

KAM

FAMILY DINING

2024



INTRODUCTION



Welcome to the Family Dining 2024 report. This is the second time that KAM have deep-dived into the family occasion within hospitality- our inaugural research into the topic was back in 2022 and we wanted to see what, if anything, has changed. There are 8.2m families in the UK (adults living with one or more dependent children, source: ONS), which equates to nearly 600m family dining occasions, per year, across the whole of the dining out sector.

KAM is continuing to place a focus on family dining and uncovering the consumer behaviours and attitudes that influence how families decide where and when to spend their time and money. With feedback from 1,000 parents of children from 0-17 years old, this research highlights the needs, wants, stress points and opportunities for this valuable dining and leisure occasion, and how these have changed over the last 24 months, in order to help operators and brands attract, engage and build loyalty with these valuable consumers.

This year, KAM's exclusive research is supported by HGEM, the award-winning hospitality platform that helps operators consistently deliver exceptional experiences, who have provided some real-life commentary from family diners, which you will see throughout.

I hope you find this report insightful and that it provides you with the information and ammunition to maximise the clear value that the family dining occasion can deliver to the hospitality channel.

Blake Gladman, KAM (This is me)

Methodology

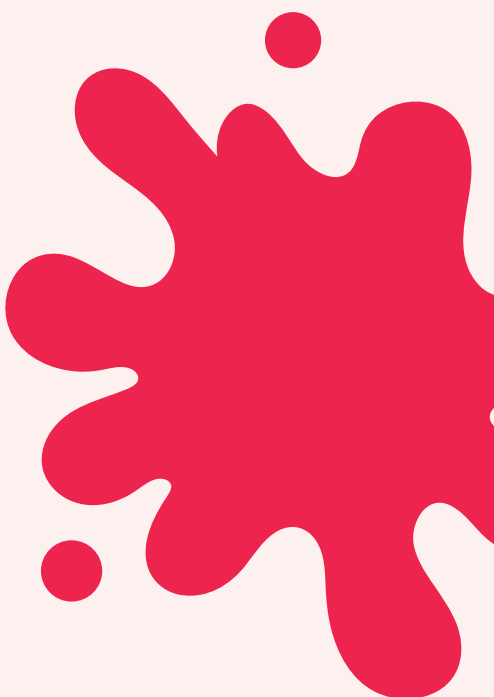

KAM data is from a nationally representative survey of 1,000 UK adults (+18) who are responsible for children in their household (17 and under). Survey was conducted 21st August - 3rd September 2024.



This report was kindly supported by experts in expert in Guest Experience Management, HGEM, who have provided customer quotes from visits to Casual Dining restaurants completed by mystery guests visiting with their families. These are ordinary paying customers who complete detailed and objective reports about their experience in return for a reimbursement. Each report is reviewed and validated by HGEM. The comments relate to questions about dining with children.



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**FAMILY
DINING
2024**

**WHO ARE THE
FAMILY DINERS
IN 2024?**





THERE ARE **8.2 MILLION** UK HOUSEHOLDS WITH DEPENDENT CHILDREN

91% OF FAMILIES DINE OUT WITH THEIR CHILDREN AT LEAST ONCE EVERY 3 MONTHS

Age group breakdown of children when dining out

Babies/
toddlers
(<2 yrs)
8%



Pre-
schoolers
(3-4 yrs)
6%



Primary-
schoolers
(5-11 yrs)
53%



Secondary-
schoolers
(12-17 yrs)
47%



22% OF PARENTS REPORT THAT THEIR CHILDREN HAVE DIETARY RESTRICTIONS AND **11%** INDICATE FOOD ALLERGIES

Breakdown of dietary restrictions

Vegetarian
7%



Dairy free
7%



Gluten free
7%



Vegan
5%



Pescatarian
4%



THE DINING DYNAMOS



Babies/
toddlers (<2 yrs)

These families spend, on average,
£3,621 per year on dining out

59% of parents dine out with them at least once a week

The top 5 factors that influence **choice of meals** with this age group are:

- Food you know they will eat | 46%
- Value for money | 45%
- Quality of ingredients | 35%
- Price | 35%
- The healthiest option | 31%

40% of these children are involved in the decision of where to dine out

The top 5 factors that influence **choice of venue** with this age group are:

- Kid-friendly atmosphere | 46%
- Kid-friendly menu | 45%
- Reasonable prices | 45%
- Baby changing facilities | 41%
- Cleanliness | 41%



Pre-schoolers
(3-4 yrs)

These families spend, on average,
£4,501 per year on dining out

52% of parents dine out with them at least once a week

The top 5 factors that influence **choice of meals** with this age group are:

