

Channel Spotlight: UK Eating Out Market Q1/2026



Participation falls to a low as consumers move to snacks

Participation in the eating-out market fell sharply (-3ppts) to its lowest level since Q3 2021. However, both frequency and spend increased (+6%), indicating that demand remains resilient, particularly for delivery and food-to-go, despite economic uncertainty and weakening consumer confidence.

Snacking gained momentum as lunch, dinner and drink-only occasions declined, playing a dual role as both a social accompaniment and a practical on-the-go or solo solution.

Brands such as Burger King benefitted by leaning into small-bites innovation. 25–34-year-olds continue to drive the sector, though occasions are becoming more intentional and increasingly shift towards in-home consumption.

Diners are now more quality-, brand- and health-led, seeking experiences that feel worthwhile, convenient and mission-driven, while ethical considerations have softened in favour of more immediate concerns.

Source: Lumina Intelligence, April 2026





Participation dips amid geopolitical uncertainty

Eating out participation fell -3ppts in Q1 2026 to 53.3%, a low unseen since Q3 2021, when the UK experienced sluggish post-pandemic recovery. The late-February US-Iran conflict eroded consumer confidence further. Yet, frequency and average spend rose, with spend driven by inflation, as operators passed on mounting operational costs.

UK eating out market: Key performance indicators in Q1 2026, with change compared to Q1 2025

Eating out participation ¹	Average frequency (per week) ²	Average spend (per visit) ³	Delivery share of occasions ⁴
			
53.3%	1.6	£18.35	15.1%
-3.0ppts	+5.5%	+5.5%	+0.6ppts

Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.03.2025 and 13WE 29.03.2026

1=Q1, n=19,500; 2=Q2, n= 10,989 / 10,399; 3=Q47, n= 10,989 / 10,399; 4=Q7, n= 10,989 / 10,399



Demographics and group composition with the largest changes in eating out occasions in Q1 2026, with change compared to Q1 2025

25–34 segment continues to power eating out market

25–34s drove growth, gaining the largest share of occasions despite cost-of-living pressures, while 55–64s exited the market to combat financial strain. Eating is increasingly solitary and home-based (+1ppt), with fewer partner occasions and reduced dine-in or on-the-go visits.



		⁵	⁶
Age	Age	I was alone	I was with my partner
25–34	55–64		
24.1%	12.1%	33.3%	28.4%
+1.5ppts	-0.8ppts	+1.8ppts	-2.4ppts

Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.03.2025 and 13WE 29.03.2026

