

# Channel Spotlight: UK Eating Out Market – Q1 2025



# Social revival, deals and sunshine fuels eating out despite consumer caution

The eating out sector remained resilient despite debilitating external factors, such as weak consumer sentiment and economic upheaval. All key performance indicators grew vs. the previous year.

Pubs and bars posted the highest growth this quarter (+2.4ppts) vs. the biggest decline last year. The Six Nations Rugby championships was one of the prime drivers of visits to pubs and bars in Q1 2025, alongside offers from major pub chains as well as sunnier weather in March.

The very quality-led psychographic tops attitudes among consumers (77% up +2ppts year-on-year). Value for money continues to drive venue choice as consumers opt for out of home experiences that justify the spend.



Source: Lumina Intelligence, May 2025

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# Eating out market grew despite challenging environment

2025 began on a positive note, despite an underlying nervousness about the economy, with all key metrics rising year-on-year. Penetration and frequency were boosted primarily by pub and bars visits. Inflation drove the rise in average spend.

55-64s saw the most notable growth of any age bracket, driven by socialising out of home. The youngest age bracket (18-24s) declined, impeded by tougher financial pressures including increasing rents and comparatively lower wages.

## UK eating out market: KPIs in Q1 2025, with change compared to Q1 2024

Eating out participation	Average spend (per visit)
	
56.4%	£17.40
+0.6ppts	+9.3%

Source: Lumina Intelligence Eating and Drinking Out Panel,  
13WE 31.03.2024 and 13WE 30.03.2025

