

QSR & CASUAL DINING

Serving fast flavour: Where connection, culture and convenience collide on campus



Introduction

Quick service and casual dining brands fuel the rhythm of student life. They slot naturally into the day: the morning coffee that starts it, the sandwich between lectures, the shared meal that rounds it off, and the late-night stop on the way home after a night out. Accessible, familiar and fast, they offer small moments of comfort and reward in every kind of day.

By the time students arrive at university, these brands are already part of their world. That early familiarity builds trust and helps new places feel their own. Visibility, consistency and context then become key – the right message at the right moment can turn a routine choice into lasting loyalty.

As students gain independence, their decisions become expressions of control and identity. They still want speed, value and convenience, but now expect transparency, creativity and a sense of purpose. Food is no longer just fuel; it's how they connect, recharge and show who they are.

For brands, that mix of habit and meaning creates both reach and resonance. The students making quick-dining choices today will shape the loyalty patterns of tomorrow.

This paper explores how Gen Z's relationship with food is evolving on campus – from convenience and comfort to choice and connection. It examines the behavioural shifts shaping the QSR and casual dining category, and how brands can build stronger, more meaningful visibility within student life.

The Market Opportunity

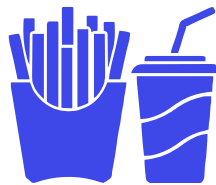
Quick dining is expanding fast. From burgers to bakery, fried chicken to fast-casual meals, the category continues to diversify and shape how and where people eat out.

The UK eating-out market is forecast to exceed £100 billion in 2025, signalling a record year for the sector. Branded quick-service and bakery-led operators now account for more than one third of total UK foodservice turnover, and growth continues to outpace the wider hospitality market.

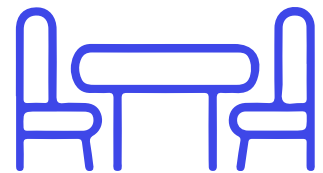
Burger chains, coffee-and-bakery brands and fried-chicken specialists are performing strongly, supported by competitive meal-deal pricing and the steady rise of digital ordering. Hybrid models that combine dine-in, takeaway and delivery are now standard, giving consumers more ways to engage and operators new ways to scale. Within this evolving landscape, the fast-casual dining segment has grown by around 8% year on year, bridging the gap between quick service and traditional dining.



+£100bn UK eating-out market forecast for 2025 signals record year



+33% UK foodservice turnover now QSR & bakery



+8% growth in fast-casual dining bridging gap between QSR and traditional dining

Sources: Restaurant Online 2025 [1], Lumina Intelligence (2025), UK QSR Market 2025 [2], Restaurant Management UK (2024) [3]

Established leaders such as McDonald's, KFC, Burger King, and Greggs continue to hold the largest share of the market, while challenger brands such as Popeyes are expanding rapidly through product innovation and regional rollout. Fast-casual operators including Nando's and wagamama have carved out their own space, combining speed and sociability in ways that keep attracting new diners.



Popeyes UK targeting opening nearly 1 restaurant a week in 2025

Source: The Caterer [4]

Together, these brands define a market that is large, dynamic and increasingly shaped by younger consumers. With growth driven by speed, value and convenience, the quick dining sector is perfectly positioned for the next generation of diners, and nowhere is that influence clearer than on campus.

Students Drive the Demand

Students are one of the most valuable and visible customer groups in UK dining. Their eating habits set patterns that ripple beyond campus, influencing mainstream trends in convenience, flavour and digital experience. For QSR and casual dining brands, they represent both volume now and loyalty for the future.

Food is a defining part of student life. Between lectures, study sessions and social plans, eating out fits naturally into daily routines. Shared kitchens, irregular hours and the pull of social connection make quick, affordable dining a regular habit rather than an exception.

Their spending power reflects that consistency. The NatWest Student Living Index 2025 reports that undergraduates now spend £97.30 per month on dining out, making it one of their top three discretionary costs after rent and groceries. Across the week, usage peaks around lunchtime and stays high into the evening, showing how QSRs and fast-casual brands capture multiple eating occasions.



Students spend £97.30 a month on dining out, putting it only behind rent and groceries

Source: NatWest Student Living Index 2025 [5]

Eating out is also frequent and social. Data from the native.fm, Student Life Report 2024 shows that 81% order restaurant or takeaway food at least once a month, and nearly 60% do so every fortnight or more. Within that 3% order daily and a further 13% every few days, highlighting how embedded quick dining is in student life.

