

EATING OUT REVIEW – UK – 2024

The UK foodservice market has shown remarkable resilience in the face of significant challenges. This adaptability paints an optimistic picture for the future.



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Eating Out Review - UK - 2024

This report looks at the following areas:

- The impact of rising costs on consumers and the foodservice industry
- The size, growth projections, and key segments of the foodservice market
- The shifting trends of consumer dining and takeaway habits in recent years
- Key factors and behaviours influencing consumer dining out and takeaway choices
- A focus on guest satisfaction and unmet needs within the event catering segment



The UK foodservice market has shown remarkable resilience in the face of significant challenges. This adaptability paints an optimistic picture for the future.

Overview

The UK foodservice market has demonstrated resilience in the face of the cost of living crisis, with 90% of Britons engaged in dine-in experiences as of October 2023 (up from 84% pre-pandemic). However, the dine-in segment is still accounting for a lower share of foodservice sales than it did before the pandemic, while takeaway continues to claim a bigger slice of the pie, suggesting a lasting shift in consumer preferences.

This partially stems from the ease of enjoying food at home, with two thirds of consumers preferring the convenience of tech-based ordering, fuelling demand for delivery services. Yet, tech-savvy consumers seek more than just convenience. More than half are happy to share their data in exchange for exclusive discounts and personalised offers.

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While takeaway retains its hold, the return of dine-in thrives on families seeking quality time together. Pubs and fast food outlets currently dominate the family dining landscape, highlighting the growing demand for holistic family experiences, from dedicated play areas to adult relaxation options. Foodservice establishments have an opportunity to adapt to this shift by embracing family-friendly sitting arrangements and creating comfortable spaces for families to enjoy.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

Opportunities for the foodservice market

- Three major opportunities for the market

Market dynamics and outlook

- The five-year outlook for foodservice
- The foodservice market will continue to grow
- While the market outlook remains positive ...
- ... not all segments are recovering at the same pace
 - Graph 1: foodservice % change in market value, by segmentation, 2019-23
- Future proofing the UK's hospitality industry

What consumers want and why

- Dine-in participation surged in 2023
 - Graph 2: overall eating out usage, 2019-23
- Pub restaurants are the nation's favourite dine-in spot
 - Graph 3: restaurants and food outlets visited for eat-in meals, 2023
- Fish and chip and kebab shops are the champs of takeaway
- Friends and family hold the strongest sway
 - Graph 4: foodservice visitation drivers, 2023
- New trends in UK dining
 - Graph 5: eating out behaviours, 2023
- Food, drink and portions are the stars of event catering

Innovation and marketing

- Foodservice technologies fuel growth
- Greater inclusivity in foodservices

MARKET DYNAMICS

Market size

- Market set to outpace inflation in 2023

- Bouncing back with value and experience trends

Market forecast

- The foodservice market will continue to grow...
- ...by navigating a cautious recovery
- Learnings from the last income squeeze

Market segmentation

- Segmented recovery: while the market is bouncing back from the pandemic...
- ... growth isn't evenly distributed
 - Graph 6: foodservice % change in market value, by segmentation, 2019-23
- The pandemic accelerated the growth of takeaways
- Dine-in dips, while takeaway hits a sustained high
 - Graph 7: dine-in and takeaway sales as a percentage of total sales, 2019-23

Macro-economic factors

- Inflation is still the key factor affecting consumers' finances...
 - Graph 8: CPI inflation rate, 2021-23
- ...causing people to cut back on luxuries and essentials
 - Graph 9: expected responses to rising prices, 2023
- Food and drink prices still top the list of consumer concerns
 - Graph 10: "Have you been affected by any of these issues over the last two months? Please select all that apply", 2023
- Menu prices soar as inflation continues to bite
- Consumer sentiment: The recovery is continuing...
 - Graph 11: the financial wellbeing index, 2016-23
- ...and people feel more confident about their financial prospects
 - Graph 12: the financial confidence index, 2016-23

Social, environmental and legal factors

- Future proofing the UK's hospitality industry
- Operators take steps to tackle obesity...
- ...but more needs to be done
- Saving businesses from the energy crisis
- Takeaway law bans single-use plastic items

WHAT CONSUMERS WANT AND WHY

Eating out participation

- Usage of foodservices shot past pre-pandemic levels in 2023
- Dine-in participation surged in 2023

- Graph 13: overall eating out usage, 2019-23
- Dine-in soared in 2023, while takeaway habits remain a mainstay
- Pub restaurants are the nation's favourite dine-in spot...
 - Graph 14: restaurants and food outlets visited for eat-in meals, 2023
- ... especially among families and empty nesters
- Rethinking family dining in pubs
- Fast food is serving up a dine-in revolution...
 - Graph 15: annual changes in restaurants and food outlets visited for eat-in meals, 2022-23
- ... led by young families
- Fish and chip and kebab shops are the champs of takeaway
- Familiarity rule the roost in uncertain times
- Traditional sit-down restaurants see spike in takeaways
- Multiple types of food outlets are seeing increased usage
 - Graph 16: annual changes in repertoire of food outlets^ visited for eat in or takeaway, 2020-23
- More Britons are embracing diverse restaurant offerings
 - Graph 17: annual changes in repertoire of restaurants^ visited for eat in or takeaway, 2020-23

Ways to encourage visits

- Word-of-mouth wins
 - Graph 18: foodservice visitation drivers, 2023
- Friends and family hold the strongest sway
- Likes, labels and loyalty rule dining choices
- Having a good reputation is key for foodservice operators...
- ...so are value and variety

Eating out behaviours

- Diners embrace indie, tech and tot-friendly eats
 - Graph 19: eating out behaviours, 2023
- Tech-driven convenience and deals
 - Graph 20: eating out behaviours relating to foodservice technology, 2023
- Labels that empower informed choices
 - Graph 21: eating out behaviours relating to nutritional information on menus, 2023
- Traditional kids' menu options are losing appeal
 - Graph 22: attitudes towards smaller portions, by children, 2023
- Ditching cookie-cutter chains for indies
 - Graph 23: attitudes towards independent restaurants, 2023
- Woo young foodies with festive feasts
 - Graph 24: [no title]

Event catering

- Top event types with catering in the past year
 - Graph 25: events attendance, 2023
- Four in five guests are satisfied with event catering
- Events leave attendees hungry for savings
 - Graph 26: consumer satisfaction with event catering, 2023
- Food, drink and portions are stars of event catering
- High prices and limited dietary choices are the pain points
- Sustainable catering at events has room to grow

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- Acquisition fuels KFC's drive-through growth
- Food halls simmer up new concepts
- Greene King ditches Loch Fyne
- Exclusive app offers and VIP access
- Steakhouse grazes top sustainable restaurant rating
- Allergen awareness on the menu
- Transforming the way brands and influencers click
- Enhanced accessibility in restaurants
- Destination for families
- Tech-focused ordering
- Data-driven marketing
- Pop-up reimagines supermarket experience
- Contract catering serves up a comeback

APPENDIX

Market forecast data and methodology

- Market size : value
- Market forecast and prediction intervals (value)
- Forecast methodology

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology
- TURF analysis methodology
- How to read: TURF analysis
- Key driver analysis methodology
- How to read: key driver analysis
- How to read: key driver analysis
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