

2025

Lumina Intelligence UK Restaurant Market Report

Brochure



Executive Summary

The **Lumina Intelligence UK Restaurant Market Report 2025** is a necessity for those looking to navigate the 2025 landscape.

It includes market sizing and forecasts up to 2028, latest consumer behaviour insight and analysis of the current restaurant competitive landscape providing a holistic source of intelligence on this channel for suppliers, operators, service providers and investors alike.

Our unique comprehensive report helps our clients understand the scope of the restaurant channel and how best to navigate the forth coming opportunities and challenges in the market. It is a must-have for any who invest, operate in or supply the restaurant channel.



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 forecasts? What are possible gaps that can be capitalised on?	What can we learn from how operators are innovating? How are our business efforts impacting our market share?	How are consumers interacting with the 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, November 2024



Sample Slides

The restaurant market is set to value £19.0bn in 2025F



Market performance is expected to be mixed in 2025F. Branded operators sustain nominal growth through estate optimisation, independents continue to feel the strain of rising costs, and fine dining leads the uplift with resilient demand for premium experiences. Overall, growth in 2025F remains nominal, driven more by pricing and estate mix than by meaningful volume recovery.

UK restaurant market 2025F (vs 2024): Turnover: £19.0bn (+0.8) Outlets: 26,130 (-1.1%)		
Branded restaurants	Independent restaurants	Fine dining
Turnover: £6.8bn Turnover growth/loss: +1.9%, Net turnover growth: +£128m Outlets: 3,764 Outlet growth: -2.6% Net outlet growth: -100 Implied like-for-likes: +3.5%	Turnover: £11.1bn Turnover growth: -0.3% Net turnover growth: -£33m Outlets: 21,805 Outlet growth: -0.9% Net outlet growth: -198 Implied like-for-likes: +1.1%	Turnover: £1.1bn Turnover growth: +4.8% Net turnover growth: +£50m Outlets: 561 Outlet growth: +3.0% Net outlet growth: +16 Implied like-for-likes: +1.5%
Branded restaurants see modest turnover growth despite outlet contraction. Revenue is driven by higher average spend and improved performance at core sites. Estate optimisation is a priority for operators.	Independent restaurants experience flat growth as cost pressures persist. Limited pricing power and ongoing viability challenges continue to weigh on operators, leading to subdued like-for-likes.	Fine dining delivers the strongest YoY turnover growth, supported by the rising number of sites obtaining Michelin and AA rosette accolades and consumer interest in the premium dining experiences.

