UK INDUSTRY REPORT 2026

REPORT PARTNERS:

me&u 2FORKS Ops Club TEAM MARKETING

State of the UK Menu 2026

UK venues are leaving money on the table through their menus. This report shows exactly where it is and what to do about it.

23	411	4M+	£68.6M
OPERATORS SURVEYED	UK VENUES	ORDERS ANALYSED	GROSS REVENUE PROCESSED

CONTENTS

Hospitality has survived for thousands of years. The fundamentals haven't changed, someone behind the bar pours a pint, someone in front of it raises it with a smile. But everything in between, how that pint gets ordered, poured and paid for, has changed almost beyond recognition.

The menu sits at the intersection of brand, operations and revenue, yet most operators are still navigating it on instinct rather than evidence. That gap matters more than ever. UK hospitality is trading through one of its toughest periods in years, costs rising and margins tightening at every turn, and the menu is one of the few revenue levers still within an operator's control. Get it right and the reward is tangible. Our research shows the average menu is leaving £4.16 off every bill.

That's the gap this report is built to close. We combined me&u digital menu data, editorial insight from our partners and a survey of operators themselves into a clear, evidenced view of what's actually happening across UK menus, so operators have something to act on rather than guess at. Thank you to **Team Marketing**, **Ops Club** and **2Forks** for building this with us.

SUSAN ZWINKELS | UK GENERAL MANAGER

REPORT BUILT FOR:

- Marketers
- Operations
- CFOs
- CTOs

WHAT YOU'LL GET:

- Benchmarking and insights you can use for planning and decision making
- An in-depth analysis of menu data, guest ordering behaviour by venue type across the UK, built on real operator input and me&u ordering data

me&u

The world's leading AI menu and ordering platform, trusted by 25 million guests across 6,000+ locations globally. This report draws on billions of ordering data points from 411 UK venues running on me&u.

TEAM MARKETING

Started as a WhatsApp group in 2020, Team Marketing has grown into a nationwide network of 800+ marketers, operators, suppliers and freelancers built on shared learning. Glenda Barber's marketing insight shapes this report's take on guest engagement.

2FORKS

2Forks helps food, drink and hospitality businesses connect with hungry consumers and take them from first-time buyers to fans. Annica Wainwright ("The Menu Geek") brings her menu engineering expertise to this report's findings.

Ops Club

Ops Club brings hospitality operators, founders and leaders together for insights, conversations and connections. Ops Club's backend perspective, from Travis Fish, grounds this report's findings in real trading experience.

EDITORIAL TRAVIS FISH

If you're in ops, the menu happens to you

In every business I've worked in, from a single site to five hundred, the menu gets designed somewhere up the chain - by the commercial team, marketing, the founder and the exec chef, who run the tastings, do the food development and costings, hold the pricing meetings, and pass menu designs back and forth between them. By the time it's signed off, a lot of thought has gone into it. And then it lands on the people who have to make it real.

If you're an Ops Director or a Head of, you might get a seat at the table while all of that is happening. You can push back, keep it focused, and stop creativity or commerciality running away with itself. Someone senior needs to hold the line on what's actually executable. But if you're a GM, an Ops Manager or a team member on the floor, the menu doesn't happen with you. It happens to you.

You receive it. Spec cards, new recipes, a new POS build, new deals, new crockery, new printed materials - a pile of change that all needs reading, sorting, organising and briefing, and then delivering flawlessly on a single day, often with maybe an hour of paid training per person to get your team there. When you stop and look at what's actually being asked, it's wholesale change to a live operation, overnight, done perfectly.

The day itself is such a difficult challenge that things go wrong almost by default. You're testing deals and bundles live and finding out whether the modifiers actually work on the till. You're spotting the allergy error on the menu against the matrix.

You're checking whether the right deliveries turned up, whether the crockery fits the dish and the shelf, whether there's a typo on the boards or the wrong price band has come down from HQ. Half of it surfaces last minute, and all of it needs sorting - and then passing back up the chain, often without apology or any recognition of the task in the first place.

So why does this keep happening, in businesses of every size? Because good change management is expensive. It takes time and it takes money, and the menu is usually designed by one part of the business and merely survived by another.We don't need to go mad to fix it. But there are a few things that make a real difference.

The first is to be realistic about the cost. We can either invest properly in the change or accept that day one won't be flawless - what we can't do is keep demanding perfection while funding it like an afterthought. An hour per person and a spec card is not a launch plan.

The second is to give the whole thing more time, because time quietly solves more problems than anything else on this list. Most launches go wrong not because the menu is bad but because it arrives the day before with no leeway to react.

If the menu and the materials land weeks early rather than days, the errors surface while there's still room to fix them. The thing I'm most often left wishing for is simply that HQ had delivered the finished menu a few weeks earlier - everything downstream gets easier when it does.

The third is to run proper cook-offs, and to run them early. At group level, get the chefs together to actually make the dishes, ideally four or more weeks out. At site level, have the chefs cook it while the team watch, learn and taste, around two weeks out. Both will spot the operational things - the timings, the kit, the steps that don't travel - well before the first shift. The catch is that a cook-off is pointless without the real menu and the real crockery in front of you, which is another reason the timeline has to start earlier than it usually does. And it's worth pulling HQ into this too. If the head office teams cook off and engage with the menu like everyone else, they understand it properly, and they can be out in sites on launch day to support, fill gaps and help land it rather than watching from a spreadsheet.

