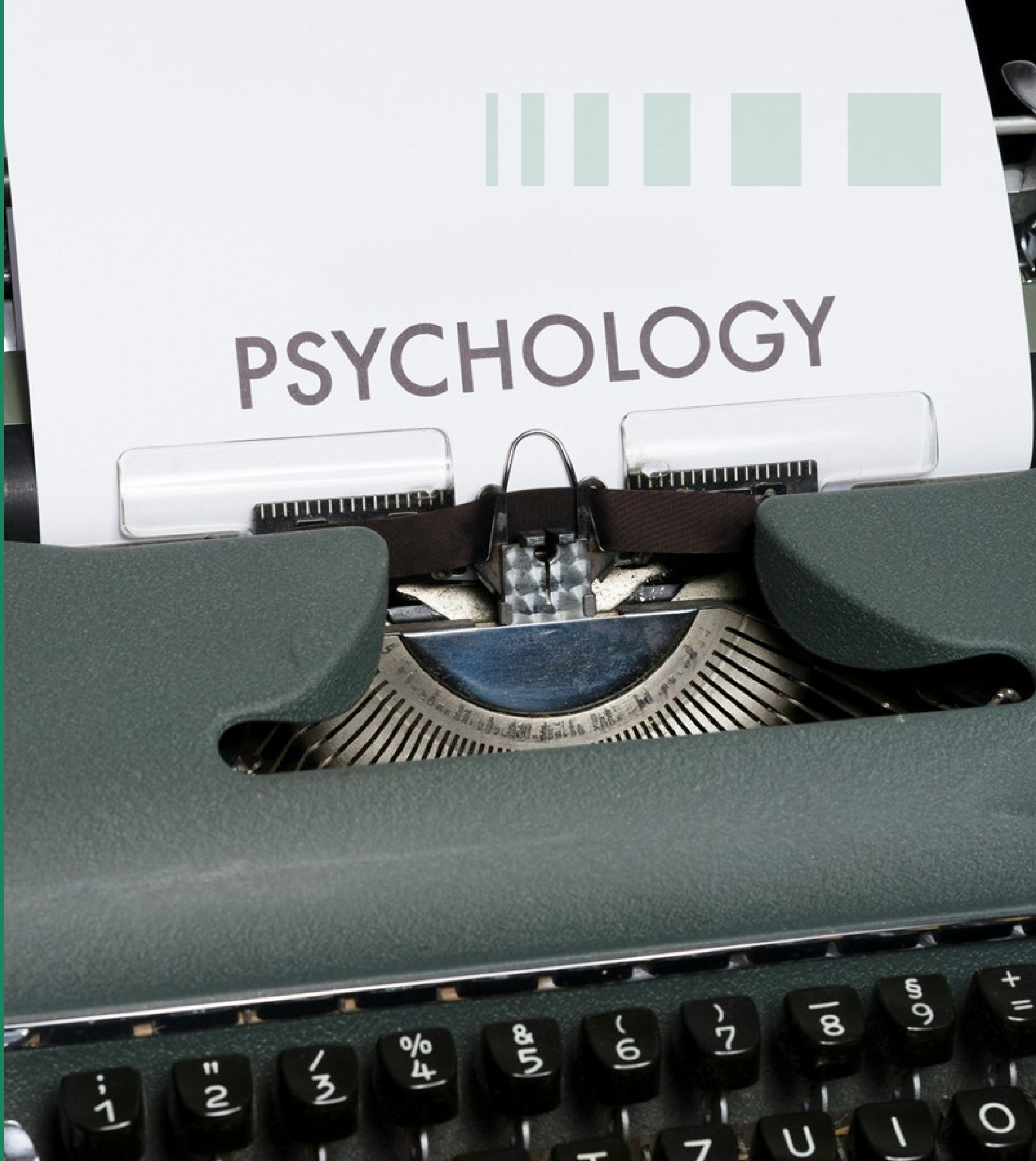
Lumina Intelligence

2026

The Modern UK Consumer

Brochure



About the Report

The Modern UK Consumer 2026 is Lumina Intelligence's definitive guide to how UK consumer values, priorities and behaviours are evolving across food, drink, retail and eating out.

