

September 2010

# the plate of the nation

what's hot and  
what's not on the UK's  
restaurant scene

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# foreword

As a nation, eating out is one of our favourite past-times. According to latest findings, a quarter of us eat out at least once a month, 18% once a fortnight and 6% at least twice a week<sup>1</sup>.



To accommodate our hunger for eating out and new food experiences, over 262,000 restaurants and eating establishments have sprung up across the UK<sup>2</sup>. On average we spend just under £22 for our tucker, including a tipple or two. And when we want to push the boat out, we're happy to spend on average £125 for dinner for two.

With eating out so central to how we all spend our free time (and our spare money), at lastminute.com we wanted to find out what's hot and what's not amongst the dining public. What makes us rant and rave about particular eateries and what are the nation's favourite restaurants doing to earn and keep our custom?

We've called our report, 'the plate of the nation'. Not only is it a cute name but it does what it says on the tin: a heads-up on the emerging trends and the big issues affecting eating out in the UK.

At lastminute.com, we handle over 2 million restaurant enquiries each year so know a thing or two about eating out, especially in the capital. But, don't just take it from us: to compile these findings we also spoke with over 2,000 British diners and over 100 of the country's biggest culinary names.

What emerges in this report is an industry that, in the main, is in rude health. A recent report noted that in 2010 there have been 140 new openings in the capital while at the same time only 72 establishments have closed their doors<sup>3</sup>. In all there are 48 Michelin-starred restaurants in London according to the latest Guide<sup>4</sup>.

Diners love London in particular. There is a richer diversity of eateries in the capital now than there has been in recent years and the tough times of the last couple of years has forced restaurants to up their game improving service, innovating menus and reconsidering prices.

You now get more for your money in London's restaurants than at any point in the past five years with deals and discounts on offer at some of the biggest names on the London scene. When you are paying less than the cost of a couple of cocktails, cinema ticket and some popcorn to enjoy three courses at a restaurant like L'Atelier de Joël Robuchon, there's never been a better time to be a gastronome in the capital.

At lastminute.com we want to make your free time great time.

**Mark Bower,**  
Lifestyle Director

1 MINTEL Eating Out Review – July 2009

2 British Hospitality:Trends and Statistics 2009

3 20th edition of Harden's London Restaurants

4 Michelin Guide Great Britain and Ireland 2010

# London beats Paris and New York to take "top culinary capital" title

While it may have won fewer Michelin Stars and has a smaller number of restaurants than its rivals, London has never-the-less won the hearts of foodies, being named the "top culinary capital" in a poll of over 2,000 of the people who really matter – the great dining public.

Almost a third of diners (32%) questioned named London the best capital for food around the world. London claimed almost twice as much popular support as nearest rivals Paris (named by 18% as the destination with the finest restaurants) or New York (which claimed a 17% share of the vote).

The UK capital only boasts 4 restaurants that have been awarded the prestigious 3 Michelin-stars including Alan Ducasse at The Dorchester (compared to Tokyo's 11, Paris' 10 or New York's 5<sup>6</sup>). But the diversity of the restaurant scene beyond that top echelon is unrivalled, according to the diners we questioned as part of 'the plate of the nation' report.

| Rank | City          | Percentage age agreeing the city has the best food in the world |
|------|---------------|-----------------------------------------------------------------|
| 1.   | London        | 32%                                                             |
| 2.   | Paris         | 18%                                                             |
| 3.   | New York      | 17%                                                             |
| 4.   | Rome          | 10%                                                             |
| 5.   | Barcelona     | 5%                                                              |
| 6.   | Tokyo         | 4%                                                              |
| 7.   | Sydney        | 4%                                                              |
| 8.   | San Francisco | 3%                                                              |
| 9.   | Bangkok       | 3%                                                              |
| 10.  | Cape Town     | 2%                                                              |

Consumers' opinions of London's restaurants are confirmed by the rude health of the restaurant industry itself. A recent report noted that in 2010 there have been 140 new openings in the capital while at the same time only 72 establishments have closed their doors<sup>7</sup>. In all there are 48 Michelin-starred restaurants in London according to the latest Guide<sup>8</sup>.

There is more good news in store for diners across the city with a host of new openings scheduled at the top-end of the food scene.

