

2025

Lumina Intelligence UK Eating Out Market Report

Brochure



Report Introduction



The Lumina Intelligence UK Eating Out Market Report 2025 is the definitive source of insight for operators, suppliers and manufacturers seeking a complete view of the out-of-home food and drink sector.

This comprehensive report quantifies the market's size and value to 2028, examines what's fuelling its growth and explores the potential barriers that could shape its future trajectory. It draws on robust data from Lumina Intelligence's Eating and Drinking Out Panel, which surveys 1,500 consumers weekly, offering unparalleled visibility into evolving behaviours and habits.

Covering the total market landscape, this report explores performance across key channels and leading operators and delves into how consumer preferences are shifting. It also provides forward-looking forecasts, helping businesses understand where the greatest opportunities lie.

Whether you're monitoring competitive dynamics, planning strategic investments, or tracking consumer sentiment, this report offers the evidence and clarity needed to make informed decisions in a rapidly evolving market.



How to use this report



Report section:	Market Insight	Competitive Landscape	Consumer Insight	Future Outlook
Relevant teams	Commercial, finance, data and insight, holding company, board	Commercial, finance, data and insight, holding company, board	Brand, creative, data and insight and marketing	Commercial, finance, data and insight, holding company, board
Operator Questions answered	What does the market look like and how will changes impact my business case and forecast? What are possible gaps that can be capitalised on?	What can we learn from how brands and operators are innovating? How are our business efforts impacting our market share?	How are consumers interacting with the eating out market? What are their motivations? What are the opportunities to be exploited?	How will the market change across the next three years and what are the threats and opportunities?
Supplier/ Wholesale Questions answered	What does the market look like and how will changes impact my customers? What factors will need to be priorities for supporting customers?	Who are the winners and potential customers in the market?	How are operators having to adapt to deliver against changing consumer needs? What can we do to support our customers?	How will the market change across the next three years and what are the threats and opportunities?
Investor Questions answered	What is the landscape and the opportunity for growth in the market?	Who are the key players in the market and how are they performing?	What are key consumer behaviours and considerations that a prospect needs to be prioritising?	How will the market change across the next three years and what are the threats and opportunities?

