More than two thirds (69%) of leaders say their business has increased menu prices over the last quarter in light of the soaring costs.
The biggest pressures
Which of the following have had an effect on your business?

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in cost of raw materials</td>
<td>79%</td>
</tr>
<tr>
<td>Business rates</td>
<td>78%</td>
</tr>
<tr>
<td>Increase in staff costs</td>
<td>73%</td>
</tr>
<tr>
<td>Fall of pound</td>
<td>72%</td>
</tr>
<tr>
<td>Increase in cost of imported goods</td>
<td>70%</td>
</tr>
<tr>
<td>Decreased staff availability</td>
<td>62%</td>
</tr>
<tr>
<td>Terrorism</td>
<td>50%</td>
</tr>
</tbody>
</table>

“Competition is tougher than I’ve ever know it—there’s more choice for consumers than ever before,” said Peter Martin at the Conference. CGA’s BrandTrack data reveals just how promiscuous consumers have become: in 2014 they averaged visits to 2.4 new brands every six months, but by October 2017 the figure had risen to 2.9—and 3.7 for 18 to 34 year-olds. Two in five (39%) consumers say they have visited a small managed restaurant group in the past six months. This kind of experimentation is great news for start-ups, but less positive for established brands.

CGA’s inside track on… Loyalty
The arrival of so many diverse and dynamic new restaurant concepts has dramatically intensified competition in casual dining, and that has made it increasingly tough for brands to secure loyalty.

CGA’s inside track on… Technology
Diners and drinkers want to see restaurants and pubs embrace more technology—but only if it improves their experiences, and not if it diminishes the human elements of hospitality.

CGA’s consumer research shows that four in five people either expect to see Wi-Fi in pubs or would like to see it in the future—and two in three think the same about contactless payment (see table). Growing numbers want to be able to take advantage of mobile payment, ordering and booking, too. The message for operators is clear: technology is no longer just nice to have—it’s essential.

CGA’s surveys of leaders suggest that brands still have a long way to go on technology adoption. A third (32%) think their business is behind the market for technology innovation, but only half (53%) planned to increase investment in technology at the start of the year.

But as Peter Martin pointed out, operators have to be careful that any rollout of new technology truly enhances guests’ experiences. Nearly half (47%) of consumers worry that technology could limit human interaction when they eat or drink out—the biggest single barrier to their adoption of it. “Consumers want more technology—as long as it doesn’t impact the face to face experience,” Martin said.

69% of leaders have put up their menu prices in the last quarter because of rising costs

71% of leaders think Brexit has already negatively impacted their business
Consumers’ tech priorities
Which of these technologies would you now expect to see in pubs, or would you like to see in the future?

<table>
<thead>
<tr>
<th>Technology</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wi-Fi</td>
<td>80%</td>
</tr>
<tr>
<td>Contactless payment</td>
<td>65%</td>
</tr>
<tr>
<td>Mobile payment</td>
<td>42%</td>
</tr>
<tr>
<td>Mobile ordering</td>
<td>34%</td>
</tr>
<tr>
<td>Offers via mobile app</td>
<td>32%</td>
</tr>
<tr>
<td>Bookings via mobile app</td>
<td>32%</td>
</tr>
</tbody>
</table>

CGA’s inside track on… Social media
For many consumers, especially millennials, social media has become an integral part of eating out. CGA data suggests more than half (52%) of 18 to 34 year-olds have uploaded an image of a meal and / or drink to social media—and even more (58%) say they get ideas of places to visit from friends’ feeds on Facebook, twitter and other platforms. “We can’t overstate the importance of social media,” said Phil Tate.

CGA’s inside track on… Healthy eating
Nearly 14 million British consumers have been driven to at least one mainstream brand by the availability of healthy options, CGA’s BrandTrack survey shows—proof of how far health has moved up the eating-out agenda. It has been pushed there by 18 to 34 year-olds, half (50%) of whom have been influenced in their eating-out choices by nutritional information on menus.

Operators, meanwhile, are sensing a move away from meat. Asked about likely healthy eating trends over the next year, nearly two thirds tipped vegetarian food (65%) and vegan food (61%). They think the sugar tax is going to drive more people towards sugar-free drinks too.
Reynolds really is... more than just a greengrocer

A diverse range of fresh vegetables, salads, fruit, dairy and cheese

Bespoke delivery solutions and next day delivery right across the UK

Long-term relationships with growers and full traceability of produce

An industry leading menu development team with a passion for fresh produce

Unique hand-selected picking, offering unrivalled quality and order accuracy

HEAD-TO-HEAD WITH JOHN VINCENT

The Leon co-founder was one of the star guests of the 2020 Conference, telling CGA’s Peter Martin about his ups and downs over the 13-year life of his brand. Here are some of the messages he shared.

