

# Lumina Intelligence Menu & Food Trends Report 2022

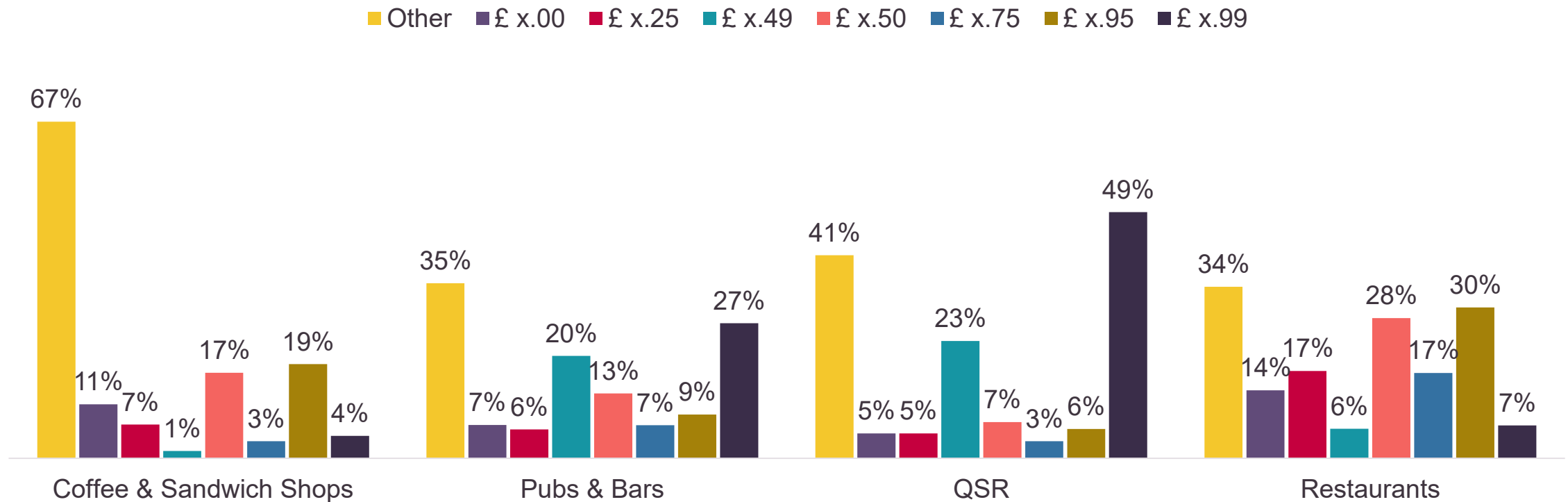
December 2022



# QSR OPERATORS FAVOUR THE £X.99 PRICE POINT

Almost half of all QSR dishes end in the £x.99 price point, with this channel traditionally being seen as having more accessible pricing. Other channels have less rigidity in pricing strategies, utilising different endings throughout menus.