- Food you know they will eat | 48%
- Quality of ingredients | 46%
- What the child asks for | 37%
- Child's favourite food | 35%
- Value for money | 32%

64% are involved in the decision of where to dine out

The top 5 factors that influence **choice of venue** with this age group are:

- Kid-friendly atmosphere | 57%
- Reasonable prices | 48%
- Kid-friendly menu | 48%
- Cleanliness | 41%
- Friendly & attentive staff | 38%



Primary-schoolers
(5-11 yrs)

These families spend, on average,
£4,567 per year on dining out

50% of parents dine out with them at least once a week

The top 5 factors that influence **choice of meals** with this age group are:

- Food you know they will eat | 49%
- Child's favourite food | 43%
- Value for money | 40%
- Quality of ingredients | 37%
- Price | 34%

82% are involved in the decision of where to dine out

The top 5 factors that influence **choice of venue** with this age group are:

- Reasonable prices | 61%
- Kid-friendly atmosphere | 51%
- Kid-friendly menu | 49%
- Cleanliness | 44%
- Friendly & attentive staff | 36%



Secondary-schoolers
(12-17 yrs)

These families spend, on average,
£4,086 per year on dining out

41% of parents dine out with them at least once a week

The top 5 factors that influence **choice of meals** with this age group are:

- Food you know they will eat | 48%
- Value for money | 45%
- Quality of ingredients | 39%
- Child's favourite food | 38%
- Price | 36%

83% are involved in the decision of where to dine out

The top 5 factors that influence **choice of venue** with this age group are:

- Reasonable prices | 68%
- Cleanliness | 52%
- Friendly & attentive staff | 46%
- Kid-friendly atmosphere | 36%
- Healthy food options | 35%

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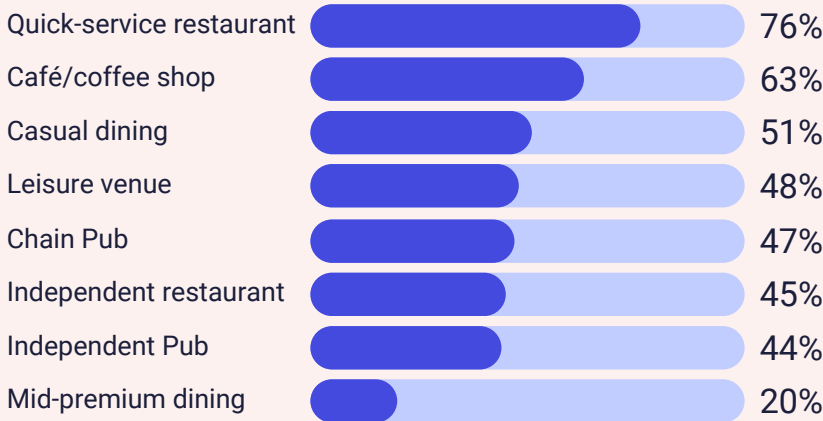
**FAMILY
DINING
2024**

**FAMILY
DINING HABITS
IN 2024**



WHERE & WHEN DO FAMILIES DINE OUT?

The most popular types of venues for families when dining out are...



There is no significant difference between the most popular venues now vs our 2022 Family Dining report.

46%

46% of families dine out together at least once a week.

Rising to 59% for those with babies/toddlers (<2 years) and gradually decreasing as the children get older (52% for 3-4 yrs, 50% for 5-11yrs and 41% for 12-18yrs).

35%

Visit frequency, however, appears to be in decline, with **35% of families saying that they are eating out less this year compared to last year** - compared to 26% saying more - so a net decline of 9%.

67%

wish they were able to **eat out more often as a family**



DINING ADVENTURES

The main reasons that families dine out together are...



69%

Dinner (69%) is the primary dining out occasion for families, followed by lunch (66%). There is significant potential for growth in brunch (19%) and breakfast (24%), which are currently under-represented. The next largest occasion is coffee/snack/treat (41%).



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**FAMILY
DINING
2024**

**THE DECISION-
MAKING JOURNEY
FOR FAMILY DINERS**



WHERE SHALL WE GO, KIDS?

THE KIDS' PERSPECTIVE:

68%

Of children are involved with the decisions that are made when families choose where to go when they dine out.

What factors are important to *children* when thinking about a restaurant to go to?



HAVING FUN IS A PRIORITY FOR KIDS!



WHERE SHALL WE GO, KIDS?



THE ADULTS' PERSPECTIVE:

What factors are important to adults when thinking about where to eat?



KEEPING THE KIDS HAPPY IS THE PRIORITY!



Tasty food is essential, but staff and entertainment are crucial for ensuring a fun experience for kids and their parents.