The re-vamped and revitalised Savoy Grill will open in the charge of Gordon Ramsay. Bruno Loubet has made a return to London with his Clerkenwell-based "Bistrot", joined by French powerhouse chefs Joel Antunes, who has taken up residence at the Park Plaza, Westminster Bridge and Raymond Blanc with his City-based Brasserie Blanc.

The Mandarin Oriental hotel will play host to Bar Boulud (as its proprietor Daniel Boulud's first UK venture) and to Heston Blumenthal.

The big names are joined by a host of residents spreading their wings with the teams behind Hawksmoor, St. John, Jamie's Italian, Arbutus, Terroirs and Texture all planning to expand their empires.

*"From high-end to frills-free the range and quality of London's food just keeps getting better. We're licking our lips at the prospect of the new openings – not least because it will mean greater choice for our diners and better offers than ever."*

Mark Bower

# credit crunch continues to bite at big-name eateries as over 70% of top UK restaurants battle to fill tables ... although gordon ramsay will still leave you with the longest wait for a table ...

## Availability has never been better

Availability in some of the most famous eateries has never been better as some of the biggest names in British food battle to fill their tables. Of the country's top-100 restaurants, 74% could offer a same-day table reservation. Diners have to wait (admittedly for up to three months in Gordon Ramsay) at only 12 of the top-100 restaurants nationwide.

The trend is being felt even at the UK's top-rated tables: of the top-10 restaurants in Britain in the September 2009 Restaurant Awards (from which the top-100 list is also drawn), a similar proportion had tables available on the day – with 7 out of ten not requiring a reservation.

This trend was confirmed by the restaurants themselves – with two in five saying they had seen bookings fall this year compared to last.

And the trend is not confined to London's competitive gastronomic scene – it is being felt across the country. All of The Walnut Tree (in Abergavenny, named in the top-3 restaurants nationwide), The Vineyard (in Newbury and number 5 on the list), Nathan Outlaw (in Cornwall ranked at 18), Northcote Manor (Blackburn), Midsummer House (Cambridge) and a host of others all reported a similar trend with tables immediately available – including at peak times on Friday and Saturday nights.

*"Bad news for all but the biggest celebrity chefs, but of course great news for the dining public as there are now more tables available than ever and restaurants are offering better value with things like set menus and discount deals to fill their space."*

Mark Bower

## In for a long wait

Despite the tough economic times, 12% of the top-100 restaurants are still able to keep eager diners waiting for up to three months.

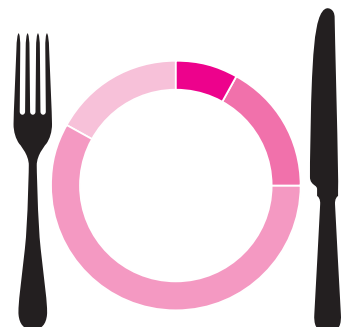
The restaurants that did report waiting lists – in a league table topped by Restaurant Gordon Ramsay, where stomachs will be in need of filling following the three month wait – were:

| Rank | Restaurant                                                      | Waiting time for reservation |
|------|-----------------------------------------------------------------|------------------------------|
| 1    | <b>Restaurant Gordon Ramsay</b> , London (Gordon Ramsay)        | 3 months                     |
| 2    | <b>The Fat Duck</b> , Bray, Berkshire (Heston Blumenthal)       | 2 months                     |
| 3    | <b>Le Manoir aux Quat'Saisons</b> , Oxfordshire (Raymond Blanc) | 2 months                     |
| 4    | <b>Gidleigh Park</b> , Chagford, Devon (Michael Caines)         | 7 weeks                      |
| 5    | <b>Marcus Wareing at the Berkeley</b> (Marcus Wareing)          | 6 weeks                      |
| 6    | <b>The Ivy</b> , London (Gary Lee)                              | 6 weeks                      |
| 7    | <b>The River Café</b> , London (Ruth Rogers)                    | 5 weeks                      |
| 8    | <b>Zuma</b> , London (Rainer Becker)                            | 3 weeks                      |
| 9    | <b>The Royal Oak</b> , Maidenhead (Dominic Chapman)             | 2 weeks                      |
| 10   | <b>The Plumed Horse</b> , Edinburgh (Tony Borthwick)            | 1 week                       |
| 11   | <b>The Kitchin</b> , Edinburgh (Tom Kitchin)                    | 1 week                       |
| 12   | <b>The Waterside Inn</b> , Bray, Berkshire (Farrice Uhryn)      | 1 week                       |

*"There are some big name eateries that have huge waiting lists for tables – a combination of those with celebrity chefs, Michelin stars or 'hot new kid on the block' status."*

Mark Bower

**If a customer would like to dine with you but is having difficulty booking a table for a Saturday night, what would you recommend?**



## Getting the table you want

lastminute.com advises diners having trouble booking a table somewhere really special to consider Sunday lunch as an option and also visiting pre-theatre. Almost 60% of the restaurants surveyed recommended grabbing an early sitting if you want to guarantee a table for a Saturday night plus get a great deal.