Built on an in-depth annual survey of 3,000 UK adults, the report moves beyond age, income and demographics to uncover the psychological drivers of choice. It reveals how today's consumers navigate value, quality, health, trust, experience and convenience in an increasingly polarised economic and cultural environment and what this means for future demand.

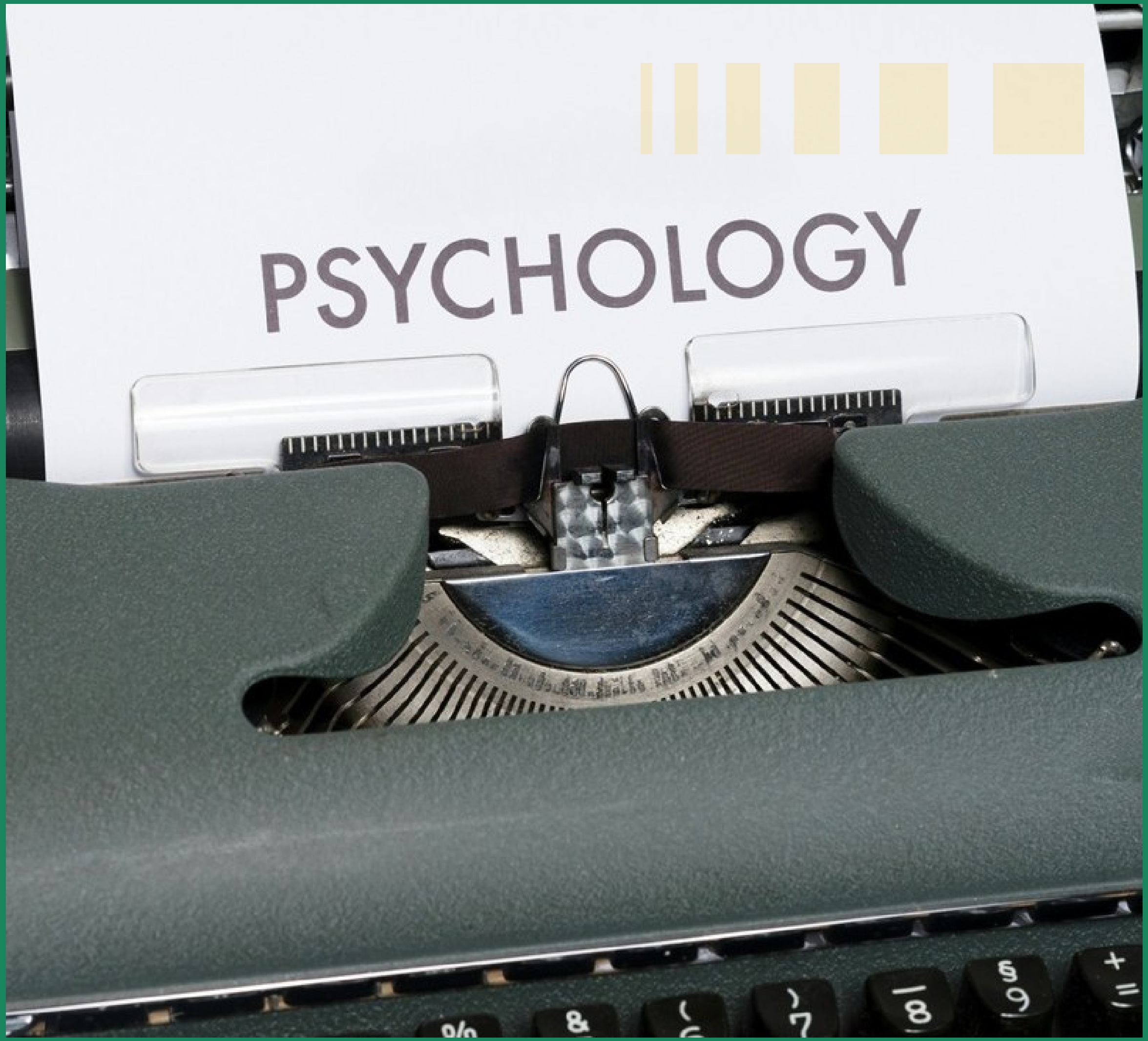
Designed for decision-makers across foodservice and manufacturing, the report equips businesses with the insight required to future-proof strategies, sharpen propositions and align with modern consumer expectations as we move through 2026 and beyond.