“ We went in with some friends and three kids. The staff were straight over with colouring books to keep them entertained. It was excellent. ”



WHAT SHALL WE EAT, KIDS?



58%

Of adults are involved with choosing what food kids eat when they dine out.

The following are the most important factors when parents choose what meal(s) to order for their children when dining out



Quality and value for money are key when selecting meals for children, but the confidence that the food will be eaten plays a bigger role in decision-making. A full plate of untouched food is undesirable to say the least!

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**FAMILY
DINING
2024**

**FOOD
GLORIOUS
FOOD**



CURRENT ATTITUDES TOWARDS KID'S MENUS...

49%

think children's menus are generally uninspiring

49%

think children's menus are not good value for money compared to adult menus

52%

want the option to have half-size / smaller size of adults' meals for kids

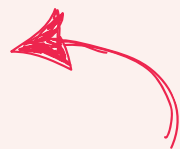
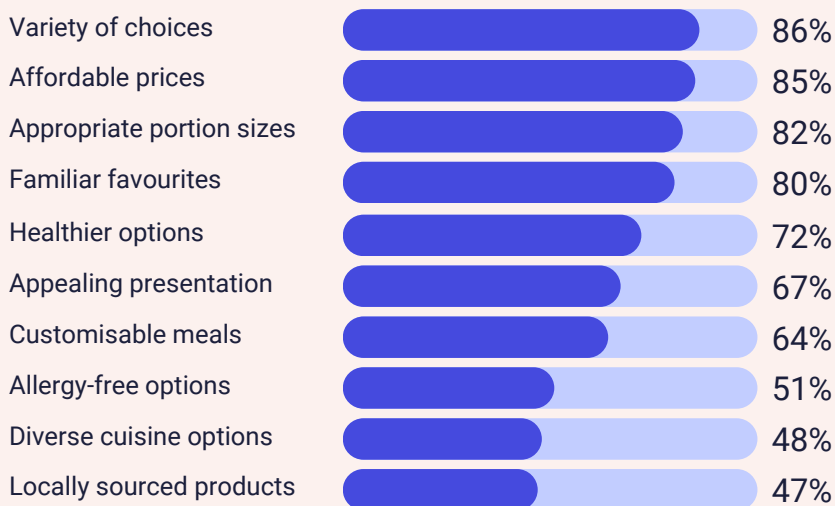
53%

want the option of a 'small kids' and 'larger kids' portion options





WHAT DO PARENTS WANT TO SEE ON CHILDREN'S MENUS?



PARENTS WANT FLEXIBILITY AND LOTS OF OPTIONS.

“ Food was fresh and tasty; portions were good and offered value for money. Staff were friendly and patient with children unsure of what they wanted. Good choice for both the adventurous and unadventurous eaters. Would definitely visit again. ”

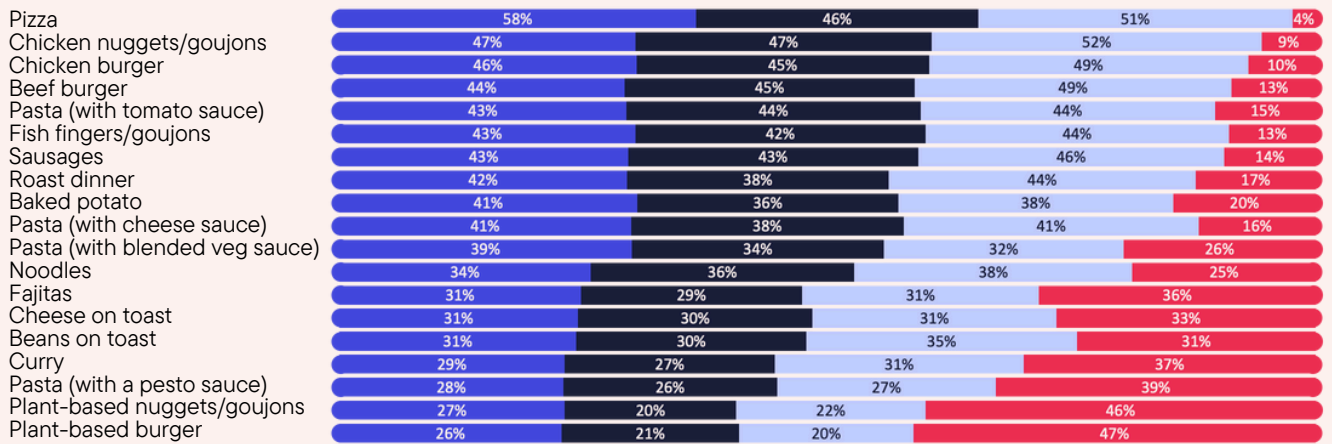


THE 'MAINS' THING

What would children want to see, want to order and what would they **actually eat!**

WHAT PARENTS WANT TO SEE ON A CHILDREN'S MENU

WHAT THEY WOULD ORDER FROM THE MENU



WHAT CHILDREN WOULD EAT FROM THE MENU

WHAT THEY NOT INTERESTED IN



When creating kids' menus, it's essential to balance parent's preferences, children's desires, and of course, their actual eating habits. Most kids prefer traditional items, so finding innovative ways to enhance their nutritional value, or make less popular choices more fun, is key.



