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**Casual dining brands see -6.8% outlet decline in 2020**

New research using Lumina Intelligence’s Operator Data Index indicates that the branded casual dining segment of the UK eating out market experienced -6.8% outlet decline in 2020.

2020 saw more than 20 groups and operators enter CVA’s or insolvency proceedings with large periods of no trading and strict capacity restrictions to contain the coronavirus, forming the perfect storm for the casual dining sector.

Branded restaurants experienced the steepest decline in 2020 of -16.6%, with the coronavirus pandemic exacerbating existing issues in the branded restaurant market. Many mid-market brands closing sites that have been struggling to maintain relevance for several years, amid growth in consumer interest for smaller differentiated operators.

Overall, the top ten casual dining brands outperformed the wider segment, seeing outlet decline of just -2.3%, with five of the top ten experiencing outlet growth in 2020.

The below table highlights the outlet growth rate in 2020 of each channel of the branded casual dining segment:

|  |  |
| --- | --- |
| Branded restaurants | -16.6% |
| Branded pub/bar restaurant  | -2.0% |
| Traditional fast food | +1.5% |
| Contemporary fast food | -9.2% |

Looking ahead, outlet decline is forecast to net out in 2021 as estates stabilise after 2020 closures, with contemporary and traditional fast food to see outlet growth and branded restaurant and pub/bar restaurant to see outlet decline decelerate significantly.

Katherine Prowse, Insight Manager at Lumina Intelligence says, “With delivery and takeaway solutions still operating throughout the lockdown, it is unsurprising that there has been an increase in the number of traditional fast food outlets in the UK. For branded restaurants and pub/bars, opportunities to open dine-in operations have been incredibly limited, resulting in large causalities across the sector. However, despite the current lockdown, we are predicting overall outlet volumes to remain firm in 2021, as the operators stabilise following the impact of 2020.”

Find out more about the Lumina Intelligence Operator Data Index [here](https://www.lumina-intelligence.com/product/operator-data-index-grocery-data-index/).

**ENDS**

**Report methodology**

The Lumina Intelligence Operator Data Index is a tool that tracks the performance of hospitality operators, providing market rankings based on turnover and outlet numbers, segmented by sub-channels.

Our Operator Data Index includes:

* Comprehensive data on 700+ leading UK hospitality operators
* Access market rankings, sales and outlet counts and monthly analysis presentations.

**About Lumina Intelligence**

Lumina Intelligence inspires the global food and drink sector with deep, actionable insights powered by the world’s best analytics technology. Our products and services are used by the major brands and organisations in these fast moving and growing markets to support business planning, strategic marketing and new product development.

With offices in London, Chicago, Montpellier, and Singapore, and local on the ground analysts across our businesses, you can trust our market knowledge. We are committed to providing all our customers with up to date accurate information to support critical decision making.

Combining the expertise and experience of HIM, MCA Insight and Lumina Intelligence, we are the experts in market and consumer insight across the food & drink and nutrition markets.

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