Lumina Intelligence

2026

# Lumina Intelligence UK Eating Out Market Report

Brochure

# Report Introduction

The Lumina Intelligence UK Eating Out Market Report 2026 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 2029, examining what is fuelling performance and exploring the structural factors shaping its future trajectory. It highlights a market increasingly defined by cost pressures, shifting consumer participation and widening channel divergence.

Drawing on robust data from Lumina Intelligence's Eating and Drinking Out Panel, which surveys 1,500 consumers weekly, the report offers clear visibility into evolving behaviours, from more value-led decision making to growing demand for quality, health and purposeful occasions.

Covering the total market landscape, the report explores performance across key channels and leading operators, while assessing how growth is concentrating within scaled brands, quick service formats and food-to-go missions. It also provides forward-looking forecasts to support decision-making 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? |

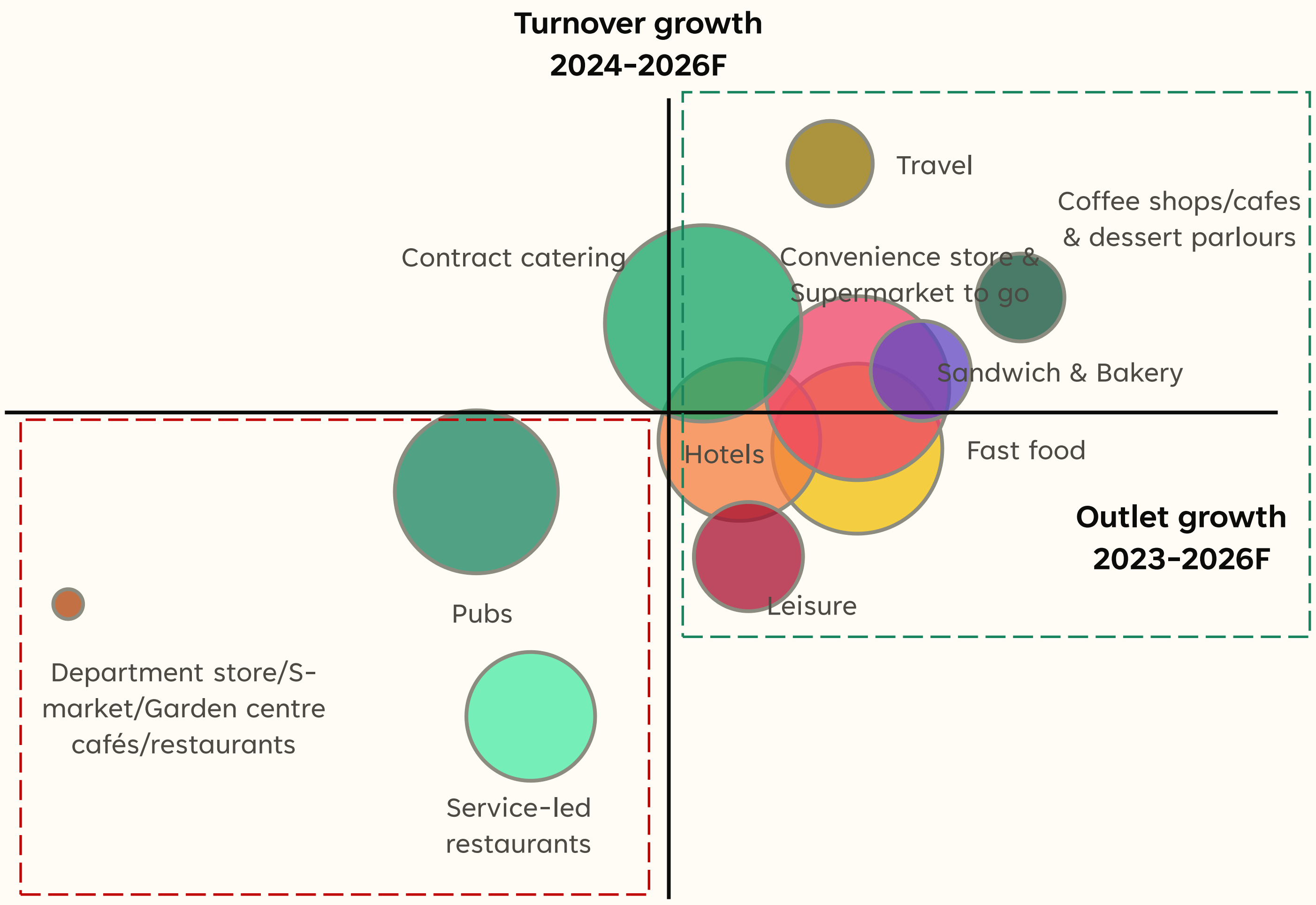
Source: Lumina Intelligence, May 2026

# Sample Slides

# Food to go-led channels drive eating out growth

Coffee shops/cafés, sandwich & bakery, fast food and travel continue to drive outlet and value growth, supported by unit expansion and investment in service-led technology and food and drink propositions. In contrast, department store and supermarket cafés will decline as operators repurpose space for grocery. Restaurants, most exposed to cost inflation, are set for to see the number of outlets decline, as turnover grows negligibly.

