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Cafés and quick-service chains drive a one-third rise in retail park restaurant units in Britain

Savills found most post-pandemic growth came from smaller convenience-led sites, leaving casual dining well below its former role

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Cafés and quick-service restaurants are driving the reshaping of restaurant space in British retail parks, while casual dining continues to lag behind its pre-pandemic role, according to a sector study by Savills Research. For hospitality operators, the change means that much of the new capacity in out-of-town retail locations is being added in convenience-led formats, increasing competition in coffee and fast-food categories rather than restoring the full-service mix that was more common before COVID-19.

Savills said that, across the high streets, shopping centers and retail parks it analyzed, almost all growth since 2020 has come from the expansion of café and quick-service restaurant formats in out-of-town retail locations. Casual dining brands that had a meaningful presence in retail parks in the previous decade have largely not been replaced on a like-for-like basis. Instead, the mix has moved toward formats built around speed, convenience and easy access, which Savills said fits the strengths of retail parks. The study also said drive-thru expansion has been a major part of that shift.

The change matters because retail parks are carrying more restaurant units than they did before the pandemic. Savills said food-and-beverage units in retail parks now account for around a third more units than before COVID-19. The increase looks much smaller when measured by floorspace, at about 3%, which suggests that much of the growth has come from smaller-format units rather than large sit-down restaurant space. For operators, that points to a market that is expanding in unit count but doing so with tighter footprints and faster-turnover concepts.

Savills said the leading brands still dominate the national market. Across the three subsectors it studied, the top five brands remain the main providers of restaurant and café space. But the pattern varies sharply by location. On high streets, Savills recorded a net reduction in top-five brands since 2020, reflecting both consolidation and changes in brand strategy. In shopping centers, the study found little overall change, largely because established café and quick-service operators continue to be viewed as dependable tenants with strong customer followings.

Retail parks moved in the opposite direction. Savills said that is where most of the recent growth has been concentrated, with convenience-led restaurant formats taking more space as landlords respond to shopper behavior and to the operational advantages of these locations. Those advantages include easy car access, shorter visit times and the ability to support drive-thru service. For restaurant groups looking at expansion, that means retail parks are no longer just an add-on to high street or mall strategies. In several categories, they have become one of the main areas of network growth.

The study also drew a distinction between large incumbent chains and newer operators. Brands ranked 6-20 by Savills, which it described as disruptors, are beginning to gain traction in retail parks, especially in cafés and quick-service formats. Even so, their expansion in those locations remains much smaller than on the high street. Savills said these brands opened twice as many high street sites as in shopping centers and retail parks combined.

Savills found a different pattern again among up-and-coming brands in the top 50. That group has driven the biggest change in shopping centers over the past six years, helping those destinations broaden their café and quick-service offer. On high streets, the total number of units has been broadly unchanged since 2020, but the names on the storefronts have shifted. Savills said some landlords have become more flexible about tenant strength, but operators still usually need an established record before they are offered space.

For smaller chains ranked 50-100, Savills said the high street remains the main proving ground. That is where brands moving from independent status to small-chain scale are most likely to open and test formats. Savills said those businesses are the ones to watch because much of the market's next phase of expansion is likely to come from them. That is also where any recovery in casual dining may first become visible. Savills described casual dining as a shadow of its former scale, although it said the pipeline of new brands is becoming more encouraging and that growth is now concentrated among emerging operators rather than the old larger names.

Beyond changes in individual brands, the study said restaurant and café uses have become a larger part of retail destinations in general over the past decade. On high streets, Savills said food-and-beverage operators typically account for 25%-30% of the total offer. In shopping centers, the share is 14%-23%, with larger destinations skewing more heavily toward restaurant uses. Savills said the proportion of food-and-beverage units has increased by more than 20% in the largest shopping center destinations and by 17% across the market as a whole. The firm noted that these figures refer to units, not floorspace, a distinction that matters because larger centers tend to devote more physical area to restaurant tenants than the unit count alone suggests.

Savills said the rise in restaurant space reflects three types of change. Some of it is organic, coming from normal shifts in tenant demand. Some of it is strategic, with landlords actively seeking more restaurant uses to match changing consumer habits. Some of it is reactive, when owners turn to restaurant tenants because no alternative retail tenant can be found. The commercial logic is straightforward. Savills said restaurant uses increase both footfall and dwell time. But the study also warned that saturation is a real risk because consumer spending is still finite even as households

devote a larger share of disposable income to leisure.

The best mix depends heavily on the type of retail destination, according to the study. In super-regional malls, Savills found a broadly even split between cafés, quick-service restaurants and full-service dining, with each major scheme averaging 38 outlets. By floorspace, casual dining takes the largest share, even though the average number of units is about 12 in each category. Savills said those large schemes tend to combine long-established top-five operators with a broader mix from the top 100, showing the value of variety and of being able to rotate brands more quickly.

Prime city-center shopping centers show a similar balance, but at a smaller scale. Savills said those schemes average about 20 restaurant outlets, roughly half the level of the super-regionals, with broad parity between the main formats. In those city-center assets, brands outside the top five have become increasingly important, especially in casual dining.

In sub-regional and community shopping centers, the dining role is smaller and fast, convenient formats carry more weight. Savills said the top five operators account for about 75% of brands in those schemes, and cafés overtake quick-service restaurants as the most common format. For landlords and operators in those locations, the challenge is to stay relevant and offer enough differentiation without taking on too much exposure to unproven concepts.