Average price of a dish by last digit, by channel, 2022

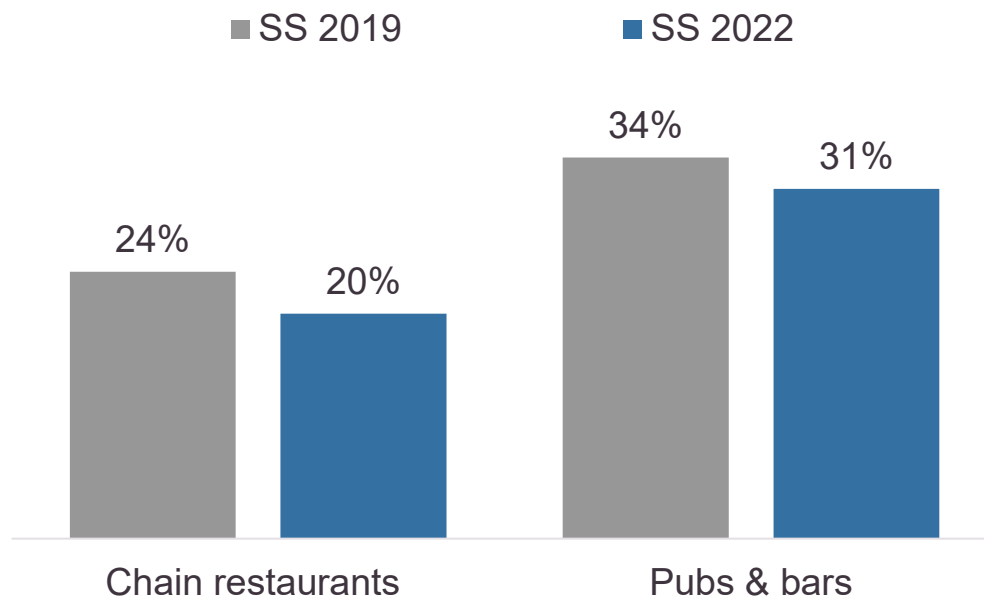


Source: Lumina Intelligence Menu Tracker Tool, February - October 2022

# PROPORTION OF DISHES CONTAINING MEAT DECLINES FROM 2019

The total proportion of dishes containing meat has fallen across both chain restaurants and pubs & bars from 2019 to 2022. Operators are aligning with trends for plant-based diets whilst reducing the use of meat across menus, managing costs.

Proportion of total dishes containing meat,  
Spring/Summer 2019 vs 2022



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

Meat-free dish innovation, 2022



## Cheese & Mango Empanadas

426 kcal V I

Two crispy brie & mango pasties  
served with sticky chilli jam.

*Las Iguanas*

## NUTRITIOUS POWER-FOODS

### NOURISH BOWL (VE) | 9.5

Rich in Vitamin C, Folate & Potassium  
Quinoa & buckwheat grains, baby spinach, rocket,  
broad beans, heirloom tomatoes, broccoli &  
pomegranate with an orange dressing | 389kcal

### THE POWER OF FIVE\* (VE) | 9.5

5 of your 5 a day and 300 calories  
Pan-fried greens, butternut squash, aubergine,  
mushroom and peppers, toasted sesame seeds  
& miso sauce | 300kcal  
Upgrade with sticky jasmine rice +2 | 180kcal

*All Bar One*

# KEY PRODUCT TRENDS IN MAINSTREAM MARKET – OCT 2022

Lumina Intelligence is seeing key trends highlighted coming through on mainstream operator menus in the chain restaurant and pub & bar channels.

## Retro foods

### Jam Roly Poly 4.99

An old-school favourite. Served with either custard (496kcal) or vanilla ice cream (463kcal)

*Brewer's Fayre*

## Flavoured butters

### MILLER'S BREAD BOARD

Baked olive bloomer, ciabatta loaf, beef dripping butter, I vinegar. 1132kcal

*Miller & Carter*

Stone-Baked Flatbread topped with garlic butter (V)  
730kcal

*Vintage Inns*

## Personalisation and health



**MIX IT UP** JUST £12.09 Best pick n mix ever!

Pick your sizzler, 2 sides and a sauce, the perfect combo. All served on a bed of sizzling peppers and onions. (45 kcal)

PICK A SIZZLER	PICK TWO SIDES
Half roast chicken (304 kcal)	Fresh garden salad (39 kcal)
Chicken skewers (330 kcal)	Corn on the cob (90 kcal)
Southern-fried chicken skewers (742 kcal)	Fries (337 kcal)
Battered halloumi (764 kcal)	Coleslaw (99 kcal)
Crispy chicken strips (660 kcal)	Chips (819 kcal)
3 x 5oz* gammon steak (754 kcal)	Onion rings (238 kcal)
8oz* 28-day matured rump steak (289 kcal)	Soft tortilla wraps (333 kcal)
NEW Impossible™ nuggets (522 kcal)	Savoury rice (165 kcal)
Grilled salmon fillet (370 kcal)	Baked jacket potato (194 kcal)
	Sweet potato fries (410 kcal)

**PICK A SAUCE**

Caribbean (305 kcal)	NEW Korean BBQ (224 kcal)	Smoky chipotle buffalo (82 kcal)
Sweet chilli (764 kcal)	Texan BBQ (180 kcal)	NEW Chinese-style salt and pepper seasoning (33 kcal)
Hot hot hot (65 kcal)	Peri Peri (52 kcal)	

**SUPER SPECIAL TUESDAY**  
ALL MIX IT UP DISHES ONLY £8

*Hungry Horse*

## Tacos and sharing



### Taco Sharing Board 1,192 kcal



Tuck into tacos together; a board of blue corn & soft flour tortillas with guacamole, sour cream, roasted tomato salsa, jalapeño & coriander salsa, pickled slaw, cheese, fresh lime, coriander & your choice of fillings. Perfect for 2-4 to share.