- 8.3% book Saturday lunch;
- 16.7% book Sunday lunch;
- 58.3% book pre-theatre or an early sitting;
- 16.7% go on a waiting list for cancellations

# if you're looking for the flashiest date, london blokes blow the budget

If you're in the market for being wined and dined, the men of London are your best bet for a blow-out dinner according to our research. Londoners spend on average £151.80 on a "blow-out" meal for two according to our survey amongst 2,000 diners.

At the other end of the scale, Scotland's culinary reputation (or its lack of a reputation in the gastronomic arts) suggests that dates North of the border are the cheapest – with an average spend of just £99.40 on a "blow-out".

## Flash with their cash

The research suggests that the average spent across the country on the finest of dining is £125 for a top-class meal for two. This means that Londoners spend almost £25 more than the average and that in Scotland you will have £25 less than the national average lavished upon you.

| Rank | Region            | Average spend per couple for a "blow-out" dinner |
|------|-------------------|--------------------------------------------------|
| 1.   | London            | £151.80                                          |
| 2.   | South East        | £135.20                                          |
| 3.   | North West        | £127.80                                          |
| 4.   | Wales             | £127.60                                          |
|      | <b>UK AVERAGE</b> | <b>£125.00</b>                                   |
| 5.   | East Anglia       | £125.00                                          |
| 6.   | Yorks & Humber    | £120.80                                          |
| 7.   | East Midlands     | £120.20                                          |
| 8.   | South West        | £114.60                                          |
| 9.   | North East        | £113.40                                          |
| 10.  | West Midlands     | £101.60                                          |
| 11.  | Scotland          | £99.40                                           |

*"Just as size isn't everything, so spend isn't everything either, whether you're gazing lovingly at each other or painting the town red. However, what this research shows is that, if you're serious about your cuisine, you're better off in the capital than you are anywhere else in the country and that, North of the Border you're less likely to be wined and dined in style. Of course, that might mean that the food isn't the main thing on the menu!"*

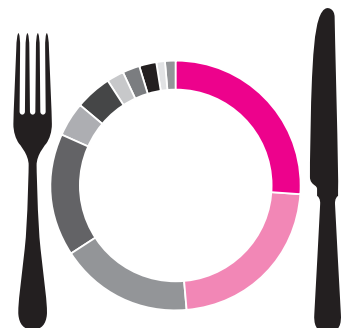
Mark Bower

Those in the South East ranked second in the list of top-spenders, averaging £135.20 for a top-class meal for two. Those in the North West and Wales ranked third and fourth, spending on average £127.80 and £127.60, respectively. At the other end of the scale, it was the ladies of the West Midlands who fair worst in England as the average spend on a blow-out meal was £101.60 – £50 less than those in London.

## Favourite food

Our research found that when it comes to enjoying 'la dolce vita', Italian food is still firmly our favourite cuisine for a night out. Penne and pomodoro were preferred over British meat and two veg with aromatic, spicy curries in third place. French cuisine, once most associated with fine dining was fifth on the list, alongside Thai as the most preferred food for a night out.

Which one of the following types of restaurant would/do you most like to visit on a night out?



|            |     |
|------------|-----|
| Italian    | 23% |
| British    | 20% |
| Indian     | 15% |
| Chinese    | 14% |
| French     | 4%  |
| Thai       | 4%  |
| Japanese   | 2%  |
| Mexican    | 2%  |
| Spanish    | 2%  |
| Portuguese | 1%  |
| Vietnamese | 1%  |

# are we being served? “service as standard” tops list of restaurant bug-bears

Seeing a “standard” 12.5% added onto their bill tops a list of diners’ bug-bears when it comes to eating out, according to our research. Well over two thirds (67%) of gastronomes said that this was something that got their goat when dining out.

