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European Restaurant Spending Hits Record Highs as Dining Habits Shift

Fewer visits, rise in solo dining and digital delivery reshape industry across UK, Germany, France, Italy and Spain

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The European restaurant industry is undergoing significant changes, according to new data from Circana presented at the European Foodservice Summit 2025 in Amsterdam. Consumers in the United Kingdom, Germany, France, Italy, and Spain are spending

more than ever on dining out, but they are doing so less often. This trend, which began during the pandemic, continues to shape how and why people choose to eat outside their homes.

Between June 2019 and June 2025, spending in the restaurant sector rose by 10 percent, reaching record highs. However, the total number of visits remains 10 percent below pre-pandemic levels. For restaurant operators, the challenge has shifted from recovery to adapting to new patterns of dining behavior. Jochen Pinsker, a foodservice industry advisor at Circana, described this as a “reset” for European dining. He noted that consumers are now balancing health and convenience with social occasions and solo meals, creating a more dynamic and fragmented market.

Recovery rates differ across Europe. Germany leads with a projected 1.6 percent increase in visits for 2026 compared to 2025, driven by digital ordering and home delivery. The United Kingdom faces greater challenges, with visits still 21 percent below pre-pandemic levels. In Spain, visits through June 2025 are down 4 percent compared to 2019, similar to Italy and slightly better than France’s 9 percent drop. Economic uncertainty means Spain is expected to recover more slowly than its neighbors, with only a modest 0.2 percent growth forecast for 2026.

One notable shift is the rise of solo dining. Eating alone at restaurants was once rare but has become a lifestyle choice for many Europeans. Spending on solo meals outside the home jumped by 153 percent between 2010 and 2019. Today, solo diners account for nearly 16 percent of full-service restaurant visits, up from just over 9 percent in 2016. This trend is linked to urban living, hybrid work schedules, and the popularity of digital cafés that make “table for one” experiences more common.

At the same time, social dining occasions are also increasing. By June 2025, social gatherings made up 31 percent of all restaurant visits in Europe, up from just under 30 percent in 2021. Shared plates and tapas nights remain especially popular in southern Europe.

Value is another key factor influencing consumer choices. Europeans are increasingly looking for deals that offer good value without sacrificing quality or experience. One in three dining occasions now includes a promotion or meal deal—up from about one in

four just three years ago.

Home delivery services are also changing what it means to “eat out.” Two-thirds of food delivery orders now replace home cooking rather than supplementing it. Platforms like Uber Eats, Deliveroo, and Just Eat have expanded rapidly and now account for nearly four percent of all foodservice visits—almost four times their share in 2016. These platforms bring hundreds of restaurants into a single digital marketplace and encourage consumers to try new places through promotions and loyalty programs.

Healthier eating habits are also shaping menus and beverage trends across Europe’s major markets. Alcohol consumption fell by seven percent year-over-year among the five largest European economies during the first half of 2025 compared to the same period in 2024. Meanwhile, non-alcoholic alternatives grew by two percent. Tap water consumption increased by five percent—outpacing bottled water’s one percent rise.

According to Pinsker, dining out is becoming more personalized than ever before. For some people it is about sharing moments with friends; for others it is about enjoying a quiet lunch alone. Whether it is tapas with friends in Madrid, sushi at a Berlin café or alcohol-free cocktails in London, consumers are shaping their dining experiences around their lifestyles.

Circana’s analysis points to a fragmented but opportunity-rich market for European restaurants. Operators who succeed will be those who focus on value-driven strategies, invest in digital ordering and delivery systems, and adapt quickly to changing health priorities and local habits.