Cultural appetite strengthens the category's relevance. 53% of students see food, drink and restaurant choices as part of their identity and 77% of Gen Z diners are drawn to global or fusion cuisines compared with 68% of the wider population. Their openness to new flavours and formats keeps QSR and casual dining central to discovery, socialising and cultural exchange.



81% of students order takeaway or eat out every month



53% see food and drink as part of their identity

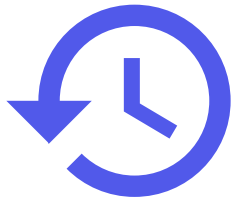


77% Gen Z diners are drawn to global or fusion cuisines vs. 68% of wider population

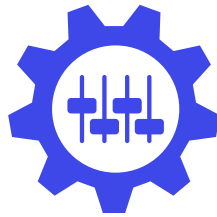
Sources: native.fm Student Life Report 2024 [6], QSR Media UK reporting on Unilever Food Solutions Future Menus Report 2025 [7]

Convenience, Customisation and Value

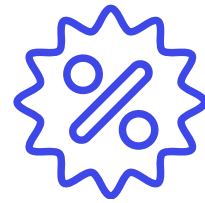
Three levers drive student choice: speed, control and cost.



48% of students say convenience drives their brand choices



62% of Gen Z more likely to return if customisation encouraged



75% of UK consumers look for offers and deals when purchasing food-to-go

Sources: native.fm Student Life Report 2024 [8], Unilever Food Solutions, Future Menus Report (2025) [9], AHDB (2024) It's all go for food-to-go [10]

Convenience defines the category. Student life is unpredictable, with timetables, part-time work and social plans often overlapping. Quick dining fits those shifting routines. Walk-up counters, app-based pre-orders and extended opening hours give students the freedom to eat when and where it suits them. Brands that remove friction become the default; not just the fast option, but the easy one.

Customisation matters almost as much as convenience. Control is currency for Gen Z, who expect food to flex to mood, diet or budget. Menus that allow small swaps, such as a sauce, a side or a portion, make choices feel personal. Digital ordering has made that flexibility effortless, giving students ownership of their experience and reinforcing the perception of value beyond price alone. Research from Unilever shows that 62% of Gen Z are more likely to return to a restaurant that encourages customisation, underlining how choice builds loyalty.

Value remains the strongest driver of purchase. 83% of students agree that they're more selective about where they spend money than last year. Rising living costs have made affordability visible, with meal-deal tiers, loyalty schemes and app-exclusive promotions shaping choice. Transparent pricing signals fairness, while clear portion expectations help students manage spend. 74% of students say they trust brands that show empathy for challenges. Visible value builds trust, and trust builds frequency.

83% of students are more selective about where they spend money than last year

74% of students trust brands that show empathy for challenges

Source: native.fm Student Life Report 25/26 [11, 12]

When brands deliver on all three levers – fast, flexible and fair – they win both share of wallet and sentiment. Meeting students where they are, with options that feel easy, personal and transparent, turns preference into habit and habit into loyalty.

Atmosphere, Belonging and Brand Affinity

Eating out is one of the most social parts of student life. Shared meals and recognisable spaces create comfort and continuity in a period of constant change. For many, these places are woven into the rhythm of campus life, where everyday routines become shared rituals.

Atmosphere shapes how students experience a brand. Lighting, music and tone influence how a place feels and whether it fits their mood. Nearly half of UK diners say ambience affects where they eat, showing that environment carries real weight in dining decisions. Brands such as Nando's and wagamama have built reputations on this balance, creating places that feel relaxed enough for everyday visits yet still expressive, inclusive and distinct. The right space can flex across missions, from a quick solo lunch between commitments to an affordable dinner with friends or a sit-down meal that marks the end of the week, meeting students in the many different moments they eat out.