## Restaurant rants

Beyond the obvious “poor service”, the fact that restaurants simply assume diners want a gratuity added to their bill – and that they actively have to ask for it to be removed – topped tables being packed too close together, wobbly tables, table-turning and waiting times for bills, to take the top restaurant gripe title.

*“While standards have undoubtedly risen in British restaurants, diners’ expectations of what they will get for their money are also on the rise. Being asked to pay for service as standard – particularly on a bill almost half say they’ve been left waiting for at the end of a meal – is bound to cause irritation.”*

Mark Bower

The things that most get a gastronome’s goat when eating out were ...

| Rank | Restaurant rant                                | Percentage agreeing this was a common annoyance |
|------|------------------------------------------------|-------------------------------------------------|
| 1.   | “Seeing service put on my bill as standard”    | 67%                                             |
| 2.   | “Tables being packed too tightly together”     | 64%                                             |
| 3.   | “Tables being wobbly in restaurants”           | 52%                                             |
| 4.   | “Being asked to leave a table at a set time”   | 51%                                             |
| 5.   | “Being left waiting for my bill to arrive”     | 47%                                             |
| 6.   | “The levels of mark-up on wine”                | 38%                                             |
| 7.   | “Incomprehensible menus”                       | 25%                                             |
| 8.   | “Being charged corkage on wine”                | 25%                                             |
| 9.   | “Tables not being available at the right time” | 20%                                             |
| 10.  | “Inability to accommodate dietary needs”       | 12%                                             |

Our research found that a crop of “table issues” follow the less-than-optional service charge in diners’ complaints. Almost two thirds (64%) of diners are irritated by tables being packed too closely together while half are annoyed by wobbly tables (52%) or by table-turning (51%).

Wine is another common area of complaint as over one third of diners (38%) are irritated by the levels of mark-up on restaurant wines and another quarter say that being charged a corkage on wine is one of their top bug-bears.

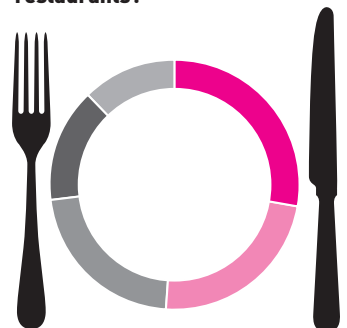
## Tips on tipping

So, what’s the etiquette when it comes to tipping? At lastminute.com we would say that if you’ve enjoyed a wonderful meal with great service then think about adding an additional 10% or so gratuity as a thank-you. Ask the waiting staff if they’d prefer the tip in cash – and where that money goes. And remember, if the service wasn’t up to scratch, you’re well within your rights to question the ‘optional’ service charge with the manager.

## Making a difference

lastminute.com asked diners which one thing they would change for a better experience in UK restaurants and, unsurprisingly perhaps, making the service charge strictly optional came out tops, followed by greater space between tables, an end to table-turning and tap water as standard.

Which one, if any, of the following things would you change to give you a better experience dining out in restaurants?



- 23% service charge as optional
- 19% more space between tables
- 18% end to table-turning
- 12% tap water as standard
- 10% bring your own wine

# the £1 per minute cost of top restaurants table-turning trend sees diners asked to “sup-up and ship-out”

“Table-turning” – asking customers to leave their table at a set time so another party can take it – means that diners in some restaurants are being asked to spend over £1 per minute for their meals.

Our research found that of the top 100 restaurants across the country, 15% admitted that they table-turn, giving diners an allotted amount of time to sup-up and ship-out at peak times. Over half (51%) of the diners quizzed by lastminute.com said that being asked to leave a table at a specific time because others were waiting came towards the top of their list of restaurant bug-bears.