Vincent on... Positivity

The 2020 Conference made the scale of the challenges facing operators at the moment very clear. But many leaders are determined to stay upbeat about the future of restaurants, pubs and bars—and Vincent is one of them. Positivity is his default setting, even if the headwinds seem fierce at the moment. “It’s important to differentiate between optimism and positivity,” he said. “We navel-gaze a little bit too much about the future... change can happen rapidly.”

Vincent on... Learning from mistakes

The expansion of LEON was not without its growing pains. Vincent owned up to plenty of errors in his early days in business, not least on property. But it is important to stay sanguine about any mistakes, he suggested—so long as you learn from them. “The issues LEON has had have been pretty predictable... all the mistakes we made have been made by other people before us,” he said. Other problems have arisen when LEON has tried too hard on things like innovation, design and menus. It has learned when things need to change—but also when they need to be left well alone. “Most of the challenges we’ve met have been self-inflicted.”

Vincent on... General managers

LEON’s people culture is one of the strongest in the market, and Vincent is adamant that the brand’s most important team members are not sat in the head office, but standing on the operational frontline. His most essential staff of all are the general managers, and Leon treats them as such. “The general manager is a god or goddess, and we do everything we can to support them,” he said. “We pour a lot of effort into the well-being of our GMs.”

Business leaders must put trust in their store teams and avoid the temptation to micro-manage, he added. “Trust and delegation are so important... the more you trust, the stronger what you have becomes.” Head office simply sets the course for the business and gives teams the tools to be the best they can be. “It’s a false comfort that head office can drive sales... you have to set the values, live the values and devolve a huge amount,” Vincent said.

Vincent on... Working with government

Having worked with his LEON co-founder Henry Dimbleby on a government project around food in schools and ways to promote healthy eating among children, few in the industry know better than Vincent what it’s like to get things done in Westminster. Many of the pair’s specific recommendations have been taken up, but lasting change in school food culture is harder to achieve—and that can be frustrating. “Working with government is a bit like being with the Wizard of Oz— the solutions often have to come from other people in the end.”

He namechecked Michael Gove as a minister who understood his motivations for improving school food, and said it was important for everyone in the industry to keep the pressure on government. Industry bodies can do a lot of that work, but individuals need to rattle the cage too, he argued. “The ALMR is doing a great job... [but] we need the radical outsiders to agitate too. It needs all of us to kick up a fuss through our MPs and the media.”

Vincent on... Going global

LEON has made no secret of its ambitions to establish its brand in the U.S., and it has already opened its first Europe-an site in Amsterdam. It’s important to have global goals, he reckoned, because LEON has no shortage of competition in its healthy eating space. “The winner in natural fast food will be an international player—because fast food is international.”

Industry winners will also be the smartest players in the game, and not the most aggressive, Vincent added. He is a fan of martial arts and takes many of its principles into business, and is currently at work on a book called Winning, Not Fighting, which could serve as his mantra. “It’s easy to view business as a military operation, but we have to get away from that,” he said.
Connecting Restaurants & Diners

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www.bookatable.co.uk

A service of
1. Smarter growing
Innovators: Evogro (www.evogro.com)
For restaurants that want to manage their own produce and keep it as fresh as possible, plant growing systems are a good place to start. Evogro provides state-of-the-art cabinets, environmental sensors and apps that let operators control the growing process and optimise crops.

2. Better farming
Innovators: GrowUp (www.growup.org.uk) and Farmdrop (www.farmdrop.com)
Reducing food miles can be a challenge for restaurants in cities, but ‘urban farm’ solutions like GrowUp can help by deploying aquaponics and vertical farming to harvest produce like salad, vegetables and fish in unused urban spaces. GrowUp uses an old warehouse in Beckton to produce 20,000 kg of salads and 4,000 kg of fish a year. For consumers, farming sustainability is being advanced by systems like Farmdrop, which lets buyers order fresh food from local farmers.

3. Reduced food waste
Innovators: Winnow (www.winnowsolutions.com), Olio (www.olioex.com) and Bio-bean (www.bio-bean.com)
Reducing food waste helps brands polish their environmental credentials, but it can have an impact on the bottom line too. Winnow uses meter technology to measure levels of food waste and make it easier to reduce them, and claims it can instantly slash kitchen costs.

Olio deals with surplus food in a different way, by sharing it with others who need it. Its free app connects businesses and individuals with one another by showing what surplus food is available and where, with users then left to arrange pick-up.

London-based Bio-bean meanwhile works on a specific area of waste: coffee. It partners with waste management specialists to collect spent coffee grounds and recycle them into biofuels, and gathers more than 3,000 tonnes a year from Costa alone.

4. Clearer provenance
Innovators: Provenance (www.provenance.org)
Transparency in the supply chain is important for increasing numbers of consumers, and Provenance suggests four in five shoppers now check for the origin of food before buying. It provides retailers with information about the source of their products that can help to back up their claims about sustainability and build trust with consumers.