48% of UK Consumers say atmosphere influences where they eat out

Source: Food Standards Agency (2024). Food & You 2: Wave 6 –Eating Out & Takeaways [13]

Students discover, choose and share dining experiences in new ways, but the motivations remain familiar: connection, enjoyment and belonging. What has changed is how visible these experiences have become. More than half of Gen Z use TikTok for food inspiration, turning peer recommendations into real-world intent. The spaces they seek out tend to mirror their values, feeling welcoming, visually expressive and socially inclusive. Over six in ten say a brand's behaviour influences where they eat, placing authenticity at the centre of decision-making. [14]



55% of Gen Z use TikTok for food inspiration



59% of Gen Z have visited a restaurant after seeing it on social media



68% of Gen Z say social and environmental values influence where they eat

Sources: AHDB (2024) Consumer Insight: The role of social media on Gen Z views on food [15], Restaurant Online (2025) The Gen Z Effect: What The Next Generation Expects from Dining Out [16], Deliverect (2024). How Quick Service Restaurants Can Captivate Gen Z Guests [17]

QSR and casual dining brands that feel genuine in tone and experience become part of students' cultural landscape. They are the places that define everyday connection, where identity, atmosphere and habit meet.

Balanced Choices, Real Impact

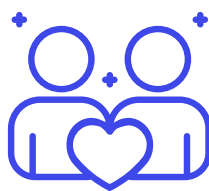
Health and balance are reshaping quick dining, particularly among younger diners. Students still want flavour, value and speed, but they now expect meals to fit their lifestyles and reflect their values. What was once a trade-off between “fast” and “healthy” has evolved into a space where choice, quality and control can coexist.

Broader national trends reinforce this shift. Research from the Food Standards Agency shows that 18% of UK adults identify as mainly vegetarian or flexitarian, 10% as vegetarian and 5% as mainly vegan. These figures highlight how plant-forward eating has entered the mainstream. Younger consumers are propelling this movement: NielsenIQ reports that 52% of Gen Z actively seek ingredients that keep them healthy, while 42% prefer natural over artificial products. For this audience, health and ethics are connected, with sustainability and transparency shaping perceptions of quality as much as taste.

The student mindset brings practicality and purpose together. “Alignment of personal values” as a purchase driver has risen 82% year-on-year, showing how they reward brands that act responsibly while remaining affordable. For QSR and casual dining operators, this creates opportunity. Credibility grows through small, visible actions that make balanced choices easy, from plant-forward menus and reusable packaging to clear calorie and sourcing information.



18% of UK consumers
identify as vegetarian or
flexitarian



52% of Gen Z seek
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80% of students prioritise
social connection and
community

Sources: Food Standards Agency (2024). Food & You 2: Wave 6 – Eating Habits & Diet [18], NielsenIQ (2024) Gen Z Report 2024 –Global Consumer Outlook [19], native.fm Student Life Report 2025/2026 [20]

Leading operators are responding. LEON has expanded its “naturally fast food” range with high-protein salads, wholegrain wraps and seasonal vegan hot boxes, framing health as accessible and flavour-led. McDonald’s has introduced the McPlant, fruit and salad sides, and transparent nutritional labelling, proving that balance and indulgence can sit together. Nando’s promotes its PERi-Plant range and reduced-sugar drinks options, aligning with student preferences for lighter, flexible meals. wagamama’s Plant Pledge commits to making half its menu plant-based, setting new expectations for mainstream casual dining. And Greggs vegan sausage roll has become a cultural icon, proving that plant-based can be both popular and profitable.

These examples show how balance has become a brand tool rather than a niche proposition. Each offers healthier choices without losing pace, flavour or cultural relevance.

Purposeful brands

Purpose has become a marker for trust. Students notice how brands behave, the choices they make and the tone they take. In a category often linked to convenience and indulgence, those making progress are proving that fast can also mean fair, sustainable and supportive.

Action matters more than intention. 83% of students are more likely to support brands that take visible steps on sustainability or social impact, while 84% want brands to provide value beyond selling products. That mindset reframes responsibility as relevance, especially for brands woven into daily routines.



83% of students value practical, visible action over flashy marketing



84% of students want brands to provide value beyond selling products



56% of Gen Z say they are more loyal to brands that contribute positively to their local community

Sources: native.fm Student Life Report 2025/26 [21, 22], NielsenIQ (2024) Gen Z Report 2024, Global Consumer Outlook [23]

Smart operators are already showing what that looks like. Greggs Foundation runs more than 900 Breakfast Clubs across the UK, providing free meals to children who might otherwise go without. McDonald's UK funds the redistribution of at least one million meals each year through its partnership with FareShare. Nando's continues its Fighting Malaria and No Chuckin' Our Chicken campaigns, pairing global purpose with local action. KFC Add Hope supports food-security initiatives in the UK and South Africa, while wagamama partners with YoungMinds to raise mental-health awareness among students and young adults.