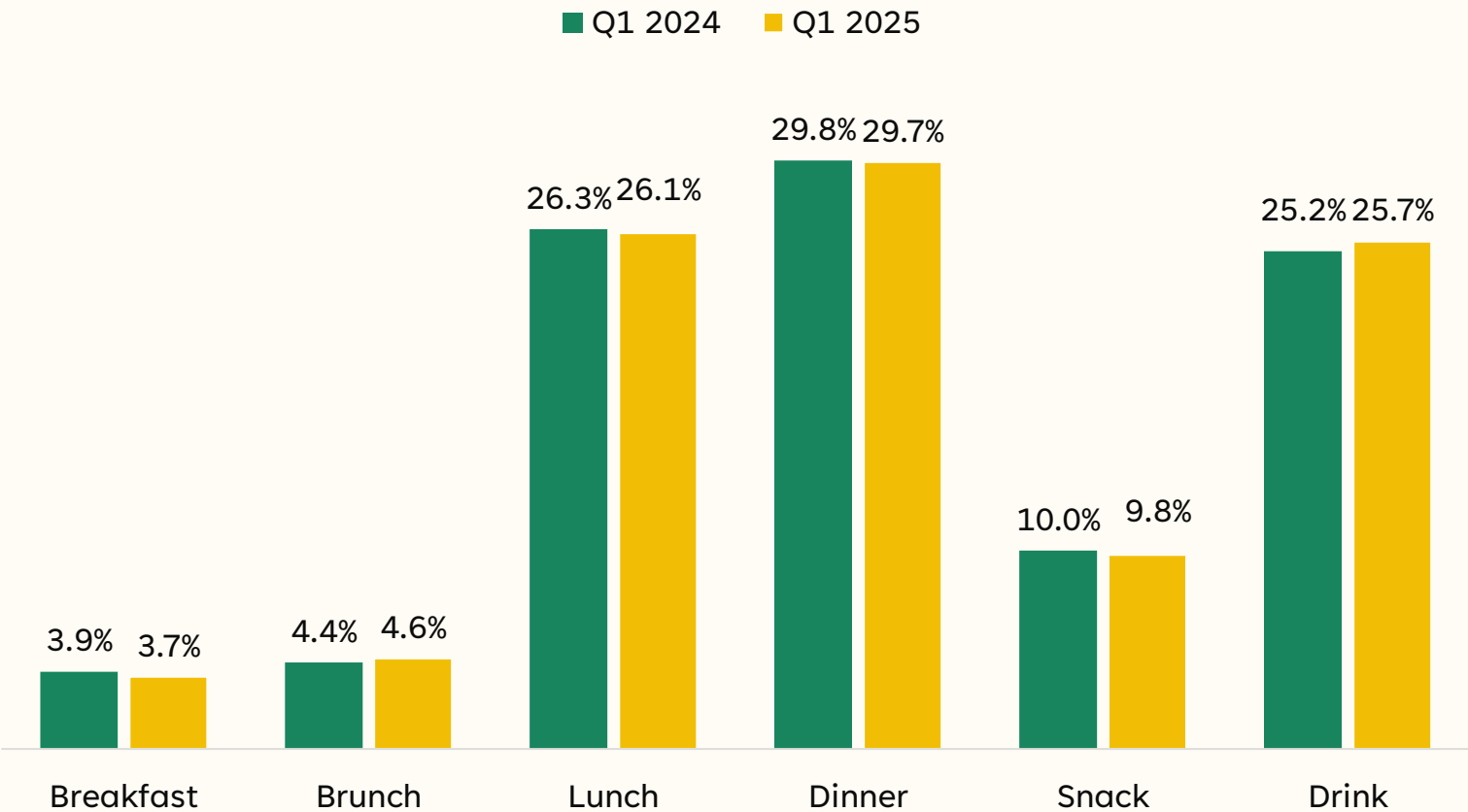


# Sunny March weather and socialising drives drink-only occasions

Drink-only occasions experienced the largest rise in share of occasions this quarter (+0.5ppts). After-work drinks, nights out, pub crawls and sports viewing (Six Nations) drove this phenomena.

Most meal occasions reported marginal losses. Dinner was the least impacted (-0.1pt), buoyed by the resurgence in socialising to some degree.

Day-part share of occasions in Q1 2025 compared to Q1 2024<sup>7</sup>



Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 31.03.2024 and 13WE 30.03.2025

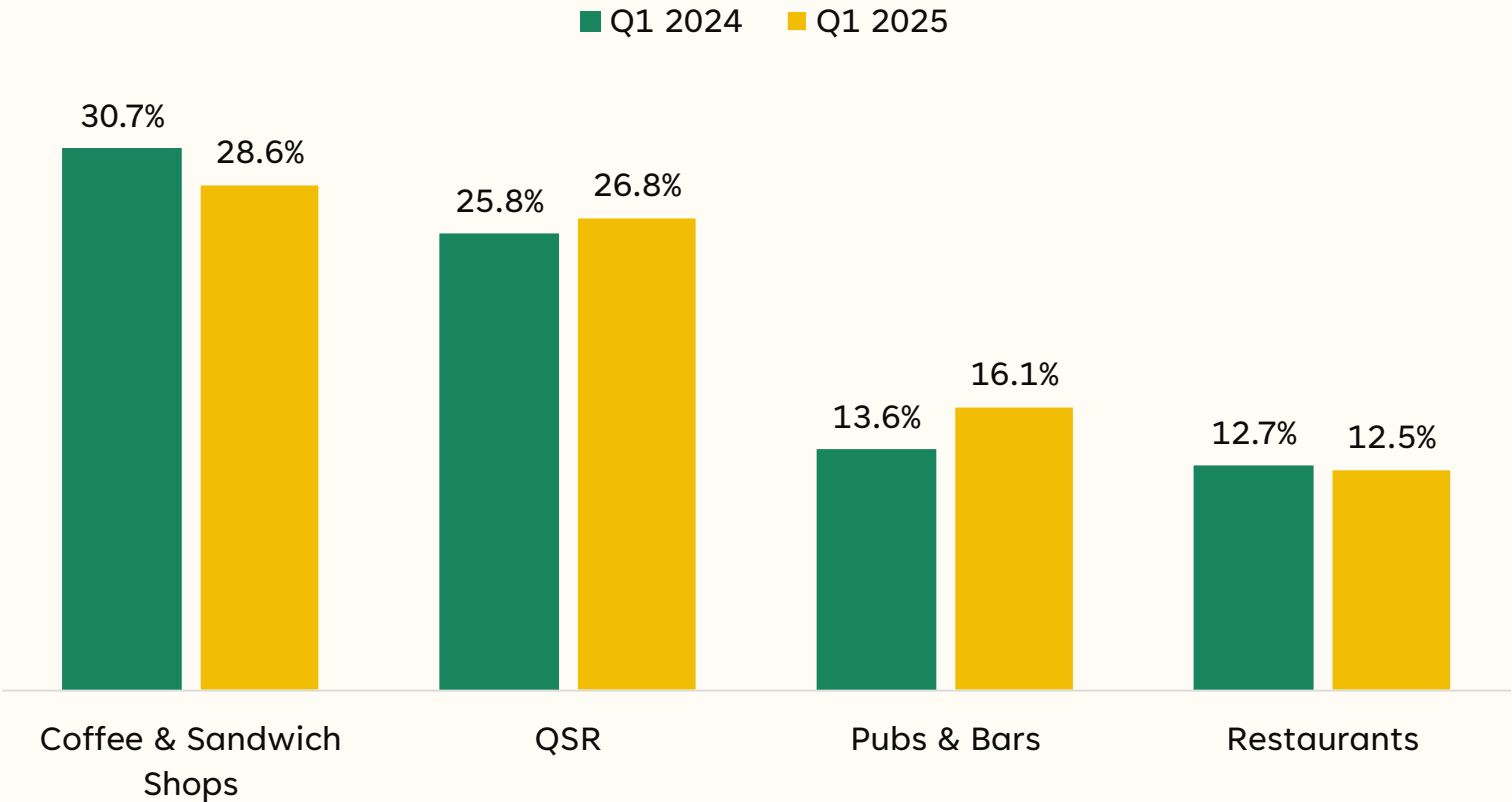


# Pubs and bars grew fastest, as consumers upped get togethers

Pubs and bars saw the strongest year-on-year growth in share of occasions, partly fuelled by Six Nations Championship spectators, warmer weather and a surge in get togethers.