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

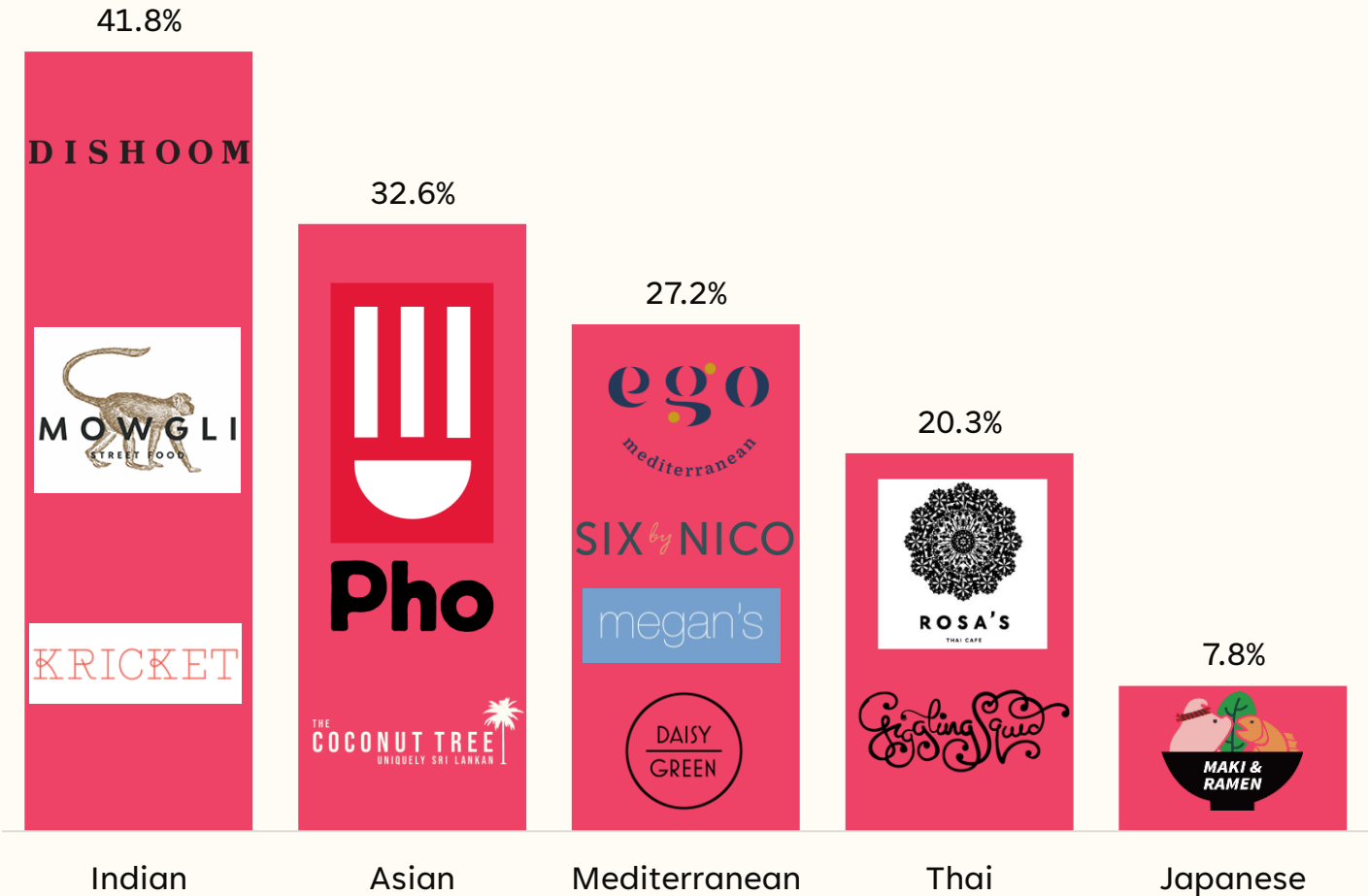


Asian cuisines have dominated outlet growth across the past 3 years

Asian inspired brands, particularly Indian, Thai and Vietnamese are growing in popularity fuelled by gastronomic tourism trends and growing interest in more authentic, regional dishes.

Growth in the diversity of cuisines reflects the evolving consumer appetite for authentic and global flavours.

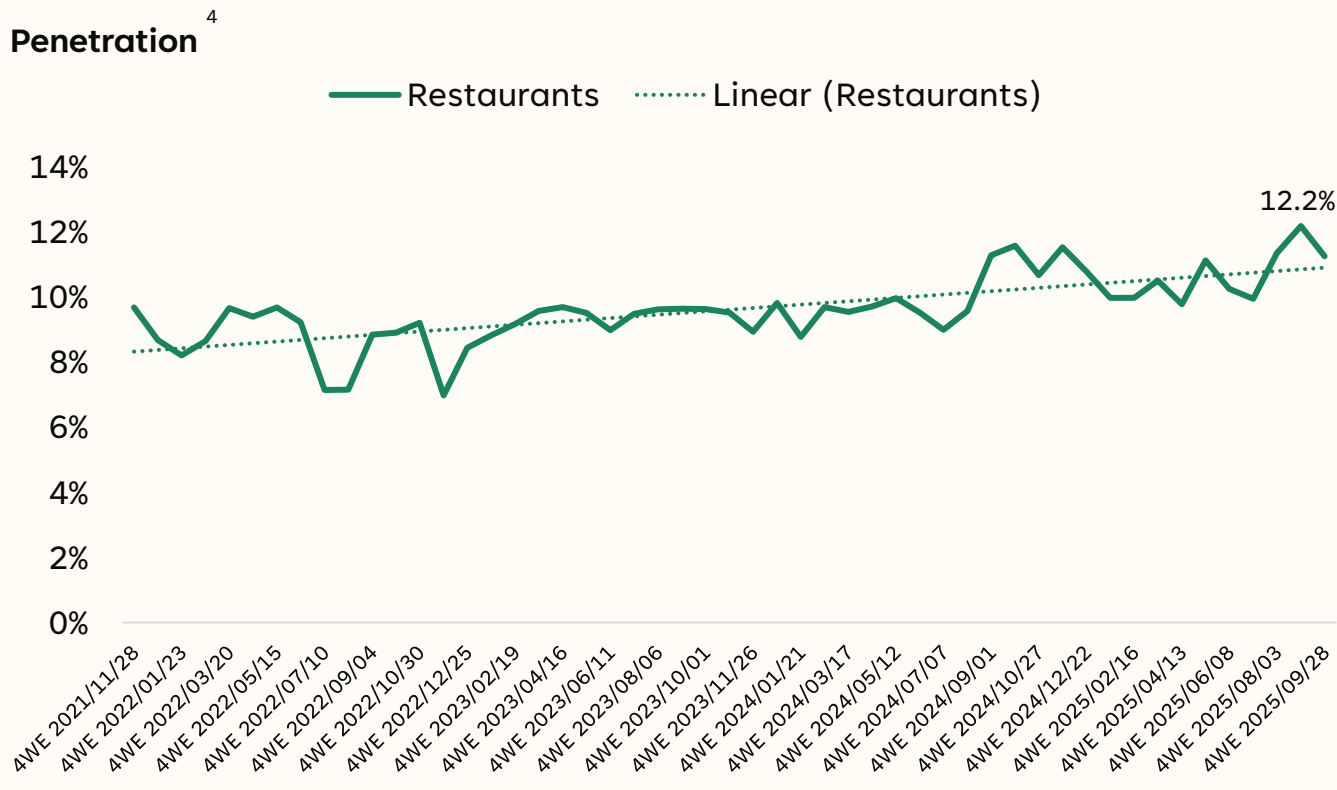
Top 5 cuisines by outlet growth, 2022-2025F



