Lumina Intelligence

# Channel Spotlight: UK Eating Out Market – Q2 2025

# Selective spending rises as confidence remains fragile

Penetration slipped YoY (-0.8ppts) as consumer confidence hit an 18-month low in April. Sentiment lifted in May and June, but more consumers used ‘value for money’ to guide choices. Frequency rose 5.9% with better weather, led by 25–34s. Families, under financial pressure, cut back on dining out (-0.5ppts).

QSRs led on growth this quarter (+1.1ppts), reversing 2024’s slight dip as more consumers made conscious cuts. A flurry of deals launched by QSRs pulled demand away from coffee and sandwich shops (-1.3ppts). Naturally, the share of drink-only occasions softened, with spend moving to other day parts.

Quality-led mindsets remain dominant at 79% (+2ppts YoY). Value for money continues to shape venue choice, as consumers seek out experiences they deem worthwhile. Meanwhile, brand-led attitudes grew +3ppts. Health-conscious consumers rose +5ppts, as more cited ‘healthy options’ (+2ppts) as a visit driver. It is apparent that consumers continue to desire elevated experiences.

Source: Lumina Intelligence, July 2025

# Eating out market is being challenged

Penetration dipped marginally in Q2 2025 vs. Q2 2024, amid ongoing economic uncertainty, while all other key metrics grew. Frequency gains were primarily driven by QSR, and inflation remained the main driver of higher average spend.

## UK eating out market: Key performance indicators in Q2 2025, with change compared to Q2 2024

| Eating out participation | Average spend (per visit) |
|---|---|
| 57.8% | £17.89 |
| -0.8ppts | +9.8% |

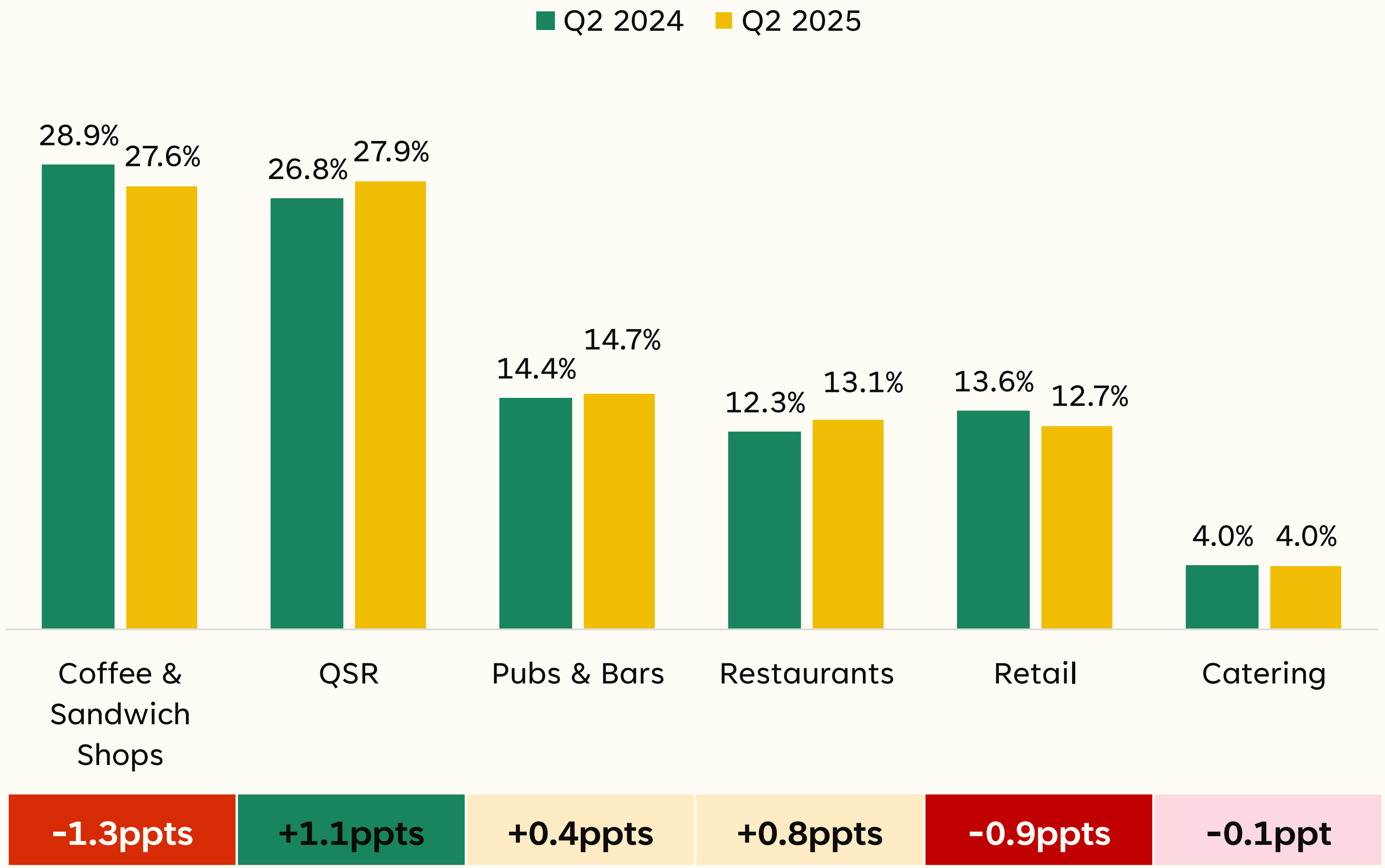
Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.06.2024 and 13WE 29.06.2025

