JULY
2026

Emerging Trends

The latest Vypr REPORTS

Food, drink and quick service restaurants

Contents

About Vypr

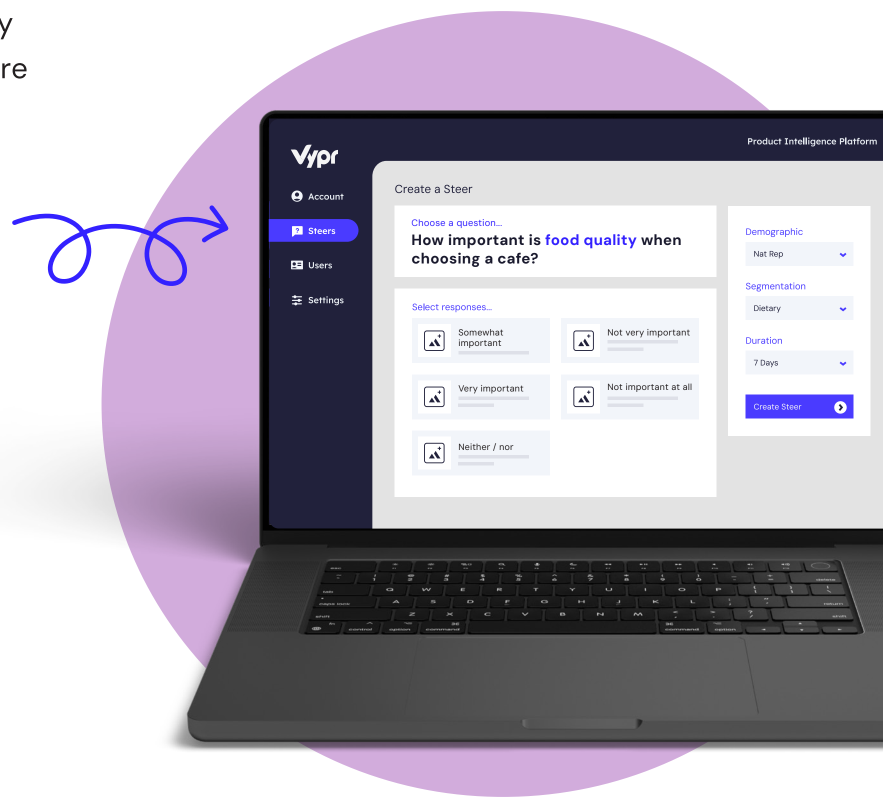
Vypr is a leading product intelligence platform designed to empower brands with the insights needed to make informed product decisions at the right moments.

Our platform leverages a proprietary community of over 80,000 UK consumers, providing our customers with direct access to real-time feedback. This unique capability allows brands to refine their strategies and develop products that truly resonate with their target audiences.

We go beyond traditional market research by focusing on the immediate, intuitive reactions of consumers. Instead of lengthy questionnaires, we engage our community with short, targeted questions that capture fast, instinctive responses.

This approach is rooted in the principles of System 1 thinking, a concept popularised by Daniel Kahneman in his seminal work, Thinking, Fast and Slow. System 1 represents the brain's quick, automatic decision-making process, which is responsible for approximately **95%** of purchasing decisions.

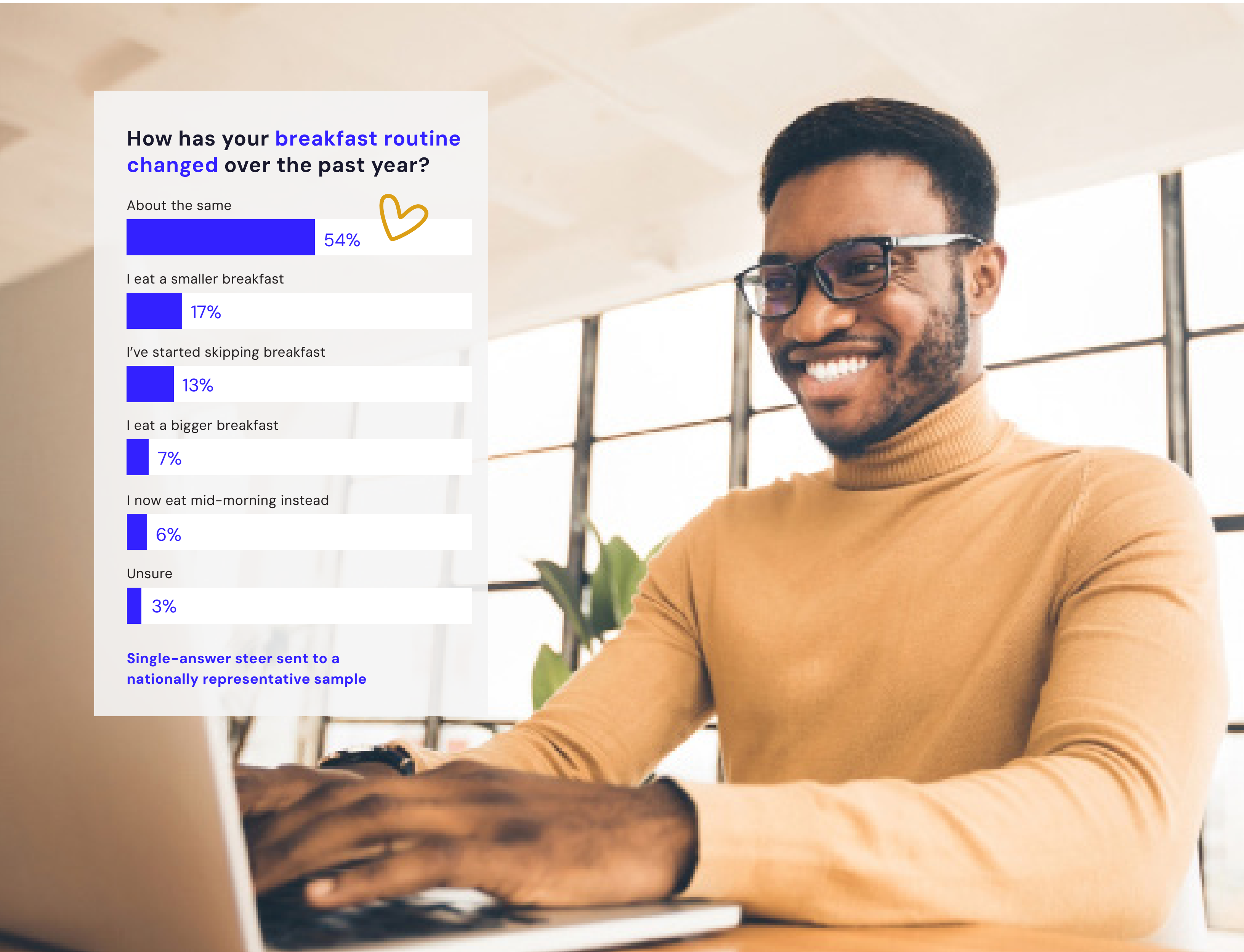
By tapping into this cognitive function, Vypr enables brands to understand consumer behaviours and attitudes with accuracy and speed.



Methodology

The findings in this report are based upon first-party research conducted throughout June 2026. The primary research apparatus used to collate consumer feedback was a bespoke survey application, available on smartphone.

The application is device agnostic and allowed a nationally representative community of real UK consumers to provide answers to a broad range of questions. To deliver comprehensive insights, Vypr adopts a mixed-method approach, integrating both qualitative and quantitative research methodologies.



Executive Summary

Over the last decade, the food and drink industry has planned against a handful of key consumer assumptions. These held that a health claim alone could earn a higher price, that the structure of the eating day was breaking down into disorder, that smaller appetites signalled contracting demand, and that consumers who cut back were in the process of withdrawing from the category.

This edition of our Emerging Trends report puts those assumptions to the test across three sections and over eighty consumer steers, drawing on first-party data from Vypr's nationally representative UK panel and a System 1 methodology that captures instinctive response rather than considered opinion. With a recurring theme throughout the data being the gap between what people say and what they actually do, this distinction matters more than usual, because where the two split apart is the behaviour that decides what happens at the till.

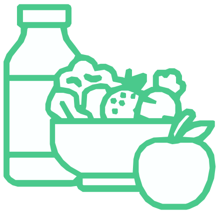
The three sections of this report look at different areas of a market in flux. The Reformulation Economy examines the claims on the pack, establishing which still drive trial, testing what they're worth in willingness to pay, and assessing the third-party rating tools a committed minority now use to verify those claims independently.

The Occasion Map turns to when and where Britain eats, tracking the redistribution of the eating day, the role of habit in fast food choice, and the changing expectations consumers bring to cafes and pub. Lastly, The Shrinking Plate addresses how much Britain eats, exploring the deliberate management of portions, the limits of the protein proposition, the guilt cycle shaping fast food behaviour, and which consumers the category will need to serve as appetites recalibrate.

These sections cover different ground but point in the same direction: the UK consumer of 2026 has become a good deal more deliberate. They interrogate the claims placed in front of them, reorganise their eating around the occasions that hold value, and manage their appetite with a clearer sense of what any given occasion is worth.

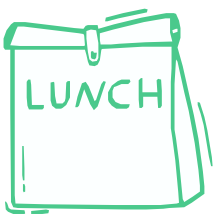
The opportunities the research identifies, across reformulation, occasions and portions, do not require the industry to reverse a consumer trend or persuade anyone of anything. Rather, each requires building for behaviour that already exists and is not yet being served. The sections that follow set out where that behaviour sits, what it asks of the brands serving it, and where the most defensible commercial positions are currently unoccupied.

Key highlights



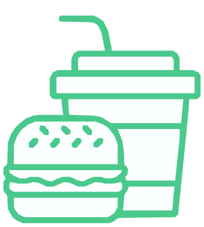
Health claims drive trial but command almost no price premium. Across three matched pricing tests, in which the only variable was the claim on the pack, willingness to pay moved by less than half a percentage point. **52%** of consumers state they would pay more for cleaner food, but almost no change, positioning reformulation as a trial and retention mechanism rather than a pricing lever.

Trust in on-pack claims has eroded faster than the category has renewed it. **24%** of consumers now trust no health claim at all, rising to a third of the over-65s. High protein, among the strongest trial drivers in the data, is also the claim consumers most often name as overused, and consumers increasingly read the ingredient list against the front-of-pack message before accepting it.

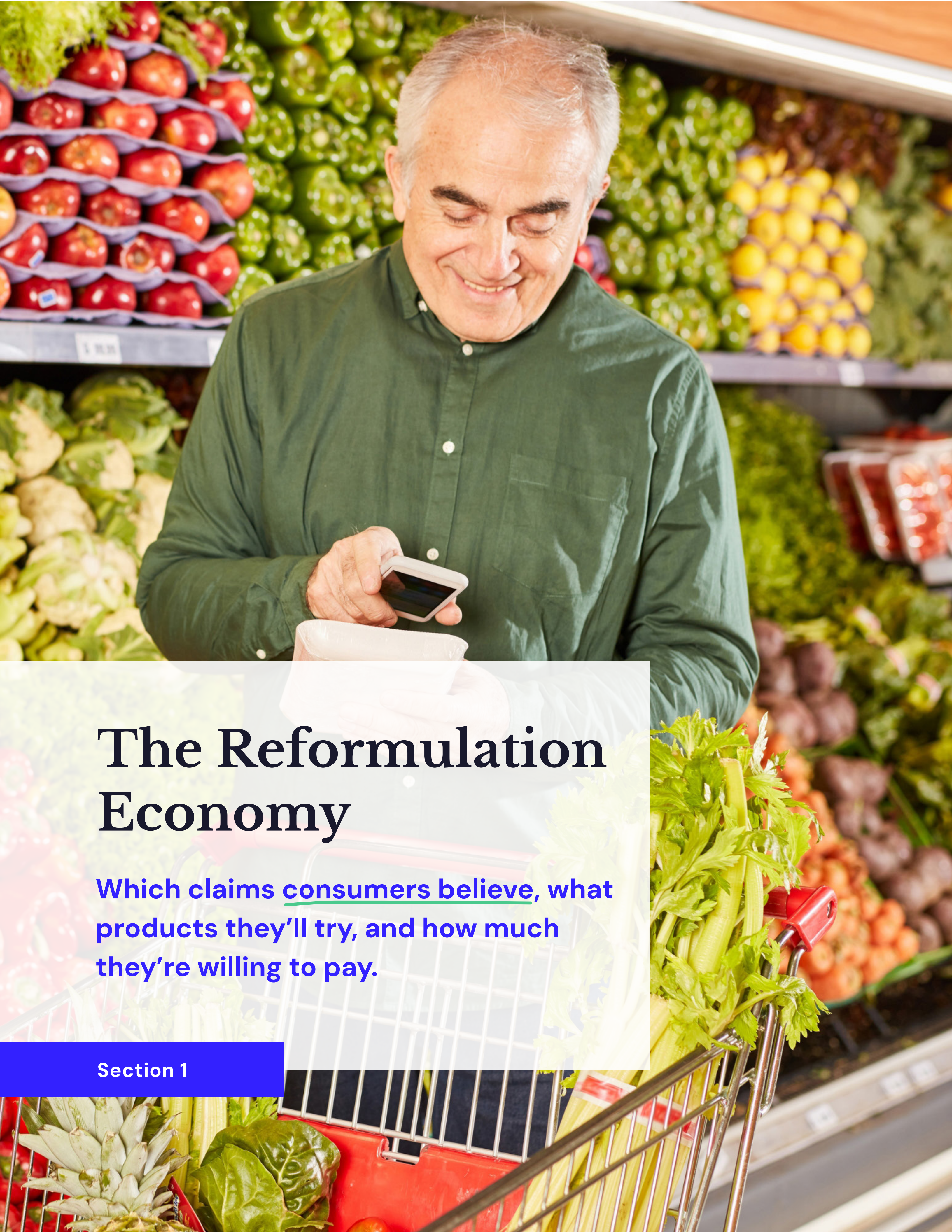


The eating day is consolidating toward its centre. Lunch is the occasion gaining ground most quickly, while breakfast and late-night eating are both contracting and **30%** of 18-24s now skip breakfast entirely. The growth occasions (lunch and the mid-morning and afternoon bridges) are not those around which the industry's formats and calendars are currently organised.

