

KAM FAMILY DINING 2026



WELCOME TO FAMILY DINING 2026



This is the third time we've taken a deep dive into family dining at KAM, this year in partnership with the Association of Indoor Play – and it's always one of our most popular reports. Maybe because so many of us have experienced the occasion first-hand. When it's good, it can be one of the best reasons to eat out. When it's bad, you're £70 lighter, one child is crying, nobody has eaten what they ordered and you're wondering why you didn't just stay at home.

Which brings us to one of the biggest messages from this year's research:

If your family strategy starts with the kids' menu, you've already started too late.

Of course the food matters. A lot. But getting chicken nuggets, pizza and pasta onto a colourful menu is actually only a small part of getting family dining right.

The experience starts long before anyone orders. Can families find you? Can they book easily? Do they feel confident they'll be welcome? Is there something everyone will eat? Is it going to feel worth the money? Then there's the arrival, the welcome, the wait for food, the flexibility of the team, the noise, the space, the entertainment and whether parents actually get to enjoy themselves too.

There isn't even one neat definition of a 'family' or a 'family dining occasion'. A rushed Tuesday refuel is a very different proposition to a birthday lunch. A four-year-old and a fourteen-year-old may technically both be 'kids', but try giving them the same menu and see how that goes. The key word is flexibility.

So this year we've deliberately looked at the whole journey. We've explored why families go out, who really chooses the venue, what children want, how needs change with age, what value actually means, what causes stress and frustration and what operators can do to make the entire experience better.

And this audience is worth getting right. Families are eating out more often than they were in 2024 and we estimate the average family now spends £4,698 a year dining out.

There's a big prize here. But I'd argue **the opportunity isn't to create a better kids' offer at all. It's to create a better family experience.**

Hopefully this report gives you plenty of ideas for doing exactly that.

Katie Jenkins
Marketing Director
KAM

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METHODOLOGY

KAM data is from a nationally representative survey of 950 UK adults (+18) who are responsible for children in their household (14 and under). The survey was conducted during August 2026.

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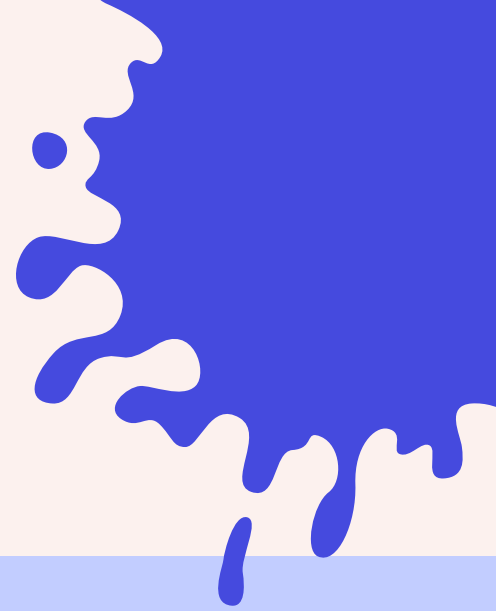
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**FAMILY
DINING**
2026

WHO'S COMING TO THE TABLE?



FAMILIES ARE **GREAT** FOR BUSINESS



There are **8.2 million** households in the UK with children*

Around **1-in-2** of these households “dine out” at least once a week (55%)

The average annual household spend on “family dining” is **£4,698** (up 17% from 2024)

The average family is dining out on **8 more** occasions per year than in 2024

That’s a gain of **£683** per family per year for the industry!

71% said they would like to see *more venues being family friendly*

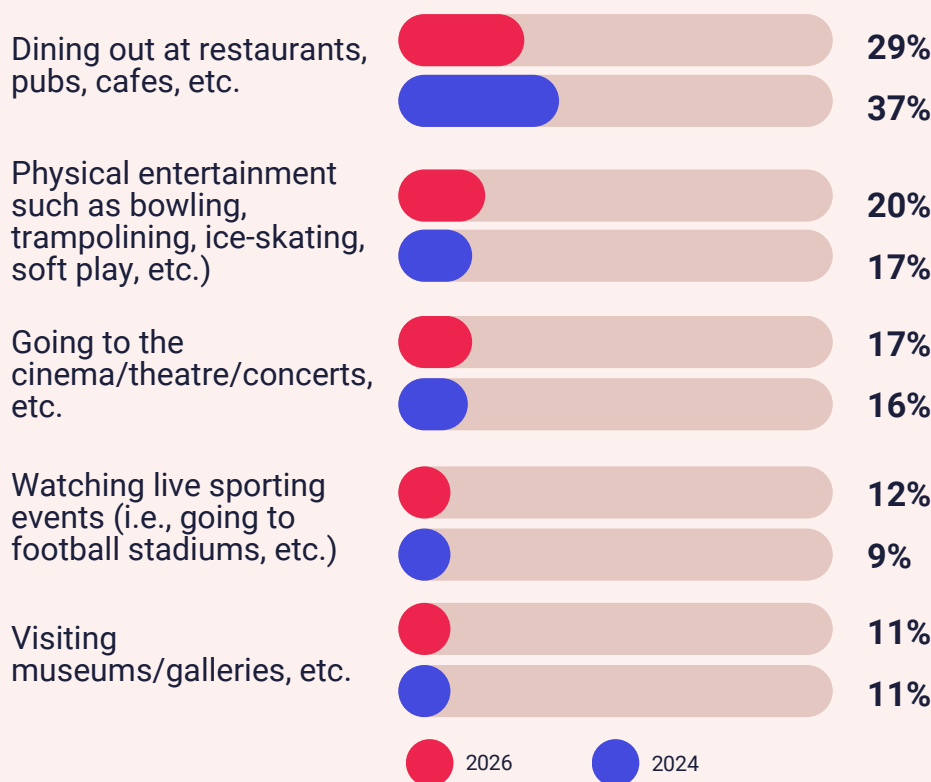


DINING OUT GETS THE BIGGEST SLICE OF THE FAMILY LEISURE BUDGET

29p in every pound
of family leisure spend, with kids, goes on ‘dining out’.

Of all the money parents spend on leisure and entertainment with their children, ‘dining out’ in hospitality venues takes the biggest share (29%), ahead of physical activities such as bowling, trampolining and soft play (20%) and trips to the cinema, theatre and concerts (17%). However, dining out’s share has fallen quite sharply since 2024 (37% → 29%) suggesting the family leisure budget is being spread across a more diverse range of venues and activities.

Share of family leisure spend by activity (2024 vs 2026)



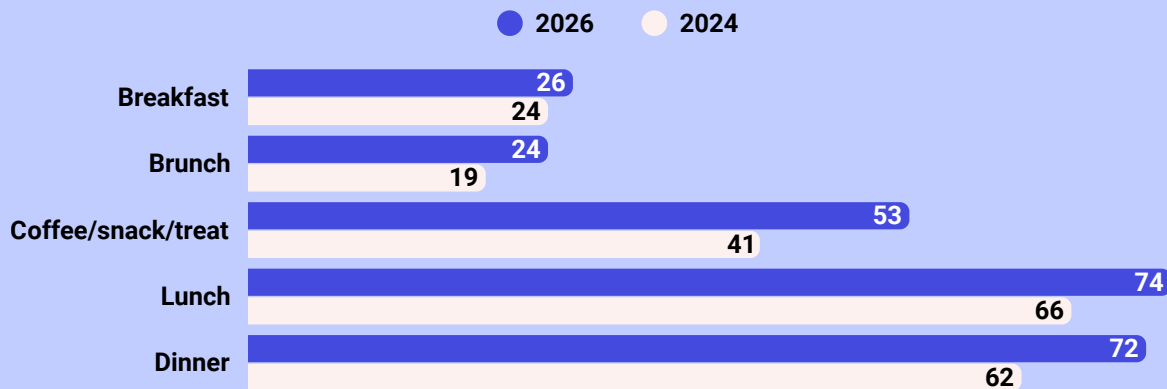
**FAMILY
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2026

UNDERSTANDING THE FAMILY DINING OCCASION



WHEN & WHERE ARE FAMILIES DINING OUT?