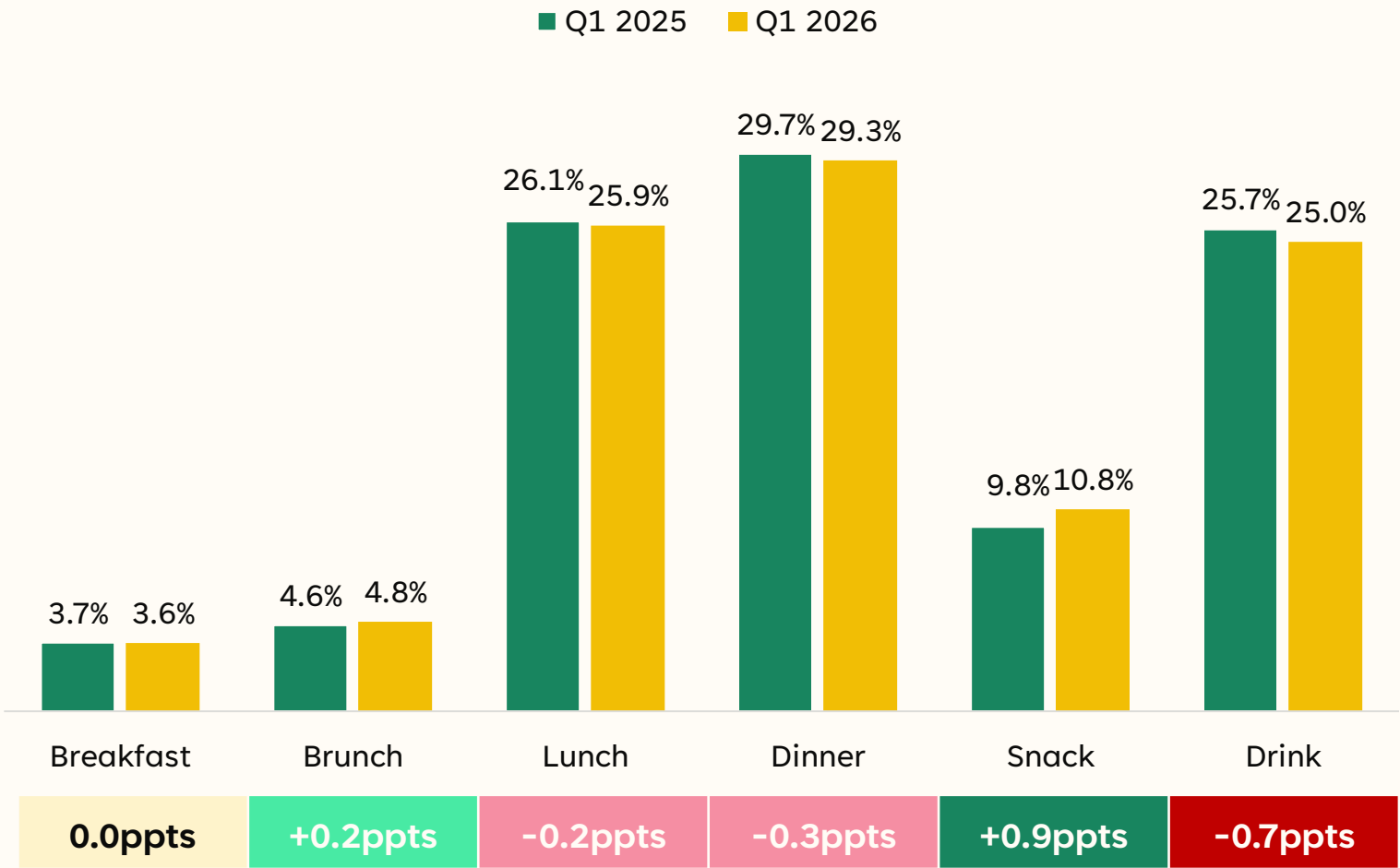
5=D1, n= 10,989 / 10,399; 6=D5, n= 10,989/ 10,399



Day-part share of occasions in Q1 2026 compared to Q1 2025⁷

Lunch, dinner and drink-only lose out as snacking increases

Snacks drove occasions growth this quarter (+0.9ppts), with brunch also making credible gains, while lunch, dinner and drink-only occasions declined, as geopolitical uncertainty heightened consumer caution.