Purpose is also about proximity. On and around campus, food brands that show up helpfully, offering value-led menus, job opportunities or genuine community partnerships, earn trust that advertising alone cannot. Purpose in this category is defined by behaviour, not positioning. The brands that show care through what they do, not just what they say, become trusted parts of student life. That authenticity, expressed through action rather than slogan, builds both loyalty and long-term relevance.

85% of students value brands that genuinely understand students

49% of students say they can easily spot when brands are being inauthentic

Source: native.fm Student Life Report 25/26 [24, 25]

Digital-First Ordering & the App Generation

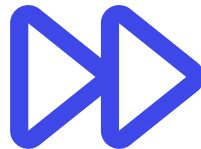
Digital ordering has become part of how students eat, not just how they pay. Mobile apps, kiosks and click-and-collect options fit naturally around busy days, giving control over timing, customisation and cost. The experience feels intuitive because it mirrors how this audience already manages much of daily life through their phones.

Over 80% of UK QSR orders now come through mobile or kiosk channels, with students appreciating the convenience of digital pre-order to save time or avoid queues. These tools make it easier to grab food between commitments, adjust an order or use a discount without friction.

Digital platforms are also where value is most visible. App-exclusive bundles, meal-deal tiers and reward systems turn savings into everyday wins. Students are more likely to engage with a food brand that personalises promotions, and many describe app notifications as helpful nudges that make budgeting easier. When done well, communication feels relevant and useful rather than intrusive.



+80% of UK QSR orders now come through mobile or kiosk channels



74% UK consumers use apps or websites as go-to for meals or beverages



75% of Gen Z customise their food orders

Sources: Lumina Intelligence (2025) UK QSR Market 2025. Trends & Digital Shift [26], CI & T (2024) [27]
Deliverect (2025) Gen Z: Their identity, food delivery behaviour and key stats in 2025 [28]

The most effective brands connect digital convenience with real-world moments. Location-based offers, QR-led deals near campus and menus that refresh around term dates bring context to the interaction. When digital experiences continue into shared public spaces through DOOH screens, short-form content and contextual creative, they feel part of student life rather than another ad interrupting it. Students move easily between digital and physical touchpoints, and the brands they rate do the same.

Examples of this approach are everywhere. Greggs Rewards turns everyday coffee into a simple points-for-perks system. Nando's PERi-Points and McDonald's App Rewards build consistency across dine-in, takeaway and delivery. Domino's Student App Deals align promotions with academic timetables and late-night ordering peaks. Each uses technology to meet genuine needs, helping students save time, money and effort while keeping experiences simple and familiar.

Proximity, Community and Context

Familiarity is one of quick dining's greatest strengths. From the golden arches to the red bucket, QSR and casual dining brands are woven into the fabric of British life. For many students, they carry a sense of comfort and continuity that travels from home to campus. Each franchise may serve its own community, but together they create a consistent national experience that feels both personal and predictable.

On and around university campuses, location shapes behaviour. A short walk to a Greggs, KFC or Subway between lectures can turn intent into action, especially when supported by visibility, context and offer. In such a crowded category, constant presence matters. Brand salience builds through repetition; when a familiar offer or product appears in the right place at the right time, it strengthens awareness and triggers spontaneous visits.

Behavioural data supports this pattern. 64% of Gen Z make unplanned QSR purchases based on convenience or location, showing how digital engagement and physical accessibility combine, with proximity the final trigger for purchase.

64% Gen Z make unplanned QSR purchases based on convenience or location

Proximity to campus is a key driver of preference

Source: NielsenIQ (2024). Gen Z Global Consumer Outlook Report [29]

Students' Unions, study spaces and social hubs are the heart of campus life. Food brands that show up consistently in these environments become part of that rhythm. Whether it's a breakfast offer before lectures, a lunchtime promotion, or a campaign that celebrates student life, relevance is about meeting moments that matter, not interrupting them.