5. Alternative ingredients
Innovators: Impossible (www.impossiblefoods.com) and Algama (www.algamafoods.com)
Burgers without meat? Drinks from algae? They might seem like far-off and far-out concepts, but both are already here. U.S.-based Impossible Foods claims its burgers, made entirely from plants, accurately recreate the flavours, aromas and textures of traditional patties, while producing 87% less greenhouse gas emissions than beef. Algama is meanwhile harnessing abundant microalgae as a new source of protein.

6. New recipes
Innovators: FoodPairing (www.foodpairing.com)
As operators strive for points of distinction in an ultra-competitive market, menu innovation is becoming vital. FoodPairing helps chefs and bar workers by suggesting good pairings of ingredients after analyzing compatibilities on a molecular level, leading to unexpected combinations in dishes and cocktails.

7. Ultra-personalisation
Innovators: VitaMojo (www.vitamojo.com)
Health-conscious consumers are getting new ways to make eating more convenient—like VitaMojo, which lets people order personalized menus and track their nutritional and calorie intake. It already has sites in St Paul’s and Spitalfields, and delivers through Deliveroo.

8. 3D printing
Innovators: Natural Machines (www.naturalmachines.com)
Restaurant kitchens got their first robots a while ago, but 3D printing could prove to be an even greater game-changer. Natural Machines is building Foodini, a new gadget that uses natural and fresh ingredients to produce artfully designed platefuls of food on demand.

9. Voice ordering
Innovators: OrderScape (www.orderscape.com)
Delivery is already a boom area for many restaurants, and chatbot technology could be about to make it even more popular: OrderScape lets people order delivery or pick-up from restaurants by talking to Amazon’s Alexa gadget, and is now being rolled out in the U.S. by brands including TGI Fridays and Fazoli’s.

YFood’s Nadia El Hadery (right) gave the 2020 Conference a fascinating glimpse of new technologies that have the potential to revolutionise the ways food and drink is produced, supplied and sold. Here are just nine of the innovations that could start to turn the tables on eating and drinking in 2018.
Supporting your business is our pleasure

Over the last 40 years we’ve worked with hundreds of leisure businesses across the UK – everything from pop-up restaurants and country pubs to big chain bars and five-star hotels. It’s given us a real appreciation of what you do and what you need from your bank. That’s why we have 90 Relationship Managers who only work with businesses like yours.

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Neil Parry, Regional Director, Leisure & Hotels
07795 121 619 | neil.parry@natwest.com

MARKETING FOR 2018: SOCIAL, VISUAL AND PERSONAL

Smartphones and social media have put a bomb under restaurant, pub and bar marketing, and more change is coming in 2018. These are some of the Conference insights from WE ARE Spectacular’s Mark McCulloch (right)

Smartphones are the battleground now
Traditional marketing has gone on forever, McCulloch told the 2020 Conference. The switch from print platforms to digital ones has been fast and dramatic, and not everyone has adapted yet. “For years we’ve been marketing safely—now it’s about blowing everything up and starting again, because the attention has changed!”

The new battleground for marketing is obvious. People spend hours a day on devices like smartphones, Mark McCulloch said—so that is where brands need to meet them.

Social media is getting more visual
Web traffic data shows Facebook is still the number one social media platform, and most brands now have well-established strategies for marketing here and on Twitter. But YouTube is not far behind Facebook for usage now, and it’s been under-exploited, Mark McCulloch said. “A lot of us as marketers and brands aren’t creating a lot of content to put on there.”

Instagram is another visual platform with huge potential, he added—and operators should be aware that more and more of their guests are seeking to make photographic memories of their experiences. “Everything should be Instgrammable… Look at all facets of your business, from the décor to the food to the staff to make sure you’re photogenic.” Instagram Stories is worth exploring in particular. “It’s a really good way to get attention, because a lot of brands aren’t there yet.”

Millennials are not alien beings
Reaching Millennials—often defined as those born between 1980 and 2000—isn’t as daunting as some people think, McCulloch argued. “They’re not alien beings or a super-race or anything really different—they’re just a bit younger.” But brands need to properly understand their attachment to mobile devices, with MatchPint research showing adults now spend an average of 220 minutes a day looking at their phones. “Millennials grew up along technology… it’s just part of life for them.”

The centennials are coming
As if Millennials weren’t enough of a challenge, next on the horizon are Centennials—people who have never known a world without technology. This generation particularly values peer-to-peer acknowledgement, research suggests: 95% read online reviews while shopping, and 50% won’t purchase if they can’t find enough of them. “People want to see what real people are saying,” McCulloch noted.

Micro will be big
Digital marketing has focused for a while on major influencers and big platforms, but 2018 will see things downsize, McCulloch predicts. Brands should think about more intimate social media channels like Medium, Branch and The Sphere, deploy focused ‘micro hashtags’ like #ishorerestaurant or #dumplings, and use ultra-targeted Facebook marketing—to close friends of young men with birthdays in the next week, for example. It is also time to identify mid-range social media influencers, with between 10,000 and 30,000 followers, and work out how they can endorse your brand. It’s all going to require a lot more work, McCulloch admitted—but it’ll be worth it.