*Las Iguanas*

## Truffle



### Truffle Dough Balls

£6.95

460 kcal

Deck the Balls! Truffle & garlic butter coated Dough Balls seasoned with plenty of black pepper and Gra...

*Pizza Express*

### Truffle Cheese Fondue (V) (i)

£9.50

Cheese & Truffle Fondue, with Sourdough Bread

*Bill's*



# COST OF LIVING LEADS CONSUMERS TO PRIORITISE VALUE



## VALUE SCRUTINY

**78%**

Very Value Conscious  
+6ppts YoY

What are the most important long term consumer trends impacting the F&B industry? (Top 2)

50%



Squeeze on household budgets

41%



Value consciousness

The cost of living crisis has led to consumers being increasingly value conscious and prioritising cost above other credentials. Operators will need to ensure value is at the core of their offer in order to stay competitive and relevant to consumers during this financially difficult time.



**Toby Carvery** encourages mid-week footfall with a £7.99 roast deal. **Bluebell** offers bottomless pizza, prosecco & poretti for £29pp on the last Saturday of every month.



**Asda** launches £1 'Winter Warmer' meal deal for over 60s to help with cost of living across 205 cafes. The offer includes soup, roll and unlimited tea or coffee.



**Canova and Serata Hall** capitalise on working from home daytime footfall through the 'Hot Desk' offers that include **bottomless coffee**, fast Wi-Fi and monthly passes.

Source: Lumina Intelligence Eating & Drinking Out Panel & Top of Mind; Asda website

# OPERATORS GET CREATIVE TO NAVIGATE COSTS

**The rise of energy costs, paired with other obstacles in the out of home market, has led to unprecedented trading conditions for operators.** Pubs and restaurants are mitigating these costs by hosting 'blackout nights', providing consumers with cosy and atmospheric experiences.

## WARM



**The Topsy Fox**, a pub in West Sussex, hosted its first 'blackout' night in November 2022. The pub was on a fixed energy contract, but was quoted ten times more upon renewal. During the event the front of house operated without the electricity, with live acoustic music playing. Receipts were handwritten, giving customers a personal touch. These evenings create a point of difference to encourage footfall.



**Cheshire restaurant Next Door** hosts a nine-course tasting menu comprising of dishes made without using electricity or gas. Instead, the restaurant uses charcoal cooking methods. Wifi and card payments are unavailable and live music accompanies the dinner. Not only is this concept cost effective, it also allows guests to disconnect from the digital world.

Source: Big Hospitality, Code Hospitality, Lumina Intelligence, MCA, Morning Advertiser, December 2022

# RETRO AND MEXICAN DISHES GROW IN POPULARITY

## Warm

**Retro foods** are growing in popularity as consumers seek a sense of nostalgia. The uncertainty and change from the pandemic has resulted in demand for comfort and familiarity in the form of childhood favourites and classic dishes. **Parlour** in London is “*bringing back the Artic Roll*” on its menu and offering classic dishes including Chicken Kyiv on a hashbrown. **Bompas & Parr** in Arcade Food Hall has re-vamped retro desserts and introduced shareable trifles, layered with jelly, blancmange, biscuit and cream.



**Parlour's  
Artic Rolls**



**Parlour's  
Chicken Kyiv**



**Bompas & Parr**

## Established



**Tacos Padre**



**Santo Remido**

The growth of Mexican cuisine has driven the popularity of **tacos**. Tacos are an affordable dish that are well-suited to growing vegetarian and vegan diets due to a range of filling options. **Tacos Padre** in Borough Market offers a variety of street-food style tacos. **Santo Remido** in London offers the option to create your own tacos at the table or choose from a variety of meat and vegetarian dishes.

Source: Lumina Intelligence, November 2022, Lumina Intelligence Eating and Drinking Out Panel, November 2022

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# Get in touch

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