Source: Lumina Intelligence, May 2025

Sample Slides



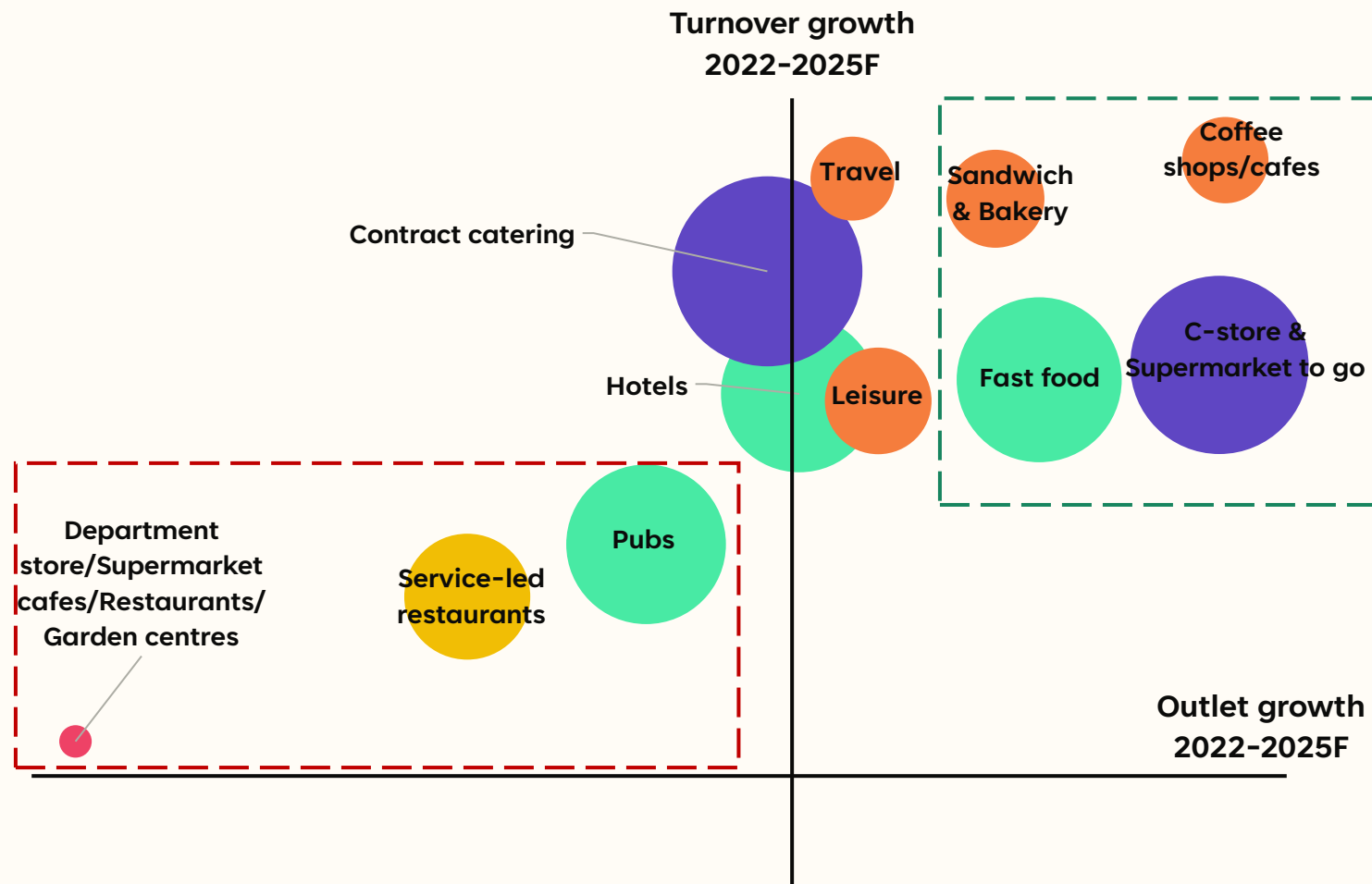


Food to go-led channels are driving growth in the market

Coffee shops/cafés, sandwich & bakery, convenience and supermarket to go and fast food are leading outlet and turnover growth in the eating out market. Physical expansion and investment in customer service technology and food and drink propositions are driving growth among these channels.

The department and supermarket café channel is suffering from closures of in-store cafés to maximise sales space for grocery.

Eating out market channel performance by turnover and outlet growth

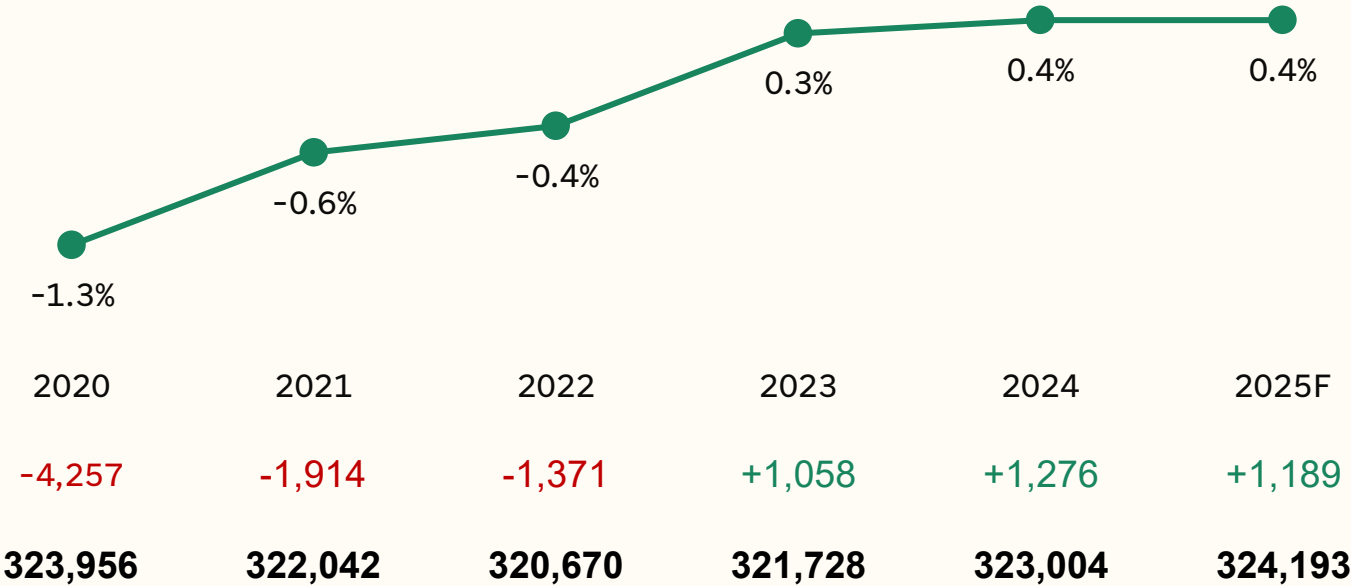


Source: Lumina Intelligence Market Sizing Insight & Analysis, May 2025,
Note: Bubble size and colour relates to size of channel from total outlets at 2025F