Good content takes time
Smartphones have made it easier than ever to produce video; as McCulloch said: “Everyone is a walking TV channel now.” But you can’t knock out compelling content in just a few minutes, he warned. “We need to give [content creation] the time it deserves.”

Brand interaction is evolving
Web searching for brands is moving in two new directions, McCulloch said: ‘near-me’ searches on the move, and voice-based engines like Alexa. Messaging and WhatsApp are changing the way people communicate with their brands, and chatbots—which have the potential to automate a lot of responses to customers’ comments and complaints—are worth investigating too.

It’s all about stopping thumbs
With so much online content for people to scroll through, stopping them in their tracks will be marketing teams’ biggest challenge of all in 2018. To pick up tips, draw on your own experiences, McCulloch advised. “When you’re flicking through your news feeds, think about where you stop and what made you stop—and retro-engineer that back to work out what your brand could do [to get similar results].”
Challenging trading conditions driven by shifting consumer demand means that an organisation’s risk universe can change with lightning speed. Effective risk management and associated controls should be a priority on the agenda of all senior management teams in the sector.

Businesses are also facing pressure to comply with ever increasing regulation, legislation and emerging Brexit associated risks. In the face of such unprecedented change, you need advisors who truly understand your business challenges and ambitions.

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The 2020 Conference coincided with Budget Day—and ALMR chief executive Kate Nicholls was there to digest developments for the sector

Government hasn’t been much of a friend to restaurants, pubs and bars in recent years—but the Association of Licensed Multiple Retailers (ALMR) chief executive Kate Nicholls told the 2020 Conference there are tentative signs it is starting to listen.

Business leaders had been anxiously awaiting news of the 2017 Budget, unveiled just hours before the start of the 2020 Conference, and Nicholls was relieved to report that there was “no sting in the tail” of this year’s announcement. A freeze on alcohol duties and measures to put a little more cash back into younger people’s pockets were pieces of welcome news for pubs and drinkers. “Nothing’s been made much better, but nothing’s been made worse—and that’s a huge step forward,” was Nicholls’ summary.

But the ALMR and the out-of-home eating and drinking sectors still have a long list of issues they would like central government to address. They include property rates, recently subjected to revaluations that have squeezed some operators’ margins further. The ALMR’s work here goes on, Nicholls said, and government might at last be waking up to the issue. “The system is broken, and we continue to campaign for root and branch reform.”

There are signs of positive movement on Brexit too, with Nicholls suggesting that a crisis-averting deal on UK rights for EU nationals was close. “I’m quietly confident that we’ll get what we’ve asked for on EU worker rights… and that would be a huge win for the sector.” The ALMR’s Brexit-related lobbying is also focused on trade negotiations and food imports.

Hospitality created one in three of all new jobs last year, but needs more support from government if it is to continue to be a powerhouse industry, Nicholls argued. But if the sector is to be fully heard, it needs to pull together under the ALMR umbrella, she added. “The more involved operators can get, the greater the chance we can convince ministers that we need more support.”
Many U.S. drinks trends eventually cross the Atlantic to the UK, and Nielsen CGA’s Alex Martin gave the 2020 Conference a glimpse of things to come with a round-up of recent developments. Here are seven of her messages:

1. **Craft beer**
   It’s a big trend in the UK already, but a glance at the U.S. market shows it has a long way to run yet. CGA data suggests craft beer still has only a 5% share of beer volumes in the UK—but a 30% share in the U.S. Consumers want craft beers with a unique flavour and high quality ingredients, Martin said, and are increasingly sceptical of mass manufacturing. “People want speciality and limited edition... it’s about trying something new.”

2. **Imported beer**
   The popularity of imported beer is rising in the U.S., with Mexican and European brands gaining traction. The import market in the UK is still relatively niche, but beer drinkers’ horizons might soon be expanding here too.

3. **Cocktails**
   This is another trend that is already advanced in the UK, but CGA’s U.S. data suggests there is still potential for major growth. Some 64 million consumers now drink cocktails in the U.S., and classic varieties remain most popular, but tastes and occasions are both evolving, with sour and brunch cocktails now a big thing. Cocktails incorporating beer and wine are also on the rise.

4. **Tequila**
   Tequila volumes have grown by 7% in the U.S. in the last year, and it now has a 12% share of the spirits market—making it a bigger category than rum.

5. **Whiskey**
   Whiskey is another spirit getting more attention Stateside, with rye and flavoured varieties the fastest growing types. As in many spirit categories, the trend is towards domestically produced brands rather than imported ones.

6. **Rosé**
   “Rosé is the forgotten category of wine,” Martin argued, flagging up stats that show more than one in four consumers drink it now. One in eight of them has tried a rosé cocktail too, and one in five will try one in the future.