% of parents that have eaten out with their children for the following occasions in the last 3 months:

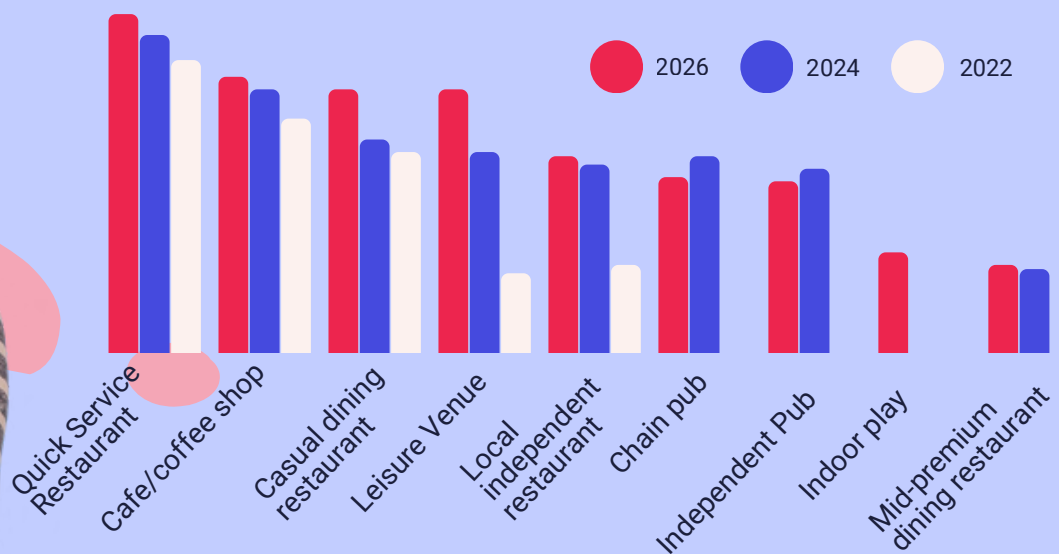


While lunch and dinner remain the dominant family dining occasions, eating out with children is less confined to main meals, with a larger percentage of families visiting across all occasions compared with 2024.

Over half of parents have visited a venue with kids for a coffee, snack or treat in the last three months, highlighting the growing importance of informal, lower-spend occasions. There is an opportunity for operators to increase visit frequency by giving families more reasons to drop in between traditional meal occasions (think after-school treats, hot drinks and cake deals.)

And visits are to a variety of venues

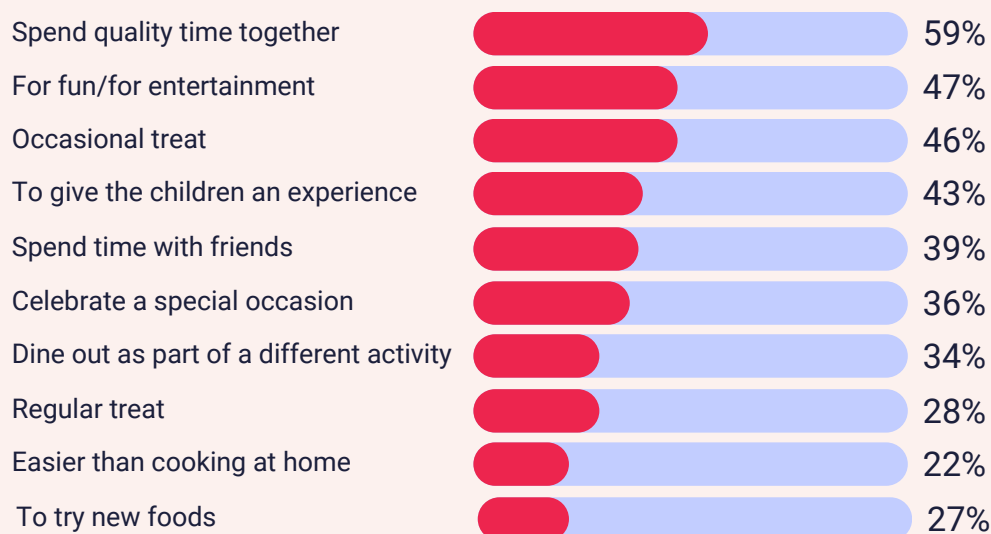
The most popular types of venues for families when dining out are...



FAMILY DINING IS (OFTEN) ABOUT MORE THAN GETTING FED

59% say they dine out as a family to spend quality time together

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



Family dining is about much more than simply getting everyone fed. With family life increasingly busy and competing with screens, clubs and countless other distractions, eating out can create valuable time to reconnect. In fact, spending quality time together is the number one reason families give for dining out (59%), while fun, treats and shared experiences also feature strongly.

Hospitality has an important role to play in creating those moments of connection, giving families a reason to switch off, spend time together and enjoy a shared experience. It means a stand-out Family Dining offer goes well beyond what's on the menu.

FUNCTIONAL VS EXPERIENCE-LED

NOT ALL FAMILY DINING OCCASIONS ARE
DRIVEN BY THE SAME NEED-STATE...

Refuel (approx. 39% of occasions)

(needing something to eat while out, for convenience or not wanting to cook).

When families are simply looking to refuel, practicality takes priority. Value for money is the single biggest driver of venue choice, closely followed by confidence that children will enjoy the food. Considerations like decor and environment, while still important, have less of an influence over choice of venue.



(approx. 61% of occasions) Experience-led

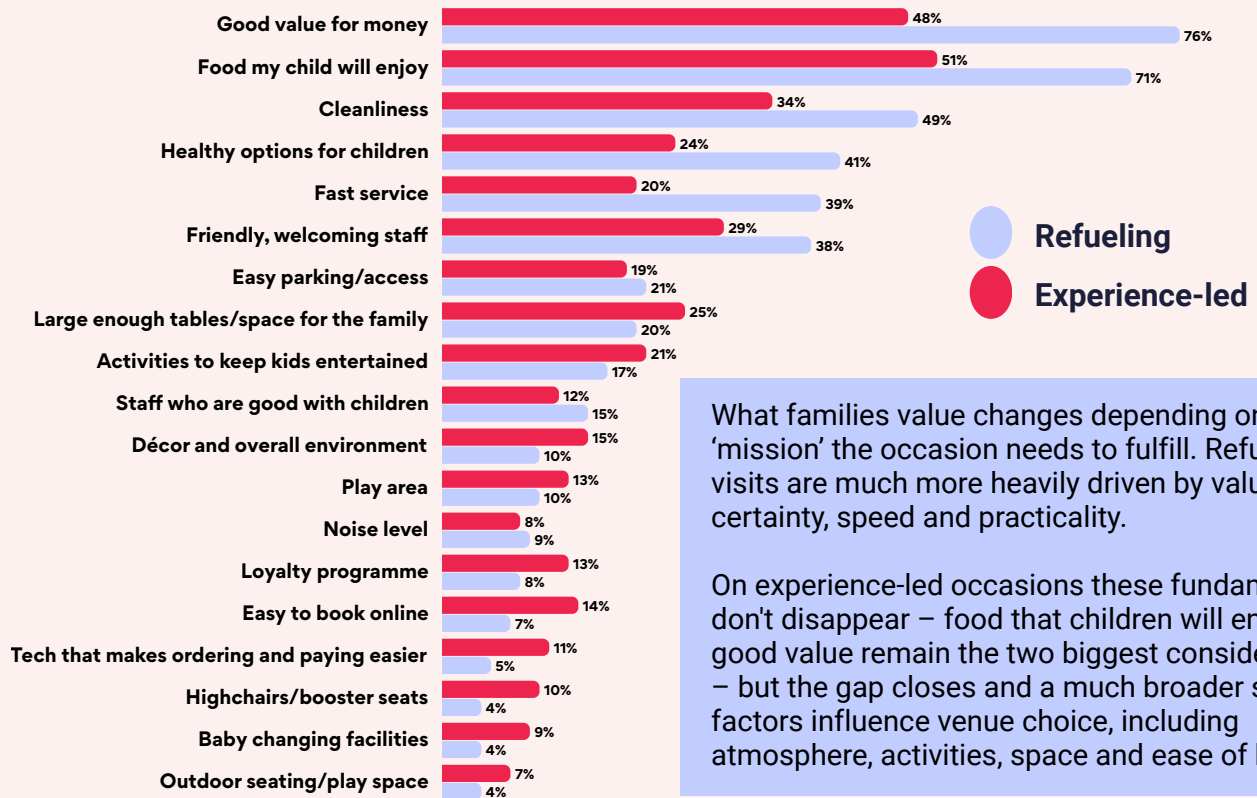
(enjoying the experience of eating out together, spending quality time together or celebrating something.)

Even on experience-led occasions, great food for children and good value remain the foundations of venue choice. But as family meals become more about spending time together, parents look beyond food and value. The overall experience, from the environment and facilities to ease of booking, plays a much bigger role in deciding where to eat.