Source: Lumina Intelligence Operator Data Index, October 2025

Penetration highest since covid

Restaurant penetration reached 12.2% in August 2025, the highest level since the pandemic, indicating a recovery in dining-out occasions after a slower period. Consumers returning to restaurants is driven by seasonal factors, with a sunny spring and summer encouraging out of home occasions, alongside easing cost pressures for some and a revival in socialising habits. QSRs and Pubs saw the highest penetration growth as consumers prioritised casual occasions, creating heightened competition for restaurants.



Channel	Weekly Penetration (52 w/e Avg)	Change vs LY
Total Market	58.1%	+0.9ppts
Coffee & Sandwich	21.3%	+0.4ppts
QSR	20.3%	+1.4ppts
Pubs & bars	11.6%	+1.5ppts
Restaurants	10.7%	+0.9ppts
Retail	3.4%	+0.2ppts
Catering	3.4%	+0.2ppts

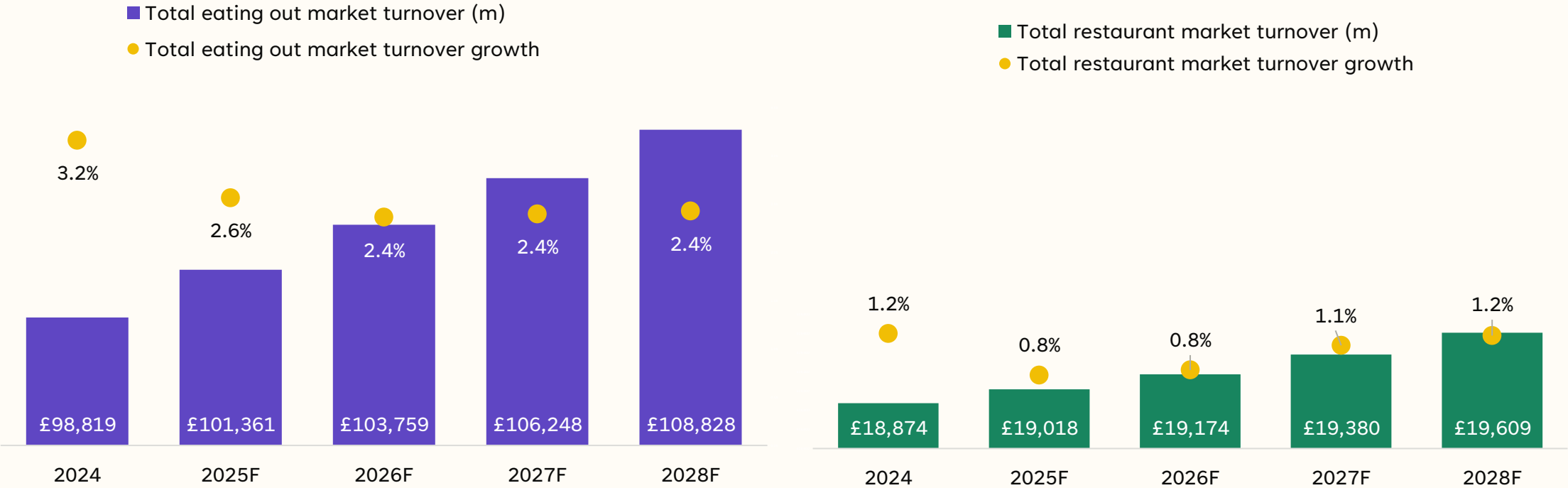
Source: Lumina Intelligence Eating and Drinking Out Panel, data collected November 2020–September 2025