1=Q1, n=19,500; 2=Q2, n=11,423 / 11,266; 3=Q47, n=11,423 / 11,266; 4=Q7, n=n=11,423 / 11,266

# QSRs gain as consumers cut back

QSRs saw the strongest YoY growth in share of occasions, as consumers sought more budget-friendly options. Coffee and sandwich shops fell the most (-1.3ppts), with demand shifting to other channels. Pubs and restaurant rose modestly, as more consumers took advantage of the warmer weather to socialise.

## Channel share of occasions in Q2 2025 compared to Q2 2024[9]



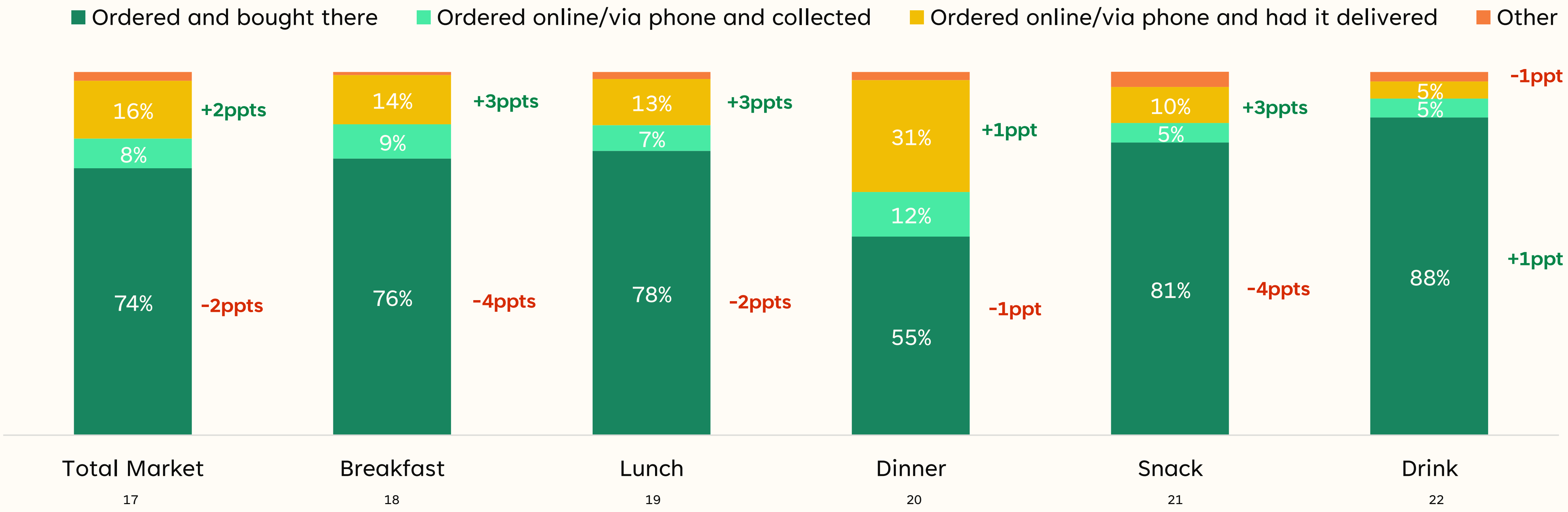

Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.06.2024 and 13WE 29.06.2025

9=Q4A, n=11,423 / 11,266

# Delivery's share rose particularly for breakfast and lunch

Delivery saw a surge in demand across day parts, particularly at breakfast, lunch, and snack times, suggesting a rise in ordering from offices. Significantly fewer chose to eat on-site, especially for breakfast.