THE 'MISSION' CHANGES WHAT MATTERS

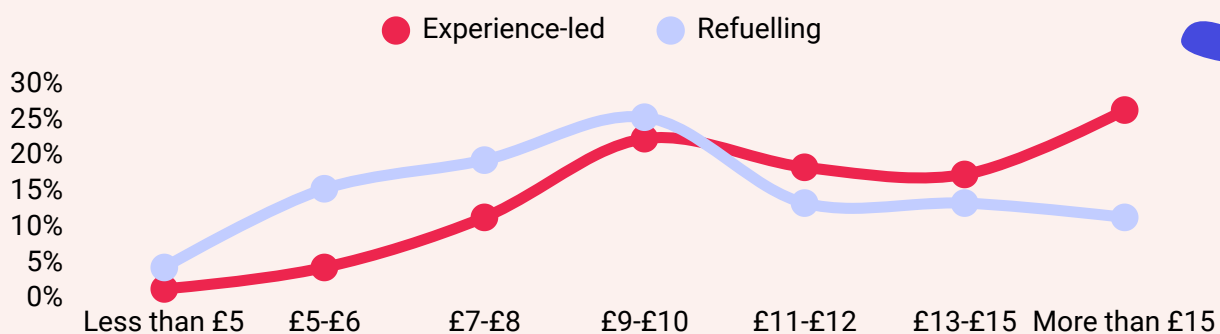
Whats MORE important when on a REFUELLING vs EXPERIENCE-LED mission:



The mission also changes the price ceiling

A quick refuelling visit needs visible value, ease and accessible price points. When the meal is part of the experience, families are willing to spend more, but expect more in return. The opportunity is to build enough flexibility into the offer to cater for both.

Maximum price parents would be willing to pay for a children's meal





**FAMILY
DINING**
2026

WINNING THE FAMILY VOTE

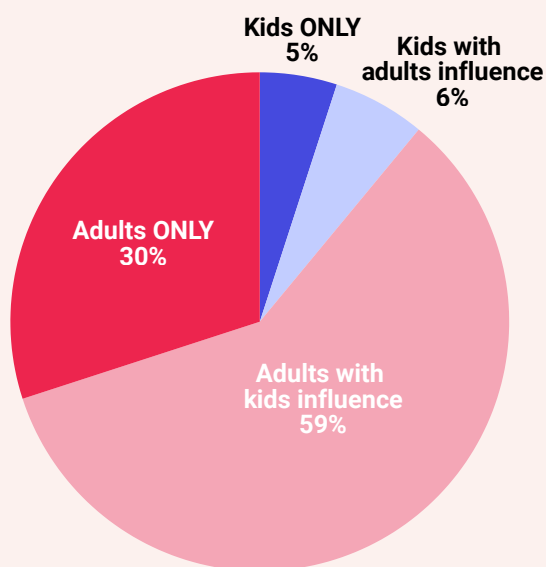


WHO DECIDES THE VENUE?



7-in-10 children have a say in venue choice

But adults remain involved in 95% of family dining decisions



TWO AUDIENCES TO WIN

Children have significant influence over where the family eats, but adults still hold most of the decision-making power. Operators therefore need to appeal to children while giving parents the reasons and reassurance to say yes.



Children who identify as **neurodiverse** and those with **dietary requirements** have more influence on the decision making process



WHAT MATTERS TO CHILDREN



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



Fast service is particularly important for children who identify as **neurodiverse** (41%)

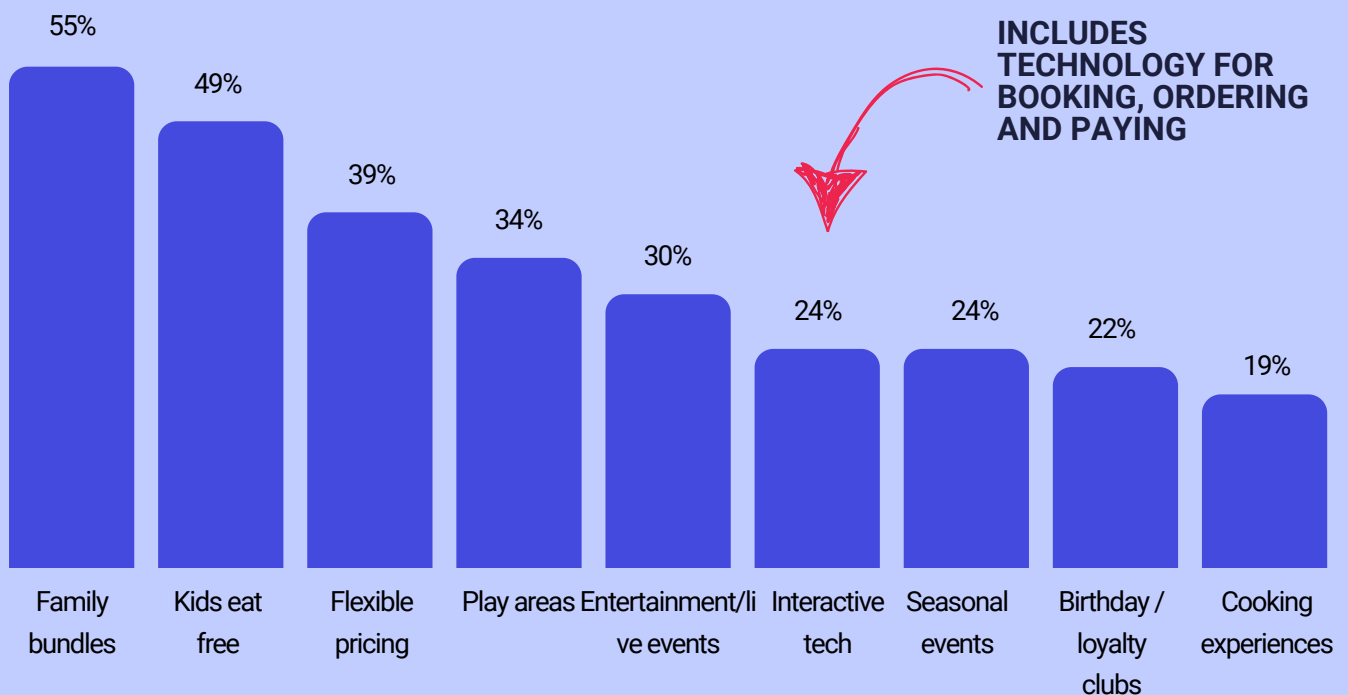
HAVING FUN REMAINS A TOP PRIORITY FOR KIDS!



WHAT COULD TIP THE BALANCE



Which offers and experiences could make families *more likely* to choose one venue over another?



Value-led mechanics are the strongest extra reasons families give for choosing one venue over another. Family bundles (55%), Kids Eat Free (49%) and flexible pricing (39%) all rank highly, showing how important visible value remains in the family market. But obviously price isn't the whole story. Play areas, entertainment, events and other experiences can also help a venue stand out and give families another reason to choose it.

PLAY AREAS: 45% among families with **under-8s**

 KIDS EAT FREE: 56% among **neurodiverse**

HOW FAMILIES FIND YOU

Families are using a broad mix of channels to decide where to eat, with general search still leading the way. But the discovery journey is changing fast. AI wasn't even an option in our 2024 research, yet today 26% of families are already using it to find venues that meet their needs. Other methods include:



FAMILIES ARE PLANNERS

63%

of parents say they are **more likely** to book when dining with kids

For operators, being easy to discover needs to be matched by being easy to book.