7. **Sparkling wine**
   Wine growth in the U.S. is also being fuelled by sparkling varieties. As well as domestic wine brands, Prosecco, Asti and Cava are all growing in profile.
LEADING THE WAY INTO 2018

The 2020 Conference wrapped up with a panel of leaders discussing the hot topics and big trends for the year ahead. This is what they had to say

On the panel

Peter Borg-Neal, founder of Oakman Inns
Laura Harper-Hinton, co-founder and creative director of Caravan
Paul Moran, managing director of Living Ventures
Roger Wade, founder of Boxpark

Growth

While some operators retreat, the businesses of all four leaders on the panel remain firmly in growth mode. Caravan has just opened its fourth site in the City and is now planning a new roastery, while Oakman Inns is at the 20-site mark and counting. Living Ventures continues to seek new openings across its various brands, and Boxpark has lined up its third venue in Wembley and has its eye on “half a dozen” potential sites.

One of the secrets of Boxpark’s success is being honest about, but like LEON’s John Vincent earlier in the day, leaders

Property

Property costs like rents and rates have been a major challenge in 2017, and life isn’t going to get any easier in 2018, leaders agreed. “Property is a big issue,” said Moran. “Rents went too high… it’s very difficult to get the right sites, and people aren’t prepared to go off pitch as much now.” Wade thinks one consequence of high property costs in hotspots like central London will be that operators start downsizing from big sites. Boxpark, with its collective of modest shipping container units, is a good facilitator of that, for start-up brands in particular. “Increasingly you’re going to get operators thinking small.”

Another side-effect of spiralling property costs is that landlords are going to have to rethink their approach to rents, Borg-Neal suggested. It’s been a seller’s market for a long time, but with some operators trimming their estates and downsizing from big sites. Boxpark, with its collective of operators in modest shipping container units, is a good facilitator of that, for start-up brands in particular. “Increasingly you’re going to get operators thinking small.”

Brexit

A year and a half on from the vote to leave the EU, Brexit continues to cause headaches for the sector. For leaders, the key impacts are two-fold: the threat to the movement of EU nationals seeking to work in the UK, and the huge hit to the pound, which has made food and drink imports much more costly. Harper-Hinton said the latter has had a big effect on Caravan, with the cost of coffee imports in particular now much higher. Passing on some of the price hikes to consumers is inevitable, but operators can also mitigate the damage by boxing clever with their offers, and using better value ingredients. “You need to be smart about what you’re putting on the menu and how you put it on.”

People

Leaders were unanimous in their determination to find and nurture the right people to take their businesses forward. “We’re thinking a lot more than we ever have about how we keep and motivate people,” said Moran. Keeping good team members and moving them up through the rank is also important to Harper-Hinton and Caravan. “It takes a lot of effort to train these people, so you want keep hold of them.”

Confidence

There was much at the 2020 Conference to feel despondent about, but like LEON’s John Vincent earlier in the day, leaders agreed with that: “This industry has always been cyclical, and out of the tough times there are opportunities to grow.” Wade added that comparable sales growth isn’t the be-all and end-all in the industry. “Too many private equity companies have come in and become obsessed with like for like sales. But there simply isn’t like for like out there any more—every- thing’s changed. To use it as a comparison now is ridiculous.”

For reasons to be optimistic, look to the U.S., he suggested. “For reasons to be optimistic, look to the U.S., he suggested. Eating out is now engrained in everyday life across the Atlantic, and can become so in the UK too.
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Big change is coming in data protection—and if businesses aren’t ready for it then it’s high time they started preparations.

That was the message of consultant Christine Andrews, who ran through some of the likely impacts of the new General Data Protection Regulation (GDPR), which will tighten up many aspects of data use when it comes into force in May.

GDPR brings data protection firmly into the digital age, and gives consumers much more control of their data—including the right to inspect, take and erase it. “It’s all about putting consumers first, and putting them in control of their data,” Andrews said. It puts the onus on any business that holds data to be more accountable, and that may require a thorough rethinking of current practices.

Three key words govern GDPR, Andrews said: accountability, transparency and demonstrability. Accountability highlights the need to maintain comprehensive documentation, and appoint a Data Protection Officer to take oversight of it, so that protection becomes engrained in the company. It’s not enough to simply comply with GDPR: you need to prove you comply with it. “Get data protection into the DNA of the business,” Andrews said. Making all staff aware of the new measures is particularly important, and if your suppliers are handling your data, look carefully at their policies too.

She described data protection as a risk-based operation, and urged businesses to construct data maps and prepare for a breach, however unlikely it may seem. “When the proverbial hits the fan, what are you going to do? You need to have your response planned.” The alternative—substantial new levels of fines—is not pleasant.

As if rising costs and intense competition weren’t enough, businesses face a disruptive overhaul of data protection laws in 2018. Christine Andrews of the DQM GRC consultancy was on hand to tell the Conference what leaders need to know.