## Eating out market channel performance by turnover and outlet growth




Source: Lumina Intelligence Market Sizing Insight & Analysis, May 2026,
Note: Bubble size relates to size of channel from total outlets at 2026F

# Disciplined growth and occasion capture define branded restaurant strategy in 2026

### Portfolio discipline and selective consolidation

Branded restaurant operators are prioritising disciplined growth, strategic acquisitions and estate optimisation to protect margins, build scale and concentrate investment behind proven, differentiated formats.

### Legacy casual dining fights for relevance

Legacy casual dining brands are refreshing menus, formats and customer propositions to defend relevance, as consumers become more selective and growth concentrates around experience-led and concepts with a clear quality and experience proposition.

### Loyalty becomes ecosystem-led and occasion-led

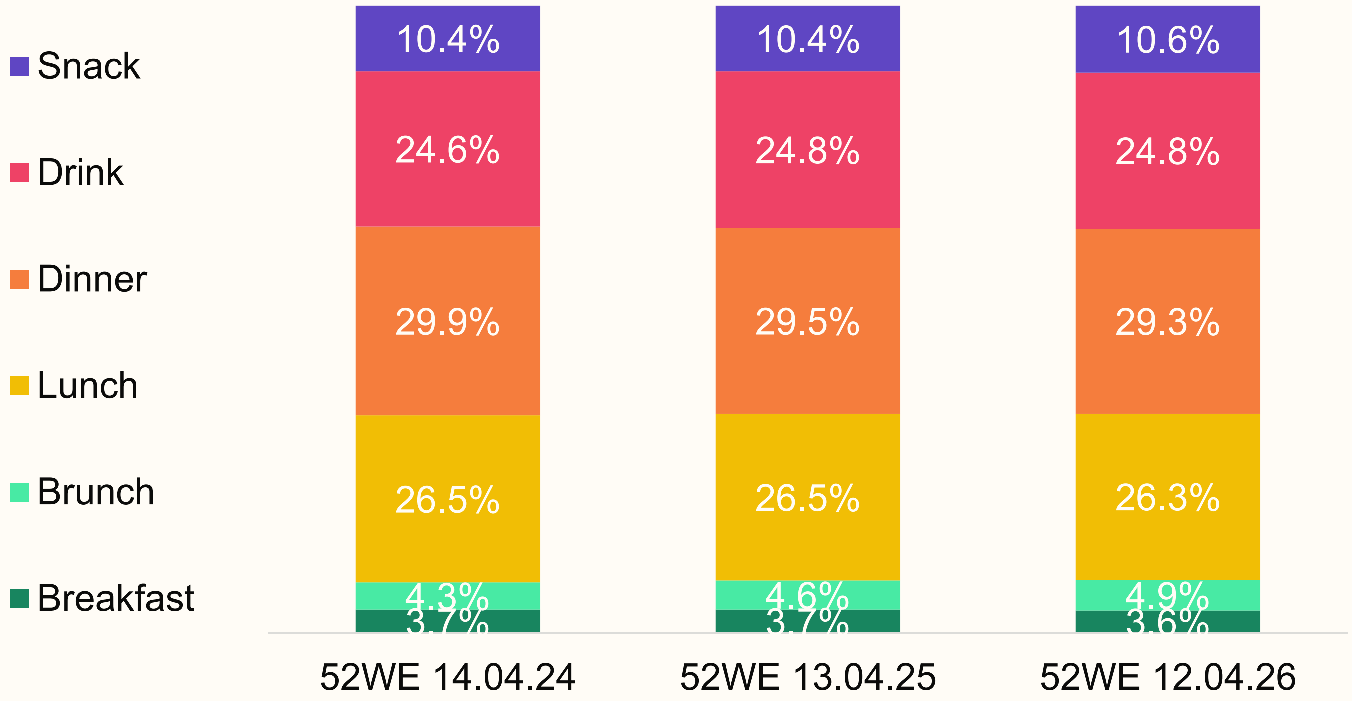
Loyalty is evolving beyond standalone reward schemes, with operators using partnerships, delivery integrations and family-value mechanics to drive repeat visits, extend engagement across channels and to capture specific occasions.