FAMILY DINING

2026

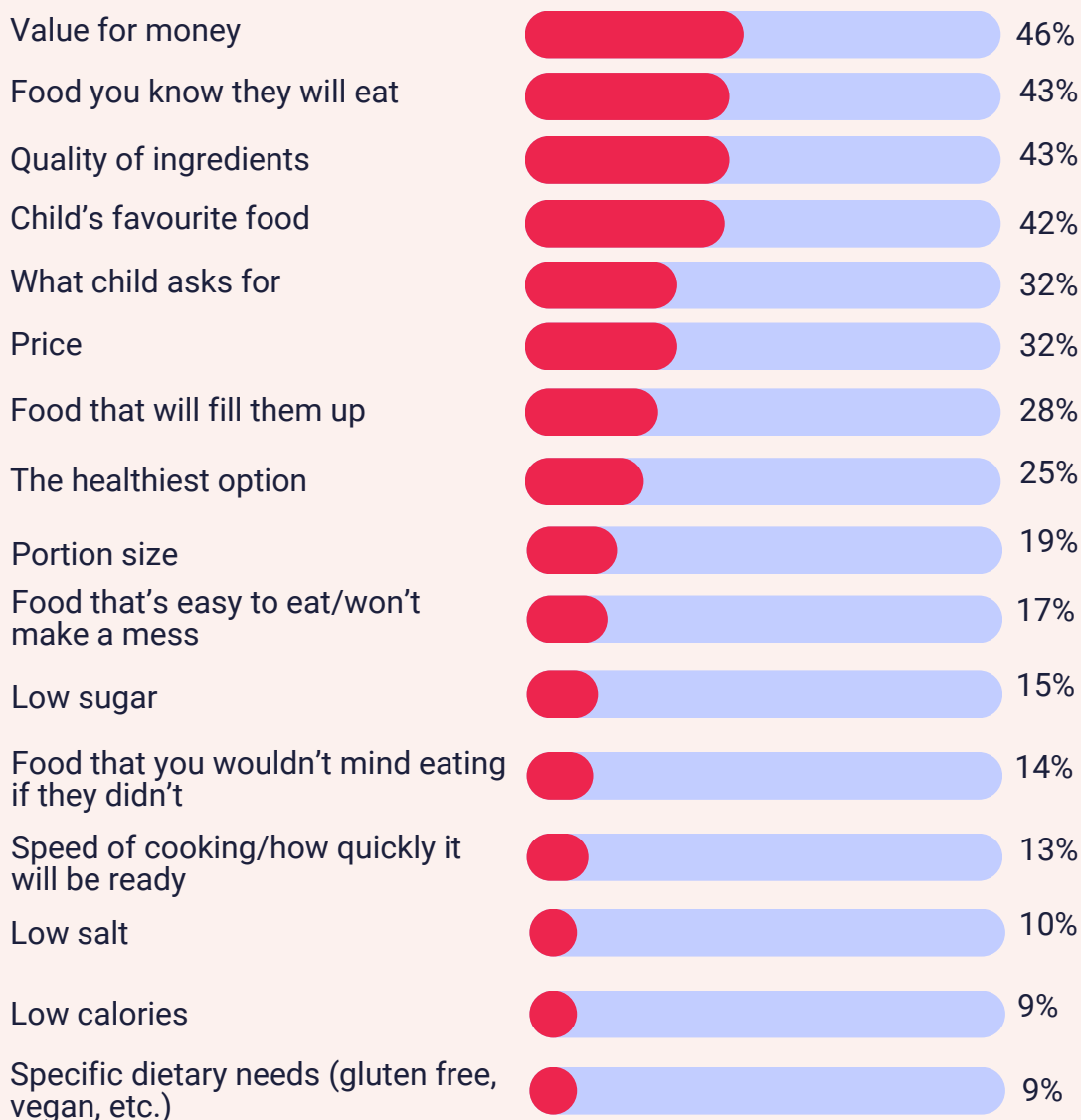
WHATS ON THE MENU?



WHAT DRIVES THE MEAL CHOICE?

Parents are balancing value, certainty and quality when choosing children's meals. Value for money now takes the top spot at 46%, but reassurance that their child will actually eat the food (43%) and the quality of ingredients (43%) are almost as important. The challenge for operators is to deliver familiar, dependable choices without compromising on quality or perceived value.

What matters most when parents choose their child's meal?



UP 4% SINCE 2024, AND NOW TAKING THE NUMBER 1 SPOT



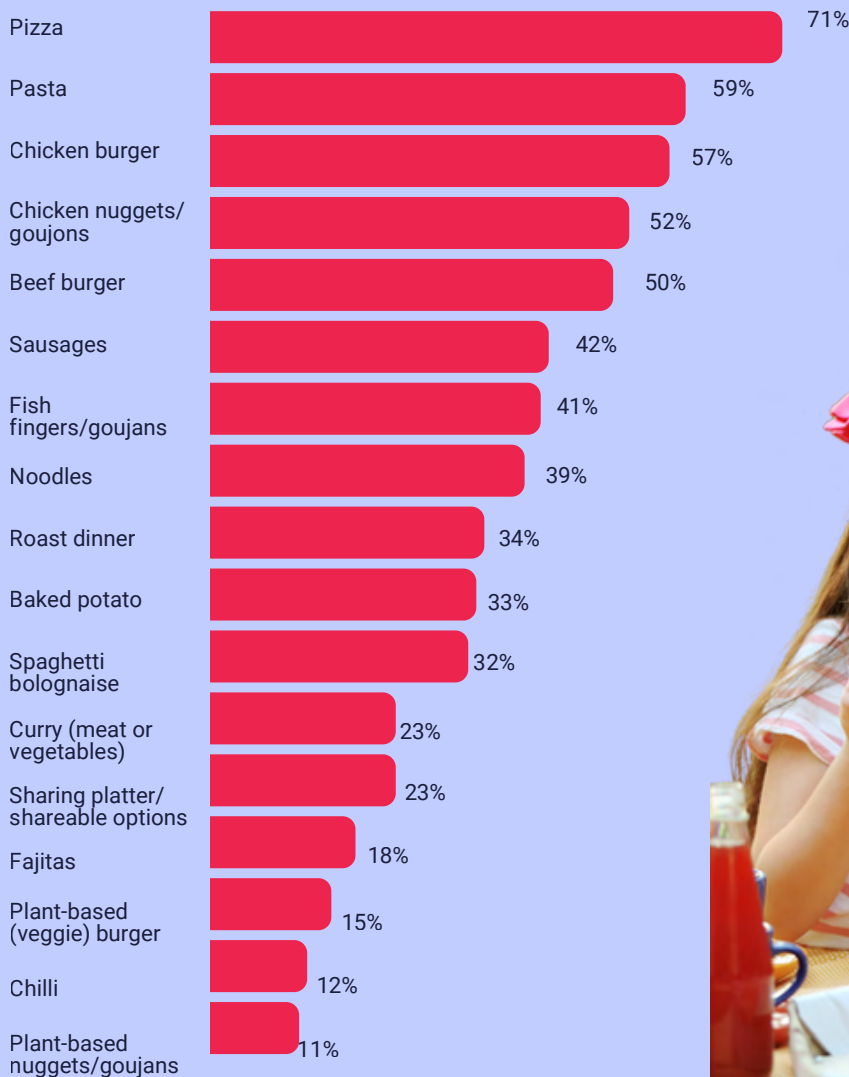
'Food you know they will eat' is the number 1 factor for families with neurodiverse children. (And those with kids under 4yrs)



Specific dietary needs rises from 9% overall to 23% among families with dietary requirements.

THE “MAINS” THING

Which main meals do parents like to see on a children’s menu?



FAMILIAR FAVOURITES STILL RULE

When it comes to mains, familiarity wins. Pizza tops the wish list at 71%, followed by pasta (59%) and chicken burgers (57%), with traditional children's-menu favourites dominating the top of the ranking. But that doesn't mean families want kids' menus to stand still. The opportunity is to make familiar favourites better, rather than simply replacing them.

THERE'S MORE TO SIDES THAN CHIPS



Which side dishes do parents like to see on a children's menu?



KEEP THE MAIN FAMILIAR. FLEX THE SIDES.

Familiar mains still win, but sides give operators room to be more adventurous. Chips remain number one, yet vegetables and alternative sides all have strong appeal. The opportunity is to keep the core dish recognisable while using sides to add balance, choice and a little more interest.

ONE KIDS' MENU OBVIOUSLY DOESN'T FIT ALL



TWEENS & TEENS

As children get older, demand shifts towards more adult-style dishes, greater choice and flexibility, while some of the more traditional "kids' menu" cues become less important. There's an opportunity to bridge the gap between the children's and adult menu, without families having to commit to a full adult portion or price.

What appeals to this age group...

- Half sized/smaller adult meals
- Mix and match mains and sides

Meals that appeal more:

- Burgers
- Fajitas
- Sharing platters
- Halloumi fries
- Garlic bread
- Chips/fries

SCHOOL

HOLIDAY HEROES

BY PIZZÆXPRESS

MegaTeen Saver £12

INCLUDES A CLASSIC PIZZA AND A SELECTED DRINK. UNTIL 28.08.26. T&CS APPLY

THE HULTON ARMS EST. 1863

YOUNG FOODIES

BIG FLAVOURS BIGGER FUTURES!

PROPER PUB FOOD FOR HUNGRY LEGENDS!