How to use this report

Report section:	Market Insight	Competitive Landscape	Consumer Insight/Growth Opportunities	Future Outlook
Relevant teams	Commercial, finance, strategy, insight, leadership	Commercial, strategy, insight, leadership	Brand, marketing, insight, innovation, experience teams	Commercial, finance, strategy, leadership
Operator Questions answered	How are value, quality and health being redefined by UK consumers? Where are spending priorities shifting between necessity, treat and luxury?	Which formats, concepts and models are winning across foodservice and convenience? How are operators differentiating via experience, quality and value?	How do consumers actually behave versus what they say about health, value and quality? Where are the biggest growth opportunities?	How will consumer expectations, formats and spend evolve over the next 3–5 years?
Supplier/ Wholesale Questions answered	Which product attributes are genuinely prioritised by customers today? How do health, quality and value trade-offs shape ranging decisions?	Who are the winners and challengers across retail and food-to-go?	How should product, pack and format innovation simplify health and quality cues? How can suppliers better support operator missions?	How should pipelines, pricing architecture and portfolios evolve to stay relevant as consumer needs shift?
Investor Questions answered	What is the size, shape and resilience of consumer attitudes and beliefs across foodservice and retail?	Who are the best-in-class operators meeting consumer needs and wants as well as differentiation through experience, quality and value?	Which consumer behaviours, needs and missions are most likely to unlock sustainable growth?	What are the biggest risks and opportunities shaping long-term growth, returns and scalability?

Source: Lumina Intelligence, April 2026

Sample Slides



Health products viewed as necessities

Health is no longer a trend. It's a mindset. Multivitamins, organic food, and healthy snacks have shifted from 'nice-to-have' to necessities, reflecting a holistic approach to wellbeing in fast-paced lives. However, consumers still crave treats. Indulgence meets wellness through sweets, drinks, and healthier snacks that offer comfort with minimal guilt. At the luxury end, spa and wellness treatments dominate, while eating out ranks fifth, an occasional splurge for those with tighter budgets.