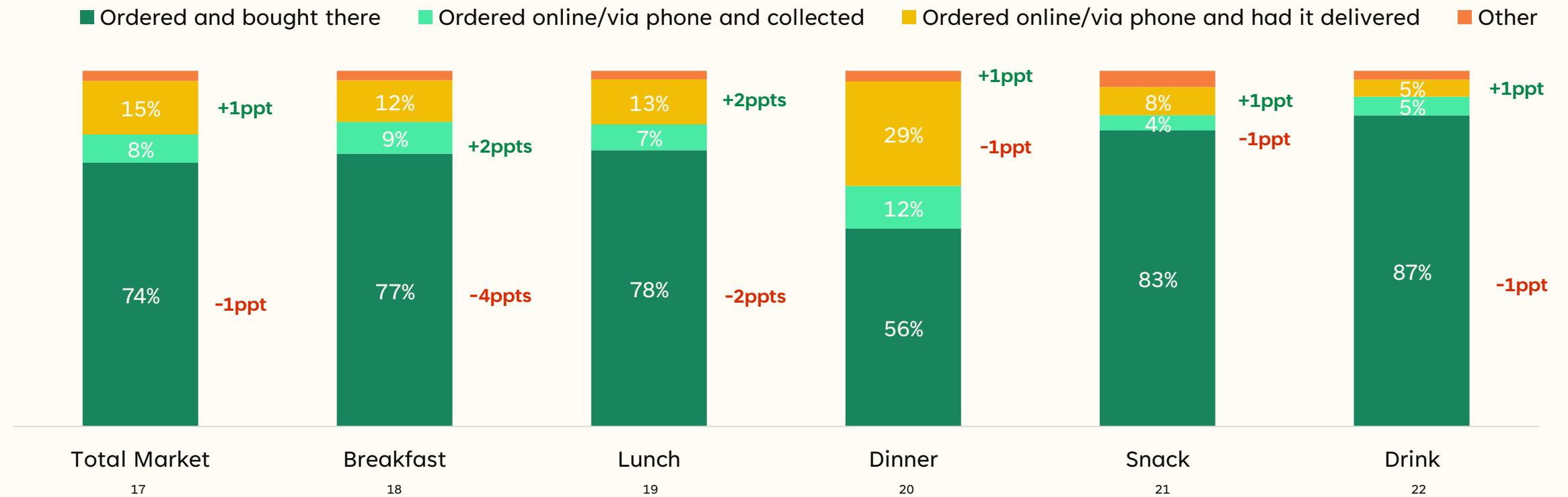


Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.03.2025 and 13WE 29.03.2026
7=Q41, n= 10,989/ 10,399

Delivery experienced an uptick in share, particularly for lunch, especially solo or partner occasions



Method of purchasing share of occasions by day-part in Q1 2026



Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.03.2025 and 13WE 29.03.2026
17=Q41 and Q7, n= 10,930 / 10,349; 18=Q41 and Q7, n= 571 / 548; 19=Q41 and Q7, n= 3,649 / 3,584; 20=Q41 and Q7, n= 4,161 / 4,083; 21=Q41 and Q7, n=1,444 / 1,530; 22=Q41 and Q7, n= 3,490 / 3,369

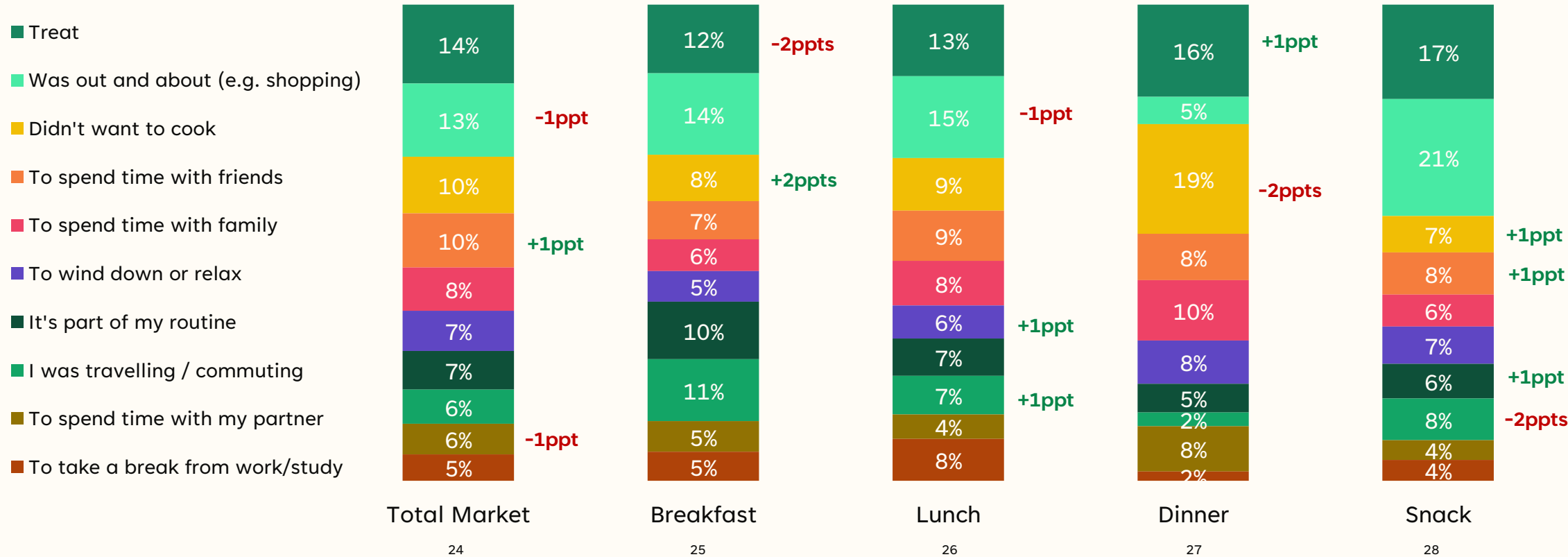
Note: +/-ppts refers to growth/decline compared to Q1 2025. Further splits by day part are available on the dashboard.