Source: Lumina Intelligence, May 2026

# Lunch continues to be the core mealtime, with brunch outpacing dinner

Movement within share of occasions by day part have been minimal year-on-year but penetration tells a different story. Year-on-year, participation has not changed drastically, but from a two-year standpoint, there has been a sizeable uplift for lunch, dinner and drink. Demand for drink-only and dinner occasions is slowing, with growth shifting to brunch and lunch as offers within these day parts expands.

**Day-part split of total market occasions** [14]




| Penetration | Change vs LY | Change vs 2YA |
|---|---|---|
| Breakfast | **-0.1ppts** | +0.1ppts |
| Brunch | **+0.2ppts** | +0.7ppts |
| Lunch | **+0.1ppt** | **+1.4ppts** |
| Dinner | -0.1ppts | **+1.1ppts** |
| Drink | +0.1ppt | **+1.2ppts** |
| Snack | +0.2ppts | +0.8ppts |

Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 14.04.24, 52WE 13.04.25, 52 WE 12.04.26

14=Qn3, n= 43,526 / 45,077 / 44,043

# Family diners still want to eat out, but are cautious

Occasions shared with family dipped marginally year-on-year, alongside participation, affirming that dining out with non-family groups is increasing in frequency at a faster rate. Spending time with family remains both the leading and fastest-growing reason for family dining occasions. Sundays and Mondays are prime days for families. Sundays are reserved for a traditional family lunch, while Monday is likely linked to convenient, delivery-led meals at home. At the same time, rising cost pressures are driving more families to eat in as a money-saving measure. Overall, families are not eliminating eating out entirely, but they are planning carefully and are more apt to select sites with offers.

**Key performance indictors – by group composition** [20]

| Companions | With family | Not with family |
|---|---|---|
| Penetration | 17.6% | 48.4% |
| Penetration change YoY | -0.2ppts | **-0.4ppts** |
| Occasions share | 24.9% | 82.1% |
| Share change YoY | **-0.3ppts** | **+0.3ppts** |
| Frequency | 1.26 | 1.52 |
| Frequency change YoY | +0.8% | +3.4%% |
| Total spend | £24.03 | £17.31 |
| Spend change YoY | +3.7% | +4.9% |