CHOOSING SIDES

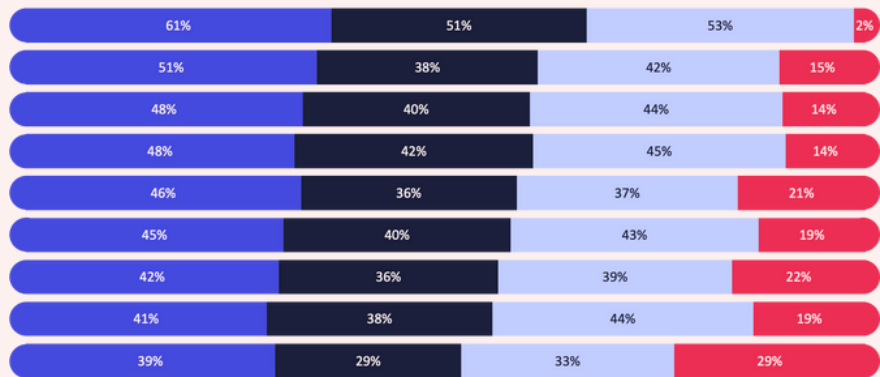


What would children want to see, want to order and what would they actually eat!

WHAT PARENTS WANT TO SEE ON A CHILDREN'S MENU

WHAT THEY WOULD ORDER FROM THE MENU

- Chips/fries
- Salad
- Carrots
- Sweetcorn
- Broccoli
- Peas
- Sweet potato fries
- Mash potato
- Green beans



WHAT CHILDREN WOULD EAT FROM THE MENU

WHAT THEY NOT INTERESTED IN

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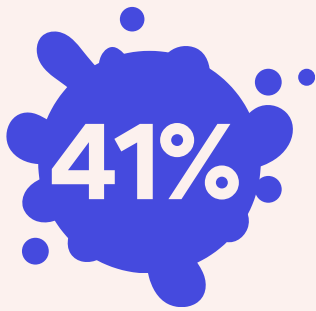
**FAMILY
DINING
2024**

**HEALTHY HAPPY
VIBES FOR
FAMILIES**

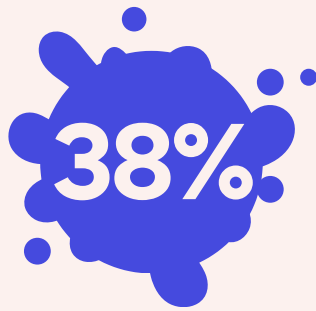


THE PARENT 'HEALTHY' TRAP

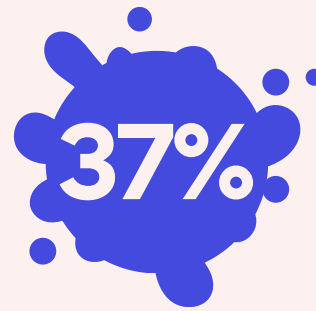
Parents want to see the following 'healthy' options on children's menus...



Want to see more nutritional food



Want freshly made juices/smoothies



Want to see less fried food



Want to see more nutritional drinks



Want locally sourced ingredients



Want sustainable ingredients



Want to see nutritional info listed on the menu



Want to see full list of ingredients on the menu



Want to see less chips on the menu

IS HEALTH IMPORTANT WHEN DINING WITH CHILDREN?

50%

Of parents say they are less likely to worry about their children eating healthily when they are dining out compared to when they are eating at home. This is compared to 23% who say they are **more** worried and the remaining 27% who have the same level of interest.

“BUT HOW HEALTHY DO THEY THINK CHILDREN’S MENUS ARE, CURRENTLY?”

60%

Of parents think that children’s menus are currently healthy, but 40% say otherwise. Interestingly this climbs to 56% for less frequent family diners, suggesting that the perception of unhealthy food is potentially a barrier to more frequent visits.