73% of Students are more likely to trust a brand after regular campus exposure

Source: native.fm (2025/26) Student Life Report [30]

Those moments shift with the student calendar. Freshers brings one of the biggest spikes in discovery, with 81% of students leaving Freshers week with clear purchase intent, and quick dining ranked among their top spending priorities. [31] The opportunity repeats throughout the year as mid-term stress, exams and end-of-year celebrations all create natural occasions to connect. Aligning with these pulses, both daily and seasonal, enables brands to become woven into the pattern of student life rather than competing for it.

On and around campus, location turns intent into action. Visibility, context and short-walk access create spontaneous visits that become routine.

Regulation and Responsible Reach

The landscape for food and drink marketing is changing.

From October 2025, advertisers will begin voluntary compliance with the UK's new HFSS advertising rules, ahead of full enforcement from 5 January 2026. Regulations will restrict how foods and drinks high in fat, salt or sugar are promoted on television before 9pm and across paid online digital media, including social, search, display and influencer activity.



New HFSS Advertising Restrictions:

- **Voluntary compliance from Oct 2025**
- **Enforcement from 5th Jan 2026**

Source: Departments of Health and Social Care (2024)
& IAB UK (2025) [32, 33]

These measures aim to reduce children's exposure to less healthy products while reshaping how QSR and casual dining brands engage adult audiences. The shift goes beyond compliance, prompting brands to consider where messages appear, how they are framed and who they reach. It reflects a wider move toward more responsible, transparent communication.

For media planners, this redefines reach. Channels that once delivered broad coverage will narrow, calling for a smarter mix of environments to maintain both scale and relevance. Building incremental reach will rely on identifying complementary channels and contexts that work together efficiently, balancing linear and digital, public and private, physical and screen-based moments. The focus is shifting from maximising impressions to engineering quality exposure among audiences that are proven and engaged.

While Out of Home and Digital Out of Home are not included in the new restrictions, they remain subject to CAP Code guidance and media-owner policies, including Transport for London's HFSS advertising ban and limits near schools. Effective OOH strategies balance flexibility with accountability, ensuring relevance and compliance coexist.

Within higher education, this landscape is more nuanced. Students' Unions are adult environments, with members aged 18+, though each university applies its own rules. Many include wellbeing principles that influence which campaigns are accepted. With +20 years' experience and the UK's largest network of universities and Students' Unions, Eighteen24 helps advertisers navigate these frameworks seamlessly, ensuring campaigns remain compliant and effective, aligned with national regulation and local expectations.

The direction of travel is clear. Regulation is reinforcing the importance of context, credibility and conduct. Success will depend not only on where brands appear but on the responsibility and intent behind every campaign. Those that combine compliant environments with credible contexts and meaningful creative will continue to reach audiences effectively in a changing media landscape.

Meet Eighteen24, Specialists in Student Engagement

In a category defined by visibility, proximity and pace, Eighteen24 connects QSR and casual dining brands with the UK's most valuable 18–24 audience: university students.

Our premium full-motion digital screens sit in high-footfall, high-dwell areas within Students' Unions across 130+ campuses, reaching over 70% of the UK's university population. These are trusted community environments – public, social, inclusive and 100% Gen Z – where brand messages feel welcome, not intrusive.

**Eighteen24s network
reaches 70% of UK
University Students**

**91% of students agree
Eighteen24 screens are useful
for staying informed**

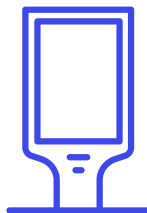
Source: Eighteen24 network data 2025 [34], Eighteen24 Student Survey 2025 (n=50) [35]

Students spend over 40mins on average per visit in their Students' Unions seeing our screens repeatedly throughout the day. This combination of frequency and dwell time builds trust, familiarity and advocacy. In a world of online ad fatigue, students increasingly filter what they see. 77% admit to tuning out social ads, while campus screens remain a trusted focal point within daily life, with students proactively looking to them for inspiration and information.

Our network combines digital flexibility with real-world credibility. Campaigns can target by university, region or mindset, supported by contextual relevance that strengthens recall and intent. When campus DOOH works alongside mobile, results multiply: research shows that OOH combined with mobile drives 63% more action than mobile alone. The result is reach and reinforcement, connecting on screen and in students' hands.