Eating less is a deliberate recalibration rather than a retreat. **87%** of adults finish an evening meal either satisfied or choosing not to eat more, and only **3%** report regularly overeating. The reduction reflects a decision about sufficiency rather than an absence of appetite, which makes the smaller-eating consumer a definable brief rather than a lost customer.



The recalibrated consumer wants satisfaction within a constraint. **20%** of frequent fast food customers want meals that feel filling despite being smaller, a requirement not currently met. GLP-1 users sharpen the point: **54%** still visit for treat occasions, yet only a quarter consider the current offer adequate for smaller appetites.



The Reformulation Economy

Which claims consumers believe, what products they'll try, and how much they're willing to pay.

Section 1

In recent years reformulation has run on a simple commercial logic: give a product the right health credentials and it earns more attention on shelf, attracts more trial, and supports a higher price than its conventional equivalent. It is a reasonable assumption, but how much of it still holds?

Looking at which claims drive purchases, as well as those that have diminished in effectiveness through repetition or unsuitable messaging, the first section works out which still pull their weight, then puts them to the test with a series of matched pricing exercises to see what a claim is really worth.

Lastly, we look at the third-party rating economy, and the emerging slate of ingredient-scanning apps and external authorities that a committed minority of consumers now use to assess products independently of the brand.

Put together, the findings describe a shopper who has got much better at questioning the claims in front of them, and a category where old assumptions about what those claims are worth is due a rethink.

The Claim That Still Works

Health claims continue to drive trial, led by natural ingredients at 47%. *Trust follows a different pattern; **24%** of consumers report trusting no claim at all, and high protein, among the strongest trial drivers, is also the claim consumers most often identify as overused.*

Established claims remain the most effective at prompting trial. Asked which on-pack messages would increase their likelihood of trying a new product, consumers placed natural ingredients first at **47%**, followed by no artificial additives at **39%** and low sugar at **37%**, with high protein and high fibre clustered around **30%**.

The messages that draw consumers toward a product are, for the most part, the longest standing messages concerning naturalness and exclusion, rather than the newer functional vocabulary.

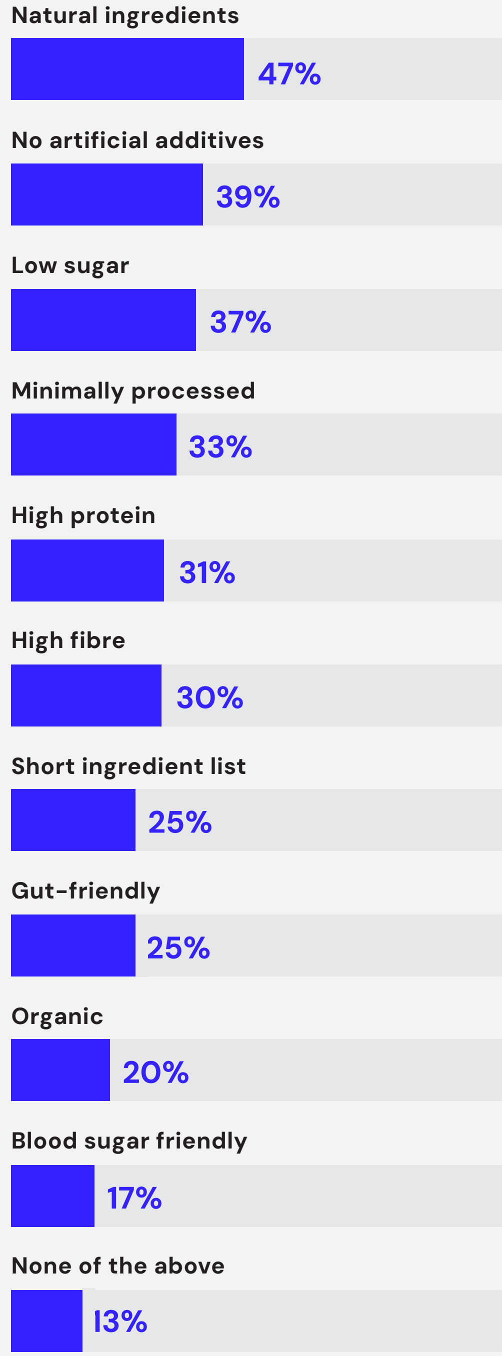
But these preferences split by age in ways that make a single-claim strategy tricky. Naturalness claims skew older, with no artificial additives reaching **51%** among the over-55s. High protein runs in the opposite direction, peaking at **43%** among 25-34s and falling to **28%** among the over-65s. A claim pitched at a younger shopper therefore lands far more softly with an older one, and a pack leaning on a single claim to reach both will end up short-changing one of them.

Trust presents a more difficult picture than trial, and when asked which claim they trust most, the largest group of consumers, **24%**, selected none of them. Among over-65s that figure rises to a third. So the words that get people to try something do not earn the same level of belief, and for a fair few they earn very little at all.

High protein illustrates this, ranking among the strongest trial drivers while simultaneously being the claim most frequently named as overused at **15%**. A message can still drive purchase while wearing thin, and that mix of strong pull and heavy overuse is the classic sign of a claim heading into the back end of its useful life.

Claim-stacking does not offset this. Asked how three or more claims on a single pack would affect their likelihood to buy, **54%** of respondents reported no change. The net effect is modestly positive, with **33%** more likely against **14%** less, but the dominant response is indifference. Among the over-65s, the most sceptical cohort, a concentration of claims produces a slightly negative effect for around one in ten. Piling on more claims brings diminishing returns, and for some shoppers it backfires.

Which of these on-pack messages would increase your likelihood to try a new food product? (if any)



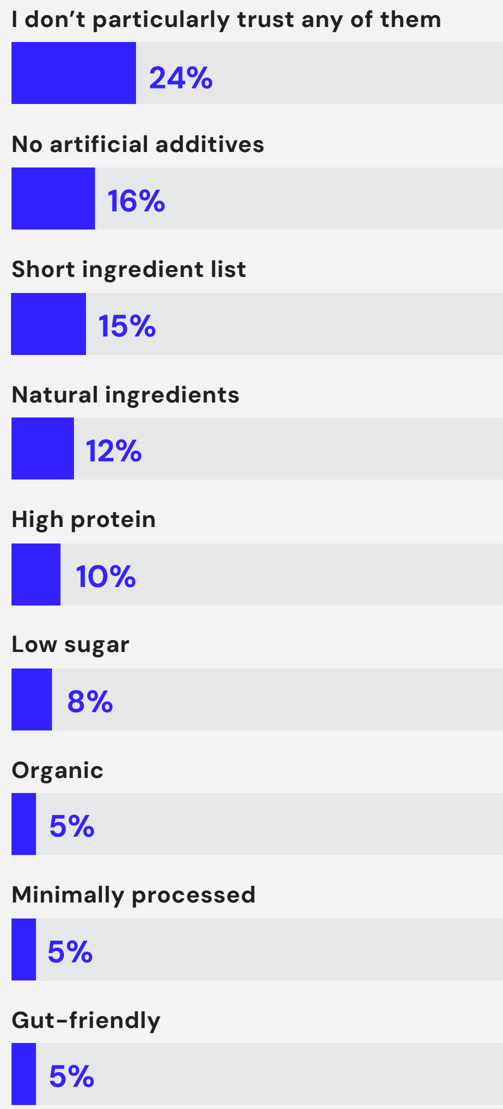
Multi-answer steer sent to a nationally representative sample

The newer functional claims largely fail to register. Asked which would prompt them to consider an unfamiliar product, the most common answer was again none, at **23%**. High protein led the functional set at **18%** and gut health followed at **14%**. Sleep and relaxation, meanwhile reached just **10%**, focus under **5%**, and adaptogens, despite sustained trade attention, registered with under **1%** of consumers. There is a clear gap between the trends the industry is busy with and the claims that actually move shoppers.

When it comes to what chips away at trust, the most common trigger for doubt is a claim that feels too good to be true, cited by **40%**, followed by vague language at **32%** and a long ingredient list that contradicts the claim at **30%**. Among over-65s, the ingredient-list contradiction rises to **41%**. Older consumers especially are reading the back of the pack against the front, and a claim the recipe cannot back up comes at a real cost.

The free-text responses reinforce this pattern. Asked to recall a claim that made them doubt its effectiveness, high protein and gut health drew the most scepticism. One respondent described gut health as a phrase that does not mean anything to them, a characterisation that recurs across the verbatim responses.

Which of these messages do you trust most on a food product?



Single-answer steer sent to a nationally representative sample

The commercial response to ingredient scrutiny can be observed across a number of retail ranging decisions, most notable being Marks & Spencer's introduction of 12 new products to its Only... Ingredients range in January 2026, each made with eight or fewer ingredients and free from artificial colours and preservatives. The launch was commercially credible but immediately attracted debate: nutritionists noted that simplified recipes can require removing the fortified vitamins that many consumers rely on from everyday foods. Nevertheless, the case illustrates the tension at the heart of this shift; a shorter ingredient list supports the front-of-pack claim, but a consumer reading the back of the pack against the front is more sophisticated than that framing assumes.

The tension:

The claims most effective at prompting trial are also among the most overexposed, and a sizeable share of consumers have withdrawn trust from the category's health vocabulary as a whole. Trial influence and credibility are moving apart, and the claims performing the most commercial work are among those nearest to fatigue.

Commercial implications:

Naturalness and free-from claims remain dependable trial drivers and index toward older shoppers, while protein drives trial among younger consumers but carries rising overuse.

A concentration of claims on a single pack offers little additional persuasion and occasional resistance. With consumers increasingly assessing the ingredient list against the front-of-pack message, a claim the formulation cannot substantiate functions as a liability, and credibility now depends on coherence across the whole pack rather than the strength of any single message.

Callout:

24% of UK consumers report trusting no health claim at all, rising to a third among the over-65s. The language of reformulation is losing credibility faster than the category is renewing it.

WHAT THIS MEANS FOR BRANDS

If your pack carries one hero claim, split-test it by age before you print. The data shows naturalness claims peaking with the over-55s and protein with the under-35s, so a single claim aimed at both will underperform with one. For a mixed-age range, the approach is a primary claim matched to each product's core shopper rather than one house claim across the range. Drop any secondary claim your ingredient list cannot visibly back up, because for the over-65s a contradicted message does more damage than none at all.

The Clean-Label Price-Off

Health claims drive trial but command little price premium.

Across three matched pricing tests, the addition of a clean-label or protein claim moved willingness to pay by less than half a percentage point, though stated consumer attitudes toward premium pricing tell a different story.

The willingness-to-pay tests in this subsection were constructed as matched pairs within Vypr's pricing methodology tests. In each case, consumers were shown a product and asked what they would pay across a full price range. The single variable between the two versions was the claim on the pack, with product, brand, image and format all consistent.

The three pairs covered a bread pack (plain against a short-ingredient-list claim), a chilled ready meal (plain against minimally processed and high protein), and a yogurt (plain against 20g protein and no added sugar).

The three pairs returned closely consistent results. In all three scenarios, the claim produced no material change in willingness to pay.

For the bread, the willingness-to-pay curves of the plain and claimed versions are near-identical, separated by an average of a third of a percentage point across the full range. At £1.50, **63%** would purchase the plain pack against **64%** the claimed one, and the revenue-maximising price is the same for both. The ready meal followed the same pattern, an average separation of a third of a percentage point and an identical optimal price, while the yogurt showed the smallest movement of the three; the addition of 20g protein and no added sugar shifted willingness to pay by negative 0.08 of a percentage point.

