

SCAN AND ORDER  
OUR MENU



## UK Restaurant Market Report 2022

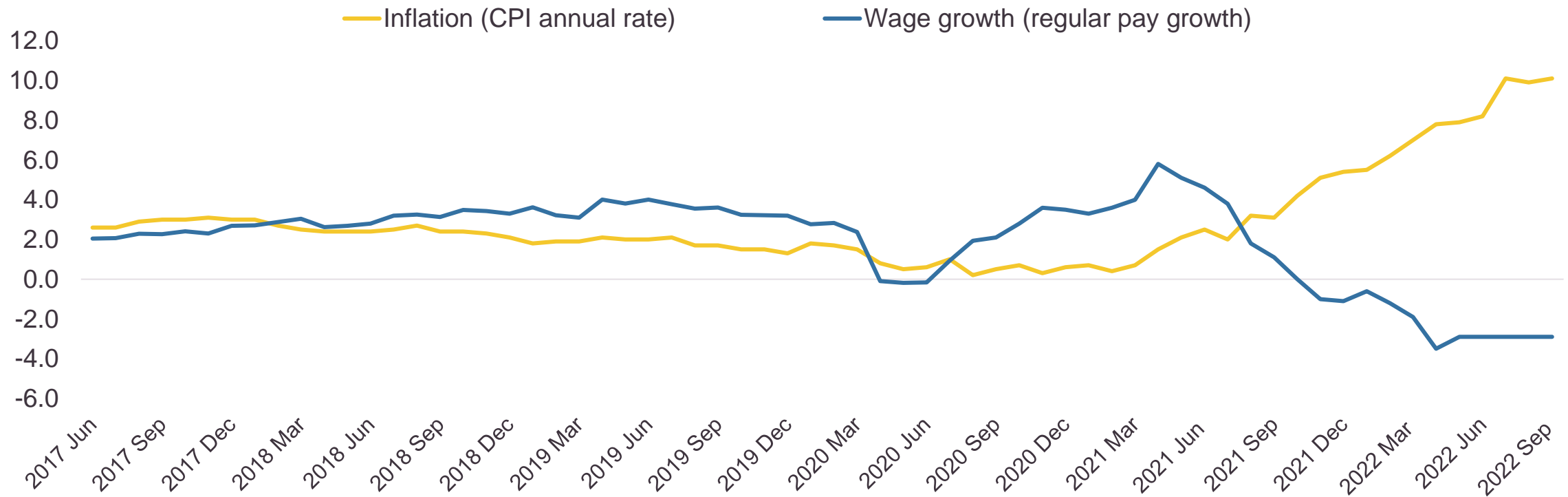
October 2022



# DIVERGENCE BETWEEN INFLATION AND WAGE GROWTH

**Real pay growth rates have decreased, impacted by the strong rise in inflation.** The war in Ukraine has led to a surge in already increasing energy prices, resulting in decade high levels of inflation. A decline in regular pay growth year-on-year means that households will see a strain on spending power, with increases in energy bills, national insurance taxation and grocery shopping costs.

## UK inflation and wage growth, 2016-2022



Source: ONS, October 2022

# BIG TABLE GROUP LAUNCHES NEW PREMIUM-LED FORMATS

Big Table Group has converted underperforming Café Rouge and Bella Italia sites into premium-led brands Rouge and Amalfi Ristorante, respectively.

## ROUGE

- **Big Table group opened a second Rouge site in the Bullring, Birmingham in Spring 2022.** The elevated menu includes pâté, steak frites, and a range of seafood. The concept is aligned with current consumer trends for distinctive and occasion-led propositions. The site's location will benefit from shopper traffic, where the operator can utilise relaxation-led messaging to drive visits.



## AMALFI RISTORANTE

- **Big Table Group launched a second Amalfi Ristorante site on 28 March, in Soho, London.** The group is increasing competitive advantage through the launch of this premium format, with the concept more differentiated compared to other brands in the portfolio. Amalfi Ristorante has positioned itself as a destination for treat-led occasions by offering an escapism-inspired experience.

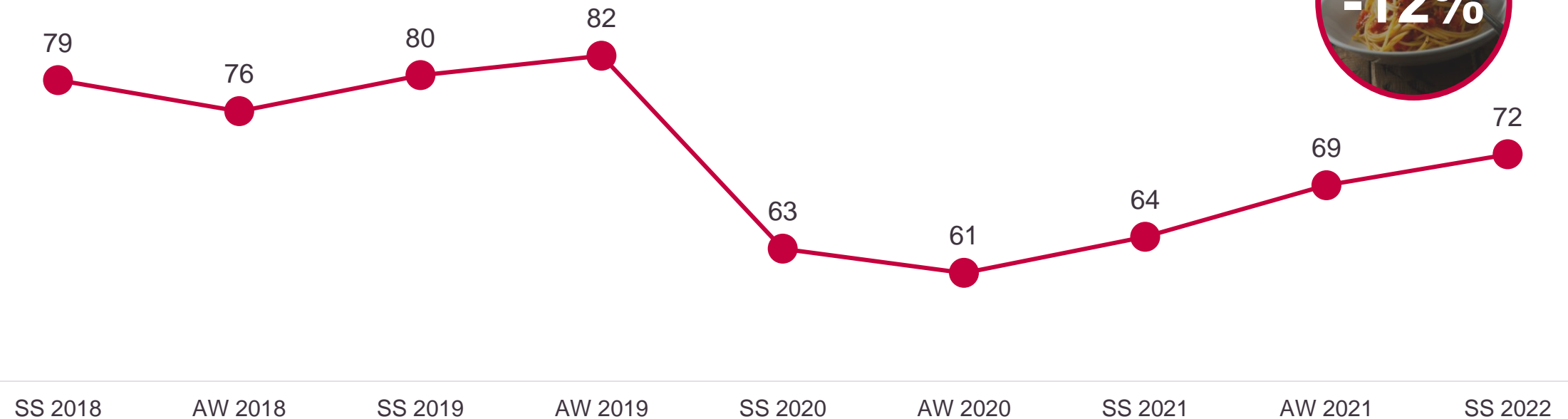


# CHAIN RESTAURANT DISH COUNTS MAKE A RECOVERY

The average number of dishes per restaurant menu has made a recovery during the Spring/Summer 2022 period. Menu expansion has occurred following the removal of coronavirus restrictions, though menus remain behind pre-pandemic levels as operators look to mitigate challenges around supply chains and costs.