The fourth is to sort out how the change physically arrives. Food and fresh ingredients will always come from multiple suppliers on their own schedules, that's a given, and new products can be auto-dropped to sites once the comms have gone out.

But the physical kit - the menus, the crockery, the print, the equipment - can be grouped and boxed together. It costs more and it's harder logistically. But receiving the whole change in one delivery, rather than chasing seven drops over a month, is far easier to manage and gives you much more reliable execution across multiple sites.

The fifth is video, which is still wildly underused. It doesn't need to be expensively produced - an iPhone is enough. Film the cooking, the specs, the plating, even the rationale behind the menu and why it's changing, and push it out to the whole business through your comms tool over a run of communications in the weeks before launch. Done well, the change becomes a build towards launch day rather than a surprise on it, so nothing feels new when the doors open. And running underneath all of it is time. The difference between change that's done to you and change you own is being brought along on the journey and that takes time - told why the menu is changing and not just what's changing, and asked what you're worried about before launch rather than weeks after. We can't involve everyone in everything, and we shouldn't try. But the gap between that and the menu simply being done to you is enormous, and most of what closes it costs very little beyond a bit of intent.

I'm Travis Fish. I work with founders to help them make better decisions and execute brilliantly. I run Ops Club, the community for hospitality people, and Ops Lab, which provides embedded hospitality insight and leadership to founders building companies in hospitality, leisure, wellness, and the tech businesses that serve them.

FIND ME AT OPS-LAB.CO AND OPS-CLUB.COM.

FINDINGS

OPERATOR CHALLENGES

Most operators know what sold. Very few know why.

We surveyed 23 UK operators across four venue types, asking how they judge menu performance day to day. The same story came back from all of them: deciding what to put on the menu is the easy bit. Working out whether it actually helped is where most venues are guessing.

Sales data tells you what sold. It doesn't tell you what guests looked at and skipped, which items are quietly lifting the bill, or whether the change you made last season had any effect at all. That's the gap most venues are working around.

MOST COMMON HARD DECISION

What to cut from the menu

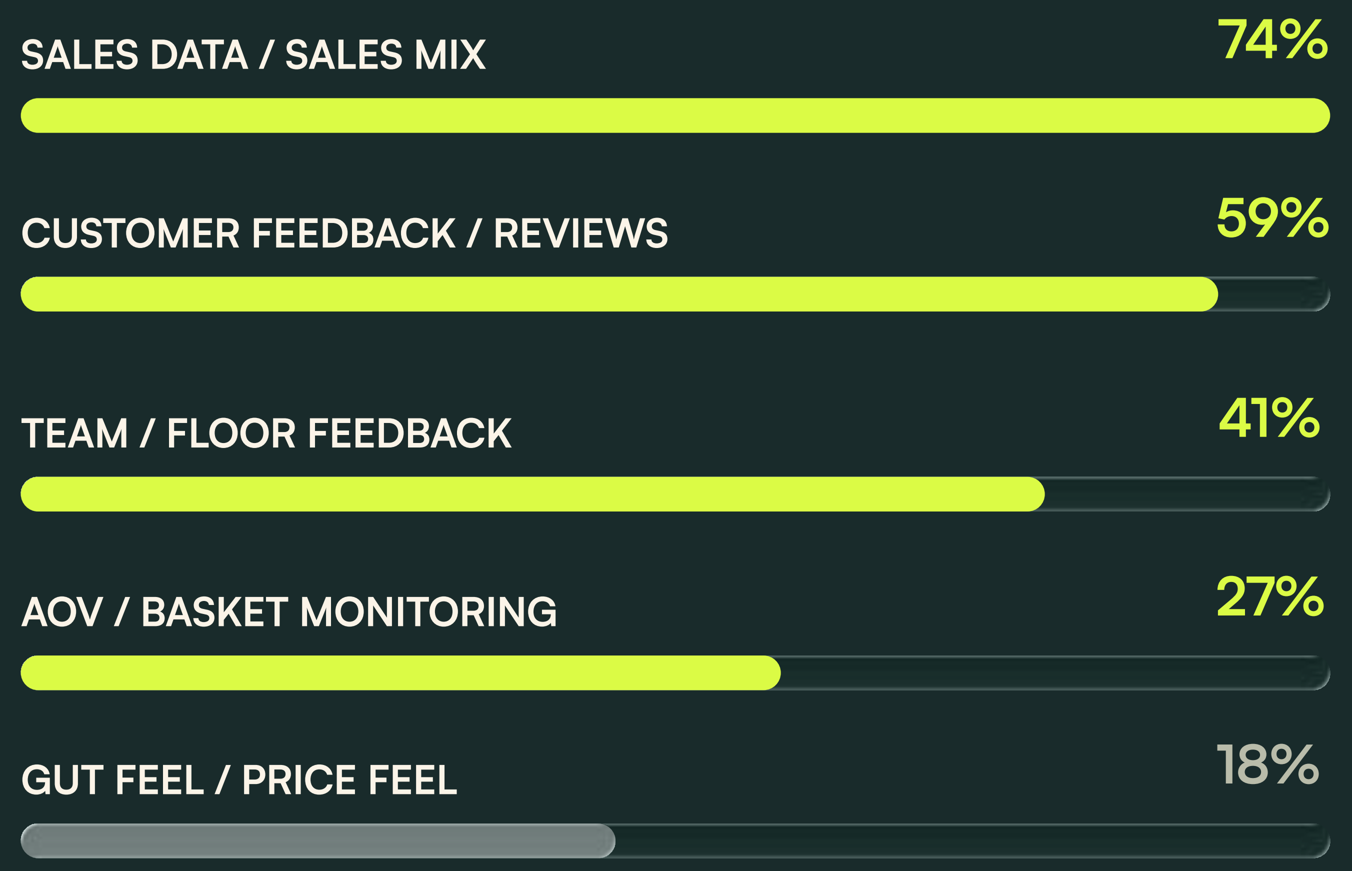
"Cutting dishes. You always worry the one you drop is someone's favourite - and you'll never know until it's gone and someone complains on TripAdvisor six months later."