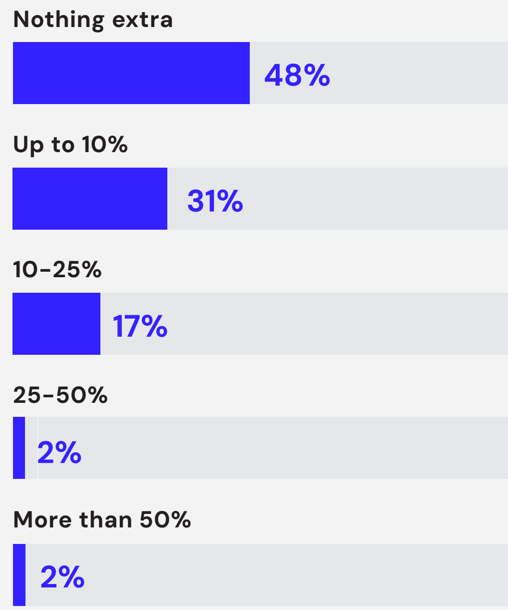
Set against what people say, the behaviour comes into sharper focus. When asked directly how much more they would pay for a product marketed as clean label or minimally processed, **48%** said nothing extra, while **52%** indicated they would pay something, including **17%** who specified 10% to 25% more. Taken at face value, that stated willingness would support a reformulation premium, but the matched-pair pricing indicates that, at the point of a purchase decision, the stated premium does not materialise.

This gap between what people say they will pay and what they actually pay has real consequences for how reformulation business cases get built. Conventional survey research captures the stated figure, which points toward a premium opportunity, while behavioural pricing captures the revealed figure, which does not support one. A reformulation case built on what people say they will pay is, in other words, built against demand the behaviour does not back up.

Age introduces a single qualification. Stated willingness to pay a premium is highest among 25-34s, **7%** of whom claim they would pay more than **50%** extra, and lowest among the over-65s, **62%** of whom would pay nothing additional.

Whatever modest premium tolerance exists concentrates among younger consumers, consistent with where protein and newer claims perform in the trial data. Given the scale of the divergence between stated and revealed behaviour, however, the stated figures warrant caution even within that group.

Assuming acceptable taste and availability, how much more would you pay for a food product marketed as “clean label” or “minimally processed”?



Single-answer steer sent to a nationally representative sample

Quorn's progressive reformulation of its frozen range between 2025 and 2026 provides a useful reference point for this process. After reducing Quorn Mince to four ingredients and Quorn Pieces to three, the brand's recommendation score jumped three points in a single quarter[1], with shoppers rating the product higher on taste, health, quality and value simultaneously. Quorn Chilled Mince, the first chilled product to join the range, launched at £2.79. The reformulation drove recommendation as opposed to premium, a positioning which the pricing data in this section consistently records.

The tension:

Consumers report that cleaner products merit a higher price and behave, in a purchase context, as though they do not. Stated and revealed willingness to pay point in different directions, which exposes any strategy calibrated to what consumers say they will pay rather than what they do.

Commercial implications:

The behavioural data positions reformulation more securely as a trial and retention mechanism than a pricing one. A claim earns attention and pickup and can defend a product's place in the basket, but the matched-pair tests record no corresponding willingness to pay more.

Where reformulation carries a cost-of-goods increase, the supporting case rests on volume, loyalty or category access rather than on a premium the pricing data does not register, and pricing decisions in this area benefit from behavioural testing given the scale of the gap between stated and revealed demand.

Callout:

Across three product categories, adding a clean-label or high-protein claim moved willingness to pay by less than half a percentage point. Where **52%** of consumers state they would pay more for cleaner food, the matched-pair pricing records almost no movement.

RESEARCH AREA

Before you sign off a clean-label premium, run the matched pair on your own pack: same product, same image, claim versus no claim, across a full price range. If your willingness-to-pay curves sit on top of each other the way these three did, the premium is not there. In that case, fund the reformulation from volume, retention or listing access, not from a higher shelf price. Build the cost recovery into the case before the reformulation; the data says the shopper will not cover it for you.

[1] Source: https://www.foodanddrinktechnology.com/news/66834/quorns-chilled-range-joins-no-artificial-ingredients/

The Third Party Rating Issue

A young-skewing minority uses ingredient-scanning apps to assess products independently, and acts on the results, with 62% willing to abandon a product over a poor rating.

*The category remains fragmented and low in awareness, however **40%** of consumers continue to trust their own judgement above any external source.*

If people are trusting on-pack claims less, the obvious question is what they turn to instead. For a committed minority, part of the answer now lies in third-party rating tools.

If a product you usually buy received a poor rating from a food rating app like Yuka, Open Food Facts or FoodSwitch, how likely would you be to stop buying it?

Somewhat likely	47%
Neither likely nor unlikely	28%
Very likely	15%
Somewhat unlikely	9%
Very unlikely	1%

Single-answer steer sent to a nationally representative sample

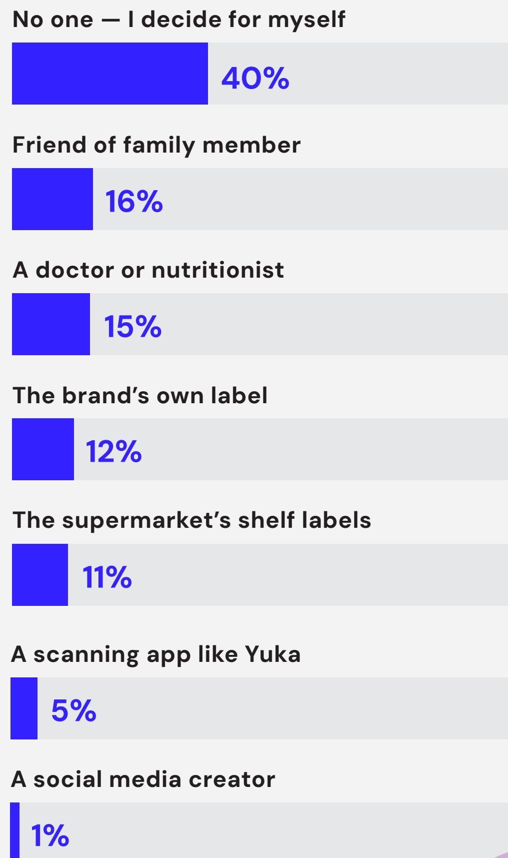
Ingredient-scanning and food-rating apps, among them Yuka, Open Food Facts and FoodSwitch, are used by approximately a quarter of consumers. That is a meaningful minority, but its limits are clear. Among non-users, **65%** have never heard of any of these apps. Outside the engaged core, awareness is minimal, with MyFitnessPal the only name carrying notable recognition among non-users and the scanning-specific apps recognised by under **10%** of them. The category is also fragmented. Among users, no single app holds the position of a category leader.

Open Food Facts, MyFitnessPal, FoodSwitch, Yuka and Hidden Persuaders all sit between **20%** and **26%**, a cluster without a clear front-runner. For any brand wondering how to deal with the rating economy, the lack of a single gatekeeper matters, because the influence is spread across several apps rather than sitting with one.

Where these tools are used, their influence on behaviour is considerable. Among users, **70%** trust the ratings to some degree, with **57%** reporting some trust and **14%** complete trust. Asked what they would do if a product they regularly buy received a poor rating, **62%** of respondents said they would be likely to stop buying it, including **15%** who said very likely.

For the committed user, a single unfavourable scan can interrupt a long-standing purchase habit. The free-text responses document precisely these episodes, among them a product assumed to be healthy revealed as the least favourable option available, and a soft drink abandoned over a flagged ingredient.

Whose rating of a food product do you trust most?



Single-answer steer sent to a nationally representative sample

[2] Source: https://www.ingredientsnetwork.com/yuka-s-food-scanning-app-helps-consumers-make-news128585.html

And the power of scanning apps does not stop at individual purchases. Yuka records 240 million scans per month globally[2] and introduced a callout feature in 2024 enabling users to pressure brands to reformulate directly. French supermarket Intermarché reformulated 900 products and removed 142 additives in direct response to consumer pressure channelled through the app. No comparable UK example exists at that scale yet, but the precedent is established: where the engaged minority is large enough, app-driven pressure produces formulation changes rather than just lost sales.

Across the wider population, the authority of these tools is more limited. Asked whose rating of a food product they trust most, the largest group, **40%**, answered no one, preferring to decide for themselves. Friends and family followed at **17%** and a doctor or nutritionist at **15%**.

A scanning app was named as the most-trusted source by under **5%**, and a social media creator by around **1%**. The apps therefore hold significant influence over their users while falling well short of broad authority, and the prevailing mode across the market remains self-reliance, which strengthens with age to reach **52%** among the over-65s.

Calorie-tracking apps, a related but separate category, display a different structure. MyFitnessPal leads decisively, used by **53%** of trackers, ahead of Nutracheck at **14%** and the remainder. In contrast to the fragmented ingredient-scanning space, calorie tracking has an established category leader, which presents a more direct partnership route for any brand whose proposition connects to calorie management.

The tension:

Scanning apps exert genuine, basket-changing influence over the minority who use them and little authority over everyone else. They are simultaneously influential and marginal, a profile that resists both the reading that positions them as the future of food trust and the one that dismisses them as a niche concern.

Commercial implications:

For the engaged minority, app ratings operate as an effective purchase filter, which raises the importance of a product's scannable credentials, its ingredient list, additives and nutritional profile, withstanding external scrutiny rather than relying on front-of-pack framing alone. The apps are not yet a mainstream authority, and a wholesale reorganisation around them would overstate their current reach. The more durable observation is that **40%** of consumers place their own judgement above any external source, which returns the emphasis to a product that is self-evidently consistent with its claims. The calorie-tracking category, with a clear leader in MyFitnessPal, offers a more straightforward partnership route where a brand's proposition fits.

Callout:

62% of scanning-app users would abandon a product over a poor rating. Across all consumers, more people trust their own judgement than trust apps, brands, doctors and supermarkets. The rating economy is influential among its users and marginal beyond them.

QUESTIONS TO ASK

Scan your own range through Yuka and the other major apps before a shopper does and treat anything that flags as a reformulation or reordering priority on the products most exposed to the scanning demographic. Because the category has no single gatekeeper, you cannot manage one relationship to fix a poor score, so the optimal move is to clean the ingredient deck itself. Start with the SKUs that skew toward younger, urban, health-engaged shoppers, since that is where the **62%** who would drop a product over a bad rating actually are.

What brands can do next

The Reformulation Economy describes a market and consumer deliberately questioning the credentials that food brands have spent a decade adding to packs. Three findings run through the section, and together suggest a rebalancing of where reformulation value sits.

The first is that claims continue to drive trial while no longer commanding belief, and that the most commercially useful claims are among the most overexposed. The on-pack health vocabulary is expanding faster than its credibility, and consumers, older ones in particular, are increasingly reading the formulation against the claim rather than accepting the claim at face value.

The second is that stated and revealed willingness to pay diverge sharply. Claims earn attention and trial. The matched-pair pricing records almost no corresponding movement in what consumers will pay, and the gap between what they say they will pay for cleaner food and what they do warrants attention from any business funding a cost increase on the assumption of a premium.

The third is that the third-party rating economy is present but concentrated, exerting strong influence over a committed minority and little over the wider market, with self-reliance the dominant mode across consumers as a whole.

Opportunity areas

Reformulation positioned as a retention and access mechanism, rather than a premium one, aligns more closely with the pricing evidence. A claim does not raise the price the matched-pair tests record, but it can protect a product's position in the basket, support listing in a health-oriented range, and defend against a competitor's cleaner alternative. On that basis reformulation continues to pay, provided it is not valued as a pricing lever the data does not support.

The credibility gap represents an opportunity in its own right. With **24%** of consumers trusting no claim at all, brands able to make their claims self-evidently accurate, through a short ingredient list that visibly supports the front-of-pack message, stand to recover the trust the category is collectively losing. The consumer reading the reverse against the front is seeking a pack that is internally consistent, and relatively few currently meet that test.

The scanning-app minority, younger, engaged and willing to abandon a product over a poor rating, constitutes a definable early-adopter segment. Designing products that withstand third-party scrutiny rather than relying on front-of-pack framing is the route to that segment, and its behaviour serves as a leading indicator of where wider scrutiny may move.

What to watch

Protein claims warrants the closest monitoring. They function as both a leading trial driver and the most overused claim in the data, a combination characteristic of a message entering decline. The brands most exposed to a protein reassessment are those that have relied most heavily on the claim without a formulation that supports it. As consumer attention to fortification sharpens alongside the wider ultra-processed food conversation, the distance between a credible high-protein product and a protein claim applied to a heavily processed one is likely to acquire commercial weight.

The rating economy will continue to grow, but the bigger question is whether it remains fragmented or consolidates. A single dominant ingredient-scanning app, comparable to MyFitnessPal's position in calorie tracking, would alter the influence calculation, converting a distributed minority behaviour into a gatekeeper that brands would need to manage. No clear leader has yet emerged, and strategies that depend on the rating economy should monitor closely for one.

The Occasion Map

How and where Britain eats is changing, and what that means for menus, venues and formats.

