

THE RISE OF THE INTENTIONAL GUEST

HOW HEALTH IS IMPACTING CONSUMERS IN 2026

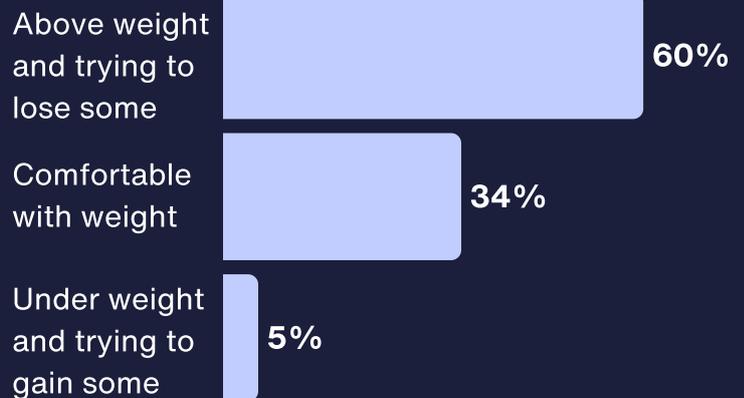


48%

Of UK adults describe themselves as “active health-seekers” who are dedicated to making health-focused decisions

A growing focus on health and wellness is influencing how Brits eat, drink and socialise. Almost half of UK adults describe themselves as “active health seekers”, while 6 in 10 say they are actively looking to lose weight.

How UK adults describe their weight...



Primary motivations for UK adults maintaining a healthy lifestyle



TECHNOLOGY IS MAKING MANY MORE AWARE OF THEIR HEALTH

**59%**

of UK adults **regularly or occasionally use health apps or devices** to help manage health and wellness goals

**67%**

of UK adults **regularly or occasionally use health supplements or wellness products**



HEALTH & WELLNESS IMPACTS CONSUMPTION CHOICES...

55%

say that they think about health **often or every time** they make a food decision

42%

think pubs and restaurants should provide **more transparent** nutritional information

55%

say a **healthy menu** is importantly or very important when choosing a venue

HEALTH & WELLNESS FACTORS ARE DRIVING BRITS TO DRINK DIFFERENTLY

Health and wellness concerns are one of the key motivations influencing the growing trend of alcohol moderation in the UK. However, this is not to say that Brits avoid going out. Instead, almost 60% of adults in the UK go out for drinks at least once a month, regardless of health goals and motivations.

Instead, Brits are seeking more alcohol-free or low alcohol options, with one quarter of adults saying they would like to see more of these options available at pubs, bars and restaurants. Alcohol-free drinks also provide an opportunity for premiumisation.

55%

of **active health seekers** have been out for drinks in pubs, bars and restaurants at least once a month in the last three months

1 IN 4

UK adults would like to see more alcohol-free or low-alcohol drink options available at pubs, bars and restaurants

3 IN 4

UK adults say that they are willing to pay more for healthy or functional food and drink options at pubs or restaurants



KAM

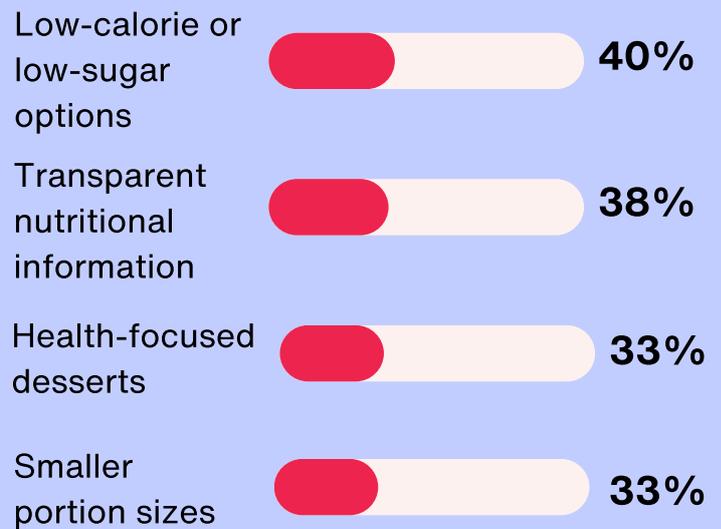
HEALTH WITHOUT SACRIFICE: WHAT BRITS WANT FROM VENUES

Many Brits want to see healthier food options available on the menus at pubs, bars and restaurants that align with their health goals. However, while consumers are looking to make healthier choices, they still consider food to predominantly be a source of pleasure, and are therefore still seeking enjoyment when eating out. Their priority is balance rather than total restriction.

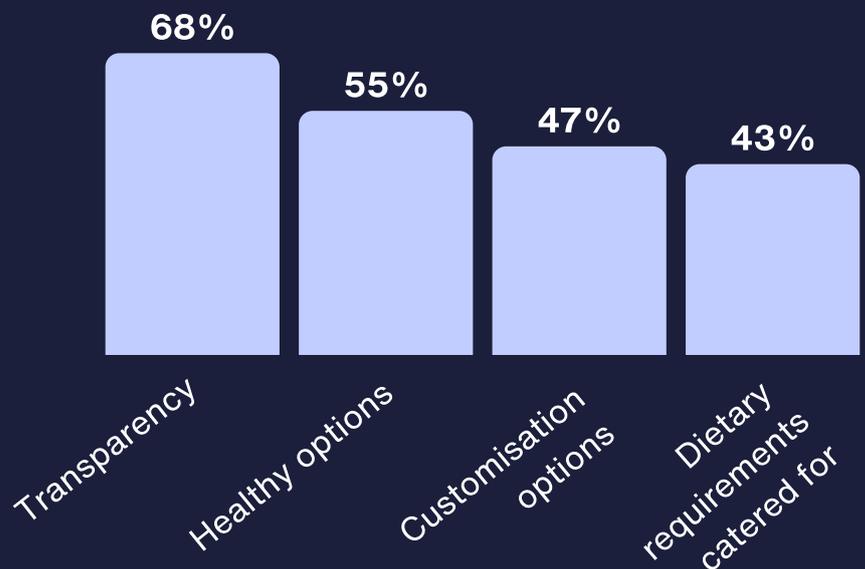
68%

of adults agree that *“Food is about enjoyment, but I try to balance it with health-conscious choices”*