FINANCIAL DIRECTOR • CASUAL DINING • 2-5 SITES

WHAT DATA THEY WISH THEY HAD

- Per-dish customer feedback
- What guests consider but don't order
- Competitor pricing benchmarks
- Menu view → conversion rate
- Family / children spend data

HOW OPERATORS KNOW WHEN A MENU CHANGE HAS WORKED



me&u operator survey | n=23 | multiple responses permitted

FINDINGS OPERATOR CHALLENGES

The pressures every operator named, across every venue type

MARGIN VS VALUE

The most common challenge across every venue type. Raise prices and you risk losing guests. Keep them and your margins take the hit. Most operators are making that call largely on instinct.

"Knowing where to position price, to gain maximum benefit between one-off and repeat customers."

DIRECTOR • COMPETITIVE SOCIALISING • 2-5 SITES

"Price point. We do some very competitive lunch offers... ensuring they are enticing enough without damaging GP is always a bit of a stab in the dark."

HEAD OF OPERATIONS • CASUAL DINING • 6-10 SITES

WHAT TO CUT

Mentioned independently by operators across every venue type. Without feedback at dish level, removing something from the menu is always a guess. The only way you know you got it wrong is when someone complains months later.

"What to take off the menu without losing volume."

REGIONAL DIRECTOR • CASUAL DINING • 100+ SITES

"Which dishes to take off."

FRACTIONAL CMO • CASUAL DINING • 2-5 SITES

"When to remove something that isn't working."

OWNER • PUB • 2-5 SITES

"Menu reduction. The business is on a journey, and with each update, reductions and ingredient synergy is being sought."

FRACTIONAL OPERATIONS DIRECTOR • INDEPENDENT • 1 SITE

BRAND VS GUEST WANTS

Felt most acutely by branded venues and multi-site operators. When a brand has a strong identity, it's genuinely difficult to separate what feels right for the brand from what guests actually want to order.

"It's quite hard when you've got such a strong brand identity to separate what we think is right for the brand from what we think (or know) the customer wants."

OPERATIONS SUPPORT MANAGER • COMPETITIVE SOCIALISING • 6-10 SITES

"Adding new products, not knowing how they would perform with my type of clients."

GM • COMPETITIVE SOCIALISING • 2-5 SITES

EDITORIAL

GLENDA BARBER

The 100% Open-Rate: Why the Menu is Your Ultimate Marketing Weapon

It might be warm outside right now, but if you look at the browser history of any hospitality marketer, it's a psychological horror film of "festive set menu templates," "turkey supply margins," and "early bird booking strategies." Yes, it's mid-year, and we are already sweating over Christmas.

In this report, Annica breaks down the vital science of menu research, and Travis dives into the operational survival tactics of execution. But where does that leave marketing?

Too often, it leaves us at the very end of the conveyor belt. You know the drill: the kitchen designs the dishes, finance hashes out the margins, and marketing gets a Slack message at 4:45 PM on a Friday: "Here's the festive PDF. Can you make it look pretty and put it on the grid?"

We are handed a finished product and expected to sprinkle magic marketing dust over it. But if you're treating your menu as an administrative afterthought or a glorified grocery list, you are wasting the most powerful commercial asset you own.

Think about it this way: We spend thousands of pounds on Meta ads, PR agencies, and influencer partnerships just to chase a 2% click-through rate.

Yet, the menu is the only piece of brand collateral with a **100% open rate.** Every single guest who walks through your door or lands on your digital ordering platform must look at it.

It's not just an inventory list. It is prime advertising real-estate. And it's time marketing took control of how it lands.

1. FROM INGREDIENTS TO EMOTION

Chefs think in flavours; operators think in yields. Marketers think in human behaviour. When a guest reads a menu, they aren't just buying food; they are buying an experience.

If your festive menu simply lists "Roasted Turkey, Trimmings, Cranberry Sauce," you aren't selling a Christmas memory, you're selling an obligation. Marketing's job is to inject emotional copywriting into the mix. We need to frame dishes so they trigger nostalgia, indulgence, and urgency. A well-crafted description doesn't just inform; it justifies the price point before the guest even sees the total bill.

2. OPTIMISING THE DIGITAL FRONT WINDOW

With digital-first platforms like me&u, your menu isn't static paper; it's a living, breathing digital storefront. This is where marketing and data hold hands.

