2025

UK Restaurant Growth Insights Report

An in-depth analysis of expansion trends and operational performance

crunchtime × Technomic by informa

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INTRODUCTION

Strategic Insights: A Data-Driven Look at Multi-Site Restaurant Growth

This report, based on the latest insights from United Kingdom (UK)-based restaurant groups, uncovers the key enablers of growth, the persistent operational challenges, and the ways in which digital systems are both helping and hindering progress.

From labour and food cost visibility to forecasting accuracy and supplier performance, the findings provide a clear roadmap for operators looking to grow without sacrificing performance. For the majority, growth remains firmly on the agenda, but with greater caution and demand for operational resilience.

QUICK LOOK

Demographics and Methodology

- These findings are derived from an anonymous study of 100 multi-site operators, each operating a minimum of 10 UK-based locations.
- In Spring 2025, Crunchtime commissioned a quantitative research study in partnership with Technomic.
- All of the data and findings shared throughout this report have been verified for validity and accuracy by Technomic.

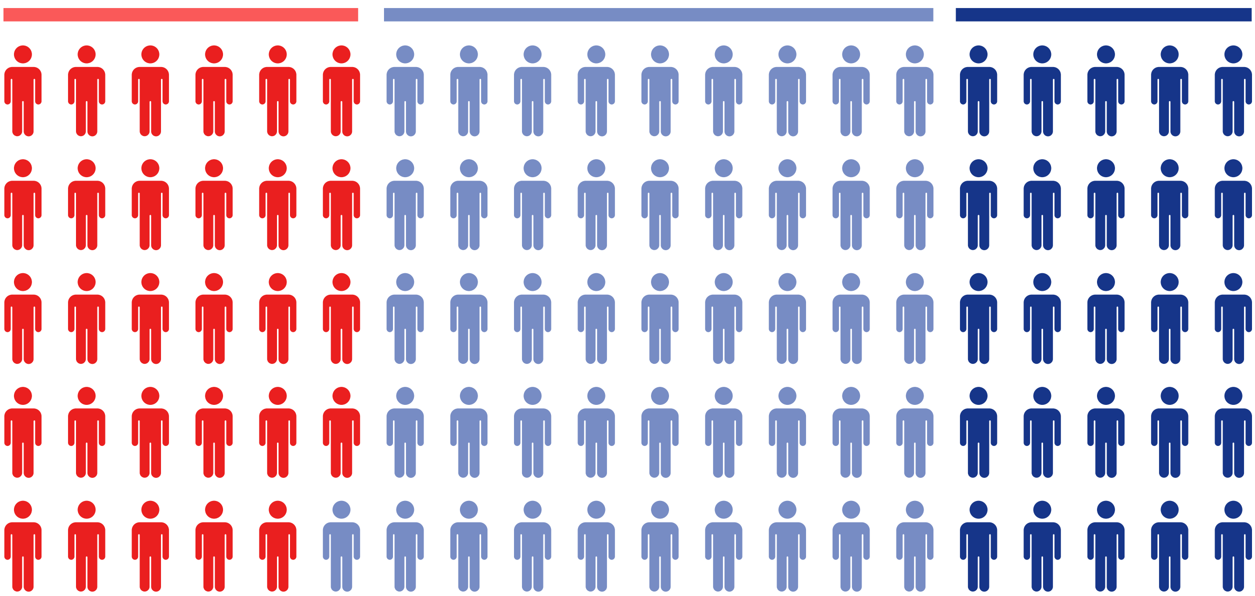
» **Refer to page 32 for full demographic and methodology information**

RESPONDENTS BY LOCATION COUNT

29%
Small: 10-19 locations

46%
Medium: 20-100 locations

25%
Large: 101+ locations



AT-A-GLANCE

Key Findings

Site growth plans remain despite economic concerns

UK operators plan to open 20% more new locations on average in the next two years than they did in the past two, despite 78% feeling concerned about economic uncertainty.

Investing in operations-led growth

85% say their growth strategy is driven by a strong focus on operations. Top areas for tech investments to achieve growth goals are labour management, business intelligence, payroll, employee training and development, and inventory management.