Section 2

As working, social and leisure habits settled into new patterns, the British eating day was expected to become similarly fragmented: fixed mealtimes replaced by constant grazing, the three-meal standard giving way to a rolling run of snacks and top-ups. The data in this section tells a more specific story, however, with the day instead being reorganised rather than dissolved, and the reorganisation being uneven, with some occasions growing while others fade.

The section examines this process across three areas. The first concerns the shape of the eating day itself; which meals are gaining ground, which are contracting, and how the pattern divides by generation.

The second addresses what consumers choose when they buy fast food or eat out casually, and the degree to which that choice reflects habit rather than active decision. The third turns to the third space; the cafes, coffee shops and pubs that sit between home and work, and what consumers now expect from them.

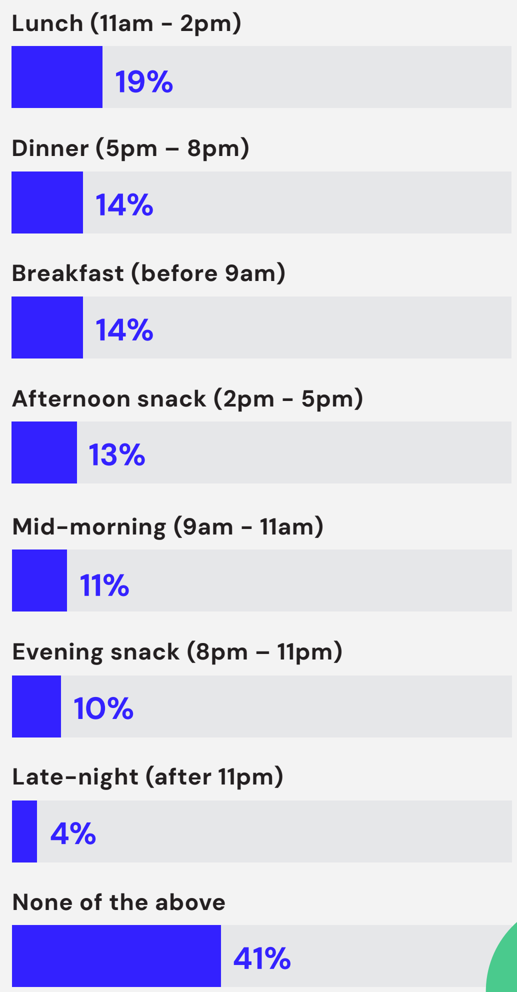
Across all three, the data describes a shopper being more deliberate about when, where and what they eat, and the occasions which survive that scrutiny are where demand is gathering.

The Daypart Drift

Dinner remains the anchor of the British weekday, *but lunch is the occasion growing fastest, while breakfast and late-night eating are both contracting. Consumption is consolidating toward the middle of the day and thinning at its edges.*

Dinner holds its position as the fixed point of the British weekday, eaten by **74%** of adults and identified as the most important meal by **62%**. It approaches universality among the over-55s, **86%** of whom eat it, and falls to **56%** among 18-24s, the first indication that younger adults are operating on a distinct daily pattern.

Which of these meals do you eat more often than you did a year ago?

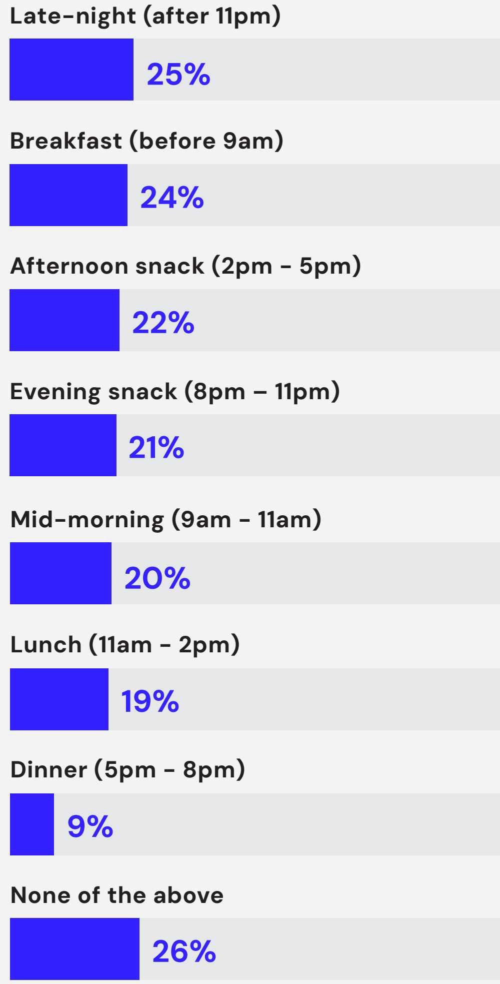


Multi-answer steer sent to a nationally representative sample

The movement around that fixed point has a clear direction. Asked which meals they eat more often than a year ago and which less, consumers describe a clear redistribution once the **41%** reporting no change are set aside. Lunch is the occasion growing fastest, cited by **19%** as something they now eat more often, rising to **33%** among 25-34s and **30%** among 18-24s. The midday meal is gaining ground, especially among the working-age consumers who account for most out-of-home food spend.

At the other end of the day, late-night eating is contracting most sharply, with **25% reporting they do it less** than a year ago, followed closely by breakfast at **24%**. The pattern points to a day compressing from both ends and a growing density in the centre, with consumers eating later in the morning, and earlier in the evening and trimming the occasions at the margins.

Which of these meals do you eat less often than you did a year ago?



Multi-answer steer sent to a nationally representative sample

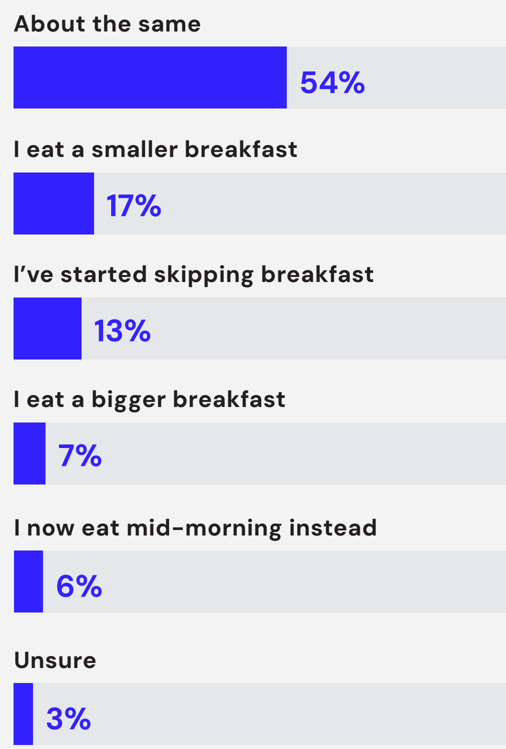
Breakfast merits a closer look, since the headline participation figure conceals a split. Just over half of adults still eat it, but **17%** report a smaller breakfast than a year ago and **13%** have begun skipping it altogether. Among 18-24s, the proportion skipping reaches **30%**. A further detail is relevant to format strategy: **11%** of women now eat mid-morning in place of a conventional breakfast, against **1%** of men. The mid-morning occasion, the stretch between nine and eleven once an early start has passed without food, is becoming a distinct and gendered eating moment, and very little product is built for it.

The structure of the day is leaner than the grazing account implies. Asked how many proper meals they eat on a weekday, **39%** report two and **37%** three, with only **6%** eating more than three. The snacking that fills the intervals is orderly rather than continuous, with **36%** reporting two snacking occasions a day and **30%** reporting one. The prevailing pattern is closer to two meals supplemented by a small number of planned snacks, with those snacks bridging the gaps that a reduced breakfast and a compressed day have opened.

The afternoon is the least developed occasion in the data. The free-text responses describe it consistently as a hot drink accompanied by something small like a biscuit, a piece of fruit, or a slice of cake.

The afternoon break reads as a functional pause rather than something people look forward to. It is an occasion observed by **26%** of adults that carries low emotional charge, attracts limited dedicated product development, and represents available territory for a brand prepared to give the afternoon a defined proposition.

How has your breakfast routine changed over the past year?



Single-answer steer sent to a nationally representative sample

The commercial expression of lunch's growing importance is already visible in the QSR sector; in 2025 and 2026, Pizza Hut, Greggs and Pret a Manger each arrived independently at the same price architecture for the midday occasion with a meal deal anchored at or around £5[3]. Greggs launched The Big Deal at £5, Pizza Hut its Crafted Flatzz range at the same point, and Pret trialled a £6-7 meal deal across 70 stores. Operators converging on the same price point for the same daypart reflects a shared commercial reading of where consumer attention and spending capacity are concentrating, even ahead of the data that confirms it.

The tension:

The eating day is consolidating toward its centre, while the industry's formats, dayparts and marketing calendars remain organised around the traditional three-meal structure with breakfast as a principal pillar. The occasions gaining ground in lunch and the mid-morning / afternoon bridges, are not those currently receiving the most product attention.

Commercial implications:

Lunch presents the clearest growth occasion in the data. The mid-morning eating moment, particularly among women moving away from a conventional breakfast, is a definable occasion with limited current provision.

The afternoon break, neutral and functional in its present form, is the least developed daypart in the British eating day, and a proposition that gives it intent rather than incidence addresses territory that is largely unclaimed.

Callout:

30% of 18-24s now skip breakfast. The youngest adults are operating a different daily pattern from older cohorts, and products built for the traditional morning increasingly address a habit they do not hold.

BRAND OPPORTUNITY

Point your next NPD cycle at the afternoon and mid-morning rather than breakfast, which is contracting and crowded. The 2-5pm occasion is observed by a quarter of adults and has almost no products built for it. A format and price designed for the hot-drink-plus-something window addresses this specifically rather than offering a snack repositioned into it. For the mid-morning gap, target the woman who has skipped a sit-down breakfast, since that is where the growth is concentrated and the provision is thinnest.

[3] Source: https://www.restaurantonline.co.uk/Article/2025/10/15/no-longer-cheap-as-chips-qsr-embraces-the-5-meal-deal/

What Gets Eaten

Fast food choice is governed more by habit than exploration.

44% of customers rarely or never change their order, and 19% report knowing their choice before consulting the menu. Delivery apps are the principal force opening that habit, though they confer no perceptible quality signal.

For most fast food customers, ordering is closer to repetition than selection. Asked how often they change their usual order, **39%** report sometimes and **32%** rarely, with a further **12%** reporting never. Taken together, the rarely and never groups account for **44%** of customers operating on established default. Among the over-65s the combined figure reaches **74%**, meaning three-quarters of older customers are ordering more or less the same thing every visit.

The menu itself does less work than its prominence suggests. Asked what most influences their choice when reviewing a fast-food menu, **21%** cite meal deals and combinations and **18%** prices.
A comparable **19%** report that nothing influences them because they already know their choice before they look, a figure rising to **32%** among the over-65s. Images of the food, the organising principle of most menu boards, influence under **5%**. For a large share of customers, the menu is a formality they pass on the way to a decision already made.

The implication for in-store activation is straightforward. A customer who has ordered the same item for years is not engaging with new-product messaging at the board, but queuing with a decision already settled. Reaching that customer depends on building familiarity before arrival rather than on merchandising at the point of sale.

Asked what matters most when choosing where to eat casually, consumers place the quality of the food first at **22%**. Price ranks fourth at **14%**, behind quality and whether the venue offers something they want to eat, and approximately level with prior positive experience. Proximity, a frequent basis for location strategy, is cited by **6%**. Among the over-65s, quality rises to **27%**. Casual dining decisions rest more on the food itself than on price or convenience, a more favourable signal for quality-led operators than the sector's prevailing price framing would suggest.

But the price pressure is not abstract. McDonald's UK meal prices rose an average of 6-8% in 2026, following sustained food and energy cost inflation, placing a double cheeseburger at £2.49 and small fries at £1.29[4]. The brand that operated for decades as a reliable marker of affordable eating is no longer cheap in the way consumers historically understood it. The response has been a dual architecture: a Saver Menu from £1.39 maintained at one end and premium limited-edition additions at the other. The two-tier approach is a commercial acknowledgement of the consumer split the data records, between those who primarily want lower prices and those who would pay more for a visit that felt better.

When ordering fast food or eating out casually, which of these is most important to you at the moment of choosing a venue?

Single-answer steer sent to a nationally representative sample

[3] Source: https://www.restaurantonline.co.uk/Article/2025/10/15/no-longer-cheap-as-chips-qsr-embraces-the-5-meal-deal/

Step back to the delivery picture and two findings sit in tension. The first is that delivery apps measurably drive discovery. Among users, **51%** report that the apps occasionally prompt them to try a cuisine or restaurant they would not otherwise have tried, and **12%** report this happens regularly, a combined **63%** being directed toward something new through the app experience. In other words, the apps drive a kind of discovery that physical menus do not, and among 25-34s and 35-44s the effect tops **60%**.