Franchise models are driving net space growth in the eating out market



Total eating out market outlet numbers,
net outlet growth and percentage growth, 2020-2025F



Notable channels for outlet changes, 2024-2025F	
Coffee shops & dessert parlours	+2.4%
Fast food	+1.4%
Department store/S-market/Garden centre cafés/restaurants	-6.4%

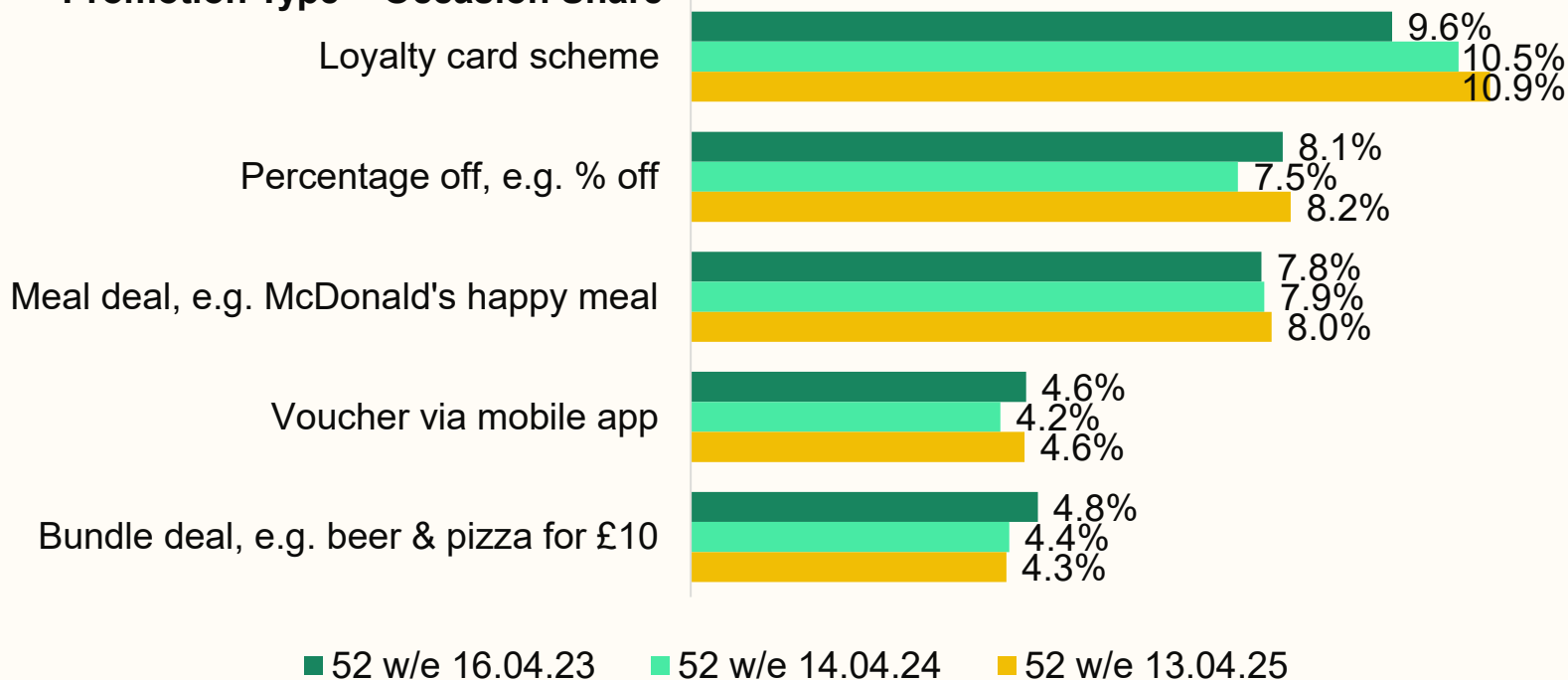
Expansion through franchise models has become a key strategy for brands across coffee shops and fast food amid mounting cost pressures.