Average dish count per chain restaurant menu, Spring/Summer 2018 – Spring/Summer 2022

AW 2019-SS 2022

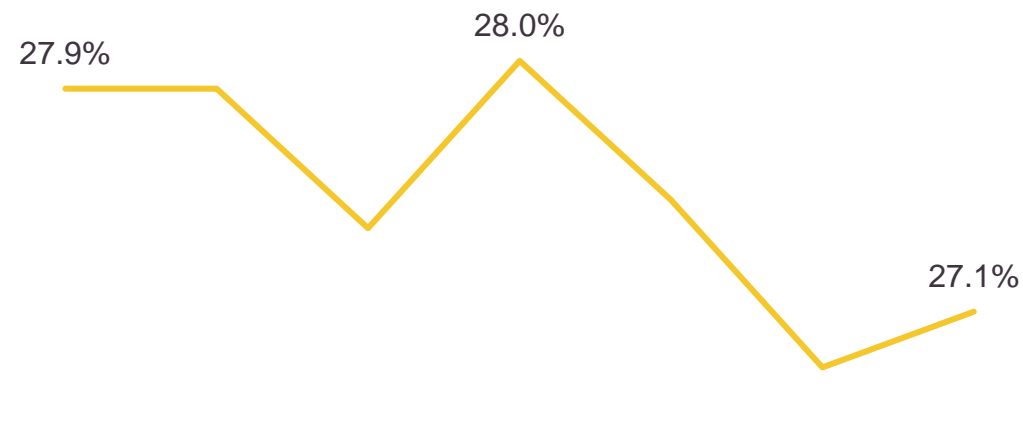


Source: Lumina Intelligence Menu Tracker Tool, Spring/Summer 2022

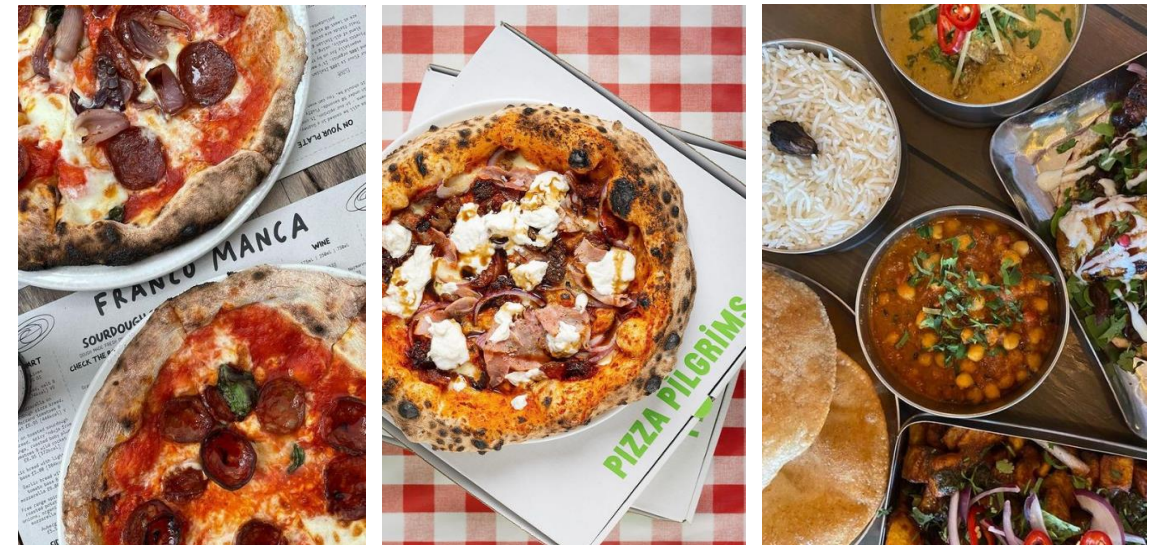
# FUTURE CONCEPTS: EVERY-DAY VALUE AND QUALITY

Value price-led concepts offering high quality and differentiated products are expected to expand across the market and align with consumers facing tighter budgets. A rise in high quality but low priced options across the restaurant market is underpinned by operators tapping into cuisines including Italian and Indian, where cheaper yet simple and high quality ingredients are utilised.

## Thinks good quality has a price (EDOP)



|          |          |          |          |          |          |          |
|----------|----------|----------|----------|----------|----------|----------|
| 12 WE    | 12 WE    | 12 WE    | 12 WE    | 12 WE    | 12 WE    | 12 WE    |
| 16.05.21 | 08.08.21 | 31.10.21 | 23.01.22 | 17.04.22 | 10.07.22 | 02.10.22 |



Operators including **Franco Manca**, **Pizza Pilgrims** and **Mowgli** have expanded rapidly throughout the UK, offering diners informality yet high quality dishes at prices on the lower end of the scale.

# Get in touch

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