*“Diners understand that restaurants have got to make money and that one way of doing that is by getting two or more sittings per night at each table. However, when they are being asked to spend more than £1 per minute for their meal, foodies will question the value of their chosen eatery.”*

Mark Bower

| Restaurant                                    | Table Time (mins) | Avg. cost for two* | Cost per minute | Cost for five mins |
|-----------------------------------------------|-------------------|--------------------|-----------------|--------------------|
| Hakkasan, London                              | 120               | £148.00            | £1.23           | £6.17              |
| Midsummer House, Cambridge                    | 150               | £174.00            | £1.16           | £5.80              |
| Zuma                                          | 120               | £138               | £1.15           | £5.75              |
| Hibiscus, London                              | 150               | £170.00            | £1.13           | £5.67              |
| Simpsons, Birmingham                          | 120               | £130.00            | £1.08           | £5.42              |
| Yauatcha, London                              | 120               | £110.00            | £0.92           | £4.58              |
| The Ledbury, London                           | 165               | £150.00            | £0.91           | £4.55              |
| The Three Chimneys, Colbost, Isle of Skye     | 150               | £130               | £0.86           | £4.33              |
| Chez Bruce, London                            | 135               | £116.00            | £0.86           | £4.30              |
| Café 21, Newcastle-upon-Tyne                  | 120               | £98.00             | £0.82           | £4.08              |
| Pipe & Glass Inn, East Yorkshire              | 120               | £86.00             | £0.72           | £3.58              |
| Arbutus, London                               | 135               | £96.00             | £0.71           | £3.56              |
| Michael Caines Restaurant at ABode Manchester | 150               | £102.00            | £0.68           | £3.40              |
| Bocca di Lupo, London                         | 120               | £78.00             | £0.65           | £3.25              |
| The Seahorse Restaurant, Devon                | 150               | £96.00             | £0.64           | £3.20              |

This time limit means that gastronomes are being asked to spend £6.17 for every five minutes they spend at their table at Hakkasan – which tops the list of table-turners, allowing a mere two hours at a table and charging a couple on average £148 for their meal. Anglian foodie paradise, Midsummer House in Cambridge came second in the list – charging diners £5.80 for every five minutes at their table.

Hakkasan and Midsummer House topped a list that included five restaurants that end up charging their customers more than £1 per minute according to lastminute.com. The trend is not confined to London’s eateries with Simpsons in Birmingham joining the list of Britain’s £1 per minute restaurants.

## Turning the tables

Restaurants that table-turn are usually popular for a reason.

At lastminute.com we’d recommend you don’t miss out on the chance to experience these great eateries, we’d just make sure you know how long you’ve got before you start tucking in. When you get there, arrive at your table early.

Our research was at peak times, the cost per minute will come down dramatically if you eat out of peak hours such as lunch and also if you order one of the many set menu meals available at restaurants such as Arbutus or Michael Caine’s restaurant.

# coeliacs catered for, but tap water stays off the menu and top restaurants impose “no jeans, no trainers” rule

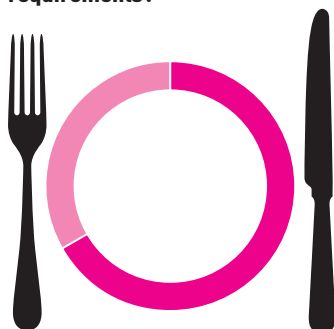
While allergies and food fads have become a part of running Britain's best restaurants, there are still limits to how accommodating our best eateries will be with tap water and trainers still a no-no at many.

## Catering for every taste

Even Britain's biggest chefs have had to concede that the customer is always right when it comes to what is best for them, as a survey of the country's top-100 restaurants has revealed that all of the UK's big names will now change their dishes for customers with allergies and will even accommodate the latest food fads for customers.

Top of the list of allergies catered for were dishes re-designed for were dishes re-designed for Coeliac Disease sufferers – gluten-free versions of iconic dishes. All of the restaurants in the top 100 will offer vegetarians more than an omelette. Nut allergies are also catered for in all of the restaurants in the survey.

Have you noticed an increase in the number of customers with special dietary needs or requirements?

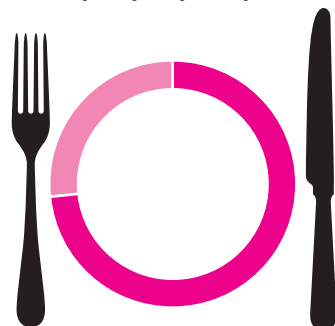


## Tap water stays off the menu

However, while restaurants will cater for the faddiest of foodies and the strangest dietary requests, they still aren't offer tap water on their menus or suggest it to diners.

The lastminute.com research found that just 27% of restaurants will offer guests tap water, while 73% will bring a “jug of iced tap”, but only if customers ask for it, with “sparkling or still?” still the refrain that you are most likely to hear in the vast majority of eateries.