Growth depends on strong vendor support

86% of UK operators strive to partner with vendors who can support their growth, but 90% who opened new locations experienced vendor-related challenges during growth, including cost increases, poor support, and lack of integration.

Visibility gaps into daily operations

89% said real-time visibility into daily operational task completion is extremely or somewhat important, but only 31% of these operators have complete real-time visibility.

Forecasting accuracy falls short

Even though 82% of UK operators are using some form of tech-based forecasting tools, their sales forecasts are only 62% accurate on average.

Improving operations execution offers tangible benefits

46% say consistently executing tasks more efficiently would directly enhance staff productivity and increase sales margins, while 43% believe it would lead to a better guest experience and higher customer retention.

Labour confidence disconnect

80% are confident or extremely confident in the overall effectiveness of their labour and scheduling strategy. Yet, 59% said staffing and labour challenges impact their ability to expand operations.

90%

of operators experienced vendor related challenges during growth

CHAPTER 1

Rising Pressure: The UK Growth Mindset Amid Economic Uncertainty

"The fact that things are not as stable as they were this time a few years ago made us aware that we needed to focus on reliability."

— Fast-casual operator, 18+ locations

Navigating uncertainty and economic pressure

78% of operators report feeling concerned or very concerned about economic uncertainty, a sentiment particularly pronounced among full-service restaurants (FSR) and pubs at 82%, compared to 76% of limited-service restaurants (LSR). 74% acknowledge that site growth is challenging in the current economic environment, and economic uncertainty has made them more cautious about expanding.

of operators report feeling concerned or very concerned about economic uncertainty

CHALLENGING OPERATIONAL AREAS DURING GROWTH PERIODS

Which of the following operational areas that contribute to driving profitability/customer experience do you find most challenging to manage during periods of growth? Please read all response options and then select up to three.

Operators ranked more accurate forecasting (more on this in chapter 4), better inventory management, waste reduction, improved staff training and onboarding efficiency as the top three areas where technology is helpful during economic uncertainty.

OPERATIONAL AREAS WHERE TECHNOLOGY IS MOST HELPFUL DURING ECONOMIC UNCERTAINTY

If your restaurant faces economic uncertainty, which of the following actions would you be most likely to take? Select up to two.