**Top growing reason for families** [16]

Spend time with family

**26.2%**

**+1.1ppts**

**Top growing days for families** [15]

Sun & Mon

**11.7%**

**+0.4ppts**

**Top growing location of consumption** [9]

Home

**39.7%**

**+2.2ppts**

**Promotions/offers used** [23]

Home

**43.9%**

**IX.107**

**+0.8ppts**



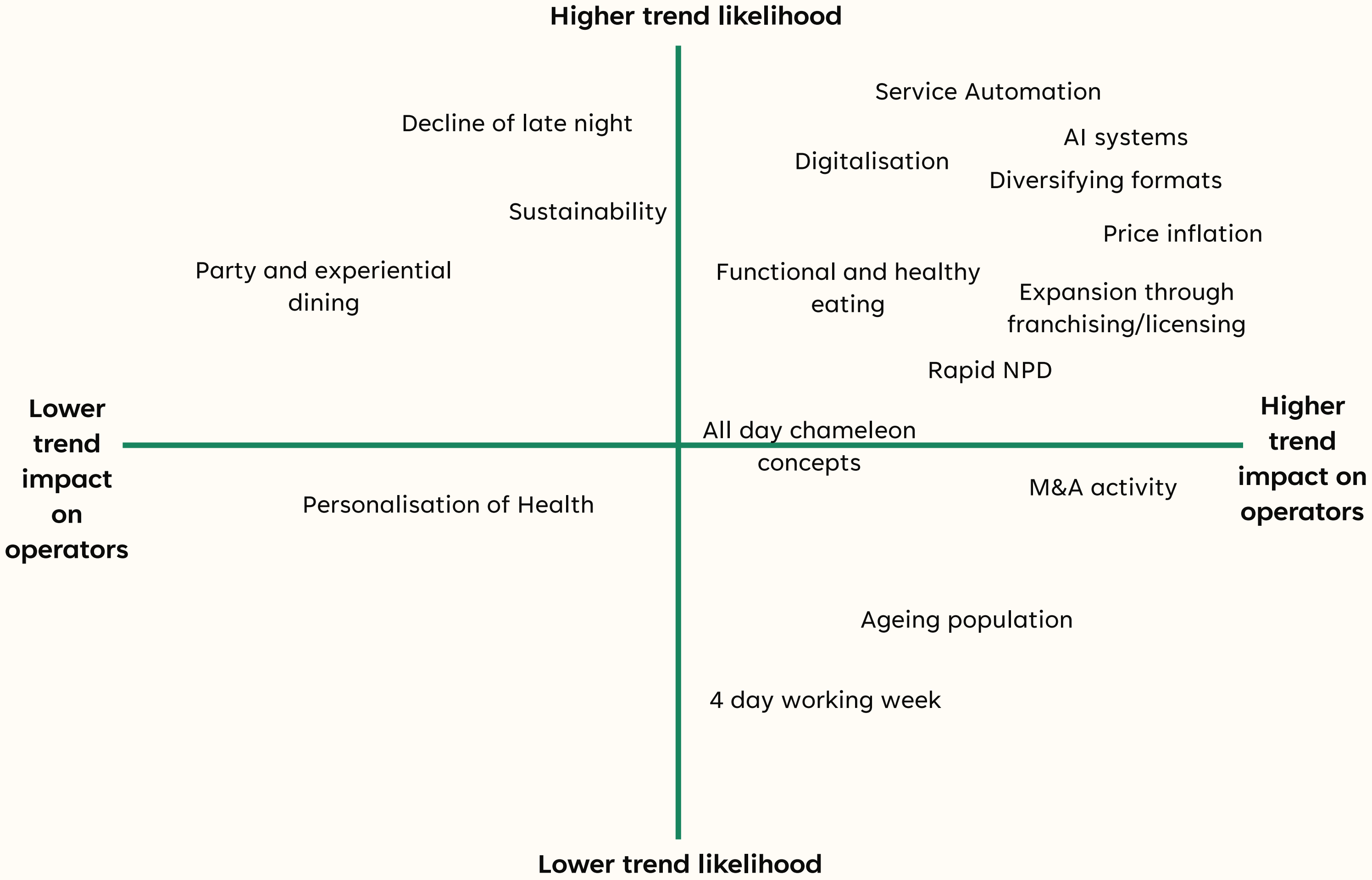
Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 13.04.25 and 52 WE 12.04.26

20=qn15, 33=QnD5, 15=Qn3, 16=Qn14, 9=Qn33, 23=Q49, n= 45,341 / 44,289

# Macro and market: 2026F-2029F trends

AI, automation, digitalisation, price inflation and format diversification are expected to have both high likelihood and high impact over the next three years, reshaping cost structures and constraining operators' ability to grow consumer spend. Conversely, trends such as M&A, all-day chameleon concepts, an ageing population and a four-day working week are less imminent but would carry significant impact if they materialise.

**Trends, 2026F-2029F**




Source: Lumina Intelligence, May 2026

# Service-led operators should focus on differentiation to crate compelling reasons to visit

## Compelling reasons to visit

**Seasonal menus, LTOs & brand partnerships:** These create sense of urgency, drives trial among new audiences, rewards regulars, and generates organic social content. In the current environment, where consumers are making fewer but more considered visits, a compelling LTO gives them a reason to act now.

**Experiential elements:** Broadening a venue's activity offer through live events or competitive socialising shifts the value equation for the consumer from "a meal out" to "an evening out." This extends dwell time, boosts spend and creates a social context that home dining cannot replicate.

**Zoning:** Multi-functional venues that offer varied environments within the same footprint broadens appeal across different occasions and day-parts. As hybrid working reshapes consumer routines, venues that work as a productive daytime space as well as an evening social venue captures visits that would otherwise be lost.

## Differentiation and service excellence

**Professionalism & presentation to differentiate from home:** As consumers become more selective about which out-of-home visits they prioritise, quality of service becomes a more powerful differentiator, given it is the one dimension that home cooking and delivery cannot replicate.

**British provenance & locally sourced ingredients:** As import costs rise sharply in response to the US-Iran conflict and global supply chain disruption, pivoting toward British-sourced ingredients is simultaneously a cost management strategy and a consumer-facing differentiator.

**Own a food or drink niche:** Operators who commit fully to a single category build a clearer reputation, simplify procurement and kitchen operations, and create a cult following that drives both frequency and word-of-mouth recommendation. In a market where consumers are making fewer visits and need a clear reason to choose a specific destination, this is a sound strategy.

Source: Lumina Intelligence, May 2026

# Extended Table of Contents

# 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)

2020-2026

## 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

2019-2029F

## 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 2026

# Report Details


## Format

Electronic PDF

## Pricing

£3,450

## Publication

May 2026

## Access

Corporate Access

Lumina Intelligence

## 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