Q. Top five necessity, everyday treat and luxury/indulgences

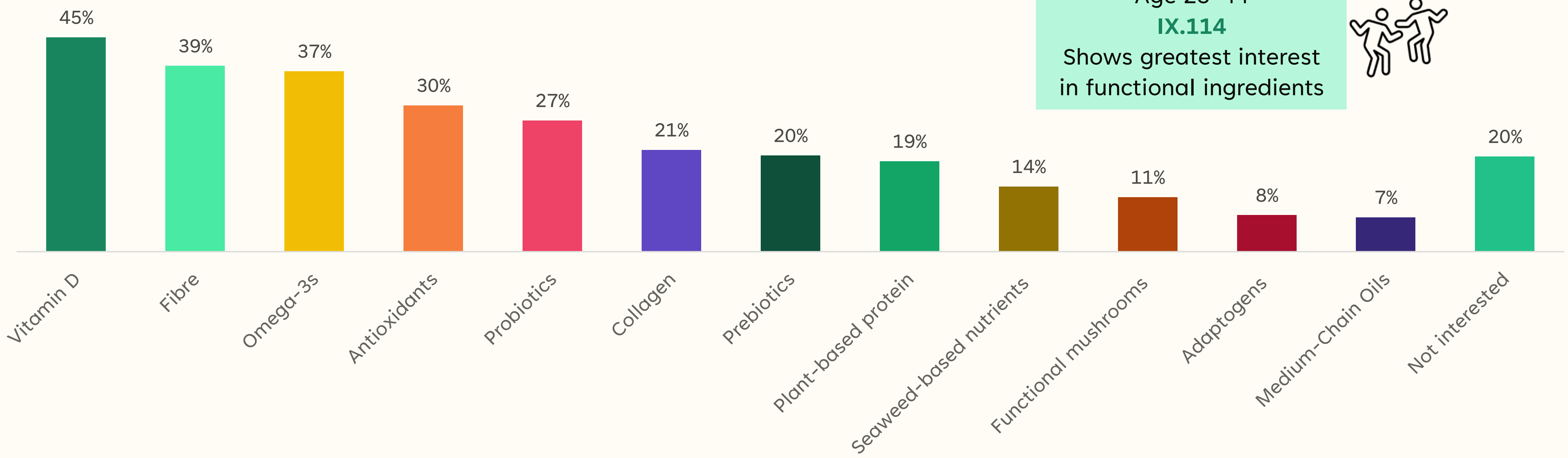
Rank	Necessity	Everyday treat	Luxury/ indulgences
1st	High speed Broadband	Desserts after dinner at home	Wellness/Spa/Beauty treatments
2nd	Multi-vitamins supplements, sport supplements	Healthy snacks	Premium chocolates
3rd	Healthy snacks	Lattes, Milkshakes, Smoothies, cold-pressed juices	Meal-kit subscriptions
4th	Online entertaining platforms (Netflix, Apple TV, Hulu)	Take-away coffee	Gym membership
5th	Organic food	Online entertaining platforms (Netflix, Apple TV, Hulu)	Eating out

Source: Lumina Intelligence, Psychographics Survey, June 2025, Q11. Group each of these options into these three groups: "Necessity", "Everyday treat" and "Indulgence/Luxury, N=3,000

Vitamin D, fibre and omega-3s top the list of functional ingredients

Vitamin D, fibre, and Omega-3s, elements backed by extensive research and strong scientific evidence, rank as the top three functional ingredients consumers want in food and drink. Antioxidants and probiotics follow closely, gaining momentum as scientific validation grows.

Q. Which of the following functional ingredients would you like to see more often in food or drink products?



Age 25-44
IX.114
Shows greatest interest in functional ingredients

Source: Lumina Intelligence, Psychographics Survey, June 2025, Q20, N=3,000

Storrd: A new design-led, premium convenience store

Storrd exemplifies a new wave of quality-led convenience retail designed to upgrade everyday top-up missions. Launched in Camden Town in December 2025, the shop is positioned as a boutique alternative to traditional corner shops, blending essential grocery items with premium, chef-led food-to-go. Quality is communicated through multiple cues: functional, low-UPF food developed with nutrition expert; artisanal groceries; a New York hot deli and a clean, design-forward environment that reframes convenience as pleasurable rather than purely functional. The current pipeline is eight to 10 stores in London by end-2026.

Source: Better Retailing, Creative Review, Lumina Intelligence, April 2026

Quality needs to be felt, not just seen

Quality is something customers sense, not something they read. People judge it instantly through freshness, temperature, aroma, and presentation. The quicker you make quality visible and tangible, the less you need to explain especially when prices are under scrutiny.

What brands can do:

1. Be sensory-first

Engineer audible/visible moments that signal freshness such as bakery displays, hot counters or open kitchens.

2. Make craft and freshness visible

Highlight craft through real-life demonstrations or strategically-placed screens.

3. Have human validators

Train staff to use short, sensory scripts. Recommendations and social proof/validation beat labels and claims for Gen Z/young millennials.

4. De-gloss language

Replace premium adjectives with one concrete cue that highlights provenance or craft. Over-styled products and menus trigger scepticism in older cohorts.

