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European Restaurant Spending Hits Record Highs

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. While consumers in the United Kingdom, Germany, France, Italy, and Spain are spending more than ever on dining out, they are doing so less frequently. This trend shows that the shifts brought by the pandemic continue to shape how people eat

outside their homes.

Between June 2019 and June 2025, total spending on restaurants in these five countries increased 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 in when, where, and why people choose to dine out.

Jochen Pinsker, Industry Advisor for Foodservice Europe at Circana, described the current moment as a “reset” for European dining. He noted that consumers are finding a new balance between health and convenience, social occasions and solo meals. The market is now more dynamic and fragmented than it has been in years.

Recovery patterns differ across Europe. Germany leads with a projected 1.6 percent increase in visits for 2026 compared to 2025. This growth is driven by increased use of digital ordering and home delivery services. 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 is expected to slow Spain’s recovery further, with only a modest 0.2 percent growth forecast for 2026.

Dining habits are also changing. Eating alone has become more common and accepted as a lifestyle choice rather than an exception. Spending on solo meals outside the home rose by 153 percent between 2010 and 2019. Currently, solo diners account for 15.6 percent of full-service restaurant visits, up from 9.4 percent in 2016. This shift is linked to urban lifestyles, hybrid work arrangements, and digital cafés that make “table for one” occasions routine.

At the same time, social dining is gaining ground again. Meals motivated by social reasons now make up 31 percent of all restaurant visits through June 2025, up from 29.8 percent in 2021. This trend is especially strong in southern Europe, where shared plates and tapas remain popular.

Value is increasingly important for European consumers. One in three dining occasions now includes a promotion or set menu deal—up from just under one in three in 2022 to over one in three in 2025. Delivery services are also reshaping what it means to eat out. In many cases, delivery orders now exceed the peaks seen during the pandemic lockdowns. For many people, “eating out” means ordering food to enjoy at home; two-thirds of delivery orders replace home cooking rather than traditional restaurant visits.

Platforms like Uber Eats, Deliveroo, and Just Eat have become central players in this shift. They now account for 3.7 percent of all foodservice visits—almost four times their share in 2016. By bringing hundreds of restaurants into a single digital marketplace, these platforms are changing how consumers discover food options and make choices about what and where to eat.

Healthier choices are also influencing menus and beverage trends across Europe’s major markets. Alcohol consumption fell by seven percent year-over-year among the Big Five countries during the first half of 2025 compared to the same period in 2024. Non-alcoholic alternatives rose by two percent over the same period. Tap water consumption increased by five percent while bottled water grew by just one percent.

According to Pinsker, eating out is becoming more personalized than ever before. For some people it remains a social event; for others it is about enjoying a meal alone on their own terms. Whether it’s sharing tapas with friends in Madrid or having sushi solo at a Berlin café or choosing non-alcoholic cocktails in London, consumers are shaping their dining experiences around their lifestyles.

Circana’s analysis points to a fragmented but opportunity-rich market for restaurants across Europe. Operators who succeed will be those who focus on value-driven strategies, invest in digitalization and delivery services, and adapt quickly to new health priorities and local habits as consumer preferences continue to evolve after the pandemic years.