Marketers understand how people scroll, where their eyes linger, and how screen fatigue sets in. We need to treat digital menu layouts with the same rigour e-commerce brands treat their homepages. Where is the high-margin "Hero Dish" placed? Are the festive cocktails positioned to drive that crucial secondary purchase? Engineering the digital menu flow, marketing can actively drive up the average spend per head (SPH) without the guest ever feeling pushed.

3. KICK DOWN THE KITCHEN DOOR

If you are currently staring at a draft of your winter menu feeling disconnected from it, this is your sign to step up to the table. Don't wait to be handed the final PDF.

Ask the kitchen what the "Instagram moment" dish is. Ask operations which items need a volume push to protect margins. Bring your guest insights, your trend data, and your brand voice to the development phase. When marketing helps shape the menu from day one, selling it becomes second nature.

A NOTE TO THE LONELY MARKETER

Hospitality marketing can feel like an incredibly isolated gig, especially when you're caught between the chaos of the kitchen floor and the pressure of the boardroom. But you don't have to fight the festive battles alone. If you're looking for a sounding board, a place to vent about font sizes, or just a group of peers who get it, come join us at Team Marketing. We're hashing out these exact challenges every day. You're one of us.

WWW.TEAMMARKETING.COMMUNITY

What operators think guests order vs. what they actually do

Drawn from me&u's own basket data across 411 UK venues, 4 million+ orders and £68.6M in spend, a clear pattern emerges: the venues with the most orders tend to have the lowest spend per transaction.

Volume and spend per head pull in different directions. For example, what you display an item as popular on your menu, how you sequence it, where you surface upsells, and whether you ask for a tip influence this - these are all menu levers. The following pages provide insight into what the data shows for each venue type, so you can see where your biggest opportunities are.

411
UK VENUES

4M+
ORDERS ANALYSED

£68.6M
GROSS REVENUE PROCESSED

The biggest controllable lever is simple: get one more item into the basket. An accepted upsell is worth **£4.16** and is currently added on only **3%** of orders.

Nudging guests toward upsells and popular items at the point of ordering is the most direct way to grow overall spend.

THE VALUE OF ADDING ONE MORE ITEM

ADD ONE	VALUE ADDED	IN BASKETS TODAY
MAIN COURSE	+£7.12	~12% of orders
ALCOHOLIC DRINK	+£6.10	~15%
ME&U UPSELL ADDED WHEN PROMPTED	+£4.16	only 3%
SIDE / STARTER	+£4.00	~12%
DESSERT	+£3.16	only 1.6%
NON- ALCOHOLIC DRINK	+£2.46	~13%

FINDINGS | POPULAR TAGS

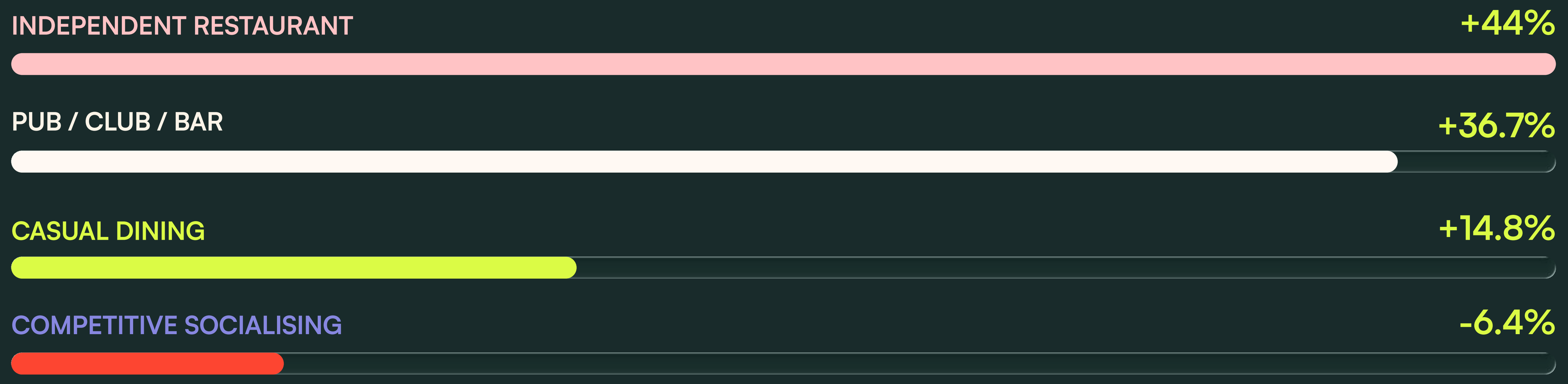
Orders displayed as “Popular” average +31.6% higher

Labelling a menu item as popular suggests to a guest that other people have ordered it.

That simple signal does real work. Orders containing at least one tagged item averaged £20.11 compared to £15.28 for orders with no tagged items. The gap is consistent.