Snacks and lunch play dual repertoire roles

While socialising drove growth across day parts last year, consumer priorities are evolving. Dinner is perceived as treat, while breakfast is a time-saving option. Lunch plays a dual role either as a on-the-go filler or for relaxation. Snacks are perceived as routine on-the-go sustenance or as part of broader socialising.



Top 10 consumer missions (reasons for eating or drinking out of home) by day-part in Q1 2026 with ppt change compared to Q1 2025



Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.03.2025 and 13WE 29.03.2026

24=Q41 and Q14, n= 10,930 / 10,349; 25=Q41 and Q14, n= 571 / 548; 26=Q41 and Q14, n3,649 / 3,584; 27=Q41 and Q14, n= 4,161 / 4,083; 28=Q41 and Q14, n= 1.444 / 1,530

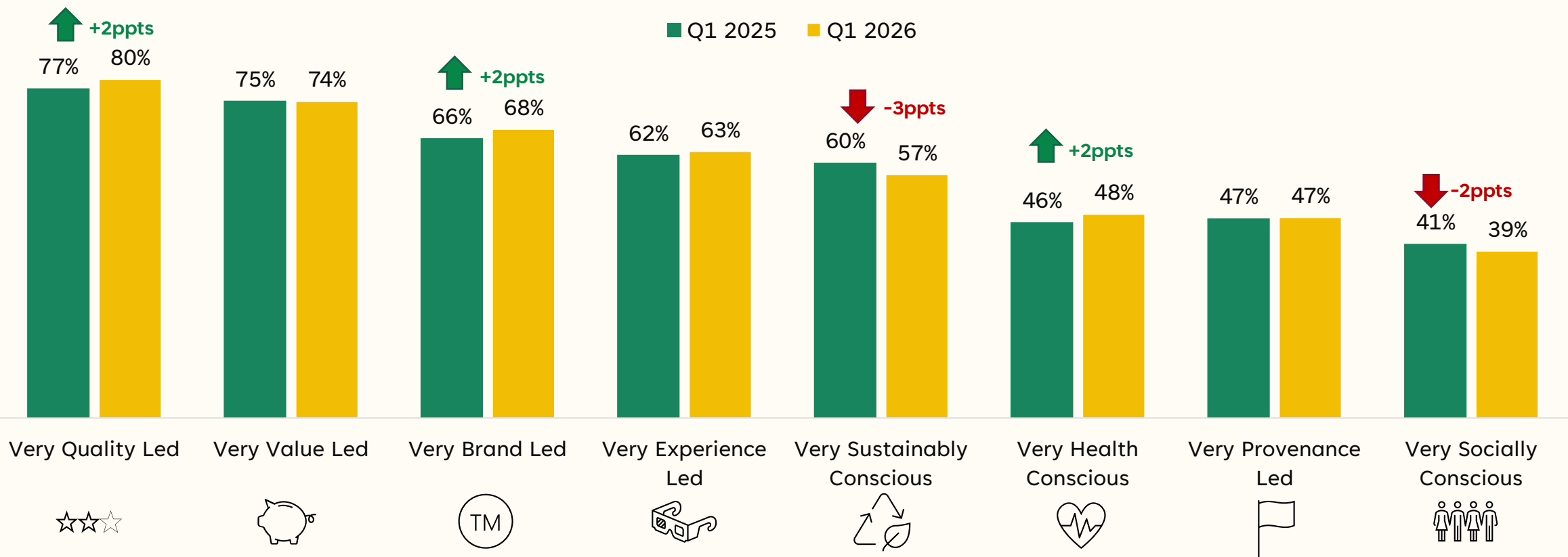
Note: +/-ppts refers to growth/decline compared to Q1 2025. Further splits by day part are available on the dashboard.

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

The proportion of quality-led consumers hit a high of 80%, making it the dominant mindset. Value ranks second in importance and brand third, having grown significantly year-on-year. Health is still making inroads due to the ongoing wellness movement. Fewer people now qualify as socially or sustainably conscious, suggesting that existential worries are overriding ethical concerns.



Psychographics share of occasions in Q1 2026 compared to Q1 2025³⁴



Source: Lumina Intelligence Eating and Drinking Out Panel, 13WE 30.03.2025 and 13WE 29.03.2026

34=D7, n= 10,989 / 10,399

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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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