77% of students tune out of social media advertising, highlighting digital fatigue



63% higher likelihood of online action when OOH is paired with mobile



16% uplift in sales for contextually relevant DOOH

Sources: native.fm Student Life Report 2025/26 [36], Posterscope OOH Effectiveness Meta-Analysis, [37] Posterscope/JCDecaux UK/Clear Channel. The Moments of Truth [38]

For QSR and casual dining brands competing for share of habit, Eighteen24 provides the setting to drive trial, reinforce trust and build long-term preference. On campus, your brand isn't an interruption, it's part of the everyday environment students see, trust and share.

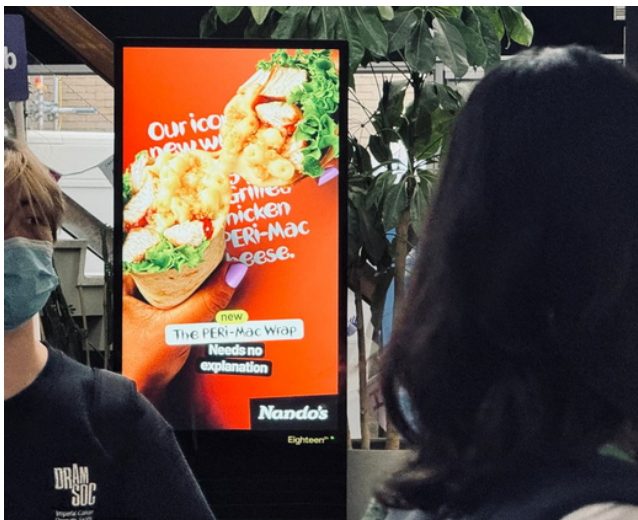
Why E24 Delivers Standout for Brands In This Category

On campus, attention is contextual, and connection is earned. Eighteen24 delivers both, bringing fast-moving, flavour-driven brands into the social heart of student life, where dining decisions are made daily.



BE PART OF THE DAILY ROUTINE

Stay visible in the high-footfall spaces that shape everyday habits. From morning coffees to shared lunches and late-afternoon cravings. Consistency builds familiarity and repeat visits.



TURN VISIBILITY INTO ACTION

Full-motion creative and proximity to purchase drive real-world intent, converting awareness into visits, redemptions and orders. See it, crave it, act on it



EARN EVERYDAY RELEVANCE

Appear in trusted environments that balance value, choice and community. Familiar settings amplify credibility, helping brands become part of students daily lives

Our Formula for Effective Gen Z Engagement:

Gen Z students expect more than visibility, they value authenticity, context and consistency. Successful campus campaigns deliver all three, building presence that feels natural, trusted and rewarding.

Be where they **are**

2 million+ unique students passing our campus screens each week

Be where they **care**

Located within Students' Unions in the heart of campus

Be where they **share**

Positioned in high - dwell areas
(Cafes, restaurants, gyms, study areas etc)

Be where they **see you**

Premium full motion D6 screens in high impact environments



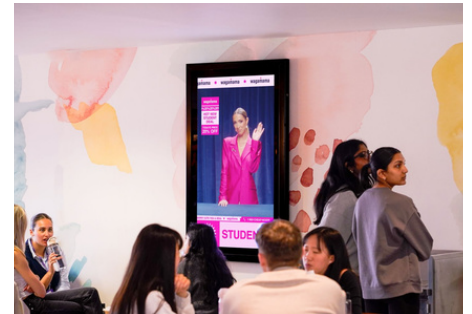
Make it Contextual

Use proximity, timing and creative fit to align with real student moments – mealtimes, study breaks and social routines



Make it Craveable

Show flavour, freshness and movement that spark appetite. Use bold creative that captures impulse and lands instantly



Make it Connected

Join up channels and moments. Align DOOH with mobile, social and offers to create a seamless path from awareness to action

Don't Miss the Moment to feed everyday choice

Gen Z's food habits are formed where they live, learn and socialise. When brands show up in these trusted spaces with relevance and energy, they move from background awareness to part of the daily routine. Context turns appetite into action. Repetition builds loyalty.

Eighteen24 helps QSR and casual dining brands spark appetite, drive action and earn loyalty with Gen Z on campus.

Talk to us about how your brand can stay front-of-mind when hunger hits
sales@eighteen24.com



Follow us on LinkedIn and Instagram for regular insights

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