> **WHAT DATA DO YOU WISH YOU HAD WHEN MAKING MENU DECISIONS?**
>
> "How guests consume menus and make their selections."
>
> DIGITAL & TRADING MARKETING MANAGER • CASUAL DINING • 100+ SITES

AVERAGE ORDER VALUE LIFT WITH POPULAR TAGS: BY VENUE TYPE



TAG THESE FIRST

- Desserts: +36% price lift, most under-used category
- Sides & starters: +31% price lift
- Soft drinks / non-alc: +13% (high margin)
- Signature mains (1-2 per section only)

LEAVE THESE ALONE

- Alcoholic drinks: no measurable lift (-2%)
- More than 20% of items in any section
- Items below £3: too low to shift the basket average
- Premium mains above £18

SWEET SPOT

11-20 distinct Tags per menu (AOV peaks at **£20.07**). Independent restaurants show the biggest lift **(+44%)** and are **94%** adopted, the best example of this lever done well.

It works where guests are choosing between options. It has no effect where guests already know what they want to order, as we see in competitive socialising.

FINDINGS

UPSELLING PERFORMANCE

When an upsell lands, it adds up to £4.16 to the basket

An upsell suggests a complementary item at the point of ordering,

An upsell suggests one extra item at the point of order - "Add a side?" or "Make it a meal?". When it lands, it adds up to £4.16 to the basket. Right now that's happening on just 3% of orders network-wide.

The mechanic isn't the problem. Attach rate runs 13.9-14.2% in Independent Restaurant and Casual Dining, 3.3% in Competitive Socialising, and under 1% in Pubs/Clubs/Bars. The gap is in how it's set up, not whether it works.

WHAT DATA DO YOU WISH YOU HAD WHEN MAKING MENU DECISIONS?

"What would convince guests to increase their purchase."

OPERATIONS CONSULTANT • COMPETITIVE SOCIALISING • 1 SITES

UPSELL VALUE PER ORDER AND AOV CONTRIBUTION: BY VENUE TYPE

VENUE TYPE	UPSELL VALUE PER ORDER	AOV CONTRIBUTION
INDEPENDENT RESTAURANT	£5.52	+1.95%
PUB / CLUB / BAR	£5.15	+0.54%
COMPETITIVE SOCIALISING	£4.60	+1.44%
CASUAL DINING	£3.60	+1.70%

TAG THESE FIRST

- Pair sides to specific mains - not menu-wide
- Keep items in £3-£8 band (25-50% of main)
- 3-6 themed groups max
- For paper menus: train staff to ask at order

LEAVE THESE ALONE

- Don't lead with drink upsells
- Don't force it. Optional always converts better
- Don't apply to every item
- Don't upsell in activity-led venues

KEY INSIGHT

Choice overload applies per decision, not per page - so the best venues group items into small themed groups ("do I want a side?"), keeping each choice easy. They also use completion bias, framing the upsell as the missing piece ("Peckish?") rather than "Add to order", repositioning it from spending more to completing the meal.

Research + strategy = better menus

Hello - my name is Annica Wainwright and I'm the world's biggest Menu Geek. I call myself that because I've pretty much built my whole life around menus.

At a very early age, I figured out that a menu is essentially a key to eating whatever you want for dinner and so I've loved them ever since.

I spent the first 16 years of my career as a restaurant critic and for the past decade, I've been optimising menus for some of the UK's best-loved restaurant brands, including Dishoom, Wahaca, Rosa's Thai, Caravan, The Real Greek, Tonkotsu and Pizza Pilgrims.

During this time, I've tested every last trick in the menu engineer's tool kit, from Anchoring right through to Z-listing dishes that fall short in a menu matrix. I know not to place sides in "Menu Siberia" and I avoid lining prices up along a neat tab, but although I've seen plenty of these techniques work wonders on a range of different menus, I never use them willy-nilly.

Because real menu magic happens when you choose your tools strategically, in the context of goals, backed by solid research.

The more you know about the people and environment around your menu - the teams who have to work with it, the customers that order from it, and the business and brand it feeds into - the better placed you are to optimise it.

In this report, you will have read that you can add an average of £4.16 (and often more!) to every order by landing the right up-sell.

So what does it mean to up-sell effectively?

It could be as simple as asking "Would you like fries with that?" or "Would you like to go large?".

McDonald's makes millions from asking the right questions at the right time. More importantly, the business has built prompts around enhancing its customer experience, suggesting things that go together and giving guests more of what they love.

I often ask operators "What's your House Black Daal?" in a nod to the star dish at Dishoom: a shareable extra that tastes great, goes with everything, tells a brand story, achieves excellent margins without too much cost to the customer and is so ingrained in the team's steps of service I'm willing to start marinating my hat if anyone here says they've tried ordering a meal from Dishoom without being prompted to add one.

That's what effortless upsells are made of.

So how do you go about creating something like that? I'm not suggesting everyone starts adding lentils to their menus. It's about inventing - or identifying (as the holy grail might already be hiding somewhere in your current offer) - an upsell candidate that works for you.

It could be a dish, it could be a drink, it could even be one of each - as long as it makes sense for customers to add them to their order.

And here's where the research comes in. Because, if you don't know what your customers are looking for - or missing - on your menu, you're going to struggle to find that magic, no-brainer sale.

One of the great wins from our menu work with Pizza Pilgrims was that we were able to double sales of their house-made soft drinks. This would never have happened without research.

Because it wasn't until we'd hosted a long line of customer interviews that we discovered that some of their most loyal guests never looked at the menu at all. They already knew their favourite pizza and the drinks order was typically inspired by a sweeping glance around the room, where they saw water, beer and cans of Coke.

By creating a loud, colourful menu that demanded attention, we were able to use illustrations to draw guests' eyes towards delicious house-made ice teas and sodas and away from generic softs, creating a better customer experience in the process.