4oz RUMP STEAK Served with chips and your choice of peas or baked beans. £8.50	SPAGHETTI BOLOGNESE Traditional beef Bolognese served with garlic bread. £8.50
YOUNG HULTON STACKER BURGER NEW! 2 x 2oz beef burgers with cheese and bacon, served with fries and an onion ring. £9.95	CHICKEN TOMATO PASTA Penne pasta in a rich tomato sauce with grilled chicken. £8.50
CHICKEN BURGER Crispy chicken fillet burger served with fries. £8.95	CHICKEN GOUJONS Served with chips and your choice of peas or baked beans. £8.50
MARGHERITA PIZZA Stone-baked pizza served with fries and salad. £8.50	FISH GOUJONS Crispy fish goujons served with chips, peas and tartare sauce. £8.95
PEPPERONI PIZZA Stone-baked pizza topped with pepperoni, served with fries and salad. £8.95	HOT DOG & FRIES Classic pork hot dog served with fries. £7.95
BBQ RIBS Half rack of BBQ ribs served with chips and coleslaw. £9.95	

EVERY MEAL INCLUDES OR

DESSERT UPGRADE - £2.50

CASE STUDY:

Bill's

Family dining has become big business for Bill's. During school holidays, family-associated participation can rise from 10% to around 40%, with almost 50,000 parents and children visiting in a week at peak periods. Rather than treating families as one audience, Bill's has been adapting its value proposition, menu and service to different ages and needs.

VALUE THAT DRIVES THE WHOLE OCCASION

Kids Eat Free has become a major part of the Bill's family proposition, but it isn't simply a discount mechanic. The offer was designed to make family dining feel more accessible, and Bill's has found that the value perception can unlock spend elsewhere in the visit. Over the last four years, the brand has given away more than 750,000 kids' meals for free.

"We had to have that value proposition to lead, but what I think is really interesting is that when 'kids eat free', the associated parent spend goes up."

Tom James, MD, Bill's Restaurants

FLEXIBILITY BUILT INTO THE MENU

Bill's has also moved towards a much more customisable children's menu, recognising the reality that one fixed dish or portion won't work for every child. That flexibility extends into service too. During school holidays, Bill's changes its service steps, trains teams to engage children first and focuses on reducing common parent stress points.

BRIDGING THE GAP FOR TWEENS & TEENS

Bill's identified a gap once children reached around 11 or 12: the traditional kids' menu no longer felt right, but moving straight onto a full adult meal could suddenly make the family visit much more expensive. The response was CAN-TEEN, a dedicated value-led offer for older kids and teens, alongside bolt-ons that allow younger diners to increase portion sizes on the regular kids menu.

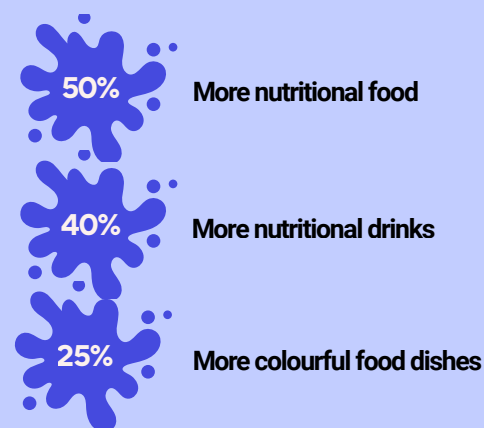
THE TAKEAWAY

Bill's isn't treating family dining as one single proposition. Value, customisation, portion flexibility, service and age-specific offers all work together to make the experience fit the family, rather than expecting the family to fit the offer.



KIDS' MENUS NEED A REFRESH

44% of parents say
childrens menus are
generally uninspiring



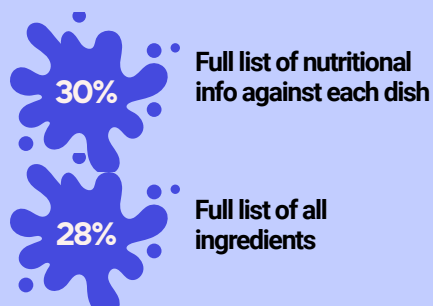
BETTER, NOT BORING

Parents want healthier choices, but they still want familiar favourites. The opportunity isn't to rip up the kids' menu, but to make the food children already enjoy better, through ingredients, cooking methods and the choices around the main dish.



VALUE THAT'S EASY TO SEE

With value already one of the biggest drivers of meal choice, parents want it built visibly into the children's offer. A simple meal deal can give families certainty over what they'll spend, without relying purely on low headline prices.



MORE INFORMATION, MORE REASSURANCE

Parents also want to know more about what they're ordering, from what's in the food to where it comes from. Clearer information can give parents greater confidence without making the menu itself more complicated.

GIVE FAMILIES A REASON TO STAY

What would encourage families to have more courses when dining out?

MAKE IT WORTH SPENDING MORE

57% If the food was **good value** for money

50% If the **quality of food** was high

39% **Promotions** and special deals

MAKE IT EASY TO STAY LONGER

41% If there were ways to **keep children entertained**

37% If it was an **enjoyable place for adults** to stay longer

36% If the atmosphere was **relaxed** and the children were **allowed to play/mess** about without causing any issues with other guests



KAM

**FAMILY
DINING
2026**

**AN EXPERIENCE
WORTH LEAVING
THE HOUSE FOR**



FAMILY DINING ISN'T ALWAYS EASY

Family dining can be extremely stressful and frustrating

25% of parents say they struggle to get their children to behave in restaurants

45% of parents say they struggle to get their children to try new foods

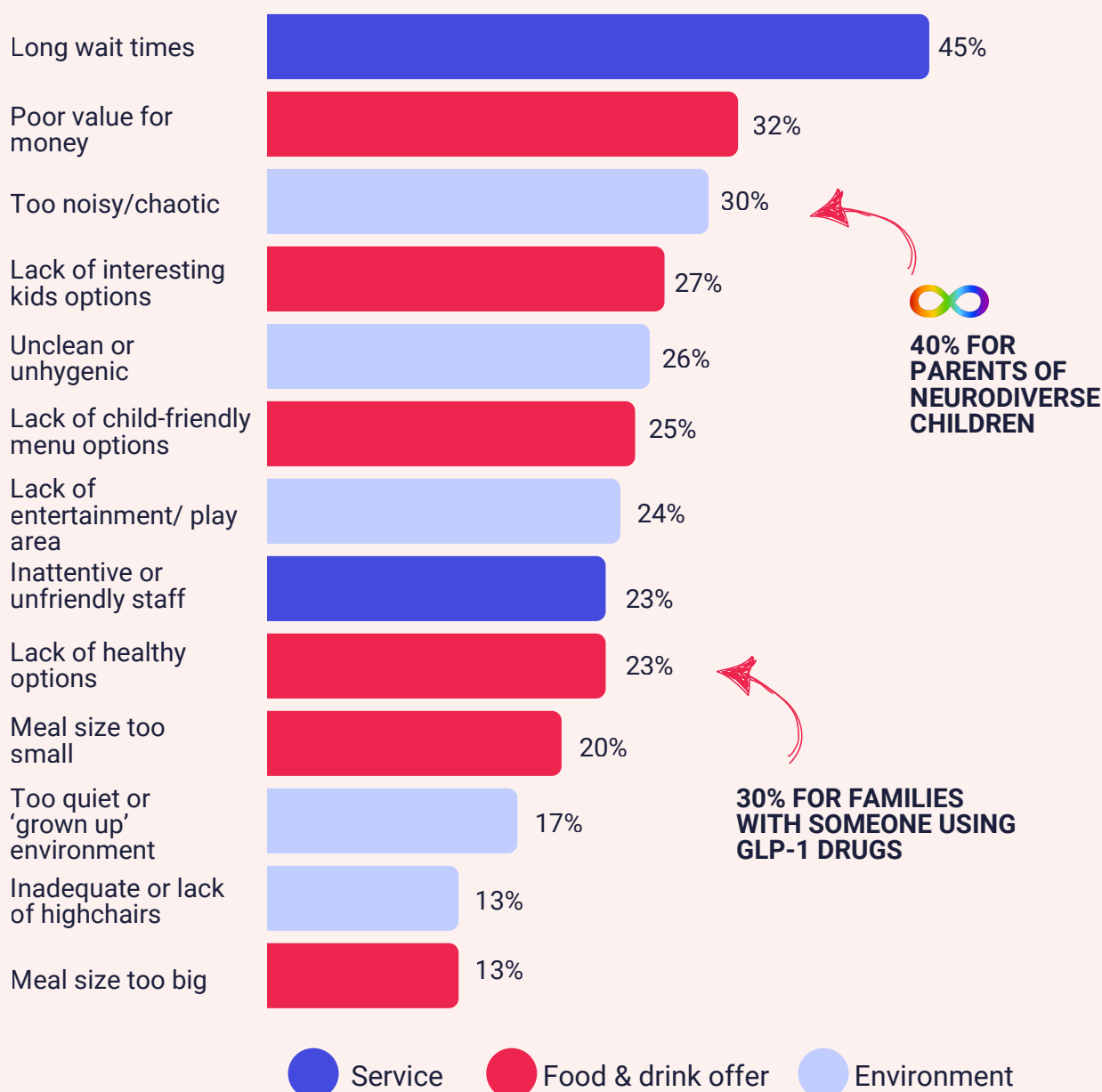
25% say they find eating out with children stressful



LITTLE THINGS CAN BECOME BIG FRUSTRATIONS

Family dining is an investment of time, money and energy. When it all works out these are special, memorable occasions, however sometimes things don't go as expected...