Christine Andrews: ‘It’s all about putting consumers first’
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You helped us make the dream come true. From all at the Tim Bacon Foundation we thank our Friends and Ambassadors from the hospitality industry for your support in helping to not only achieve our £500,000 target in our inaugural campaign but to smash it! All the money raised will make a difference to people affected by cancer.

The Dream goes on......
Jeremy Roberts is in the unusual position of wishing he wasn’t the boss of his business—but after taking the helm in the most difficult of circumstances, he was proved himself a true leader of brands and people alike.

The death of his Living Ventures co-founder Tim Bacon in 2016 was a huge shock to the sector, and a shattering blow for his company. Living Ventures had transformed the bar and restaurant scene of its heartlands in Manchester and the north west, and Bacon had been a high-profile frontman. With his passing, Roberts assumed sole leadership, determined to honour and continue his visionary work.

The Roberts and Bacon partnership had grown and spun off groups including The Living Room, Prohibition and the New World Trading Company, and Living Ventures now nurtures more distinctive and high quality brands like the Alchemist, Blackhouse and Gusto.

Key to their growth has been the people culture that Bacon and Roberts nurtured over some two decades at Living Ventures, and which is no less apparent today. Roberts knows better than most what it is like to work on the frontline of hospitality, having started out washing pans and chopping veg in hotels before rising through the management ranks and launching his own ventures. This empathy, and a willingness to devolve autonomy, is why Living Ventures keeps turnover of leaders low—and when people do leave, it is often because they have been groomed and inspired to become leaders and entrepreneurs of their own.

Beyond his leadership of Living Ventures, Roberts has steered the remarkable success of the Tim Bacon Foundation, set up to support charities working to fight cancer. Its initial fundraising target of £500,000 has already been smashed—an indication of the esteem in which Bacon was held. In Jeremy Roberts, his legacy is in safe hands.

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Wahaca has grown into one of the casual dining sector’s most distinctive brands over the last decade—but for co-founder Thomasina Miers, you sense the work and the fun is only just beginning.

Unlike many of the sector’s leaders, Miers didn’t make her way up through the ranks in hospitality. Instead, her springboard was the BBC’s Masterchef series, which she won in 2005 with what judges called a “bold and at times eccentric cooking style.” She resolved to put that style to good use in restaurants, and after meeting her Wahaca co-founder Mark Selby she toured Mexico for inspiration for their new restaurant concept. The first Wahaca followed in 2007, and ten years on it has 26 restaurants: 18 in its home city of London and now eight in regional British cities as it expands further afield.

Wahaca can no longer call itself a start-up, but Miers has made sure that it retains the entrepreneurial, disruptive spirit that it started out with. It continues to experiment with new formats, like the DF Mexico diner concept, the on-the-go Mexican Street Kitchen brand and the just-launched Shoreditch Test Kitchen, where it tries out new ideas on guests. Miers has instilled a restless energy at Wahaca that keeps it striving for innovation and gives consumers reasons to keep coming back.

Another of her passions is sustainability. She set out to prove that—contrary to some opinions—restaurants can be environmentally friendly, and makes sure that Wahaca recycles everything from food waste to the menus. Her efforts were rewarded when Wahaca became the first restaurant group to achieve Carbon Neutral accreditation from the Carbon Neutral Company.

Miers is now one of eating-out’s most recognisable faces, thanks to TV series, newspaper columns and half a dozen cookbooks, and has driven Mexican food into the UK mainstream. To have become an Industry Icon after just ten years in casual dining is a remarkable achievement, and is reward for one of the sector’s most striking success stories.

**ICON AWARD**

Winner: Thomasina Miers, Wahaca

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**SPECIAL AWARD**

Winner: John Connell, Imbiba Partnership

CGA’s 2017 Special Award goes to a man who could have written the rules for entrepreneurship and investment in the sector.

Together with Steve Wilkins, John Connell formed a partnership that launched and sold influential London bar chains including Smith & Jones, Thomas & Carter and Lewis & Clarke. In doing so he honed what is perhaps his greatest skill—a knack for finding the right site and a deep understanding of London’s leisure property.

In the late 1990s he founded Imbiba, the investment business specializing in the incubation of bar and restaurant start-ups. He has been chairman of more than a dozen of its investments since then, including one of its most notable successes: bar and restaurant group Drake & Morgan, in which Imbiba invested £1m in 2008, and which sold for £30m in 2013. Over those five years, Imbiba proved itself a hands-on partner to visionary founder Jillian MacLean, in fields like financial control, marketing and tech as well as property.

Connell’s quest for more success continues with investment in a host of growing brands, most of them incorporating his trademark ampersand—like Darwin & Wallace, Camm & Hooper, Wright & Bell and Albion & East. At all of them, he has contributed an unparalleled focus on the fundamentals of good hospitality, a hard work ethic and above all an eye for good property and good people—invariably dynamic entrepreneurs like himself. Few would bet against those concepts following the path set by Drake & Morgan.