Source: Lumina Intelligence Market Sizing Insight & Analysis, May 2025

Loyalty card usage grows through instant gratification

Consumers have increasingly turned towards promotions as a means of receiving value for money. Loyalty card schemes are the most popular promotion type and the shift towards 'instant gratification', where consumers receive immediate rewards, have led them to gain popularity.

Promotion Type – Occasion Share²³



Promotion used
35.3% occasions
+1.4ppts YoY

The wait is over. In fact, waiting is over full stop. Because with the new and improved PizzaExpress Club, you'll get to enjoy instant rewards every time you dine.

From achieving Bronze status the second you sign up, to moving through tiers effortlessly and splitting and paying the bill in the app with ease – the new Club gives you what you want, exactly when you want it.

Whatever the occasion – a midweek pick-me-up or a weekend feast – there's an incredible reward waiting for you. The best part? The more you dine, the more Pizza Stamps you earn. Level up to Silver and go large with a free Romana upgrade Monday – Thursday, or get up to 50% off a family meal* when you reach Gold.

Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 16.04.23, 52WE 14.04.24, 52 WE 13.04.25







23=Q49 n=41,542 / 43,849 / 45,341

Consumers move away from restrictive diets



There has been a slowdown in consumers adopting restrictive, meat free diets and a consequent growth of consumers with no dietary requirements. This reflects a shift away from ‘none’ and towards ‘some’, where consumers eat meat but in smaller quantities, driven by current trends around high protein diets. There is also growing expectation towards higher quality and locally sourced meat.

Dietary Requirements³²

							No dietary requirements
	Flexitarian	Non-drinker	Vegetarian	Non-gluten	Non-dairy	Vegan	
52 w/e 14.04.24	28.8%	14.9%	5.4%	4.6%	2.0%	0.7%	89.0%
52 w/e 13.04.25	26.4%	13.7%	5.0%	4.4%	1.8%	0.6%	89.8%

Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 14.05.2023 and 52WE 12.05.2024