“The food was super fresh, and it was perfect because it was filling and healthy! The atmosphere and service was great too allowing me to catch up with my family and have quality time. Everyone was happy

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**FAMILY
DINING
2024**

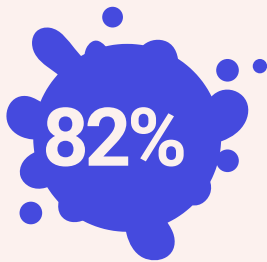
**THE POWER OF
STAFF TO DELIVER
THE EXPERIENCE**



STAFF CAN MAKE THE EXPERIENCE



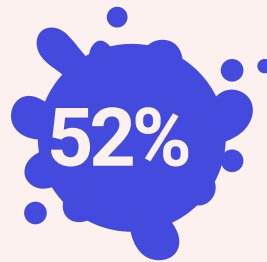
What specific staff behaviours or services do parents find most helpful when dining with their children?



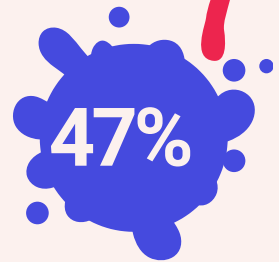
Friendly and welcoming attitude



Quick service



Flexibility with menu requests

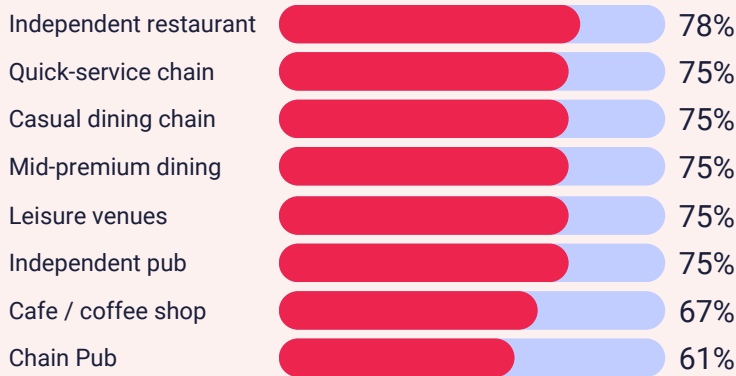


Patience with young children



HOW DO DIFFERENT VENUE TYPES RANK IN STAFF QUALITY FOR CHILDREN?

Ratings for how well venues currently delivering for families when it comes to their staff - (% rating very good/good)



TOP WORK SHARON!



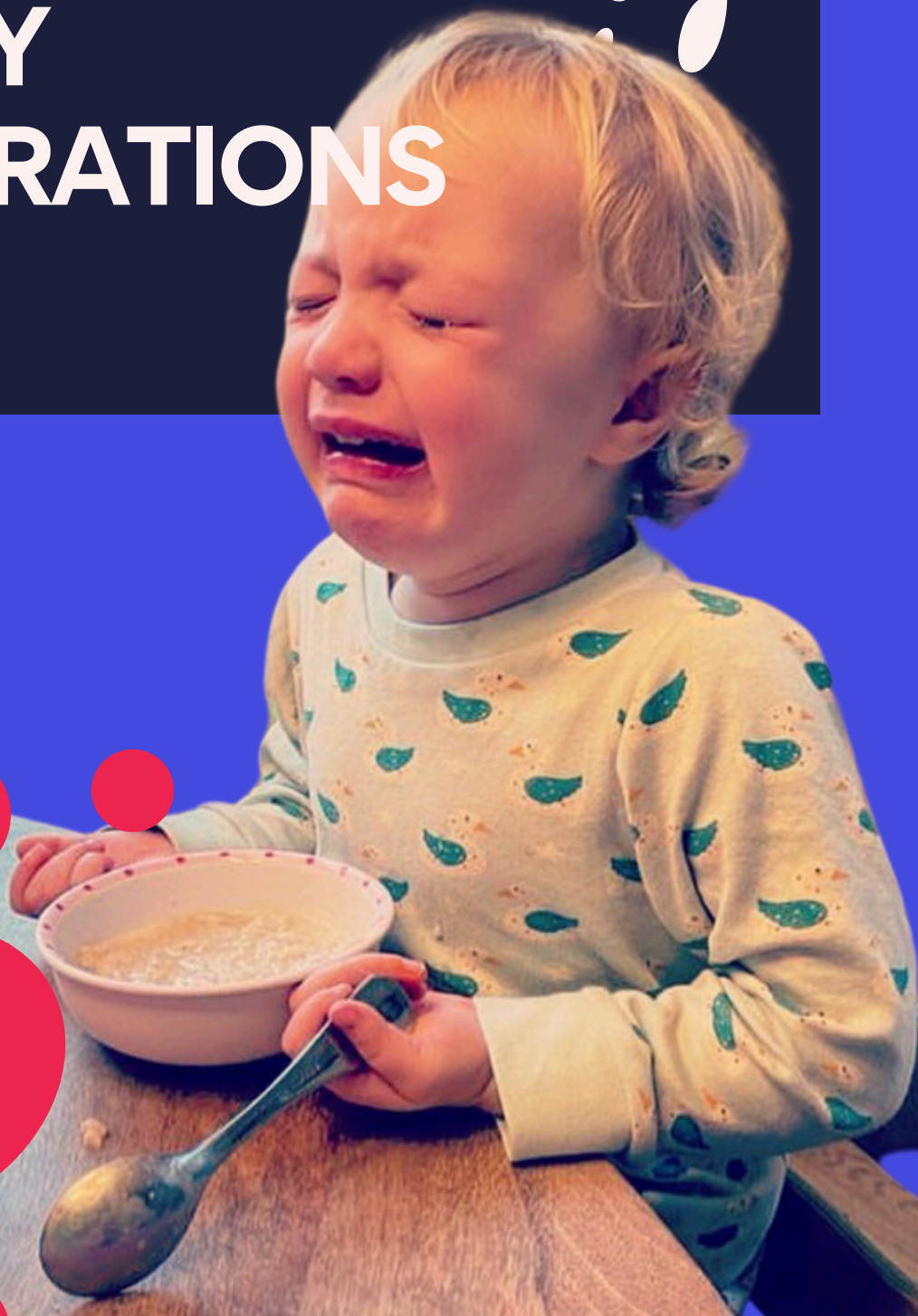
“ Sharon (staff member) was amazing! Really nice and attentive. I had two kids with me, and she made them feel really comfortable and happy! Would definitely recommend. ”