As CGA’s Peter Martin put it in his citation: “John Connell has backed and encouraged a whole generation of ambitious entrepreneurs—and especially women entrepreneurs—to launch their own businesses. He’s a deserving winner of this year’s Special Award.” In typically modest style, Connell himself said of his achievements: “In the words of Winston Churchill, the trait of this industry is to keep buggering on—to never give up.”
Over nigh-on three decades in the sector, Steve Richards has proved himself a true leader—not just of his own businesses but of the eating and drinking industry as a whole.

Compared to Thomasina Miers, he has had a more conventional route to the top of the game. He cut his teeth in operational, property and marketing roles at Allied Domecq and has since spent 25 years rising through senior management, latterly as a divisional MD at Scottish & Newcastle, MD at Spirit Group and CEO of late-night group Novus Leisure. For the last four years, he has been CEO of the Casual Dining Group, parent to some of the UK’s biggest casual dining brands in Bella Italia, Café Rouge and Las Iguanas, and has steered it to around 300 restaurants in the UK, and into new markets overseas.

These achievements alone would be enough to leave a substantial mark on casual dining—but it is Richards’ extra-curricular role at the Association of Licensed Multiple Retailers that makes him so deserving of this CGA Icon Award. Since becoming its chairman in 2009, he has helped the ALMR to attract scores of new members including restaurant and late-night groups—all while retaining its pub focus and pulling in leading players like JD Wetherspoon and Mitchells & Butlers.

The rise of the ALMR means that the out-of-home eating and drinking sector can now truly speak with one voice—vital at a time when businesses need the ear of government more than ever. Richards takes a lot of the credit for that—but like his achievements in business, it has been done not through aggressive expansion and ruthless practice, but through skillful persuasion, determination and a collegiate spirit. This Icon Award shows that it is not just the Casual Dining Group, Novus, Spirit and others that should be grateful for his contributions—but the entire industry.

Steve Richards receives his Industry Icon Award from fellow Icon and Mitchells & Butlers Chairman Bob Ivell

**ICON AWARD**

Presented by CGA

For individuals who have made an outstanding contribution to the sector over a sustained career

**Winner: Steve Richards, Casual Dining Group**

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**THE ICON HALL OF FAME**

Steve Richards and Thomasina Miers join 21 other individuals recognised by Icon Awards over the years:

- Tim Bacon (Living Ventures)
- John Barnes (La Tasca, Novus)
- Andy Bassadone (Strada, Côte, Bill’s)
- Peter Boizot (Pizza Express)
- Rupert & Jo Clevely (Geronimo, Hippo)
- Chris Corbin (Corbin & King)
- Gerry Ford (Caffè Nero)
- Karen Forrester (TGI Friday’s)
- James Horler (La Tasca, 360 Restaurants)
- Tony Hughes (Whittard, Mitchells & Butlers)
- Bob Ivel (Whittard, Scottish & Newcastle, Mitchells & Butlers, Alan Jackson (The Restaurant Group), Karen Jones (Caffè Rouge, Spirit Food & Fuel, Hawkesom), Philip Kaye (Zizzi), Jeremy King (Corbin & King), Simon Kossoff (Carluccio’s), Tim Martin (JD Wetherspoon), Julian Metcalfe (Pret a Manger), Ian Neil (Wagamama, Las Iguanas), Robin Rowland (YO! Sushi) and Mike Tye (Whittard, Spirit).
WINNERS

**BEST QUALITY BRAND**
Presented by Casual Dining
For the brands voted best for passion, food quality and freshness
Winner: Miller & Carter

**CONSUMER CHOICE**
Presented by Coca-Cola European Partners
For the best big brands across the key metrics of satisfaction, revisit and recommend
Winner: Côte

**BEST NEWCOMER**
Presented by CPL Online
For still fledgling companies and concepts that have made an impact from the start and are tipped for greatness
Winner: Swingers

**BEST DRINKS OFFER**
Presented by Diageo
For the brands considered best for drinks—both alcoholic and non-alcoholic—by their customers
Winner: The Alchemist

**BRAND XP AWARD**
Presented by HGEM
For the brands that keep their customers coming back for great experiences
Winner: Wahaca

**BREAKTHROUGH BRAND**
Presented by Bookatable by Michelin
For emerging brands moving from a small chain to the mainstream and showing the potential to grow even further
Winner: Flat Iron

Casual Dining’s Chris Brazier and M&B’s commercial director Chris Hopkins

The Alchemist CEO Simon Potts

Wahaca’s founders Thomasina Miers and Mark Selby (centre) and team with HGEM’s Steven Pike

Wahaca’s founders Thomasina Miers and Mark Selby (centre) and team with HGEM’s Steven Pike

Flat Iron’s Charlie Carroll and Jo Fleet

Côte CEO Alex Scrimgeour

Swingers’ founders Matt Grzech-Smith and Jeremy Sambrook
EVOLUTIONARY BRAND
Presented by Reynolds
For established concepts and companies which have refreshed and evolved their offer to stay competitive, relevant and growing
Winner: Pho