More accurate forecasting of food and labour costs

42% LSR | 34% FSR/pubs

Better inventory management and waste reduction

44% LSR | 32% FSR/pubs

Improved staff training and onboarding efficiency

19% LSR | 37% FSR/pubs

More effective menu engineering and profitability analysis

27% LSR | 24% FSR/pubs

Automated labour scheduling and shift optimisation

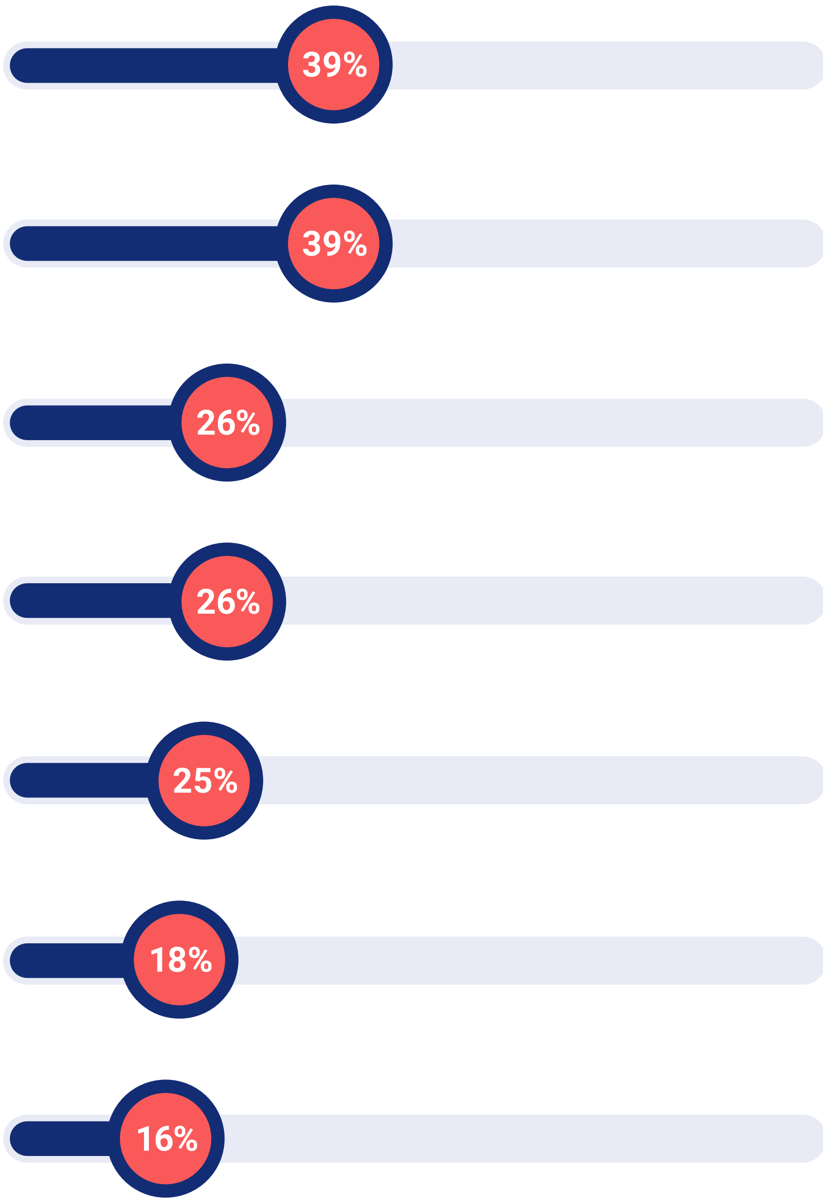
19% LSR | 34% FSR/pubs

Streamlined reporting and real-time data insights

18% LSR | 18% FSR/pubs

Reducing fraud, theft, and compliance risks

18% LSR | 13% FSR/pubs

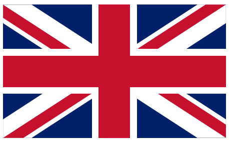


Despite economic concerns, plans for site growth remain

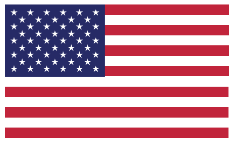
On average, operators intend to open 20% more new locations over the next two years compared to the previous two. And while concerns are high, only one in three would slow or delay site growth plans if faced with economic uncertainty. UK restaurant operators are more worried about growth in the current economic environment compared to their US counterparts.

Rather than abandoning growth plans, operators are shifting focus towards strengthening their operational foundations and improving resilience. 85% say their growth strategy is driven by a strong focus on operations.

This renewed focus is reflected in how operators define successful growth. The top three benchmarks to improve during growth are customer satisfaction, food safety scores, and location profitability, all indicators of sustainable operations rather than rapid rollouts.