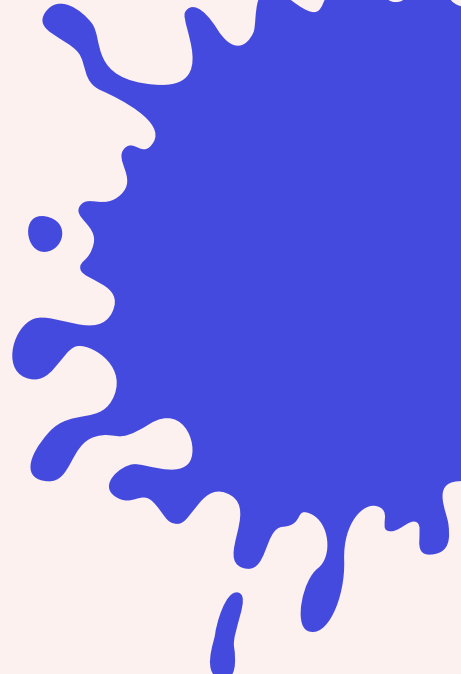
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**FAMILY
DINING
2024**

**FAMILY
FRUSTRATIONS**



FAMILY FUEDS



These are the top frustrations families face when dining out with children:

Babies/toddlers (<2 yrs)



- 40% Long wait times
- 39% Noisy/chaotic environment
- 35% Lack of interesting kids options
- 34% Lack of healthy options

Pre-schoolers (3-4 yrs)



- 44% Long wait times
- 37% Noisy/chaotic environment
- 33% Unclean or unhygienic environment
- 32% Inattentive or unfriendly staff

Primary-schoolers (5-11 yrs)



- 47% Long wait times
- 39% Unclean or unhygienic environment
- 37% Inattentive or unfriendly staff
- 34% Noisy/chaotic environment

Secondary-schoolers (12-17 yrs)



- 53% Long wait times
- 40% Noisy/chaotic environment
- 39% Inattentive or unfriendly staff
- 34% Unclean or unhygienic environment

Sometimes even the thought of taking children out for dinner can be enough to put you off, especially when they're young. So anything that allows parents to feel comfortable and confident is a win. Dining out should be a fabulous experience for everyone, of all ages.

68%

Of families would like to see more venues focus on being **'family friendly'**

“ The service was awful and we were made to feel like we were a problem from the start. The food tasted awful and my two son’s kids pizzas came when we had all finished our meal! ”

SMALL FRUSTRATIONS CAN LEAD TO A NEGATIVE EXPERIENCE

51%

Of parents have **left a restaurant earlier** than they wanted to (in the last 12 months) due to the following negative experiences...



96%

Of parents say that these **frustrations have a negative impact on** their decision to dine out with their children in the future

28%

find dining out with kids a **generally stressful experience**



ARE VENUES MEETING FAMILY DEMANDS?

Ratings of the overall dining experience across venue types
(% of customer who rated the experience as 'very good' or 'good')



73%

Casual dining chains are rated highest by those with pre-schoolers (3-4 yrs)

“

It was our first outing as a family of four with a newborn - the staff were so accommodating of where we wanted to sit and provided us with all we needed for both baby and toddler. It was a massive weight off my shoulders as leaving the house can be daunting with a little one let alone two!