4=Qn1, n=78,000

Restaurants lag behind wider eating-out market growth to 2028F



The wider eating-out market outperforms restaurants through to 2028F, supported by stronger growth across quick-service and value-led formats. Restaurants continue to grow at a more conservative pace, reflecting structural cost pressures and lower-frequency occasions that are limiting volume recovery.



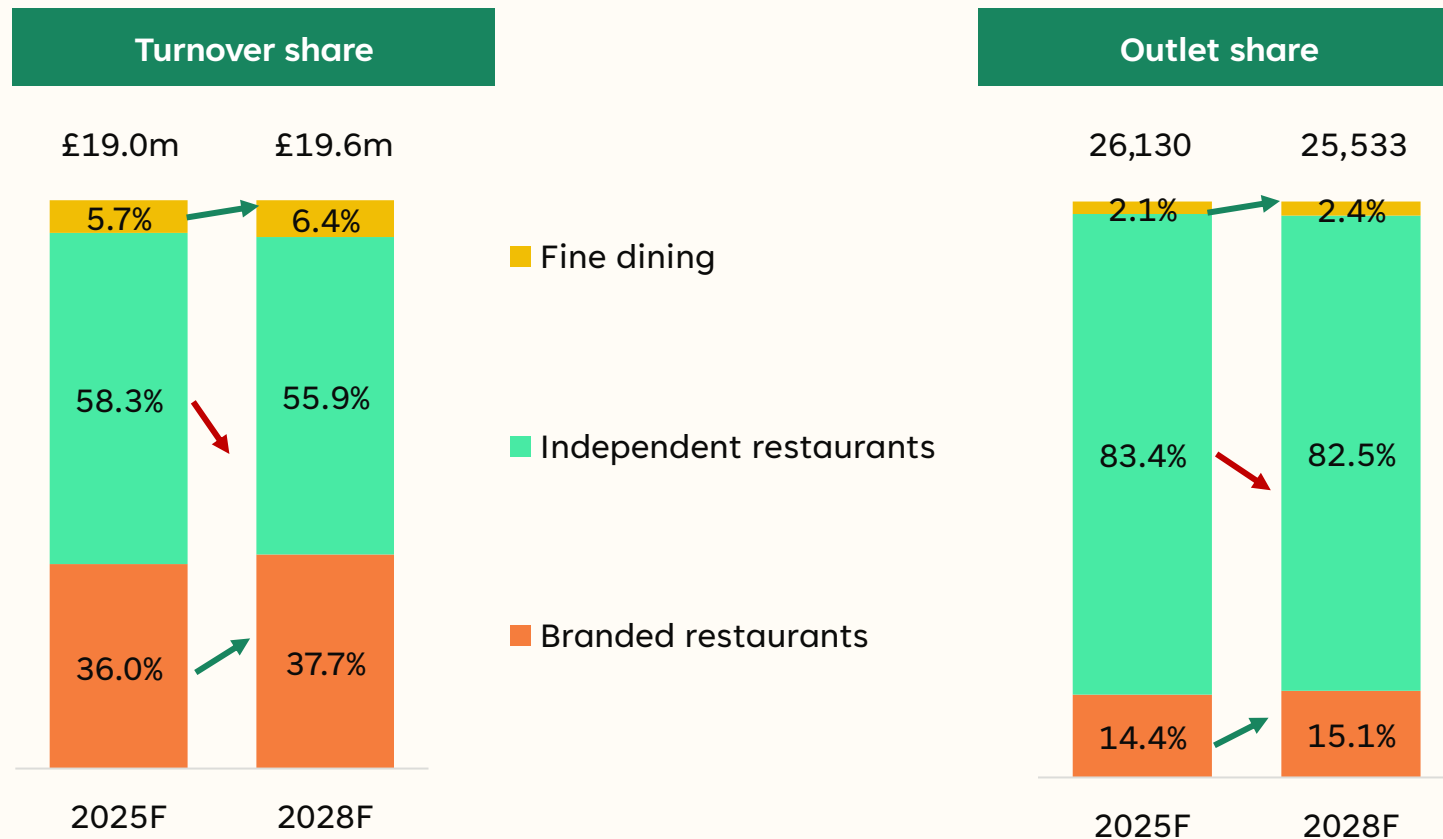
Source: Lumina Intelligence Market Sizing Insight & Analysis, November 2025