UK VS. US COMPARISON



ECONOMIC UNCERTAINTY

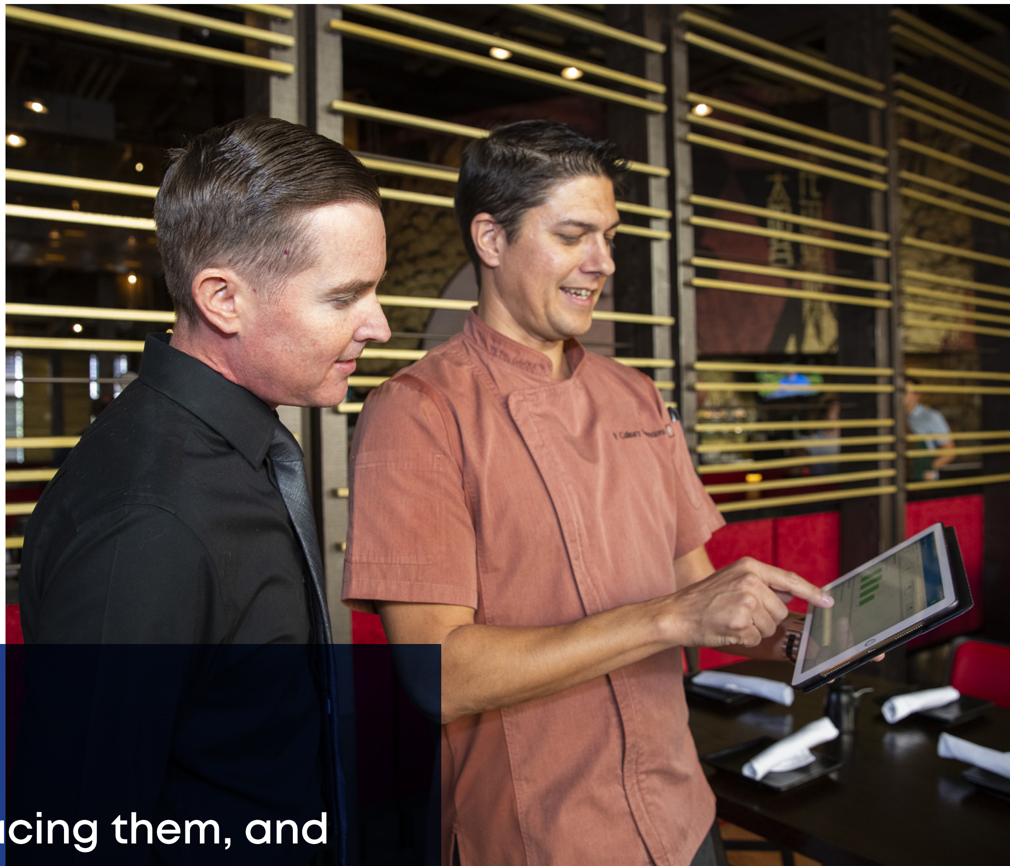
UK		US
78%	Concerned or very concerned about economic uncertainty	73%
74%	Economic uncertainty has made them more cautious about expanding	67%
1/3 would **slow or delay site growth plans**	If faced with economic uncertainty	1/3 would **increase menu prices**

For any data not included in comparison chart, the difference is less than 4 percentage points.

Click here for full *US report*

CHAPTER 2

Growth Partners: The Role of Tech Vendors During Expansion



"We were outpacing them, and they couldn't keep up with our demands."

— Quick-service operator, 10-19 locations

Investing in operations-led growth

With so much riding on operational performance during expansion, operators are increasingly selective about who they partner with. 86% strive to partner with vendors who can support their growth, and 82% ensure the right technology is in place before pursuing site growth.

While nearly all respondents use tech to manage some parts of the business, less than half (48%) use technology to manage all aspects. 54% said their tech stack is optimised to support their growth, and several acknowledged the impact of current tech systems on accelerated location growth, especially among FSRs and pubs.

82%

ensure the right technology is in place before pursuing site growth

Growth depends on strong vendor support

Despite this, half or more have completed or planned tech investments for achieving organisational growth goals, including: labour management and employee scheduling (64% overall and 73% for FSR/pubs), business intelligence (58%), inventory management (47%), and task management, auditing, food safety, and compliance (47%).

50%

or more have completed or planned tech investments for achieving organisational growth goals

COMPLETED OR PLANNED TECH INVESTMENTS FOR ACHIEVING ORGANISATIONAL GROWTH GOALS

Which of the following technologies have you invested in or do you plan to invest in to support your organisation in achieving growth goals? Select all that apply.