Source: Lumina Intelligence, April 2026

Taste and freshness signal ‘fair pricing’ for eating out

For most consumers, fair pricing is inseparable from taste. Nine in ten who rate fair pricing highly link flavour as the ultimate quality signal. While price and presentation still matter (77% and 70%), perceptions of fairness hinge significantly on sensory satisfaction.

Among consumers who highly value fair pricing, 56% cite freshness as the leading indicator when assessing premium quality in food and drink. This reinforces that value is rooted in subjective sensory cues rather than purely rational judgment.

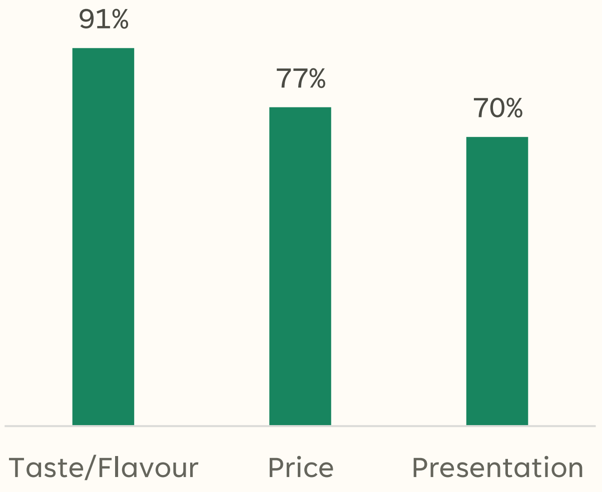
Top 3 quality evaluation criteria and the meaning of ‘good value’ out of home

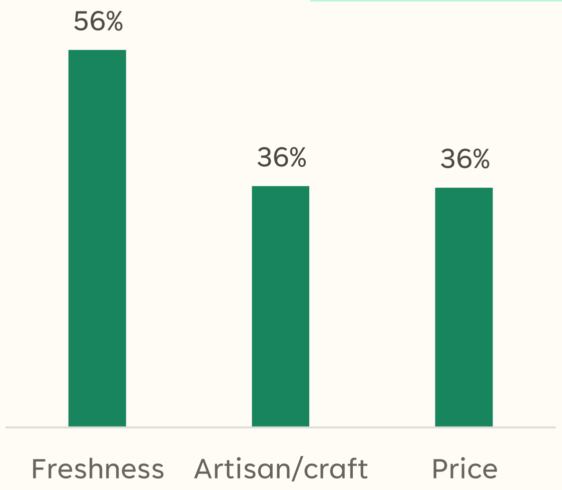
Top 3 perceived *premium* quality cues and the meaning of ‘good value’ out of home

Fair pricing for what is included (Rank 1-3)

Lumina Comment:

Value isn’t an independent variable. It’s the successful outcome of *delivering tangible and intangible quality promises.*





4.2/5
Those who desire ‘fair pricing’ agree with ‘High quality ingredients used in a dish increase its value’ most

Source: Lumina Intelligence, Psychographics Survey, June 2025, Q7. When it comes to eating/drinking out, what does “good value for money” mean to you?; Q15.1What are the 5 most important factors you check to evaluate the quality of food or drinks you buy at a restaurant/coffee shop/bar? And Q12. Which of the following make food or drink feel "Premium Quality" to you? N=1,837

Extended Table of Contents

Report Details

Format

Electronic PDF

Pricing

£3,450

Publication

April 2026

Access

Corporate Access

Methodology

Psychographics Survey

An in-depth survey was carried out in June 2025 delving into the preferences, attitudes and behaviours of 3,000 UK adults aged 18+ across multiple themes, including quality, value, health, in regards to food and drink as well as dining out.

June 2026

Bespoke Product Data Collection

Brands within the retail and foodservice sectors were scanned to develop case studies and examples.

Source: Lumina Intelligence, March 2026

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

Get in touch

Stefan Sankar
Senior Business Development Manager
Stefan.Sankar@wrbm.com

www.lumina-intelligence.com