”

67%

Quick-service chains are rated highest by those with secondary-schoolers (12-17 yrs)



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**FAMILY
DINING
2024**

**SIZE OF THE
“FAMILY” PRIZE
IN 2024**



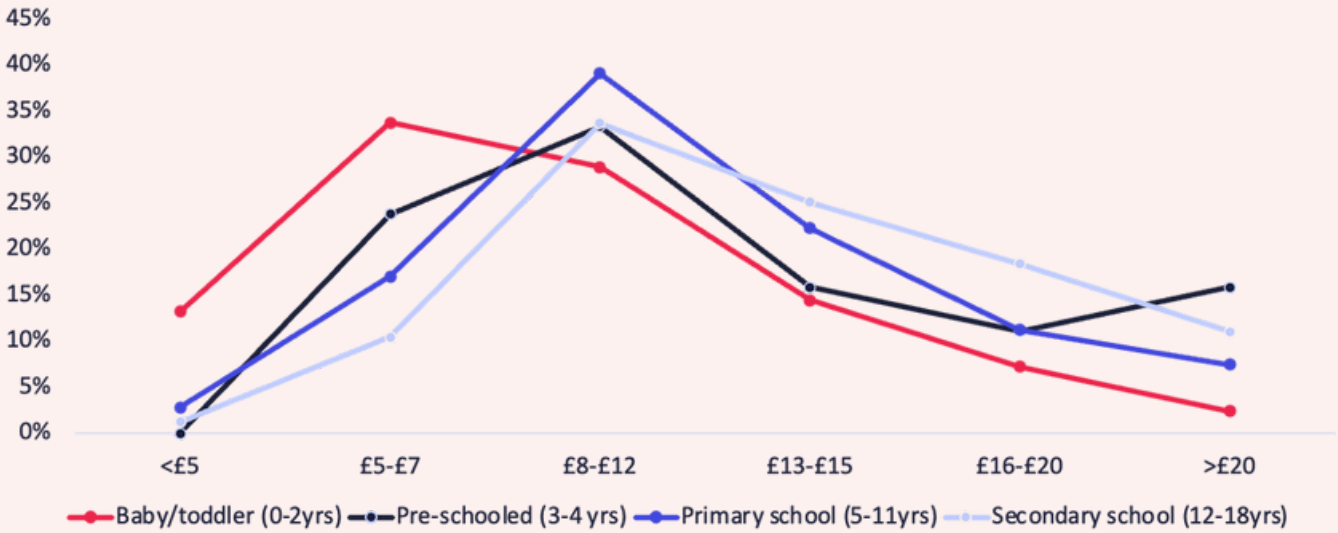


PAYMENT TERMS

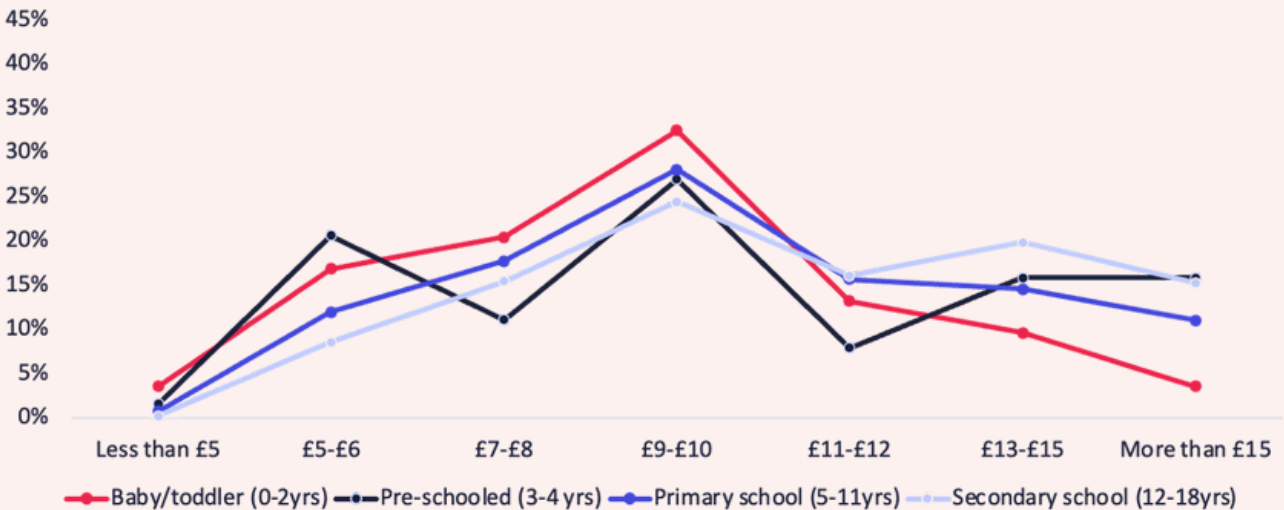
56%

Of parents **wouldn't be prepared to pay more than £10 for a children's meal**, rising to 67% for those with under 4's

What adults say they typically spend per child (total spend)



The maximum adults say they are *prepared* to spend per child (total spend)



TRADING UP



90%

Of families could be encouraged to pay a higher price for children's meals than they currently do

What would encourage adults to pay a higher price for a children's meal?