What people want to see on menus

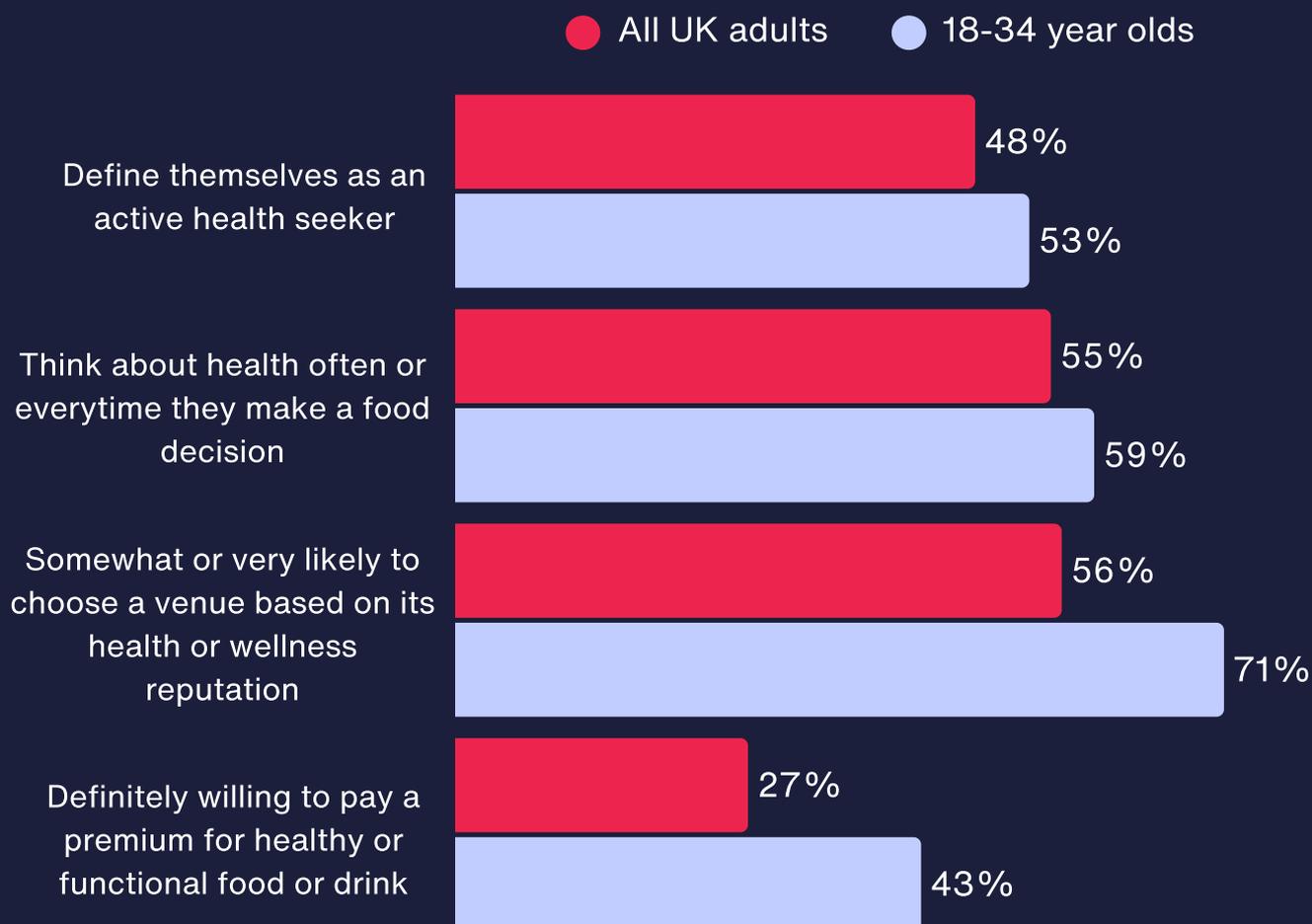


What UK adults consider important/very important when choosing where to eat



YOUNGER CONSUMERS ARE MORE HEALTH DRIVEN

Younger consumers are most likely to define themselves as “active health seekers” and are more heavily influenced by health and wellness when making decisions concerning food and drink. They are also more open to paying a premium in order to maintain their health goals and more likely to be influenced by a venue’s health or wellness reputation, with over 70% saying this would make them likely to choose it.



THE INTENTIONAL GUEST AND WHAT IT MEANS FOR HOSPITALITY

Health is embedded in how many Brits choose where, what and how they eat and drink. However, this shift does not signal a retreat from hospitality. Instead, it reflects the rise of a more intentional guest who values balance, transparency and choice.

TOP FOUR TAKEAWAYS...

1

FLEXIBLE MENUS

Guests want the ability to customise, control portions and adapt dishes to suit their health goals.

2

TRANSPARENCY

As health becomes more important, nutritional clarity and ingredient transparency are no longer optional.

3

MODERATION

Guests want quality alternatives to alcoholic drinks, and are often willing to pay a premium for high quality low and no alcohol options.

4

BALANCE, NOT RESTRICTION

Indulgence is not being abandoned but more considered.