The most successful menu optimisation projects I've worked on over the years have all had one thing in common. They've focused on achieving wider business goals by improving the customer experience. And, to do that, you obviously have to know your target market. Intimately.

If investing hours into surveying and interviewing customers sounds like hard work, let this be your carrot: only by knowing the flavours guests associated with their happiest times in Greece were we able to create the Greek Sangria, a brand new signature drink for The Real Greek that sold in higher volumes during its launch month in a (particularly rainy) September-October period than Aperol Spritz did at the height of summer.

What's your new star performer going to be?

2FORKS

Annica Wainwright is the co-founder of 2Forks, a consultancy that specialises in helping hospitality businesses on deliberate journeys from first-time visitors to fans and ambassadors, by optimising their menus, messaging and customer experience.

FIND ME AT: https://www.2forks.co.uk/

Venues that configure tipping well capture 7x more than those that don't

Venues that set up tipping properly collect seven times more in tips than those that don't.

Guests aren't more generous at one venue than another. The gap comes down to two things: whether tipping is configured correctly, and how the order is placed. Table order-and-pay captures 99% of all tips recorded; counter ordering captures under 1%. Without digital ordering, a staff member asking clearly at payment gets the same result.

WORTH KNOWING BEFORE YOU LOOK AT THESE NUMBERS

In the UK, most venues run either a tipping prompt or a service charge, not both - most £0-tip venues have made that choice deliberately. Pub/Club/Bar's 0.65% reflects service-charge use, not weak performance: excluding those venues, pubs/clubs/bars capture 2.47%, the highest of any venue type.

7x
TIP CAPTURE GAP: ENABLED VS NOT ENABLED

17%
OF ORDERS INCLUDE A TIP

£1.23
AVERAGE TIP WHEN A GUEST TIPS

TIPS CAPTURED BY VENUE TYPE: £368,548 OVER 12 MONTHS

VENUE TYPE	TIPS CAPTURED	% OF GMV	HAS TIPPING SWITCHED ON
CASUAL DINING	£22,692	1.26%	95% of venues
INDEPENDENT RESTAURANT	£65,600	1.31%	70%
PUB / CLUB / BAR	£39,399	0.65%	64%
COMPETITIVE SOCIALISING	£73	1.31%	10% only

FOR ANY VENUE TYPE

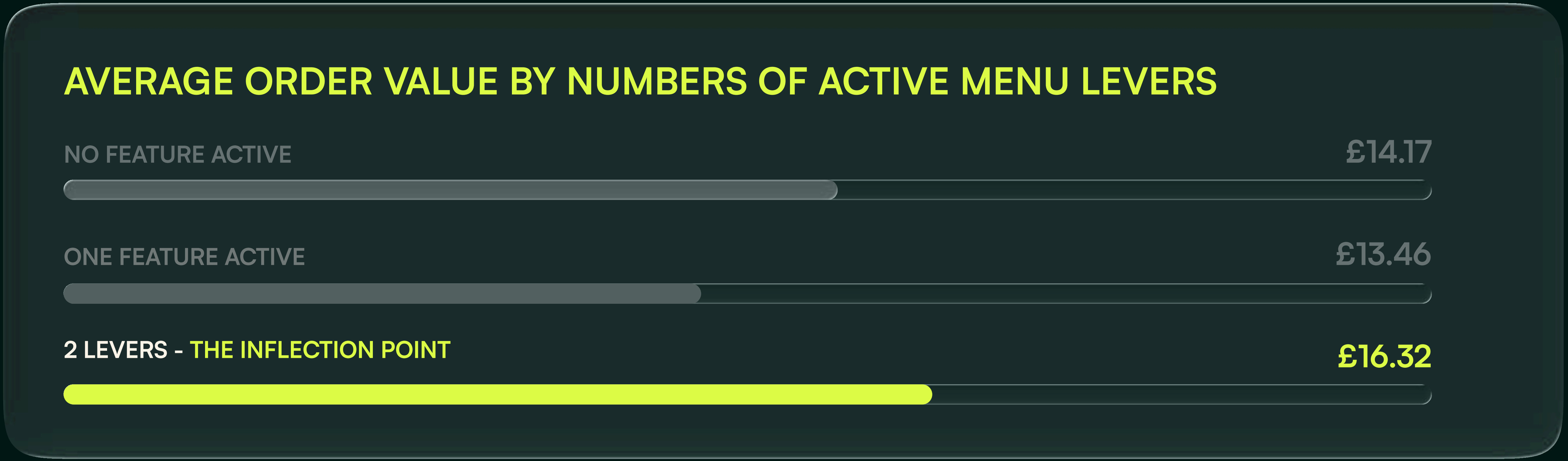
Only 17% of orders include a tip, but those who do leave a healthy 8% (£1.23 on a £15 basket). If you're not on digital ordering, make sure your PDQ or till can prompt for a tip. Encourage staff to pose the tip question.

FINDINGS REVENUE LEVERS

Using two levers together lifts AOV by 21% more than one alone

The gains compound rather than just add up.

The most common pattern in the data: an operator turns something on, sees a modest result, and stops. For non-digital venues the same logic applies: clear signposting, staff prompting at order and a visible gratuity policy all stack the same way.