What causes the most frustration to families when dining out...



FRICTION HAS A COST

1-IN-4 families have left a restaurant early because the service was slow

Getting the family experience wrong isn't just a satisfaction issue. It can shorten visits, reduce the opportunity for additional spend and give families less reason to return.

Reasons families have left a venue early in the last 12 months...



24% for parents of neurodiverse children



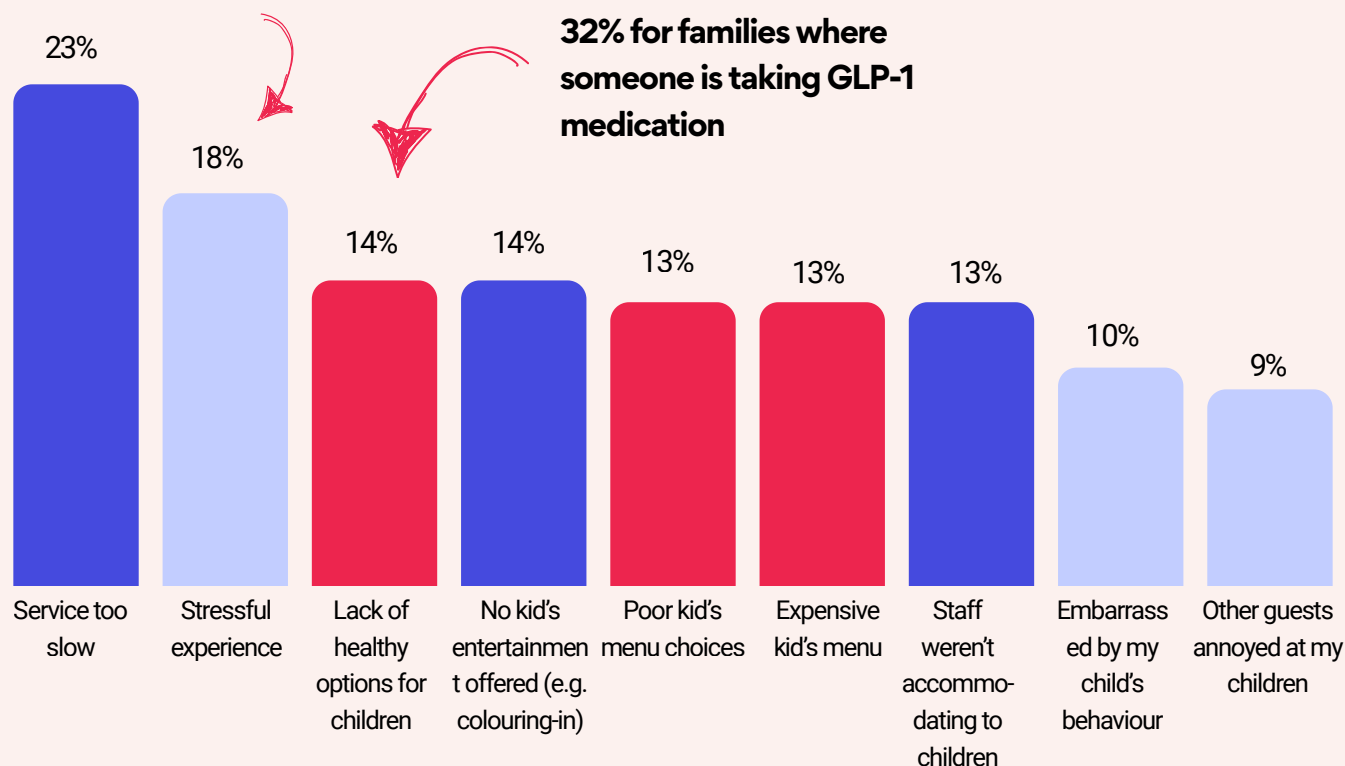
Service



Food & drink offer



Environment



GREAT SERVICE MAKES FAMILY DINING EASIER

FAST | FRIENDLY | FLEXIBLE

Service plays a big role in the overall experience . Here are some of the notable staff behaviours that are seen as most helpful when dining out with children:



Staff behaviour which families find most helpful:

70%

Friendly & welcoming attitude

57%

Quick service

52%

Flexibility with menu requests

44%

Patience with young children

37%

Special attention to children's needs

35%

Knowledgeable about menu and ingredients

31%

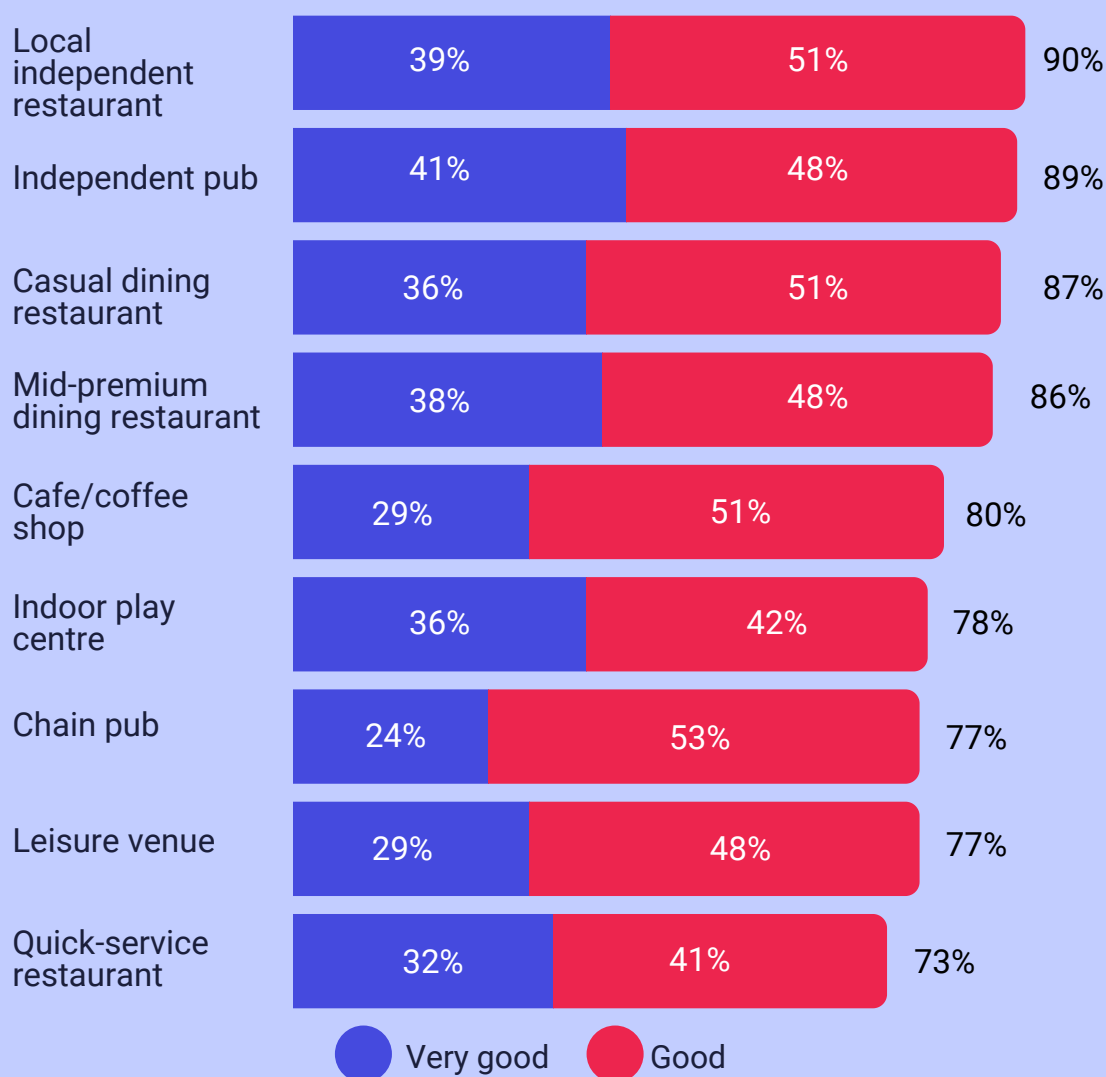
Providing distractions (e.g. crayons, toys)

27%

Willingness to accomodate special dietary needs

SERVICE BY VENUE

Families' opinions of staff service vary by the type of venue.