QSR saw a marginal uplift, but all other sectors retreated, as consumers dropped meals in favour of drinks-only occasions within pubs.

Channel share of occasions in Q1 2025 compared to Q1 2024



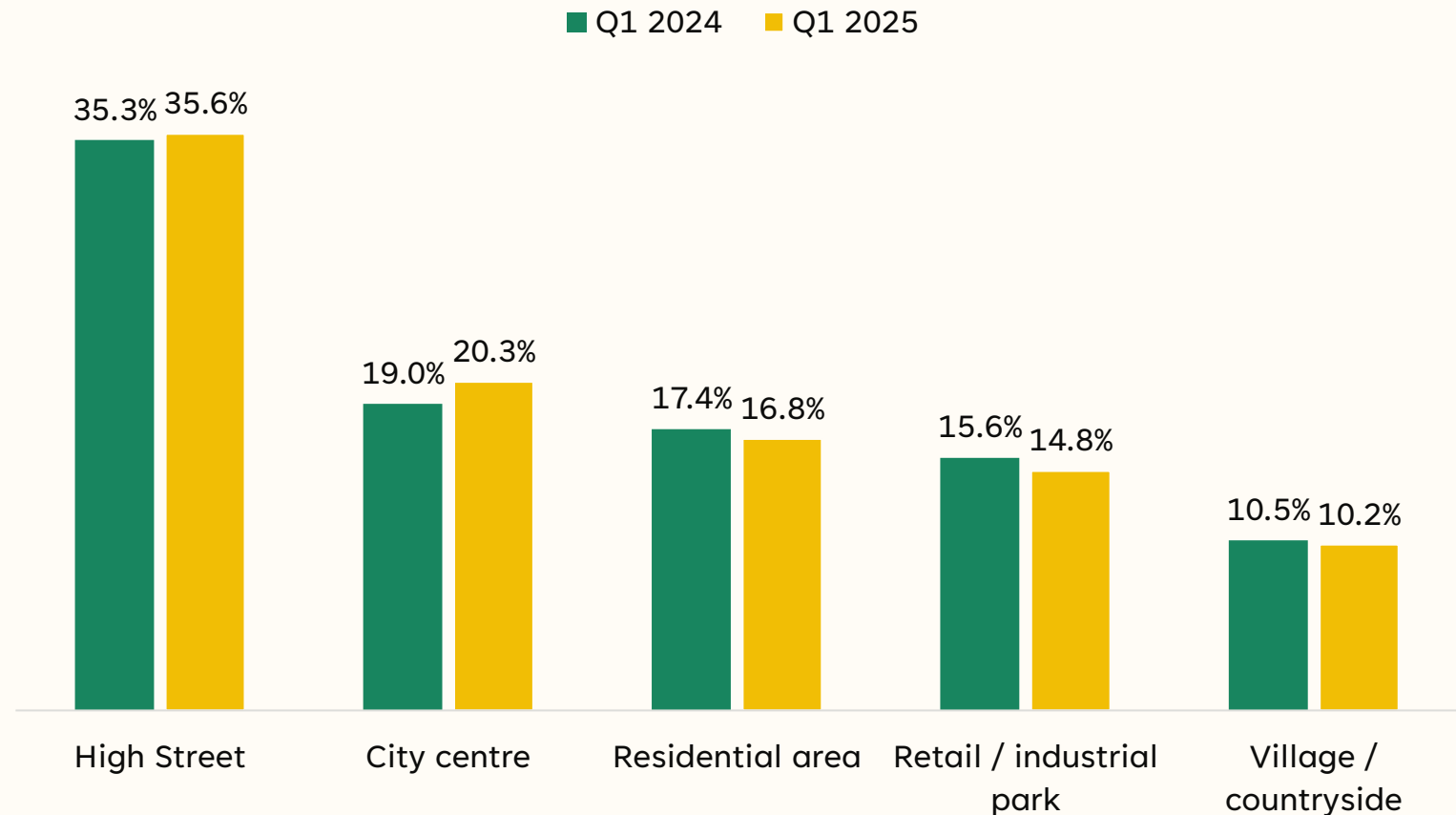
Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 31.03.2024 and 13WE 30.03.2025



## Company ‘return to office’ policies behind comeback for city centres

City centre outlets are seeing a resurgence as more companies enact return to the office mandates. This has also augmented high street footfall. Residential areas as well as retail parks have lost share, amidst the recovery in high-traffic locations.