+21%

AOV LIFT FROM 1 LEVER TO 2 (£13.46 TO £16.32)

£15.77

AOV WITH 3 LEVERS - A THIRD DOESN'T ADD MORE

THE PATTERN THAT KEEPS SHOWING UP

The gap isn't between venues that have a feature switched on and those that don't.

FINDINGS VENUE TYPE

The same levers. Different impact depending on your venue type

PUB / CLUB / BAR

AVERAGE AOV

£19.57

- Guests respond better to Tags and upsells on the food menu rather than the drinks menu
- Pubs using me&u tipping capture 2.47% of gross revenue processed, like-for-like - highest of any venue type
- Tipping is a clear opportunity to engage teams in use of digital menus

KEY TAKEAWAY

Upsells on food items and Tags on the food menu. Make a clear call on tip vs. service charge. Most pubs run neither. Staff training on prompting at order achieves the same result as a digital upsell.

CASUAL DINING

AVERAGE AOV

£25.02

- Casual dining has the highest feature adoption of any venue type (70-77%)
- 14.2% upsell attachment rate
- 95% of venues have tipping enabled
- Desserts attach on just 1.6% of orders, despite adding £3.16 each time

KEY TAKEAWAY

Focus on configuration quality over feature adoption. To fix the dessert upsell rate, prompt the upsell at the mains order stage, not at the end of the meal. Build a return visit programme: 70% of casual dining orders haven't ordered via me&u before.

FINDINGS

VENUE TYPE

The same levers. Different impact depending on your venue type

COMPETITIVE SOCIALISING

£14.39

AVERAGE AOV

- Activity-led venues - food and drink is an afterthought
- How can guests order whilst not being taken out of the moment of their game?
- The ordering journey needs to be smooth and is largely driven by item categories
- Only 10% of venues have tipping enabled

KEY TAKEAWAY

Ensure guests can easily order whilst playing their games. Group tabs, reordering prompts and tipping. Photos on the menus make guests 65% more likely to add an item than the same one without a photo.

INDEPENDENT RESTAURANT

£22.85

AVERAGE AOV

- The strongest Popular Tags result of any venue type: 94% adoption and +44% AOV lift on tagged orders
- Return visit rate of 33% leads all venue type
- Upsell setup is patchy (0-27% attach range).
- Tipping runs at 1.68% like-for-like once non-tipping venues are excluded

KEY TAKEAWAY

Popular Tags are near-universal here. Protect what's working and deepen it. Build loyalty and return-visit mechanics. Upsell configuration is the clearest gap: guests respond when the setup is right.

FINDINGS | GUEST FREQUENCY

Three in four orders are from someone who has never been before

Spend per visit is half of the revenue picture. The other half is frequency.

Industry research from 125 puts 62% of hospitality customers visiting a given venue just once a year - for restaurants that rises to 73%. The me&u data echoes it: 74% of orders across the network come from first-time visitors to that venue. Getting the second visit is the highest-ROI piece most venues aren't investing time and resource in.

Source: 125, State of the Nation 2026 (125insights.com/state-of-the-nation-2026)

74%
OF ORDERS FROM FIRST-TIME VISITORS

26%
RETURN VISITS (£24.2M of GMV)

2.5x
AVG ORDERS PER GUEST (2.57M GUESTS, 6.3M ORDERS)

RETURN VISIT RATE BY VENUE TYPE: % OF ORDERS FROM RETURNING GUESTS

For most venues, the biggest growth opportunity isn't a bigger basket, it's a second visit - only 26% of orders today are return visits. me&u can measure and move this because it tracks guests across the whole network, not just per venue - unlike platforms that only see one site in isolation.

FINDINGS | PERSONALISED MENUES

What comes after menu engineering: a menu that learns from every order

The levers covered in this report are related to configuration. Personalisation is different. me&u's guest intelligence engine - already used by 1 in 10 UK adults - ranks what each guest sees based on their order history, dietary profile and visit patterns, across all me&u venues. It gets sharper with every order placed - with no additional work from the venue team.

FROM STATIC TO INTELLIGENT - THE JOURNEY

1. A FIXED MENU

Every guest sees the same list in the same order every time. No personalisation.

2. A GUIDED MENU

Popular Tags, upsells, tipping - the levers in this report. Where most venues are right now.

3. AN INTELLIGENT MENU

AI-ranked by each guest's order history, dietary profile and visit patterns across the me&u network of venues. The menu is not configured just once, it is enriched with every order the guest places and by what's trending in venue. It learns.

WHEN ME&U SURFACES AN ITEM

6-10%

MORE LIKELY TO BE PURCHASED THAN WHEN A GUEST HAS TO FIND IT THEMSELVES

Guests end up ordering items they would never have found by scrolling. All from the menu the venue already has. No new dishes needed.

THE DIFFERENCE

A printed menu is a list that stays the same for every guest.

A menu guided by AI shows each guest what they're most likely to want, based on what people like them have ordered. It gets better with every order.

SUMMARY | KEY FINDINGS

Six things that hold across every venue type

ASK YOURSELF

How often do you audit the configuration of your menu? Do you make changes to the way it's presented, not just what's on it and how much it costs?

1. MOST MENU DECISIONS ARE MADE ON INSTINCT

74% of operators rely on their sales data when deciding if a menu change worked. The hardest decision for operators is deciding what to cut from the menu. Dish-level feedback and basket conversion visibility is data operators wish they had.