IT'S HORSES FOR COURSES

27% Of families hardly ever/never order starters when dining out and 10% don't order dessert.

31% Of families order tap water for their children all or most of the time when dining out.

92% Of families say they **COULD** be encouraged to have more courses than they normally do

The top things that would encourage customers to order additional courses...



LOST OPPORTUNITIES

£4,015

The average family spends £55 per outing, dining out 73 times a year, totaling £4,015 annually.

The average annual family spend in 2023 was £4,360. This figure was based on the average family dining out 109 times per year, spending £40 per occasion on average. So, in 2024, average spend per occasion is up (driven by increased costs, most likely) – which has subsequently led to a decrease in occasions – meaning the net outcome is actually a reduction in family dining spend across the full year.

The average family is dining out on **37 fewer occasions** per year vs 2022

This is a loss of **£345 per family, per annum** for the industry (and there are 8m+ of them!)

There are 8.2m families in the UK (adults living with one or more dependent children) (source: ONS)



THE SIZE OF THE FAMILY DINING PRIZE

£2.9bn



THE SIZE OF THE FAMILY DINING OPPORTUNITY

Encouraging an additional £5 spend per trip (that's an additional starter or dessert, trading up from tap water into soft drinks, or trading up into a more premium meal, for example) could be worth an additional £2.9bn per year to the industry.

There are 8.2m families in the UK (adults living with one or more dependent children) (source: ONS)

- Equates to 599m family dining occasions per year
- £5 x 599m = £2.9bn



SUMMARY



There is a £2.9bn opportunity for hospitality venues, just waiting to be grabbed, just by encouraging an additional £5 spend per family, per occasion. It may sound like a stretch, but we've seen throughout this report that there are many levers that can be pulled to unlock this spend. Trading up diners into just an additional course- a starter or dessert, or upgrading tap water into a soft drink, for example, are just two ways in which the industry can realise the opportunity.

It's a well-known expression, that 'a family that eats together stays together', and whilst we can't promise that the hospitality industry can lower the current UK divorce rates, we can hypothesise that families dining together can create positive memories and build a long-lasting love for social dining occasions.

However, without the care and attention to meeting the needs and demands of families that this research highlights, there is a risk that we create negative memories and ultimately help to facilitate stressful occasions which turn families away from hospitality and back to the relatively (perceived) comfort of their own homes.

We really must listen to what the family diner wants, what they expect and what would help to create that magical experience. The research we do at KAM allows you to do just that. We don't tell you what they are doing, you hopefully know that already, we tell you why they are doing it, what motivates their decisions, what makes them happy and what frustrates them.

Our research also highlights how the role of influence that children have grows and develops as they get older, but also that they are having their say even at an early age. As a parent of two young children, I can firmly vouch for this particular piece of insight! It may be the parents' money but it's the kids that hold the power of influence in their tiny hands. Whilst this is critical to know for the here and now, and for unlocking that £2.9bn opportunity, it's also important to know in terms of how we, as an industry, are feeding families and influencing hearts and minds. These children will grow up, and we want them to grow up loving hospitality and excited about the experiences that are on offer – with good food, good drinks, good company and good hospitality. Family dining is a key occasion for the industry to focus on, and to get right – for now and for the future.

Blake Gladman, KAM



ABOUT



So much more than just a research agency, KAM is the supportive voice of the UK hospitality industry. We take pride in offering cutting-edge consultancy backed by deep insights. We thrive on providing our clients with valuable and actionable insight solutions that drive real results and purposeful change. If you're ready to be informed, educated, and inspired, hop on board and let's embark on an exciting journey together. Check out our [online Knowledge Hub](#) for access to more Hospitality research and insights.

www.kaminsight.com // hello@kaminsight.com



With thanks to HGEM - expert in Guest Experience Management - for supporting this report. HGEM partner with operations and marketing functions in multi-site hospitality businesses to close the gap between what they intend for their guests to experience and what actually gets delivered. Their award-winning platform enables users to learn from half a million visits per year and take actions to grow sales. Helping you to: get more customers, make existing ones more loyal and increase your average spend.

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