32 = D8 n= 43,849 / 45,341

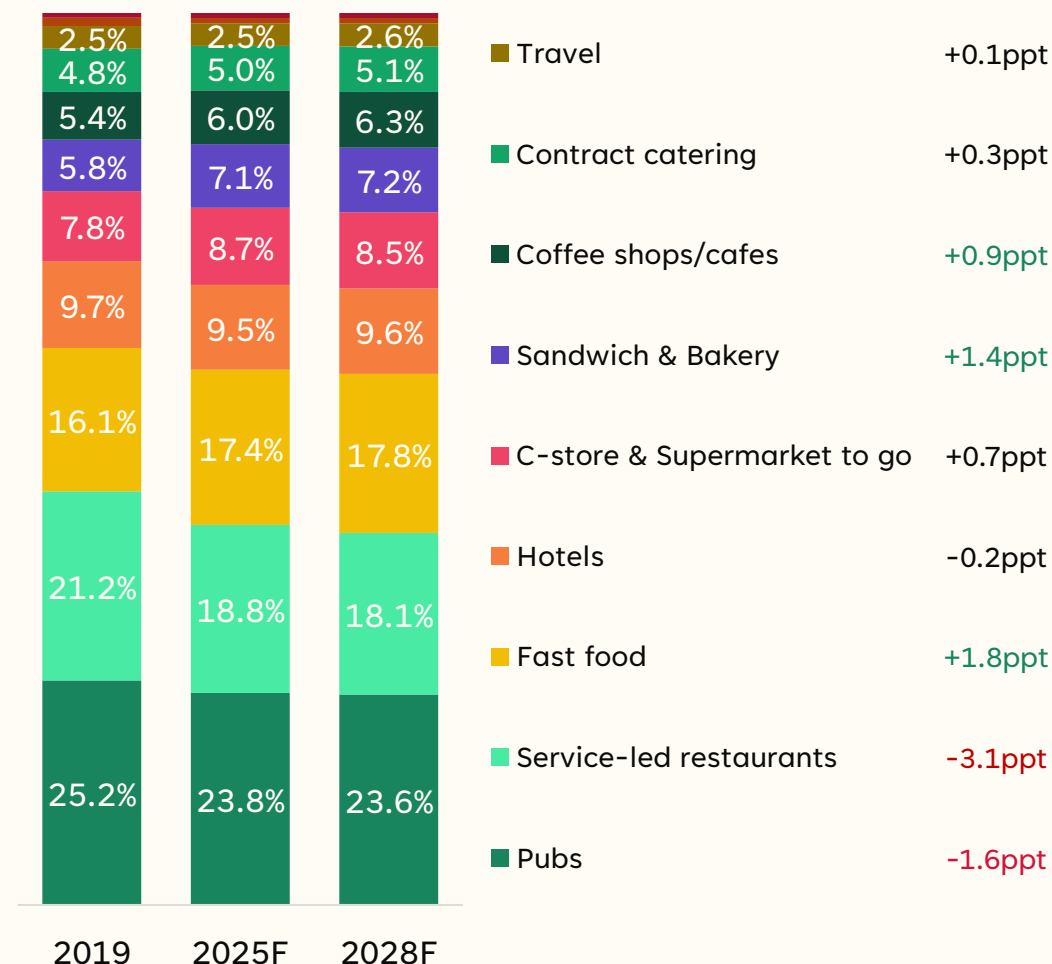


Quick service players have gained market share over time

Fast food, sandwich & bakery and coffee shops/cafés are set to achieve market share growth from 2019-2028F. Fast food has driven growth through investment and innovation in additional sites, formats and service types e.g. delivery. Range innovation in fast food has developed to align more closely with more contemporary consumer tastes.

Sandwich & bakery and coffee shop/cafés are continuing to expand into new locations and invest in products and a wider range of day-parts including breakfast and snack options.

Leading channel value share of eating out market, 2019-2028F

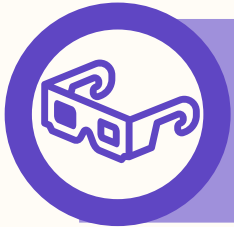


Source: Lumina Intelligence Market Sizing Insight & Analysis, May 2025

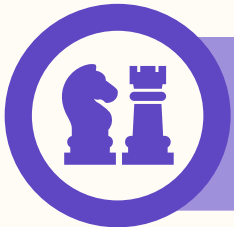
Service-led operators can prosper through additional reasons to visit, differentiation and excellence



Additional reason to visit opportunities



Seasonal, limited time offers and partnerships will foster a sense of urgency among consumers and tap into trends around more sustainable consumption, high quality and “eatertainment”.

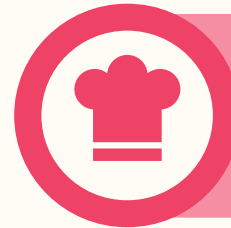


Broadening scope around competitive socialising, events including live music and leisure activities can attract a wider audience.

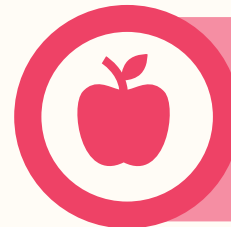


Establishing different areas or ‘zoning’ can broaden appeal and versatility including quieter, work-friendly spaces and social-focused areas.

Differentiation and excellence opportunities



Increased emphasis on professionalism and presentation in serving food and drinks will help to establish a point of differentiation to at-home consumption.



Expanding the usage of locally sourced and British produce, including on-site kitchen gardens can aid operators to mitigate cost fluctuations and tap into sustainability and local provenance trends.



Specialising in a particular food or beverage category will aid operators to establish a reputation and build a cult following that can translate into stronger footfall.

Source: Lumina Intelligence, May 2025

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Eating & Drinking Out Panel

Lumina Intelligence's UK Eating & Drinking Out Panel tracks the behaviour of 1,500 nationally-representative consumers each week, building up to a sample of 78,000 every year, across all eating out channels and day-parts (including snacking)

2020-2025

Market Sizing & Operator Data Index

Market sizing data tracking the performance of hospitality and grocery operators, based on turnover and outlet numbers

Extracts from Operator Data Index and wider synthesis with total Eating Out market sizing

Lumina Intelligence Operator Data Index tracks and forecasts outlet and turnover information for over 400 brands across the eating out market

2019-2028F

Secondary external sources

Lumina Intelligence also uses external sources including desk research, ONS, GFK Consumer Confidence Index and EY Item Club economic indicators

Source: Lumina Intelligence, May 2025

Report Details



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£3,250

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Access

Corporate Access

**To learn more about how Lumina Intelligence can support you,
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