Nevertheless, app presence does little for perceived quality. Asked how an app listing affects their view of a restaurant, **47%** report no difference and **33%** report never having considered it. Only **12%** feel more confident in a restaurant for being on an app, while **9%** feel slightly less so. Asked which app they associate with quality or higher-end restaurants, the named platforms all fall below **12%**, behind every variant of ‘none of them feel premium’. Uber Eats leads the named options at **11%**, a marginal position.

So delivery apps work as a distribution and discovery channel that does little for brand equity. They place a restaurant before new customers without materially improving how those customers judge it, which leaves the quality signal to be established by the restaurant itself, through its brand, its packaging and the food on arrival.

How does a restaurant being listed on a major food delivery app affect your perception of its quality?

Single-answer steer sent to a nationally representative sample

The tension:

Fast food customers exhibit entrenched habits at the counter alongside genuine openness to discovery through apps. The two purchase modes coexist within the same category and call for different approaches, one reaching the customer before arrival, the other engaging a customer open to being surprised in the moment.

Commercial implications:

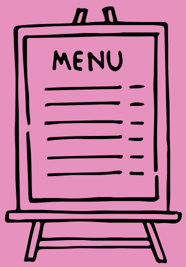
Default behaviour at the counter is sufficiently entrenched that shifting it depends on pre-visit familiarity rather than menu merchandising. Delivery apps function effectively as a discovery and trial channel but not as a quality endorsement, leaving equity-building to the brand through packaging, consistency and product. The strength of food quality as a venue-choice driver, ahead of both price and proximity, affords quality-led operators more latitude to compete on grounds other than lowest price than the sector typically assumes.

Callout:

63% of delivery app users report the app has prompted them to try something new, while **12%** think more of a restaurant for being listed on one. The channel generates discovery without conferring endorsement.

WHAT THIS MEANS FOR BRANDS

Stop spending the shift-the-order budget at the menu board, because **44%** have decided before they look at it. Move that spend to pre-visit: app, loyalty, social, the channels that reach the customer while the decision is still open. Use delivery apps as a trial engine, with a first-order discount or a bundle, but do not expect the listing to signal quality. Instead, put your quality cues in the packaging that lands at the door, the only quality message a delivery customer actually receives.



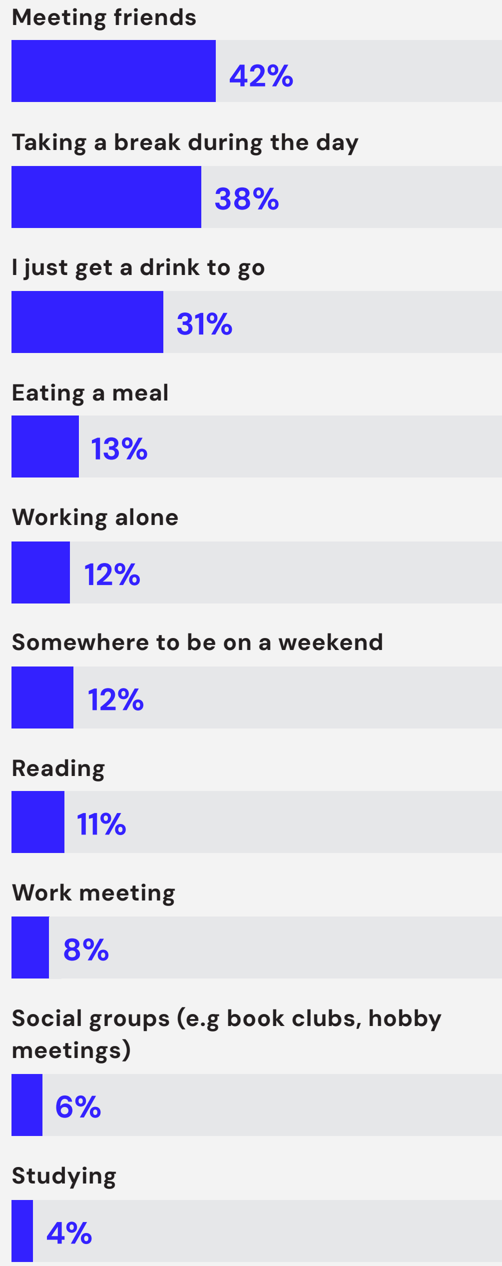
The Third Space Grows Up

The third space is sought for connection and rest considerably more than for productivity, *and the cafe specifically has become a destination assessed on the quality of its food, with **80%** of cafe-goers weighing food quality in their choice of venue.*

The modern idea of a third space (the comfortable place that is neither home nor work) tends to conjure one image: the cafe as an informal office, full of people working alone over a single coffee. But the data puts that use firmly in the minority.

Asked what they use cafes and coffee shops for, consumers place social connection and rest at the top. Meeting friends leads at **42%**, taking a break during the day follows at **38%**, and getting a drink to go accounts for **31%**. Working alone is cited by **12%** and a formal work meeting by **8%**. As people actually use it, the third space is somewhere for social contact or a pause in the day far more than a place to work, and a sharp gender split runs through it: meeting friends is cited by **55%** of women against **29%** of men, while working alone reverses the pattern, **18%** of men against under **7%** of women. The cafe means quite different things to different customers sitting in the same room.

What do you typically use cafes or coffee shops for?



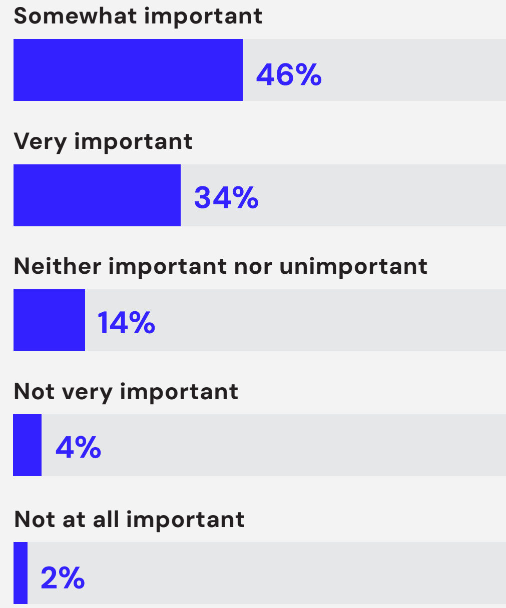
Multi-answer steer sent to a nationally representative sample

What would prompt more frequent visits divides almost evenly between two factors. Loyalty rewards at **32%** and better quality food at **31%** lead together, with a quieter atmosphere at **23%** close behind. Consumers want both a reason to return and a stronger reason to stay, and food quality now functions as a lever comparable to a discount. Among 45-54s, better food rises to **42%**.

The food quality finding has the most direct product implication. Food quality matters to **80%** of cafe-goers when choosing a venue, with **46%** rating it somewhat important and **34%** very important. Consumers are assessing these venues on what the kitchen produces as well as on the drinks, with very important reaching **44%** among the over-65s. The expectation of competent food is now general across the cafe audience and strongest among the older customers who visit most consistently.

There is also growing appetite for venues that flex across the day. Asked how likely they would be to visit a venue operating as a cafe during the day and a bar or restaurant in the evening, **51%** report being likely, including **38%** somewhat likely and **13%** very likely. The all-day format that shifts character from morning coffee to evening service has a defined audience, strongest among 45-64s, and **11%** of adults already report visiting such a venue regularly.

How important is food quality when choosing a cafe?



Single-answer steer sent to a nationally representative sample

The pub sits at the harder end of this. Asked what would prompt a daytime rather than evening visit, consumers lead with a proper daytime food menu beyond bar snacks at **24%**, followed by a quieter atmosphere at **16%**. A further **14%** report that nothing would prompt a daytime pub visit, rising to **23%** among the over-65s. Among 18-24s, **19%** identify feeling welcome without pressure to drink alcohol as the factor that would bring them in. The youngest adults are not avoiding the pub because they dislike it, but because the social expectation around drinking no longer fits how they live, a finding that connects to the wider moderation trend in the drinks category.

Operators are already testing the daytime proposition, with Marcus Hospitality Group in Norwich launching a bakery at the front of Butcher Bhoy, an Irish-themed pub, to target midweek daytime trade, and similarly installed a coffee and cake hatch at its cocktail bar Kerry's. The group's owner Marcus Pearcey summarised the competitive position plainly at an industry conference in October 2025 by stating that pubs need to compete against coffee shops 'head on' with food and coffee additions as the mechanism[5]. The permission not to drink is the prerequisite that the data identifies, and which is harder for an incumbent pub to establish through product alone.

The free-text responses saw respondents describe their ideal third space in terms of comfort, social connection and calm, describing environments ranging from friends' homes, quiet cafes, the local pub, libraries and even the great outdoors. The underlying demand is for belonging and decompression rather than workspace, and the venues competing on comfort and connection rather than on infrastructure are reading that demand more accurately.

[5] Source: https://www.morningadvertiser.co.uk/Article/2025/10/13/pub-target-daytime-trade-as-consumer-demand-shifts/

The tension:

The sector has tended to frame the third space around productivity, while the demand is weighted toward connection and rest, and has treated cafes as drinks venues while consumers increasingly assess them as food venues. Both gaps point in the same direction, toward product thinking aimed at a use case of lower priority than operators assume.

Commercial implications:

Food quality now operates as a primary driver of cafe choice and repeat visit, which removes food from its position as an adjunct to the coffee programme. The all-day cafe-to-bar format has a defined and expandable audience. For pubs, the daytime opportunity depends on a credible food offer combined with a genuine sense that a customer may attend without drinking, the latter being the factor that specifically unlocks younger adults. Across the category, the third space competes on comfort and belonging rather than on workspace provision, which is where the principal emotional demand sits.

Callout:

Among 18-24s, the leading factor that would prompt a daytime pub visit is feeling welcome without pressure to drink. The youngest adults have not turned away from the pub so much as from the expectation attached to it.

BRAND OPPORTUNITY

For food brands, treat the cafe as a distribution channel, not just a coffee occasion, and build a format that travels into it, since **80%** of cafe-goers now judge the venue on its food. For operators, the tactical decision is to invest in the food programme ahead of the next round of drinks innovation, because food is now driving both choice and return. If you run a pub chasing daytime trade, lead the comms with permission not to drink rather than with the coffee itself, because that's the specific barrier keeping the under-25s out.

What brands can do next

The Occasion Map describes a consumer reorganising the eating day rather than abandoning its structure, with three movements driving the most significant evolutions.

The first is the compression of the day toward its centre, with lunch gaining, the edges thinning, and breakfast fracturing along generational lines. The growth occasions are not those around which the industry's formats and calendars are organised, indicating a misalignment between where demand is moving and where product attention currently sits.

The second is the persistence of habit at the point of purchase set against openness to discovery through digital channels. The customer who orders identically at the counter will try something new on a delivery app, and the brands that identify which mode a customer is in, and engage accordingly, are positioned to shift behaviour that appears fixed when viewed through the in-store lens alone.

The third is the maturing of the third space into a food destination sought for connection and calm, with the cafe assessed on its food, the pub's daytime opportunity resting on food and on releasing the expectation to drink, and the underlying demand directed toward restorative and social settings rather than productive ones.

Opportunity areas

The afternoon occasion is the least developed daypart in the British eating routine. It is observed by a quarter of adults, carries minimal emotional charge, and attracts limited dedicated product thinking. A proposition that renders the afternoon break as intentional rather than incidental addresses territory that is currently unclaimed.

The mid-morning eating moment, particularly among women moving away from a conventional breakfast, is a definable occasion with a clear audience and limited provision. As breakfast continues to fracture, the bridge occasions on either side of it increase in importance and remain largely unserved.

Cafe food has become a competitive consideration rather than a supporting element. With **80%** of cafe-goers weighing food quality in their choice, the food programme now functions as a primary driver of visit and return, and operators treating food as a margin adjunct to coffee are mispositioned against where the decision is being made.

The alcohol-free daytime pub, directed particularly at younger adults, sits at the intersection of findings in this report and the wider drinks category.

The demand among 18-24s is specifically for permission not to drink, and a venue offering that alongside a credible food proposition addresses a generation the traditional pub model is in danger of losing.

What to watch

The generational divergence in the eating day is likely to widen. The youngest adults already skip breakfast, eat later, and operate a more compressed and snack-bridged pattern than older cohorts. As they age into higher-spending years, the habits they are forming now are what the category will be required to serve, and formats organised around the traditional three-meal day will sit increasingly at odds with the customer the market is acquiring.

Delivery apps will continue to grow as a discovery channel while conferring limited brand equity. The gap between reach and endorsement will acquire greater significance as the channel scales, and the brands that build their own quality signal through packaging, consistency and product are positioned to convert app-driven trial into loyalty. Those relying on the app to perform that function will continue to be discovered and forgotten in the same motion.

The Shrinking Plate

What changing appetites mean for brands, menus and product development.

Section 3

The pattern of how much Britain eats has shifted in ways the data records clearly. A third of adults are serving smaller portions at home than a year ago, close to half have reduced their takeaways, and one in four describes eating less than previously. Read as a single trend, these figures suggest a contracting market and a fading appetite.