Branded restaurants are forecast to gain share of the market

The next three years see a subtle reshaping of the restaurant mix. Branded operators consolidate value share (+1.7ppts 25F-28F) as estate optimisation and stronger brand equity improve performance. Independents remain vulnerable amid persistent cost challenges. Fine dining grows modestly as the premium end of the market remains insulated from broader spending caution as higher income consumers see their spending power strengthen further.

UK restaurant market value and outlet share by segment, 2025F-2028F



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

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Market Insight

- Restaurant market growth forecast 2025F
- Restaurant market value in 2025F
- Independents a highly challenged but crucial segment of the market
- The branded restaurant segment
- Key economic indicators 2019-2025F
- Consumer confidence October 2019-2025

Market Insight

- Eating out market sentiment
- Total eating out market landscape 2025F
- Total UK restaurant and eating out market value and percentage growth, in millions, 2019-2025F
- UK restaurant market outlets and outlet decline 2019-2025F
- UK restaurant market value and outlet share by segment, 2018-2025F

Market Insight

- Restaurant, fast food and pub market comparisons
- Branded restaurants, fast food and managed, branded and franchised pub turnover and outlets, 2019-2025F
- Estimated branded and independent average weekly sales per store, 2018-2025F
- Service-led restaurant market growth drivers and inhibitors 2025F

Competitive Landscape

- Leading branded restaurants by total estimated annualised turnover and percentage growth, 2019-2025F
- Leading branded restaurants by outlets and percentage growth, with net outlet growth, 2019-2025F
- Productivity data – staff cost to sales ratio
- Growth Drivers

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Competitive Landscape

- Top 10 branded restaurants by outlet growth
- Top 10 branded restaurants by turnover growth
- Top 5 cuisines by share growth, 2022-2025F
- Top 5 cuisines by outlet growth, 2022-2025F
- Concepts to watch

Consumer Insight

- Key performance indicators
- Weekly Restaurant Visits and Market Penetration
- Growth in Restaurant Channel Share
- Demographic Insights: Age and Affluence of Diners
- Quality and Health as Key Consumer Priorities

Consumer Insight

- Top Motivators for Restaurant Choice
- Menu Development and Ingredient Trends
- Lunch as a Key Growth Segment for Restaurants
- Expanding Daypart Opportunities: Brunch and Breakfast
- Restaurant Market Share and Performance by Meal Type

Consumer Insight

- Dining Patterns by Day of the Week
- Alcohol and Low2No Trends

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Future Outlook

- Impact of Autumn Budget Announcements on the Industry
- Economic Outlook for the UK: Growth Forecast Through 2028
- Key economic indicators, EY Item Club, 2022-2028F
- Forecasted Growth for the Restaurant Market (2025-2028)

Future Outlook

- UK Restaurant Market Value and Growth Projections
- UK restaurant market outlets and outlet decline 2022-2028F
- Stabilisation and Growth Outlook for the Restaurant Sector
- UK restaurant market value and outlet share by segment, 2024F-2028F

Future Outlook

- Restaurant, fast food, and pub comparisons
- Restaurant market growth drivers, 2025F-2028F
- Restaurant market growth inhibitors, 2025F-2028F
- Macro and restaurant market: 2025F-2028F trends

Future Outlook

- Restaurant market levers of volume growth – future expectations
- Restaurant market levers of sales growth

Methodology



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

2018-2028F

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, November 2024

Report Details



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£3,250

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Corporate Access

**To learn more about how Lumina Intelligence can support you,
please get in touch using the contact details provided below.**

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