**Method of purchasing share of occasions by day-part in Q2 2025**




Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.06.2024 and 13WE 29.06.2025

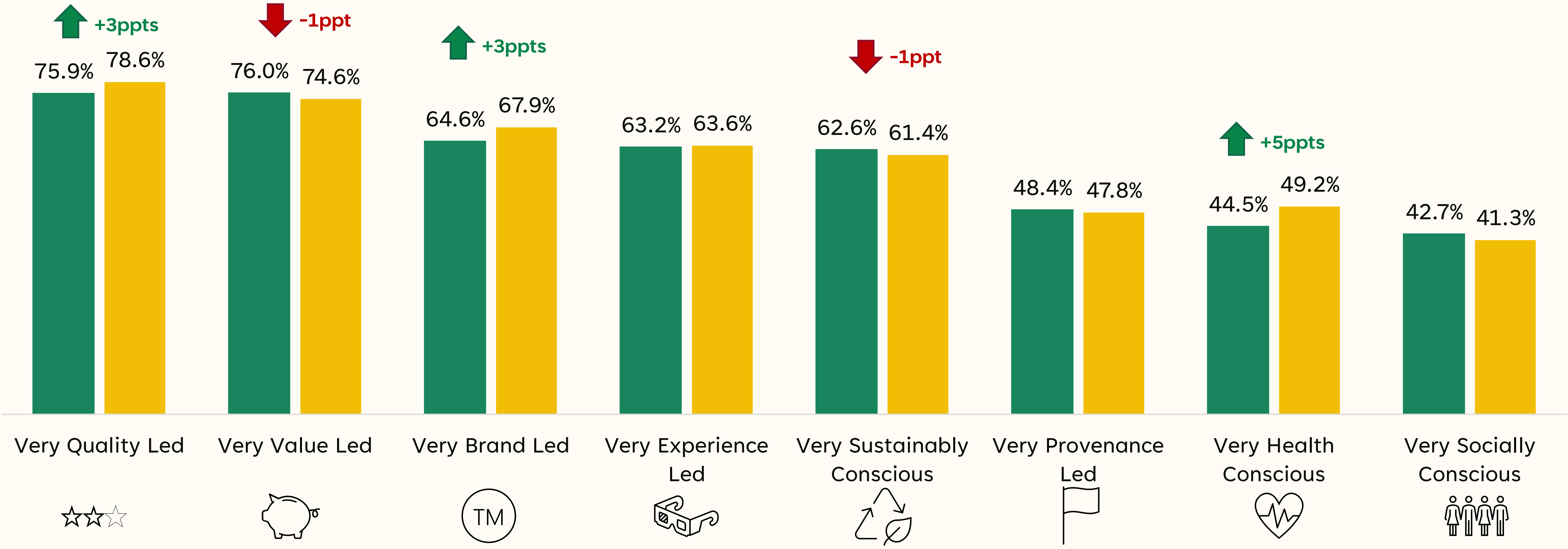
17=Q41 and Q7, n= 11,423 / 11,266 ; 18=Q41 and Q7, n== 545 / 576; 19=Q41 and Q7, n=3,772 / 3,796; 20=Q41 and Q7, n=4,126 / 4,263; 21=Q41 and Q7, n=1,555 / 1,627; 22=Q41 and Q7, n=3,381 / 3,448

Note: +/-ppts refers to growth/decline compared to Q2 2024. Further splits by day part are available on the dashboard.

# Rise in consumers who're quality, brand or health-led

Health-conscious consumers grew sharply YoY but remain smaller than the dominant quality- and value-led segments. Meanwhile, quality- and brand-led profiles rose while value-led dipped. Evidently, price is no longer the sole driver, and it is apparent that consumers now consider a wider range of factors when eating out.