But the fuller picture is more specific. The reduction is one of people managing their intake on purpose rather than losing interest in food, and the occasions that survive that management carry higher expectations.

This section examines that shift across four areas: how portions are changing at home, what consumers think about protein once the assumption is tested, the guilt cycle shaping fast food behaviour, and the expectations that fast food customers now bring to the visits they retain.

Each area produces findings a brand can act on, and together describe a shopper who is eating more selectively, spending more carefully, and holding the occasions that remain to a higher standard.

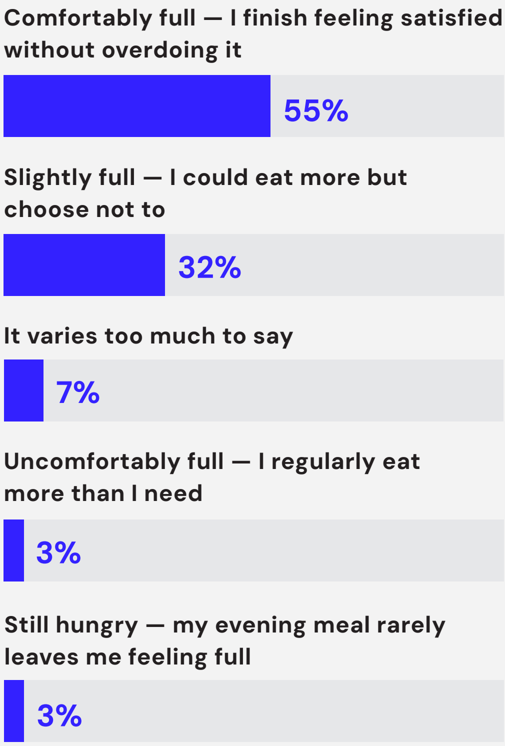
Portion, Reconsidered

A third of UK adults have reduced their portion sizes at home, *while **87%** finish an evening meal either satisfied or deliberately choosing not to eat more. The reduction reflects deliberate management of intake rather than constraint.*

A third of UK adults are eating smaller portions at home than a year ago, with **27%** reporting slightly smaller portions and **6%** significantly smaller. On its own, that figure looks like the front edge of a demand problem.

But asked how full they feel after an evening meal, **55%** of adults report feeling comfortably full, satisfied without overeating, and a further **32%** report being able to eat more but choosing not to. Only **3%** report regularly overeating. Close to nine in ten adults are therefore eating to a self-determined point of sufficiency and stopping there deliberately. So the data describes an appetite being managed, not one in decline.

How full do you typically feel after an evening meal?



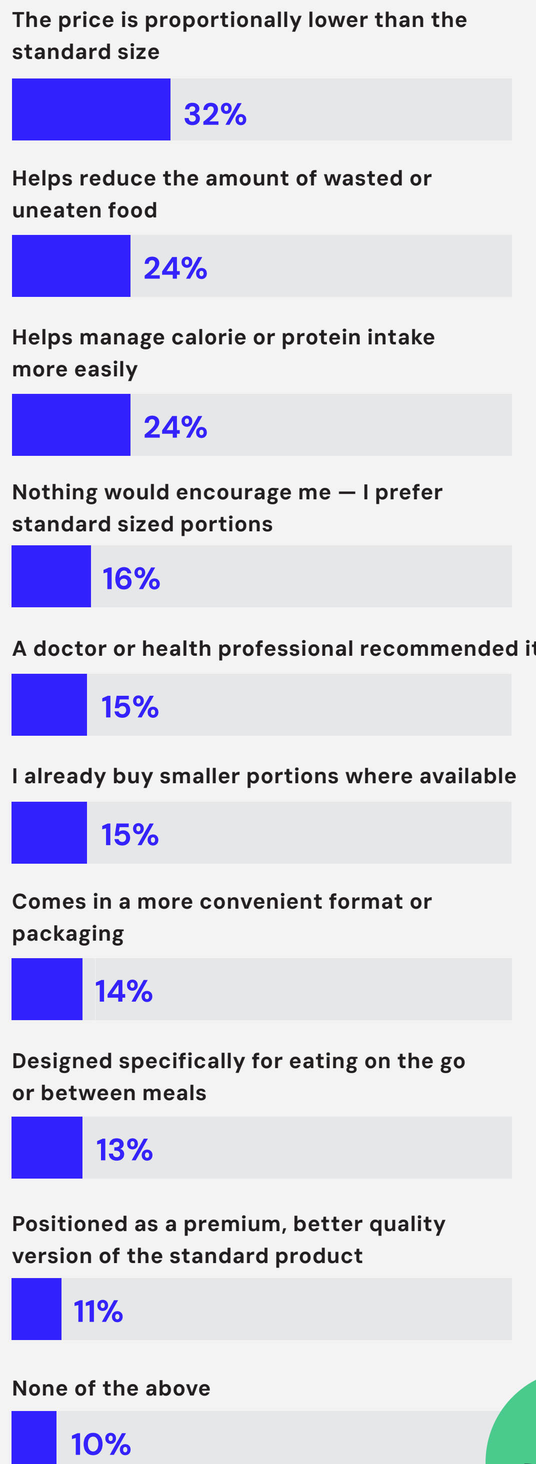
Single-answer steer sent to a nationally representative sample

The contraction is selective. Adults have reduced consumption most sharply on out-of-home and treat occasions, with **47%** cutting back on takeaways, **37%** on evening meals out, **36%** on sugary drinks, **35%** on alcohol, and around **31%** each on snacking and desserts. Home portion sizes appear last at **23%**. Consumers are protecting the meals they prepare themselves and editing those they pay others to provide, which concentrates the pressure on the commercial side of the plate.

A generational dimension complicates the narrative. Among 18-24s, **24%** have increased their home portions, more than any other group, indicating that younger adults are, if anything, eating more. The reduction concentrates among older consumers, and most steeply among the over-65s, where **41%** are eating slightly smaller portions and **8%** significantly smaller. So the shrinking plate is an age gradient rather than a single national mood, and any product response that treats all adults as one group moving the same way will misread a big chunk of them.

The factors that would encourage smaller-format purchasing extend beyond simple health concern. Proportional pricing leads at **32%**, followed by reducing food waste at **24%** and managing calorie or protein intake at **24%**. Convenient formats and on-the-go provision each attract around **13%**, and premium positioning **11%**. A further **16%** report that nothing would encourage them, preferring standard sizes.

What would encourage you to buy smaller portion sizes of your usual food products?



Multi-answer steer sent to a nationally representative sample

The free-text responses on the ideal portion converge on a feeling rather than a quantity: enough to feel satisfied without feeling heavy. That wish for satisfaction without the heaviness afterwards is the brief at the heart of product development in this space.

The tension:

Smaller formats are sought, but only where they do not register as a worse value proposition. A reduced portion at full price reads as shrinkflation, the same portion at a proportional price reads as reasonable, and a smaller portion at a premium requires visible quality to justify the difference. The single format decision meets three distinct customer responses.

Commercial implications:

Portioning operates as much as a pricing question as a product one. The **32%** requiring proportional pricing represent the mainstream, the **11%** prepared to pay a premium for a superior small format represent a specific segment, and the **15%** who already seek smaller formats where available represent an existing market for which the category has not systematically built. Format and price warrant design in combination rather than in sequence.

Callout:

87% of UK adults finish their evening meal satisfied or choosing not to eat more. The data describes a population that has determined what sufficiency looks like and is managing toward it.

QUESTIONS TO ASK

Decide which of the three portion customers your smaller format is for before you price it, because they won't all buy the same pack. If it's the mainstream, price it proportionally lower than the standard or it reads as shrinkflation and stalls. For the premium-smaller shopper, who skews older and female, the format has to show visible quality on the shelf to earn the higher price, so the upgrade goes into ingredients and pack cues, not just a size reduction.

The Protein Proposition, Tested

Protein is among the most prominent trends in food and drink, *yet roughly half the population does not actively seek it, and among those who do, **55%** would pay nothing additional for a high-protein version of a product they already buy.*

The food industry has committed substantial investment to protein over recent years, extending it across breakfast, snacking, dairy, ready meals and bread while supporting it with significant marketing activity. The consumer response, tested directly, is worth a careful look before the next round of investment.

Asked whether they actively seek high-protein products, **5%** of adults report doing so always, **17%** fairly often and **26%** occasionally, a combined **48%** qualifying as protein seekers to any meaningful degree. The remainder divides between **34%** who never seek protein and **17%** who rarely do, which is a section of the population the trend has not reached and, on this evidence, may not want to.

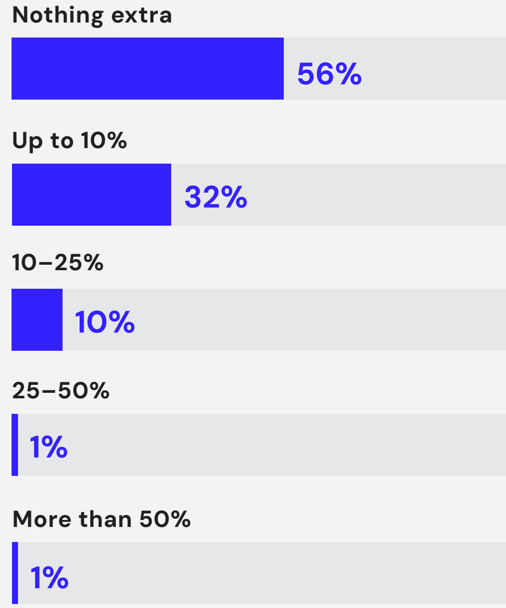
Among the engaged half, purchasing concentrates in established formats. Yogurt and dairy lead at **49%**, bars at **46%** and shakes at **36%**. The newer entrants trail, with high-protein ready meals at **27%** and protein cereal at **25%**. Protein-enriched bread sits at **19%** despite considerable development investment, indicating more limited acceptance of protein in formats not previously associated with it.

On why people buy protein, general health and wellbeing leads at **48%**, feeling fuller for longer at **42%** and weight management at **37%**. Two lower figures carry particular relevance; **19%** of protein seekers report choosing high-protein products to support weight management medication, and **13%** report buying protein out of habit with no specific reason. The medication association is already present in consumer behaviour ahead of the category communicating to it directly, while the habit purchaser represents a fragile loyalty, sustained without an active reason and exposed when circumstances change or a cheaper alternative appears.

Willingness to pay is where the proposition hits its limit. Asked how much more they would pay for a high-protein version of a product they regularly buy, **55%** of adults report nothing additional and **32%** up to 10% more, leaving only **10%** prepared to pay a premium of 10% or above. The age pattern is the actionable element: among 25-34s, half would pay up to 10% more and a further **10%** would pay above that, making them the most willing cohort, while among over-65s, **76%** would pay nothing additional. Whatever premium tolerance exists belongs predominantly to younger adults.

As for when people want more protein, lunchtime leads at **25%**, followed closely by the **23%** who report that sufficient options already exist. Evening meals and breakfast follow, while post-exercise, the occasion most associated with protein, attracts **11%.** The **23%** reporting adequate provision indicates that the opportunity is unevenly distributed across the day, with lunch and breakfast representing the more genuine gaps.

Assuming acceptable taste and availability, how much more would you pay for a high-protein version of a product you regularly buy?



Single-answer steer sent to a nationally representative sample

Fortification introduces a complication the category has not fully addressed. Asked how they feel about protein added to products such as bread, pasta or cereal, **34%** of respondents are neutral and brand-dependent and **21%** positive, while **14%** question what else has been changed in the recipe and **9%** perceive it as more processed or artificial. Combined with the **9%** who prefer natural protein sources, close to a third of adults hold reservations about fortification ranging from curiosity to active resistance.

The age split is relevant: **29%** of 25-34s feel positive about fortification, the most receptive group, while among the over-65s, **13%** perceive it as processed and **19%** are uncertain about the recipe change.

As consumer attention to ultra-processed food sharpens, the uncertainty around fortification sits directly in its path, and a clean-label position and a fortification claim cannot readily coexist without the formulation reconciling them.

On the underlying question of whether a product can contain too much protein, **41%** are unsure, **31%** consider it probable, and only **9%** maintain that more protein is always beneficial. Consumers have not settled their own view here, which gives trusted brands room to define the terms, and leaves brands whose protein story rests on quantity rather than relevance exposed.

The tension:

Protein sells to a defined audience at a modest premium, while the industry can often treat it as a broad growth lever and a general licence to raise prices. The consumer data renders the distinction between those two positions visible.

Commercial implications:

Protein carries genuine pull among under-45s, particularly at lunch and breakfast, and functions weakly as a mainstream pricing strategy. Fortification benefits from genuine naturalness credentials built into the product rather than applied to the pack, addressing the processing concern before it consolidates into a barrier. The **19%** of protein buyers already connecting their choices to GLP-1 use represents the most forward-looking indicator.