### What's your policy on tap water?



*“While it's great to see that restaurants are accommodating when it comes to special dietary needs, it's baffling why they are still so backward at offering a jug of tap water – unless prompted, that is. And with one in ten diners telling us they feel embarrassed to ask for tap water, it's shaping up to be something of a stand-off between the waiters and the waited upon.”*

Mark Bower

## Watch what you wear

Our research found that even in the hippest of haunts, there are pockets where tradition is observed. Of the UK's top-20 restaurants, 12 impose a dress code on their guests with

“trainers” out, jeans frowned upon and jackets still a requirement in some. The only slip in the decorum observed in the upper echelons of our gastro-scene is the tie: none of the top restaurants in the UK require such attire any more ...

| UK's Top 100 Restaurants                                         | Dress Code                                                |
|------------------------------------------------------------------|-----------------------------------------------------------|
| 1 <b>The Fat Duck</b> , Bray, Berkshire                          | No dress code                                             |
| 2 <b>Hibiscus</b> , London                                       | Smart                                                     |
| 3 <b>The Walnut Tree Restaurant</b> , Abergavenny, Monmouthshire | No dress code                                             |
| 4 <b>Restaurant Sat Bains</b> , Nottingham                       | Closed for August                                         |
| 5 <b>Corrigan's Mayfair</b> , London                             | Smart/Casual. No jeans                                    |
| 6 <b>The Vineyard at Stockcross</b> , Newbury, Berkshire         | Smart/Casual. Smart jeans allowed                         |
| 7 <b>Chez Bruce</b> , London                                     | Closed for August                                         |
| 8 <b>The Kitchin</b> , Leith, Edinburgh                          | Smart                                                     |
| 9 <b>Arbutus</b> , London                                        | No dress code                                             |
| 10 <b>St John Bar &amp; Restaurant</b> , London                  | No dress code                                             |
| 11 <b>Restaurant Gordon Ramsay</b> , London                      | Smart. No trainers, shorts or sportswear                  |
| 12 <b>The Sportsman</b> , Seasalter, Kent                        | Casual. Jeans and trainers allowed                        |
| 13 <b>Marcus Wareing at The Berkeley</b> , London                | Smart. Jacket and shirt. No jeans, trainers or sportswear |
| 14 <b>Le Manoir Aux Quat'Saisons</b> , Great Milton, Oxfordshire | Smart. No Jeans or trainers                               |
| 15 <b>Pied à Terre</b> , London                                  | Smart/Casual                                              |
| 16 <b>The Square</b> , London                                    | Smart. Jeans accepted. No trainers                        |
| 17 <b>L'Anima</b> , London                                       | Smart. No jeans or trainers                               |
| 18 <b>Restaurant Nathan Outlaw</b> , Fowey, Cornwall             | Smart/Casual. Smart jeans allowed                         |
| 19 <b>Maze</b> , London                                          | Smart. No trainers, shorts or sportswear                  |
| 20 <b>Terroirs Wine Bar &amp; Restaurant</b> , London            | Casual                                                    |

# methodology and sources

## About the research

lastminute.com commissioned a body of research in August 2010 amongst restaurateurs; top 100 eateries and the dining public. This involved an anonymous survey amongst twenty of the restaurants featured on the lastminute.com site; mystery shopping and research into booking at the top 100 restaurants in the UK, as defined by the National Restaurant Awards 2009, and a quantitative survey amongst 2,233 consumers.

All consumer figures, unless otherwise stated, are from YouGov plc. Total sample size was 2,233 adults. Fieldwork was undertaken between the 18th and 20th August 2010. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).

The top 100 restaurants are defined by the National Restaurant Awards 2009 which reward the crème de la crème of the gastronomic world of the UK's restaurant scene. The winners are compiled and voted for by the National Restaurant Awards Academy. This is made up of prominent chefs, restaurateurs and food critics divided across the 12 regions of the UK ensuring that the list is truly authoritative and representative of a national unbiased vote.

Big thank-you to our Head of Restaurants, Patrick Tunmore and our Lifestyle Director Mark Bower, for all their insights and expertise.

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## About lastminute.com

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lastminute.com offers customers the opportunity to book flights and hotels, buy tickets and experience packages and make restaurant reservations through its one stop shop. From adventuring in the mountains to relaxing beach breaks, spa stays, theatre trips and dining, there really is something for everyone.