2. POPULAR TAGS INCREASE AOV BY 31.6%

Stable across every month and every day of the week. 11-20 Tags per menu is the sweet spot. Lead with desserts, sides and non-alc. Don't tag alcoholic drinks: no measurable lift here.

3. UPSELLS ARE BEING USED ON JUST 3% OF ORDERS

When one lands, it adds £4.16 to the basket. Well-configured venues reach 20-55% attach. The concept works, the gap is always in the setup. Staff prompting on paper menus achieves the same result.

4. THE TIPPING GAP IS 7x, AND IT'S ALL IN THE CONFIGURATION

Venues that configure tipping well capture 7x more than those that don't. Only 10% of competitive socialising venues have it set up. Pre-select a default percentage. Guests aren't the variable.

5. TWO LEVERS DELIVERS 21% HIGHER AOV THAN ONE

The gains compound rather than just add. The most common pattern in the data is an operator activating one thing, seeing a modest result, and stopping. The return on the second lever is where the impact really lands.

6. 3 IN 4 ORDERS COME FROM SOMEONE WHO HASN'T BEEN BEFORE

Independent restaurants lead the return visit table at 33%. Getting a first-time guest to come back is the highest-return action in this report. The data to do it already exists for most venues, they just aren't using it yet.

One menu. Three ways of looking at it.

Across this report, the same menu got looked at from three different angles. Annica broke down the research behind why a well-placed upsell works. Travis showed what it actually takes to get a menu change out the door without chaos. Glenda made the case that the menu is a marketing asset, not an administrative one.

None of that is a coincidence. It's the same story the data tells: fit beats adoption, and setup quality is the real lever. A tag, an upsell, a tip prompt - they all work, but only when someone treats the menu as something worth getting right, not something to switch on and forget.

That's the thread running through every finding in this report. The £4.4M sitting in Popular Tags, the 7x tipping gap, the 21% lift from stacking two levers - none of it is about spending more or working harder on a Saturday night. It's about paying attention to a part of the business that's often left on autopilot.

Where to start. If there's one thing to do this week, audit the configuration of your menu the way you'd audit anything else that touches revenue.

The venues pushing ahead aren't the ones with more features. They're the ones paying closer attention to using the ones they already have, better.

Want to see what this looks like for your venues?

The findings in this report are the starting point - the real value is in what they mean for your specific setup. Get in touch with the me&u team to walk through the data, book a call or email Jav.

Work with the report partners

This report was a collaboration. The experts and platform behind it also work directly with operators:

- me&u: The AI menu and ordering platform behind the data in this report → meandu.com/gb
- 2Forks: Menu engineering and research-led optimisation with Annica Wainwright → 2forks.co.uk
- Ops Club: Operational execution support and founder community with Travis Fish → ops-club.com
- Team Marketing: Marketing strategy and community for hospitality marketers with Glenda Barber → teammarketing.community

Terms used in this report

GMV

Gross Merchandise Value: total value of all orders processed through a platform in a given period.

E.G "£68.6M GMV"= £68.6M IN ORDERS PROCESSED THROUGH ME&U UK VENUES OVER 12 MONTHS

AOV

Average Order Value: the mean spend per transaction across all orders in a given period or venue.

E.G "AOV £19.57"=THE AVERAGE CUSTOMER SPENDS £19.57 PER ORDER AT THIS VENUE TYPE

ATTACH RATE

The percentage of orders that include a specific item or feature.

E.G "3% UPSELL ATTACH RATE"= 3 IN EVERY 100 ORDERS INCLUDE AN UPSELL ITEM

POPULAR TAG

A badge to a menu item that signals social proof to browsing guests. "Most ordered", "Chefs favourite" etc.

E.G LABELLING HALLOUMI FRIES AS "POPULAR" ON A DIGITAL OR PHYSICAL MENU TO GUIDE SELECTION

UPSELL

A prompt (digital or verbal) that suggests a complimentary item at the point of ordering.

E.G "ADD HALLOUMI FRIES?" APPEARING AFTER A GUEST SELECTS A BURGER; OR STAFF ASKING "WOULD YOU LIKE A SIDE WITH THAT?"

UK VENUE

me&u's full-feature adoption base: venues using the platform across ordering, payments and at least one menu optimisation feature.

391 OF THESE ARE FULL-PLATFORM ME&U VENUES: 20 INDEPENDENT RESTAURANTS FROM A SEPARATE AUDIT.

SPH

Spend Per Head: total revenue divided by the number of guests served. Used interchangeably with AOV in some operators' context.

E.G "SPH £22" = GUESTS ARE SPENDING £22 ON AVERAGE DURING THEIR VISIT

RETURN VISIT RATE

The percentage of orders placed by guests who have ordered at that venue before within a defined period.

E.G "30% RETURN VISIT RATE" = 3 IN 10 ORDERS AT THIS VENUE TYPE COME FROM RETURNING GUESTS

MENU LEVER

Any configurable tool (digital or operational) that influences what a guest chooses and how much they spend. In this report: Popular Tags, Upsells & Tipping.

E.G "STACKING LEVERS"= USING MULTIPLE TOOLS TOGETHER FOR COMPOUNDING EFFECT