Callout:

Among the over-65s, **76%** would pay nothing additional for added protein, while among 25-34s more than half would pay up to **10%** more. The protein premium is a function of age rather than a property of the category.

WHAT THIS MEANS FOR BRANDS

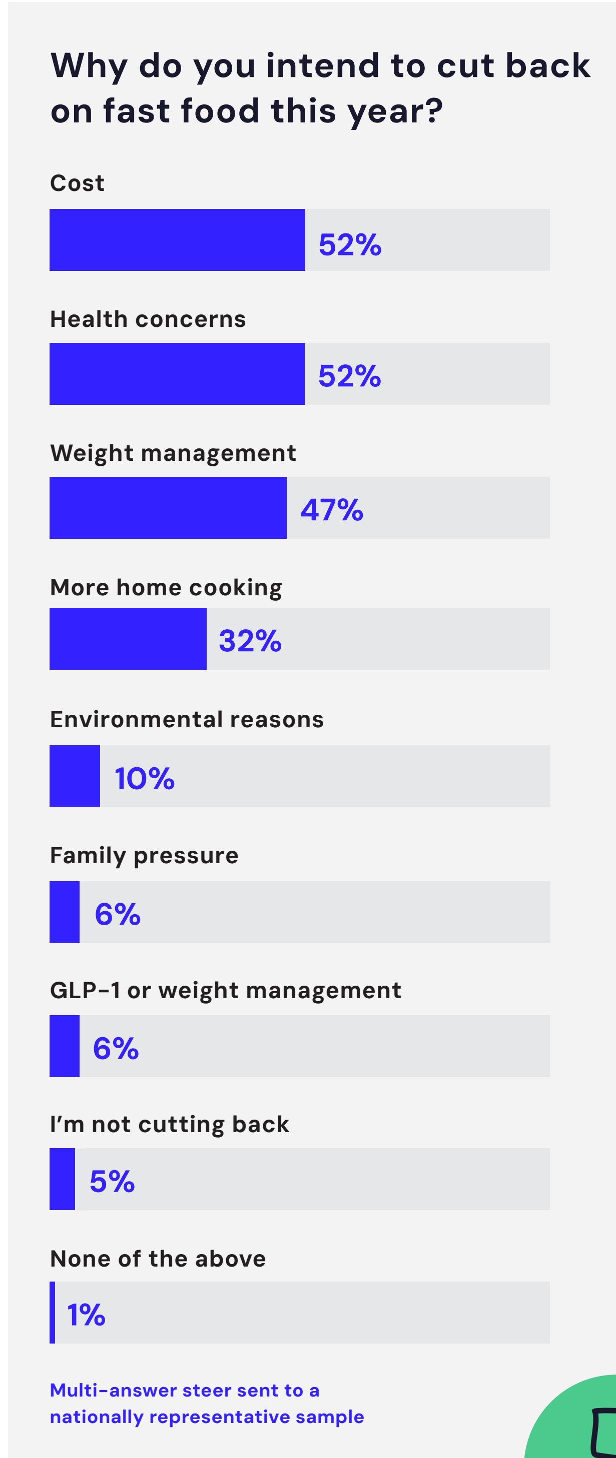
Concentrate protein NPD on the formats and shoppers that actually pay for it (under-45s in lunch, snacking and on-the-go) and stop treating protein as a range-wide premium, since **55%** will pay nothing extra and **76%** of over-65s pay nothing at all. Where you do fortify, pair it with a visible naturalness cue and a short ingredient list, since a third of shoppers already read added protein as a processing signal. A protein claim on a long, processed deck is the one most exposed as the UPF conversation sharpens.

The Participation-Guilt Cycle

Cost and health are level as the reasons consumers are reducing fast food, *each cited by **52%** of those intending to cut back. The category is responding to a combination of price pressure and an experience that has become harder to justify, rather than to a wellness movement alone.*

61% of frequent fast food users report being likely to cut back this year, rising to **72%** among 18–24s. The intention to reduce is broadly distributed and weighted toward the consumers who use the category most frequently.

The drivers are worth a close read. Cost and health concerns are exactly level at **52%** each among those intending to cut back, with weight management following at **47%** and a shift toward home cooking at **32%**. Cost and health sitting level qualifies the usual framing of the category's health challenge.



That framing typically treats the issue as a wellness matter, in which rising health consciousness requires a healthier menu. The data points to something more tangled, where the same person is cutting back for money and health reasons at once, and the two do not separate cleanly. A meal once regarded as an affordable treat has become expensive enough to require justification on health grounds as well, with value and health merging into a single assessment. A response addressing only one of them leaves the other half of the audience unaddressed.

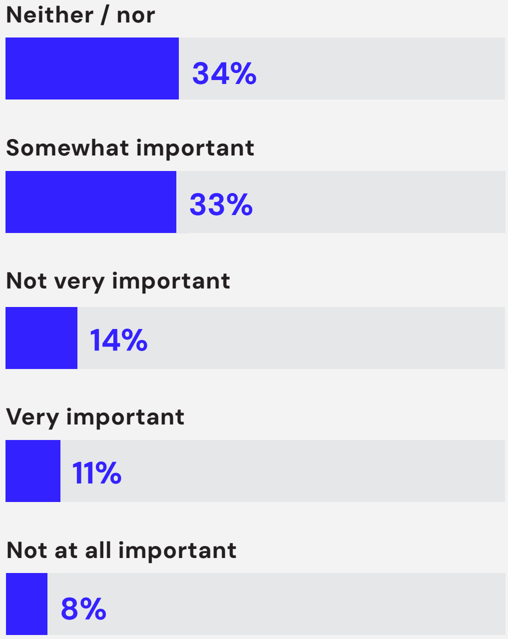
The generational pattern is relevant to strategy. Among 18-24s, cost is the primary reason to cut back at **54%**. By 35-44, health takes precedence at **57%**, and by 45-54 it reaches **64%**. The motivation for reducing fast food shifts with age, from predominantly financial to predominantly health-oriented around the mid-thirties, indicating that a single proposition addressed to all ages will engage none of them fully.

Asked what would encourage continued visits, **30%** of frequent customers cite lower prices, **15%** healthier cooking methods, and **15%** report that nothing would change their habits. The latter are not being lost to price increases or a limited menu but are instead in the process of departing the category on settled terms. No promotional mechanism or product development is likely to recover them within a useful timeframe, and identifying that segment clearly in terms of its size, composition and point of departure, is of greater commercial value than attempting to reverse a decision already made.

The guilt finding adds a dimension the category rarely addresses directly. Among frequent users, **44%** report that a guilt-free visit is somewhat or very important, **34%** are neutral, and **21%** report it as unimportant. The cut by frequency is the more revealing measure: among those visiting two to three times a week, the proportion rating a guilt-free visit very important rises, and among daily visitors half rate it very important.

The most frequent customers might be assumed to have settled into comfortable usage, yet they carry the highest guilt burden. The psychological cost per visit appears to rise with frequency rather than diminish with familiarity, indicating that many regular fast food customers are managing an ongoing tension between habit and self-image that the category has not equipped them to resolve.

How important is it that a visit to a fast food restaurant feels guilt-free to you?



Single-answer steer sent to a nationally representative sample

The tension:

The guilt cycle does not resolve through healthier fast food alone, since the guilt encompasses value, self-image and the question of whether the occasion represented a sound use of money and time. A product that reduces guilt by reducing enjoyment addresses a different problem from the one consumers describe.

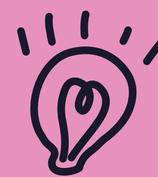
Commercial implications:

The parity of cost and health at the top of the cut-back motivations indicates that the value response and the quality response require development in parallel rather than as alternatives. The **15%** reporting that nothing will change their habits represent a commercial write-off for product purposes and treating them as recoverable misdirects effort. The correlation between frequency and guilt points to an opportunity in both communication and product, with the brands that render a regular visit considered rather than merely cheap or functional positioned to interrupt the cycle for the category's most valuable users.

Callout:

Among daily fast food visitors, **50%** report that a guilt-free visit is very important. The heaviest users carry the heaviest psychological cost, with habit and discomfort coexisting.

RESEARCH IDEA



Run a single steer to find out whether your lapsing customers are leaving on cost or health, because the two are level overall but split hard by age, and the answer dictates the response. Under-35s are going on price, so the move here is value architecture. The over-35s go on health and guilt, so a visibly better, more considered product is the play rather than a discount. Treat the **15%** who say nothing would bring them back as a write-off and put the budget you would have spent bringing them into the daily and twice-weekly visitors, who carry the heaviest guilt and the most volume.

Quality, Not Just Quantity: The New QSR Brief

Value leads consumer priorities as usual, *but* ***20%*** *of frequent fast food customers want meals that feel filling despite being smaller, a requirement the current market does not address.*

The priorities frequent fast food customers bring to a visit remain stable at the top. Value for money leads at **53%**, taste and satisfaction at **50%**, and speed and convenience at **39%**. These have anchored the category for decades and continue to do so.

But the structure beneath them has shifted. The treat or reward feeling is cited by **31%** as a top driver, ranking ahead of fresh ingredients at **24%**, portion size at **23%** and every option in the health cluster. The treat remains the emotional basis of fast food consumption, and on this evidence a more durable one than is often assumed. Its salience peaks among mid-life consumers, reaching **38%** among 35-44s and **41%** among 45-54s, the demographics managing the most competing pressures on time, money and health, indicating a consumer whose indulgence has become more deliberate and correspondingly more valuable per occasion.

Fresh ingredients rise with age to **39%** among the over-65s, and speed peaks at **54%** among 45-54s, the time-pressed mid-career group for whom the category's original efficiency proposition retains the most relevance.

How orders have changed over the past year maps the pressure points. **27%** report looking harder for value deals**, 26%** visiting less often and **23%** no change. The product brief forms in the smaller figures: **10%** now want meals that feel worth the calories spent, and **8%** each are choosing smaller meals, more balanced meals or higher-protein options. A further **16%** report still ordering treats, just less frequently, a group that has deliberately preserved the treat occasion while reducing overall frequency and represents a motivated audience for a product delivering the treat at a higher standard.

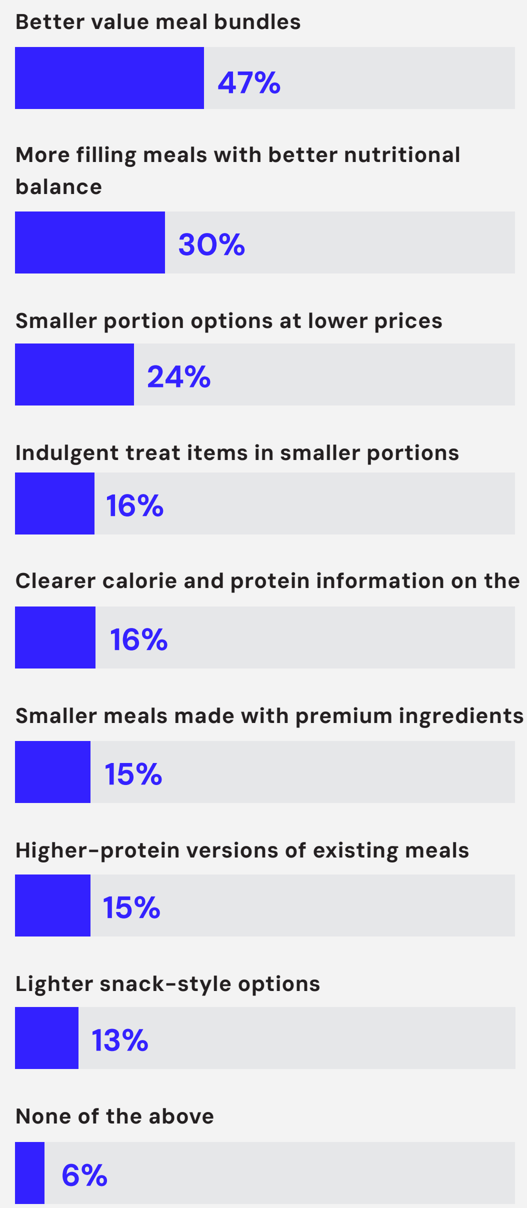
The attitude data shows the full spread the category has to hold. **22%** report unchanged preferences with convenience as the priority and **17%** that value now outweighs quality, while **13%** report still wanting indulgent meals, just less often, and **11%** that they would prefer a smaller, higher-quality meal to a standard one. The latter two groups together represent close to a quarter of frequent users reaching toward a more considered version of the fast food occasion.

Asked what would appeal if a quick-service brand offered it, consumers assemble a coherent brief. Value bundles lead at **47%**, the baseline on which the remaining propositions build. Below it sit more filling meals with better nutritional balance at **30%**, meals that feel filling despite being smaller at **20%**, smaller meals with premium ingredients at **15%**, indulgent treats in smaller portions at **16%** and higher-protein versions of existing meals at **15%**.