Families are broadly positive about the service they receive, but independents have the edge. Local independent restaurants and pubs top the rankings, perhaps reflecting their ability to deliver the personal, flexible service that families tell us matters most.

CASE STUDY: BUTCOMBE GROUP

MAKING THE PUB WORK FOR THE WHOLE FAMILY

For Butcombe, winning families isn't about creating a completely separate proposition, it's about making the pub's existing offer work brilliantly for them. From quality food and flexible menus to play areas, events and different dayparts, the focus is on giving families more reasons to choose the pub – and more reasons to stay. Breakfast has, for example, become an increasingly important family occasion.

QUALITY OVER DISCOUNTING

While price is clearly part of the decision for families, Butcombe has found that blanket promotions such as Kids Eat Free haven't been the answer for its pubs. Instead, it has focused on making the children's offer feel good quality and good value.

"We made sure that our kids menus look beautiful. We had a children's illustrator design them. We talk about the provenance of our food. We highlight that we use the same ingredients for our adults as we do for children. Parents feel good that they're giving their child something that is authentic and it's got good traceability."

— Alice Bowyer, MD, Butcombe Group

MORE THAN FOOD & DRINK

Butcombe also leans into something pubs can offer that many other venues can't: space, community and experiences beyond the meal itself. The group has invested in more children's play areas and builds family events into its calendar, from summer cinema tours with dedicated kids' screenings to Halloween and Christmas activities.

THE TAKEAWAY

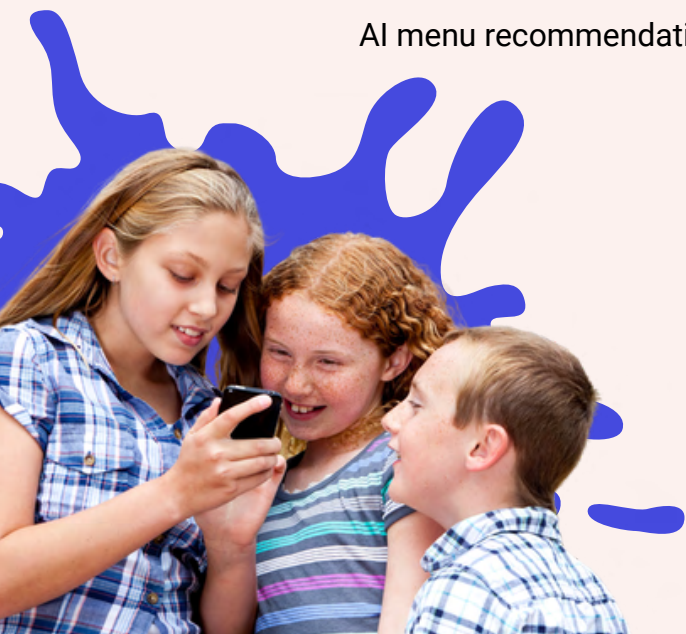
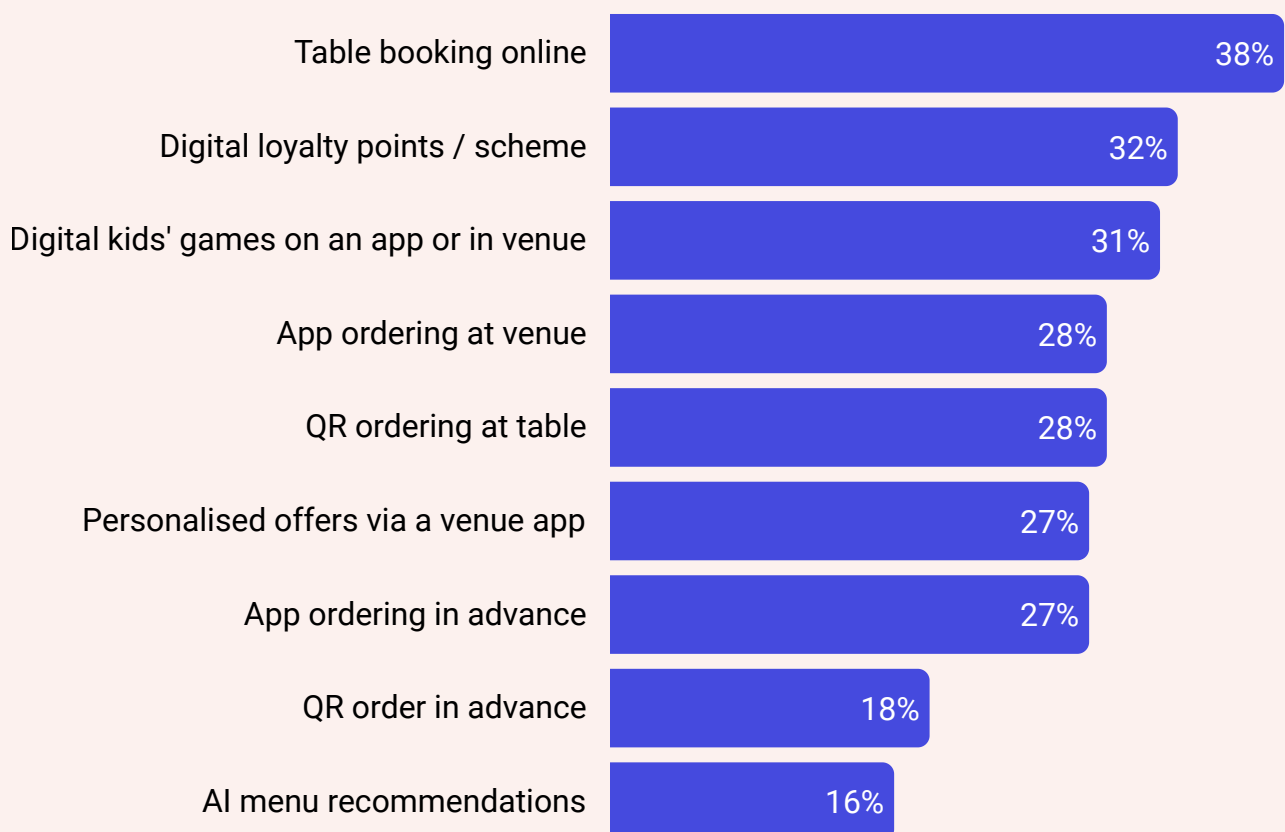
Butcombe doesn't treat family-friendly as an add-on. It takes the strengths of the pub - quality food, flexibility, space, community and occasions - and asks how each can work harder for families. The result is an offer that appeals across generations, from young children and teenagers to parents and grandparents. **Families now have the highest transactional value of all customer segments at Butcombe.**



MAKE THE EASY BITS EASIER

Technology continues to influence every stage of the dining experience from bookings, incentives, ordering, payment and reminders to return.

Families stated that the following technology would improve their overall experience.



A SPOTLIGHT ON INDOOR PLAY

For food-led venues, a great play area can be a powerful reason for families to consider them. And for indoor play venues, the reverse is just as true: great food and a great dining experience are an important part of creating an experience the whole family wants to come back to.

26%

of all families have visited an indoor play venue in the last 6 months

“

A truly memorable occasion is when the whole family feels welcome and relaxed. Friendly staff who engage with children, quick service, good-quality food, and activities like colouring sheets or small play areas all make a big difference

”

73%

rated the overall dining experience at indoor play centres/soft plays as good or very good

36%

rated the staff's attentiveness to families with children at indoor play centres/soft plays as very good, above an average of 34%

34%

of parents said a play area would make them more likely to choose a dining-out venue (this rises to 45% for parents of children under 7)

24%

of parents included a lack of entertainment or play area in their top frustrations when dining out (rising to 31% for parents of kids under 7 and 33% for parents of kids under 4)

**FAMILY
DINING**
2026

THE FAMILY DINING VALUE EQUATION



FAMILIES ARE SPENDING MORE ON DINING OUT

Family Dining is worth **£4,698** per family

£58 average family spend per occasion

81 family dining occasions a year

+£683 annual spend per family vs 2024

+8 family dining occasions per year vs 2024

Family dining is a significant and growing opportunity. Families are eating out more often than in 2024 and spending slightly more each time, though this will in part be a reflection on price increases, taking average annual family dining spend to £4,698.