BEST DESTINATION OPENING
Presented by Asahi
For exciting, show-stopping new openings of the past 24 months
Winner: The Ned, London

BEST CONCEPT
Presented by WE ARE Spectacular
The concepts with stand out offers in an ultra-competitive market
Winner: Dishoom

BEST ENTREPRENEURIAL COMPANY (SUB 50 SITES)
Presented by RSM
The best small and medium-sized businesses with fewer than 50 locations
Winner: The New World Trading Co

MOST ADMIRED BRAND OR COMPANY
Presented by Fourth
For the industry’s most respected concepts and companies as voted for, unprompted, by the sector’s leading operators
Winner: Wagamama

POWER BRAND
Presented by NatWest
For the leading brands of the sector ranked by usage, satisfaction, reliability and trust—and an industry vote
Winner: Nando’s

NEW WORLD TRADING CO’S CEO CHRIS HILL

WAGAMAMA’S NIGEL SHERWOOD, JANE HOLBROOK, SARAH HILLS AND NICK TAYLOR

NANDO’S UK MD ROB PAPPAS

THE NED’S JENNY HARRIS AND LAURA DICKINSON

PHO’S FOUNDER STEPHEN WALL AND MD MARK SMITH

DISHOOM’S BRIAN TROLLIP AND CO-FOUNDER SHAMIL THAKRAR

WAGAMAMA’S TOP TEAM: NIGEL SHERWOOD, EMMA WOODS, CEO JANE HOLBROOK (CENTRE), SARAH HILLS AND NICK TAYLOR
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With your help, malnourished children stand a better chance of growing up to become healthy adults.

Top restaurants such as Carluccio’s, Ed’s Easy Diner, Hawksmoor and Pho support Action Against Hunger.

Last year the hospitality industry raised over £1 million for Action Against Hunger’s international humanitarian work, saving malnourished children and providing families with good nutrition and safe water.

To turn your passion for food into action against child hunger, please get in touch with Chris Parker on 020 8853 7585, or email: c.parker@actionagainsthunger.org.uk

“Carluccio’s is delighted to be a long-standing partner of Action Against Hunger through the donations raised from our popular Penne Giardiniera dish. The connection between our business, working in the food and restaurant sector, and Action Against Hunger’s mission to end child hunger is an important one and I am proud that our company plays an effective role in supporting their life-saving work.”

Neil Wickers
CEO, Carluccio’s Ltd

ABOUT THE AWARDS

CGA’s Hero & Icon Awards are in two sections. Nine are Industry Hero Awards: Best Newcomer, Breakthrough Brand, Evolutionary Brand, Best Destination Opening, Most Admired Company or Brand, Best Concept, Best Entrepreneurial Company (sub 50 sites), Best Company (50 sites plus) and Industry Leader. Five are Consumer Hero Awards: Best Quality Brand, Best Drinks Offer, Brand XP Award and Consumer Choice. Industry Hero Awards are voted for by senior executives in the sector, while Consumer Hero Awards are chosen by the British public via CGA’s quarterly BrandTrack survey of about 20,000 customers of UK eating and drinking out brands. The Icon Award winners are chosen in consultation with our academy of previous Icon winners.

CGA’s Hero & Icon Awards and 2020 Conference are supported by platinum partners Asahi, Bookatable by Michelin, Coca-Cola European Partners, Coffer Corporate Leisure, CPL Online, Diageo, Flyt, Fourth, HGEM, NatWest, WE ARE Spectacular and Zonal; and by network partners Casual Dining, Chapman Ventilation, Fishbowl, Reynolds, RSM, Steelite International and Yumpingo.
CGA is delighted to announce the dates for three big events in 2018—all essential gatherings for the out-of-home eating and drinking sectors.

**Consumer Insight & Marketing Conference, Thursday 19 April 2018**
Location: Auditorium, 30 Euston Square, Kings Cross, London NW1

The leading event for brands wanting to understand consumers and connect with guests old and new. Drawing on CGA’s wealth of consumer and trade data, this Conference will also feature some of the top names in casual dining and pub marketing.

**Future of Finance & Development Seminar, Thursday 21 June 2018**
Location: State Rooms, 30 Euston Square, Kings Cross, London NW1

After a challenging 2017, there is unlikely to be any let-up in the headwinds faced by operators in 2018. It will make the insights into market trends, funding, property, costs and the wider economy we provide at the Future of Finance & Development Seminar all the more valuable.

**Peach 2020 and Hero & Icon Awards, Wednesday 21 November 2018**
Location: The Brewery, 52 Chiswell Street, London, EC1Y 4SD

As the dust settles on CGA’s 2017 Peach 2020 and Hero & Icon Awards, we look forward to the 2018 edition. Join several hundred of the sector’s leaders as we review the year just gone, look ahead to future opportunities and challenges and celebrate the outstanding achievements of pub and restaurant brands and individuals.