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**Autumn/Winter restaurant menus slashed by a quarter in 2020 versus 2019**

According to latest piece of monthly analysis from Lumina Intelligence’s Menu Tracker, on average, restaurant Autumn/Winter 2020 menus have -24.5% fewer dishes on them than in 2019.

The average Autumn/Winter menu size across chain, managed pub/bar and fast food restaurants is 58 dishes – down from 77 in Autumn/Winter 2019. The steepest decline in menu dish counts was from chain restaurants, which declined -25.8% year-on-year. The average managed pub/bar restaurant reduced its menu size by -24.0% and fast food restaurants -16.6%.

These declines have been felt across all courses, with starter and dessert seeing the steepest declines year-on-year - -27.0% and -26.7% respectively. Main course counts on restaurant Autumn/Winter menus declined -24.9% and sides -18.1%.

Interestingly, the report finds that the only channel to further reduce its menu size versus Spring/Summer 2020 is chain restaurants, which, on average declined -3.7%.

Managed pub/bar restaurants made steep declines to Spring/Summer 2020 menus with trade processes unclear at the time. Since operating throughout the summer managed pub/bar restaurants have increased menu dish counts by +11.9% to align with chain restaurants.

Fast food operators including McDonald’s and Burger King have been able to trade more successfully throughout the pandemic through delivery, drive thru and takeaway. As a result, in comparison to Spring/Summer 2020, the average fast food restaurant menu has grown +7.8%.

Katherine Prowse, Insight Manager at Lumina Intelligence said, *“Streamlining menus has been a crucial tool for brands operating throughout the pandemic. Staff redundancies and uncertain trading conditions mean operators have made cuts to inventories to reflect leaner teams, manage costs and deliver consistent dishes whilst adhering to safety measures. Shorter menus have also reduced the risk of falling victim to supply shortages across the pandemic. With the plan to ease restrictions now outlined, we may see operators increase menu sizes in Spring/Summer 2021, particularly as pent up demand from consumers converts into busy restaurants.”*

Find out more about Lumina Intelligence’s Menu Tracker [here](https://www.lumina-intelligence.com/product/menu-tracker/).

**ENDS**

**Report methodology**

Data for this report has been collated using the Lumina Intelligence Menu Tracker, which is a database of over half a million menu items across over 150 different foodservice operators.

Within this piece of analysis:

* Spring/Summer & Autumn/Winter 2018 2020 data
* A sample of 91 operators from chain restaurants (56), managed pub/bar restaurants (23) and fast food (12)
* All data is taken from a site within the operators “brand standard region”, i.e. the region with the highest number of sites.

**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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