

QSR & CASUAL DINING

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

An Eighteen24 White Paper · Nov 2025



EXECUTIVE SUMMARY

A preview of how UK students eat out, why it matters, and how brands earn the visit.

The full paper sets out the scale of the QSR and casual dining opportunity on campus, the cultural forces shaping Gen Z food choice, and how brands can build everyday relevance within student life. This summary gives you the headlines.

FOR THE FULL PAPER

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INSIDE THIS SUMMARY

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A complete guide to QSR, casual dining and the UK student audience.

The full paper covers category data, behaviour, cultural shifts and media planning implications drawn from 20+ industry sources including Lumina Intelligence, Nielsen IQ, Unilever Food Solutions, Food Standards Agency, Restaurant Online, AHDB and NatWest.

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This summary covers six headline insights. The full paper goes further with brand case studies, the HFSS regulatory implications, and the activation playbook for reaching 70% of UK students at the moments hunger hits.

What the data tells us.

INSIGHT 01 • THE MARKET OPPORTUNITY

A £108bn eating-out market with QSR taking the lion's share.

The UK eating-out market is forecast to grow from around £101 billion in 2025 to £108.7 billion by 2028, with quick service driving most of that momentum. Branded quick-service and bakery operators now account for more than a third of total UK foodservice turnover, and the food-to-go segment alone is set to reach £24.9 billion in 2026. The full paper breaks down each segment and what's driving demand.

£108.7bn

UK eating-out market value forecast by 2028

Source: Lumina Intelligence, 2026

INSIGHT 02 • STUDENTS DRIVE THE DEMAND

Eating out is a top-three student spend.

Undergraduates now spend £97.30 per month on dining out, making it one of their largest discretionary costs after rent and groceries. 81% order takeaway or eat out at least monthly, and 16% do so every few days or more. The full paper sets out where and when these occasions happen across the student day.

£97.30

average monthly student spend on dining out, behind only rent and groceries

Source: NatWest Student Living Index 2025

INSIGHT 03 • CONVENIENCE, CUSTOMISATION, VALUE

Choice builds loyalty.

Customisation is no longer a nice-to-have. Gen Z expect food to flex to mood, diet and budget, and reward brands that make this easy. Speed, control and cost are the three levers that drive repeat visits. The full paper sets out how the leading operators balance all three.

62%

of Gen Z are more likely to return to a restaurant that encourages customisation

Source: Unilever Food Solutions, Future Menus Report 2025

From craving to conversion.

INSIGHT 04 • ATMOSPHERE AND SOCIAL DISCOVERY

Discovery starts on TikTok and ends at the table.

More than half of Gen Z use TikTok for food inspiration, and 59% have visited a restaurant after seeing it on social media. But discovery is just the start. Atmosphere, values and authenticity decide whether a visit becomes a habit. The full paper explores what makes a space feel like it belongs to them.

55%

of Gen Z use TikTok for food inspiration

Source: AHDB, Consumer Insight: The role of social media on Gen Z views on food. 2024.

INSIGHT 05 • DIGITAL-FIRST ORDERING

Ordering has moved from the counter to the phone.

Mobile apps, kiosks and click-and-collect now drive over 80% of UK QSR orders. Students treat digital ordering as the default, using it to save time, customise meals and unlock exclusive deals. The full paper sets out how leading brands turn app loyalty into long-term preference.

80%+

of UK QSR orders now come through mobile or kiosk channels

Source: Lumina Intelligence, UK QSR Market 2025

INSIGHT 06 • PROXIMITY IS THE FINAL TRIGGER

Most QSR visits start as unplanned.

Behavioural data shows that 64% of Gen Z make unplanned QSR purchases based on convenience or location. Awareness opens the door, but proximity closes the visit. The full paper sets out why visibility in trusted, high-dwell campus spaces is what turns intent into action.

64%

of Gen Z make unplanned QSR purchases based on convenience or location

Source: NielsenIQ, Gen Z Global Consumer Outlook Report 2024

GET THE FULL PAPER

Ready for the full picture?

We share the full white paper directly with brands, agencies and media planners working in this category. It's a short conversation and we'll send the complete report straight back to you.

Email us for the full paper.

Tell us a bit about your brand or planning brief and we'll send the complete QSR and casual dining white paper, plus answer any questions you have about reaching the UK student audience.

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Already chatting with someone at Eighteen24?
Reply to their last email and ask for the full QSR and Casual Dining paper.

Curated research

Sourced from 20+ industry references including Lumina Intelligence, Nielsen IQ, Unilever Food Solutions, Food Standards Agency and NatWest.

Built for planners

Behavioural frameworks, brand case studies and the academic year demand calendar structured for use in briefs and recommendations.

HFSS-aware

Reflects the current advertising landscape and the channels that still deliver compliant reach with Gen Z.

The UK's largest student DOOH network

Over 400 premium full-motion D6 screens placed inside Students' Unions across 130+ campuses and 90+ universities, including 21 of the top 25. Positioned in cafes, study areas, gyms, social spaces and walkways where dwell time is highest.

400+

SCREENS

90+

UNIVERSITIES

2M

STUDENTS
REACHED
WEEKLY

116M

IMPRESSIONS
PER FORTNIGHT

Our formula for effective Gen Z engagement

Be where they
are

Be where they
care

Be where they
share

Be where they
see you

Don't miss the moment to feed everyday choice.

Gen Z food habits are formed where students 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.

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