The **20%** seeking meals that feel filling despite being smaller describe a requirement the market does not currently meet. The request concerns satiety rather than reduced quantity or calorie content, locating the work in the composition of the meal rather than its size, through protein, ingredient quality, preparation method and sensory density.

On quality against price, **36%** expect price to follow portion size downward, the instinct the category most often fears, and the remaining responses qualify it: **21%** report that quality matters but would not pay a premium for it, and **16%** would pay more for a smaller meal that felt better. Among the over-65s, that willingness rises to **24%**, and among women it reaches **18%** against **13%** for men. The premium-smaller segment is a minority but a defined one, indexing older and female, with both the spending capacity and the appetite for quality the category has consistently under-addressed.

If offered by a quick-service restaurant brand like McDonald's, KFC or Greggs, which of these would appeal most to you?



Multi-answer steer sent to a nationally representative sample

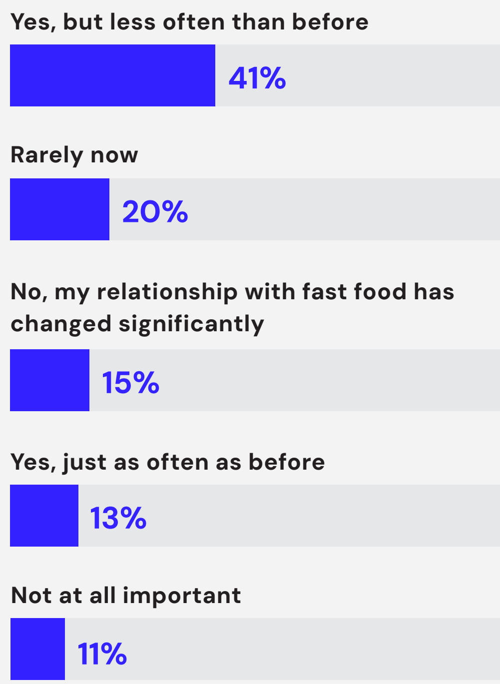
The free-text responses on what makes a fast food purchase feel worth it concentrate around value and the treat feeling, with negative responses citing rising prices and declining quality. In the consumers' own terms, 'worth it' describes a meal that delivers on its implicit promise of speed, satisfaction and an occasion that earns its place in a more deliberate relationship with food.

The GLP-1 Question

When current and lapsed GLP-1 users were asked how their relationship with fast food has changed since starting medication, **34%** percent visit less often, **22%** consider carefully whether a meal feels worth it, and **22%** report still enjoying treat or reward occasions, just less frequently, a figure level with the **22%** now preferring lighter or healthier options.

The data does not back the idea that GLP-1 users have left the category. Among current and lapsed users, **41%** visit for treats less often and **13%** as often as before, a combined **54%** still present in the category for indulgent occasions. Only **8%** report that their approach has not materially changed and **7%** select none of the available options. The majority are active participants navigating a changed relationship rather than consumers who have left.

Do you still visit fast food restaurants like McDonald's, KFC or Greggs for treat or indulgent occasions since starting weight management medication?



Single-answer steer sent to a nationally representative sample

In the context of what matters more to GLP-1 users at quick-service restaurants now: protein content leads at **32%**, smaller portion options at **31%**, freshness and quality at **28%**, value at **28%** and meals that keep them full for longer at **24%**. The experience they describe centres on satisfaction without volume, visible quality and a portion that has been designed rather than simply reduced.

Among current users specifically, the single change that would most increase visit frequency is smaller meals at proportional prices at **34%**, followed by higher-protein options that maintain fullness at **31%** and lighter treats that still feel genuinely indulgent at **29%**. The final figure carries weight beyond its rank: close to three in ten current GLP-1 users want the indulgent occasion preserved in a format they can use, rather than removed.

The retail sector has moved ahead of QSR in recognising GLP-1 users as an under-served segment, with Morrisons launching 53 GLP-1-friendly products in January 2026 alone including seven ready meals developed in partnership with Applied Nutrition, positioning the range as the UK's first supermarket-exclusive GLP-1-friendly meal offer[6].

The range covers high-protein balanced meals, food-to-go formats, breads and cheeses, with no comparable QSR equivalent existing at scale in the UK market as of yet. The gap between where grocery has moved on this and where fast food has not is where the commercial opening currently sits.

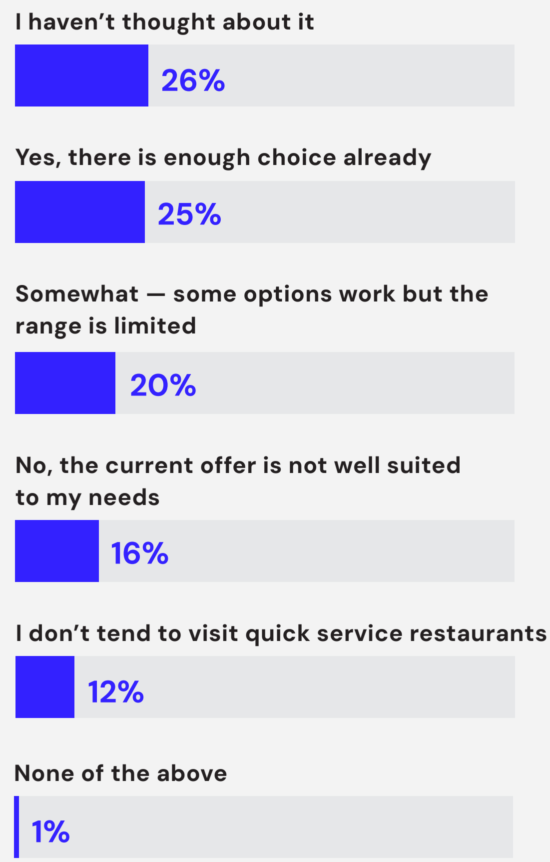
The US market, where GLP-1 adoption moved far earlier, provides an indication of direction. Chipotle introduced a High-Protein Menu in 2026, while Shake Shack launched a Good Fit Menu featuring lettuce-wrapped burgers with up to 52g of protein. Olive Garden began trialling a smaller-portions menu section and introduced it fully in 2026, and The Cheesecake Factory now operates a permanent Skinnylicious section offering dishes at approximately 500 calories. In each instance, the response is integration rather than segregation; smaller, more considered options built within the existing brand identity rather than separated onto a health sub-menu, preserving the treat occasion within a different container.

[6] Source:: https://www.foodingredientsfirst.com/news/glp-1-friendly-menus-food-dining-2026.html

On price, current users divide almost evenly, with **29%** expecting smaller meals to cost noticeably less, while **22%** report that satisfaction matters more to them than portion size, **16%** would pay slightly more for higher protein or nutrition, and **11%** would pay slightly more for better ingredients. So the room to price a smaller, better product fairly, neither cheap nor premium, is there to take while adoption is still building.

A quarter of current and lapsed GLP-1 users consider that fast food brands currently offer enough for people with smaller appetites. **20%** see a limited range, **16%** report the current offer does not suit them, and **26%** have not considered the question, the category having given no indication it might serve them. The segment is underserved rather than absent.

Do you feel that fast food restaurants like McDonald's, KFC or Greggs currently offer enough suitable options for people eating smaller portions or managing their appetite?



Single-answer steer sent to a GLP-1 users (past and present)

The tension:

The category's established response to health consciousness, lighter options and calorie labelling addresses a different customer from the one the data describes. The recalibrated consumer seeks satisfaction within a constraint, while the current provision runs the risk of delivering the constraint without the satisfaction.

Commercial implications:

The brief is specific: a meal sized for the recalibrated appetite, composed for satiety rather than volume, priced fairly rather than cheaply or at a premium, and retaining the treat quality that remains the category's most durable asset. The position is currently unoccupied and unlikely to remain so for long. Meanwhile, the GLP-1 audience represents the leading edge of a wider shift, seeking what the general moderate consumer does but sooner and in sharper definition. Building for that behaviour now is building for the centre of the market over a three-to-five-year horizon.

Callout:

29% of current GLP-1 users want lighter treat options that still feel indulgent. The treat occasion remains, awaiting a product suited to the appetite it is now asked to serve.

BRAND OPPORTUNITY

The meal nobody has built yet is smaller, engineered for satiety through protein and ingredient quality, fairly priced, and still carrying the treat. The **20%** asking for filling-despite-smaller have no product to buy. Follow the US integration model rather than a separate health menu, since the treat occasion has to survive the redesign, and use the GLP-1 shopper as the design brief because they want now what the broad moderate customer will want next. Grocery has already moved here and QSR has not.

What brands can do next

The Shrinking Plate comprises three overlapping shifts operating at different speeds, reaching different audiences, and requiring different commercial responses.

The first is a broadly distributed recalibration in how much consumers eat at a single sitting, most pronounced among older consumers, running in the opposite direction among younger ones, and concentrated on out-of-home occasions rather than home cooking. The required response is not uniform downsizing but a portfolio that provides the recalibrated consumer with formats designed for them rather than standard products with reluctant portion reductions.

The second is the protein conversation. Protein sells to a defined group at a modest premium and functions weakly as a mainstream pricing lever. The **19%** of protein buyers already connecting their choices to GLP-1 use is the most forward-looking signal in the section, and as medication adoption grows the protein-and-satiety position will extend to a wider audience, with authentic development now preferable to retrofitting once the trend becomes unmistakable.

The third is the fast food guilt cycle, which the category runs the risk of managing less effectively than it might because the narrow framing. Guilt in this context encompasses value, self-image and the question of whether the visit was worth it, and the brands positioned to interrupt the cycle are those that ensure each visit is considered and earned rather than merely cheap or functional.

Opportunity areas

The premium smaller format is the least developed space the data identifies. A meal sized for the recalibrated appetite, made with visibly better ingredients, priced fairly and retaining the treat is a tall order, but the **20%** of frequent customers who want it and the **24%** of over-65s who would pay more for it constitute an existing audience rather than a niche.

The indulgent smaller occasion is a related opportunity. **16%** of frequent customers and **29%** of current GLP-1 users specifically want indulgent treats in smaller portions. The treat warrants redesign for a portion size reflecting how consumers now eat, as a deliberate product category rather than a reluctant concession.

The GLP-1 audience is underserved at scale, with a quarter unaware that quick-service restaurants might offer anything suited to them. The brands that signal understanding of this consumer through portion options, visible protein and ingredient quality, without foregrounding the medication, are positioned to reach both that audience and the wider moderate consumer who shares its priorities.

What to watch

Patent expiry on the major GLP-1 medications begins in 2026, with the first generic equivalents expected to reach market within twelve to eighteen months. As the cost reduces, adoption will extend beyond the demographics currently driving it into a younger and more price-sensitive population. The category still developing its understanding of this consumer at that point will have missed the first-mover position, while the category holding both the product and the language will be prepared when the audience arrives.

The ultra-processed food conversation will continue to apply pressure to protein fortification and ingredient manipulation more broadly. The **14%** of adults who already question what else has changed when protein is added will grow as consumer sophistication about food processing deepens. Products that are genuinely minimally processed while being meaningfully high in protein hold the most defensible long-term position, and also the most difficult to build, with the distance between that difficulty and its commercial value indicating where the substantive development investment belongs.

Conclusion

The three sections of this report examine different parts of the market and arrive at the same consumer. In the reformulation economy, that consumer reads the ingredient list against the claim and declines to pay for the difference. In the occasion map, they reorganise the eating day around the moments that hold value and edit out the ones that don't. In the shrinking plate, they manage their appetite deliberately and raise their expectations of the occasions that remain. The behaviour varies by context, but the underlying disposition remains consistent.

What connects the findings is a change in where persuasion now sits. For most of the past decade, a claim, a promotion or a new format could reliably move a consumer. The data in this report indicates that those levers have weakened, not because consumers care less about food, but because they assess it more carefully. They place their own judgement above any external authority, distinguish between a claim that earns trial and one that earns belief, and will try a smaller, cleaner or higher-protein product and then decline to pay more for it within the same purchase.

This carries a practical consequence for how the industry plans. Several of the strategies examined here including the reformulation premium, the protein price uplift, and the assumption that health consciousness calls for a lighter menu, all rest on stated rather than revealed behaviour. Where the two diverge, it is the revealed figure that determines what happens in the basket. The brands that test against behaviour rather than opinion will price, formulate and range against a more accurate account of demand than those working from what consumers report.

The opportunities the research identifies are for the most part currently unoccupied. From the premium smaller format and the afternoon occasion to the GLP-1 consumer who still wants the treat, none requires reversing a consumer trend or persuading anyone of anything. Instead, each requires building for behaviour that already exists and is not yet being served, which is a more favourable position than the prevailing narrative of decline suggests, and a more demanding one, since it rewards precision over scale and accuracy over volume.

The consumer described across these pages has not retreated from food, from fast food, or from the pleasures either provides. What they have done is become far more deliberate and provided a specific product brief in the process.

The plate is smaller, the claims are read more closely, and the eating day is reshaped. What today's consumers are expressing is not the absence of demand but its relocation, and the businesses who follow them rather than assuming where they are headed will reap the rewards.

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