Outlet area share of occasions in Q1 2025 compared to Q1 2024



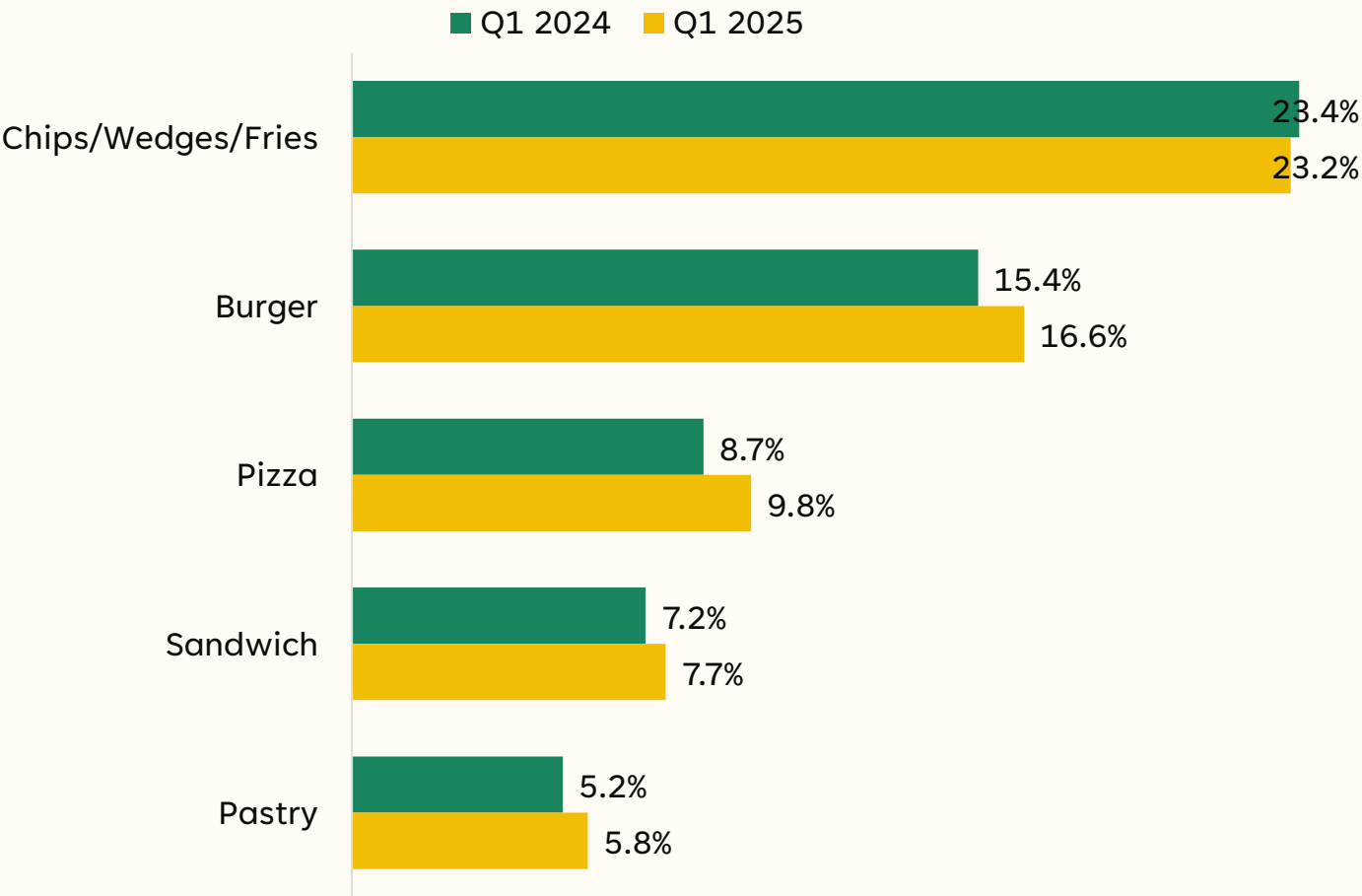
Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 31.03.2024 and 13WE 30.03.2025



# More visits to QSRs and pubs enhanced the share of favourites

Burgers and pizza gained share of the top 10 dishes consumed in the out of home market, consistent with channel increases across pubs, bars and QSR, as coffee and sandwich shops saw share decline.

Top 5 dishes share of occasions in Q1 2025 compared to Q1 2024



Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 31.03.2024 and 13WE 30.03.2025

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## **Get in touch**

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