**Psychographics share of occasions in Q2 2025 compared to Q2 2024** [34]



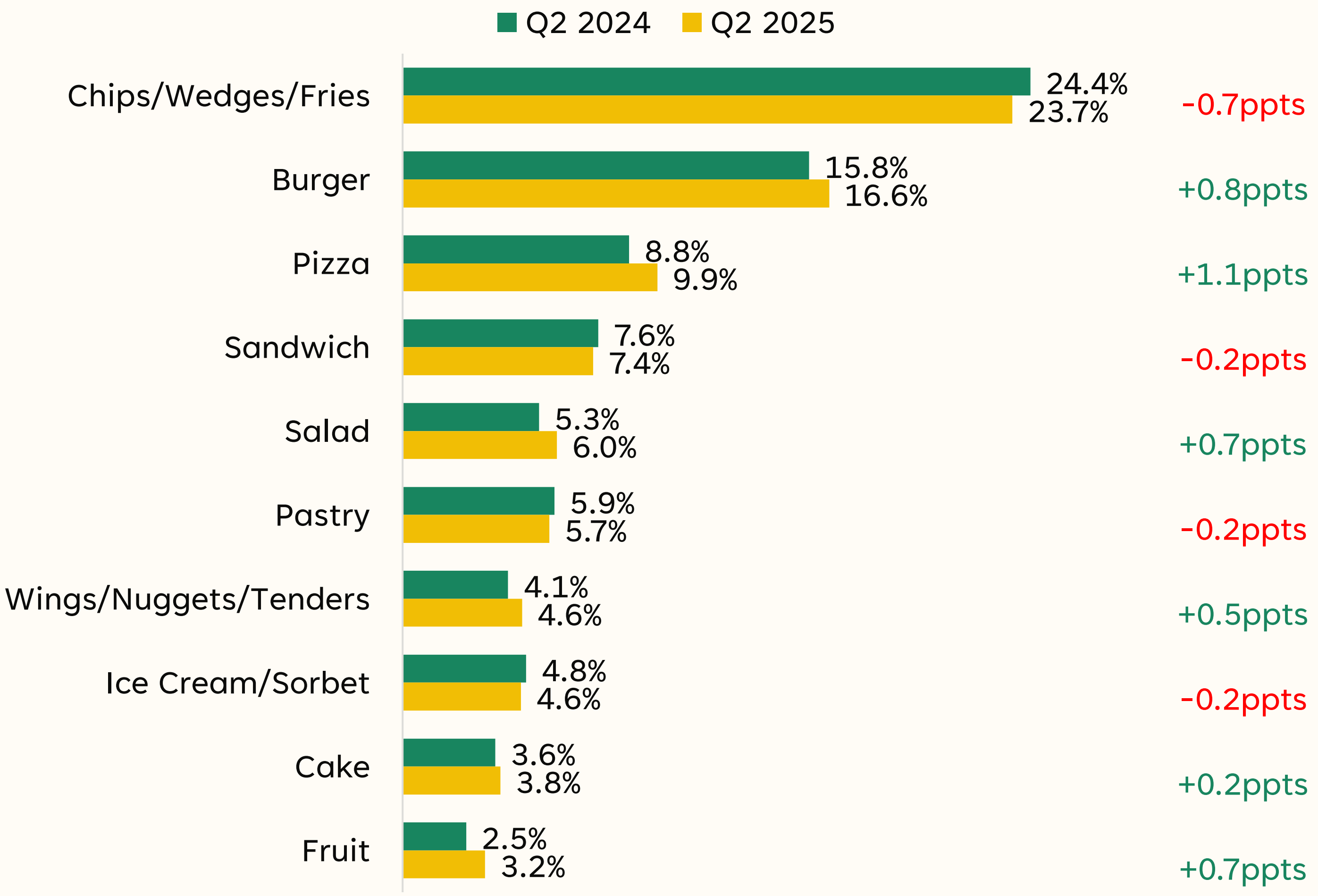

Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.06.2024 and 13WE 29.06.2025

34=D7, n=11,423 / 11,266

# More visits to QSRs enhanced the share of favourites

Burgers and pizza gained share of the top 10 dishes consumed in the out of home market, consistent with the uptick in share amongst QSRs, pubs and restaurants.

## Top 10 dishes share of occasions in Q2 2025 compared to Q2 2024 [49]




Source: Lumina Intelligence Eating and Drinking Out Panel, 13 WE 30.06.2024 and 13WE 29.06.2025

49=Q51, n=11,423 / 11,266

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# Explore Lumina Intelligence's Eating & Drinking Out Panel

Get a full picture of out of home food & drink consumption in the UK. Understand consumer behaviour, trends and perceptions to win share in the Out of Home channel .

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