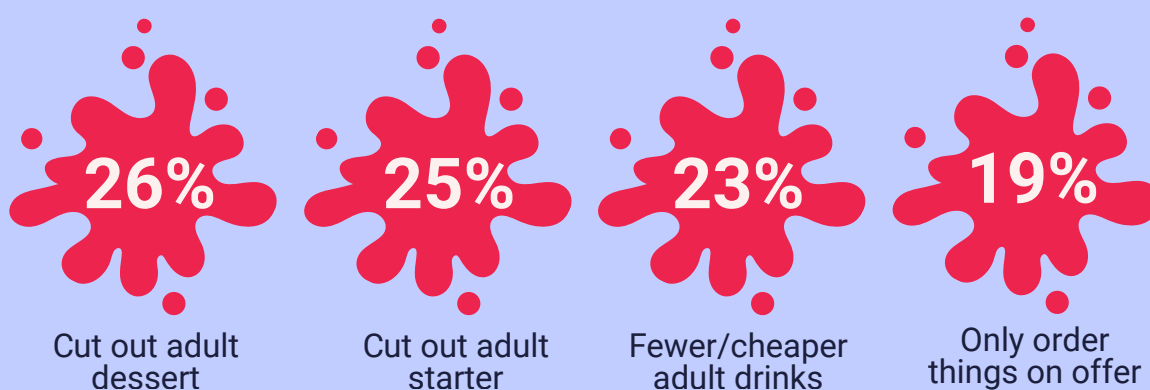
Winning just one more family occasion can add up to significant value over the year, the equivalent of **nearly half a billion pounds** for the hospitality industry (£476 million.)



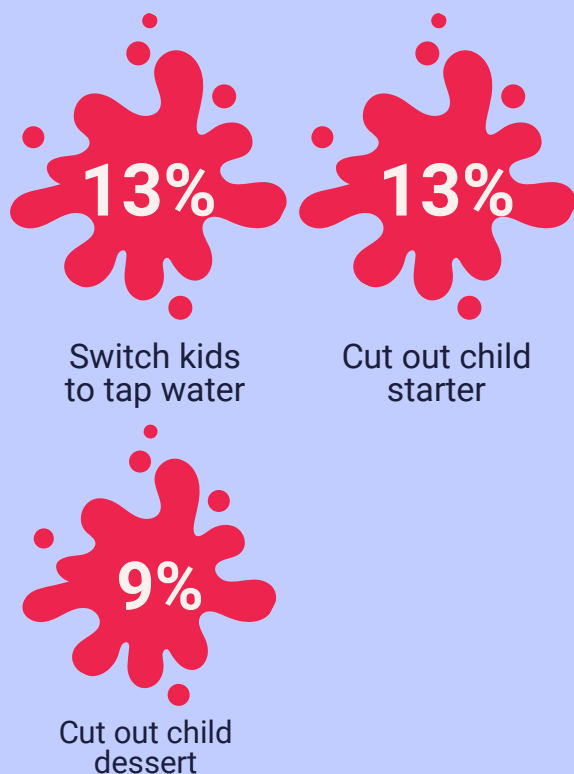
BUT BUDGETS STILL BITE

Families aren't necessarily abandoning the occasion when budgets are tight, they're managing the bill. Adults are more likely to cut their own courses or drinks before taking items away from children.

ADULTS WILL SACRIFICE FIRST



KIDS' TREATS ARE MORE PROTECTED



VALUE DOESN'T MEAN CHEAP

Affordable prices on a kids menu are important but there are times when families feel that a higher price for a children's meal is justified.

BETTER FOOD



A BETTER OCCASION



MORE FOR THE MONEY



THE OPPORTUNITY ISN'T SIMPLY TO BE CHEAPER. IT'S TO BE WORTH IT.



54%

say that affordable prices on a children's menu were very important

THE FAMILY DINING PLAYBOOK



FAMILY-FRIENDLY IS AN OPERATING MODEL, NOT A KIDS' MENU

Menu matters, but so do waiting times, service, flexibility, noise, entertainment, booking and the physical environment. Bill's changing its service steps during school holidays and Butcombe designing family versions of its events demonstrate that operationally, the best family propositions are designed through the whole customer journey, not left to the kids' menu.

DON'T TREAT 'FAMILY' AS AN OCCASION

Family dining isn't one occasion. The same family can be grabbing a quick refuel on Tuesday and looking for an experience on Saturday. The opportunity is to design an offer that can flex between missions, rather than deciding what a "family restaurant" should look like.

FLEXIBILITY IS CENTRAL TO BEING FAMILY-FRIENDLY

The research keeps coming back to the same thing: different ages, appetites, dietary needs and missions require different things. Portion choice, customisation, mix-and-match menus and empowered teams may ultimately matter more than traditional family-friendly cues. **Don't build more kids' offers. Build fewer rules.**

THE TWEEN GAP IS A COMMERCIAL OPPORTUNITY

The jump from a children's menu to a full adult meal is too big, both in proposition and price. Demand for smaller adult meals and more flexible choices increase as children get older, and the Bill's case study demonstrates how an operator is actively addressing it. There is potentially a whole menu occasion sitting between "kids" and "adult".

VALUE IS ABOUT PERMISSION TO SPEND

When budgets tighten, parents are more likely to sacrifice their own starter, dessert or drinks than their children's treats. At the same time, families will accept higher children's meal prices when they see better quality, freshly made food or a better experience. Give families confidence that the occasion is worth it, and you give them permission to spend.

FAMILIES ARE WORTH FIGHTING FOR

Despite the pressure on household budgets, the average family spend £4,698 per year on dining out with kids, up £683 versus 2024, driven partly by families eating out eight more times a year, and partly due to well-publicised price increases. The winners won't just be the venues that welcome families and offer a decent kids menu. They'll be the ones that give families more reasons to choose them.



KAM is a specialist hospitality, food and drink insight consultancy that helps operators, suppliers and investors better understand their customers and make smarter commercial decisions. Through insight-led consultancy, bespoke consumer research and market intelligence, KAM helps clients identify opportunities, improve performance and respond to changing consumer behaviour.

Alongside its bespoke consultancy work, KAM publishes industry-leading sector reports and hosts events that bring together senior leaders from across hospitality, food and drink.

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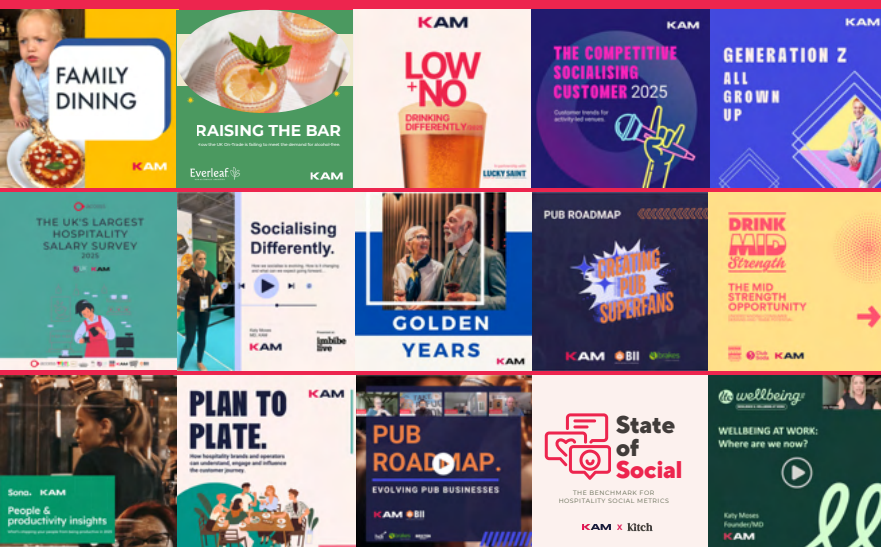


The Association of Indoor Play (AIP) is the Trade Association for the indoor play sector in the United Kingdom. We are a not for profit organisation set up to be the voice of the Indoor Play Sector.

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