64%

58% LSR | 73% FSR/pubs

Labour management and employee scheduling

58%

58% LSR | 59% FSR/pubs

Business intelligence, reporting, and analytics

53%

59% LSR | 43% FSR/pubs

Payroll

52%

49% LSR | 57% FSR/pubs

Employee training and development

47%

46% LSR
49% FSR/pubs

Inventory management

47%

46% LSR
49% FSR/pubs

Task management, auditing, food safety and compliance

41%

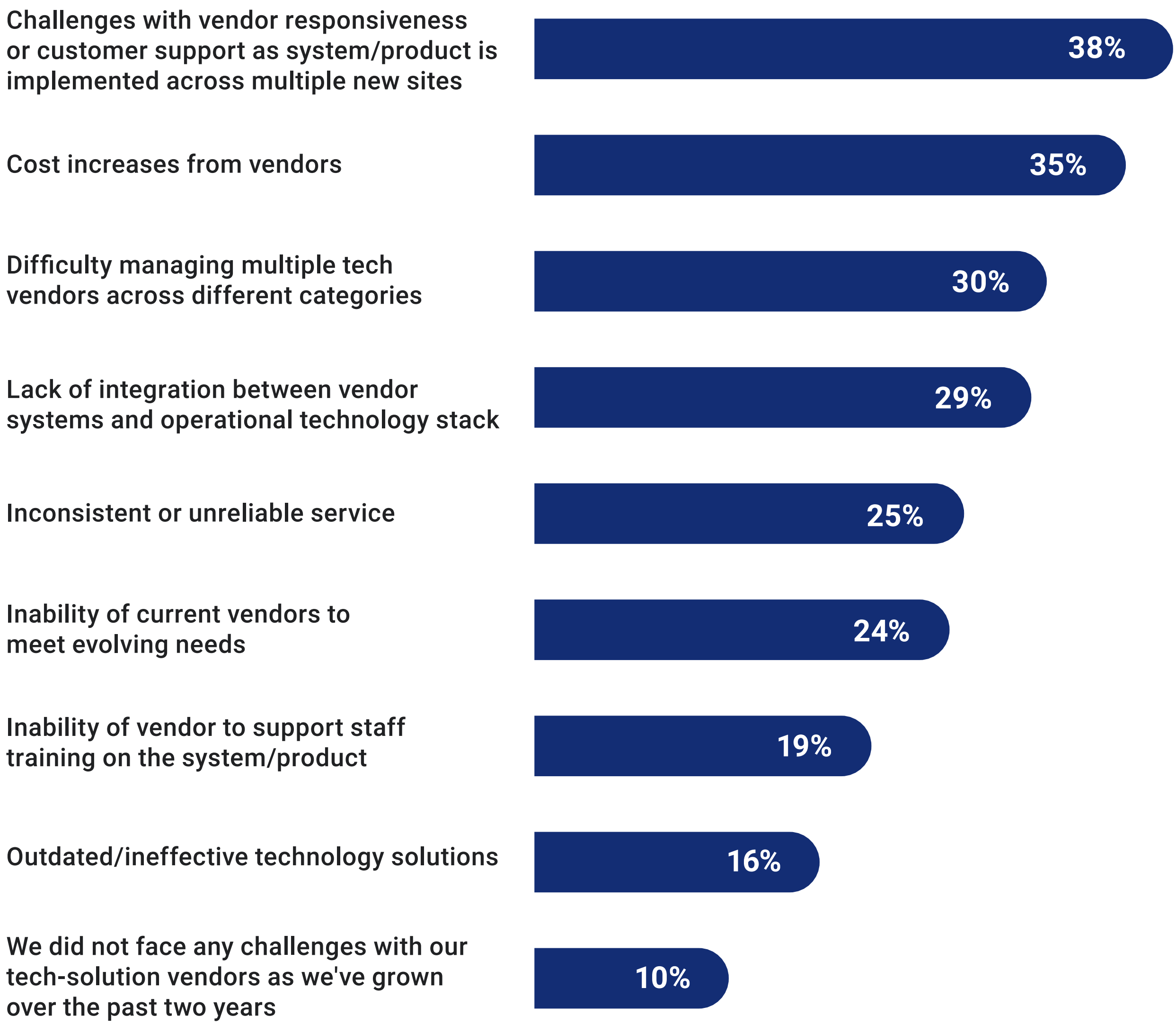
39% LSR
43% FSR/pubs

Accounting

Among those who recently opened new locations, 90% experienced challenges with their technology suppliers as they grew. These issues include poor customer service, rising costs, system integration problems, and difficulties managing multiple vendors simultaneously. Whether it's integration, scalability, or ongoing support, technology must do more than digitise existing processes. It must actively facilitate operational control and transparency at scale.

TOP CHALLENGES FACED WITH CURRENT VENDORS DURING BUSINESS GROWTH

Thinking of your overall operation, what challenges, if any, has your operation faced with current vendors as you've scaled and grown over the past two years? Please read all response options and then select up to three.



In response, operators have taken decisive action: 46% added new vendors to supplement existing ones during their growth phase, while 35% replaced existing vendors with new ones better able to support their growth. Altogether, 81% made supplier changes to better support growth, underscoring just how vital supplier performance is to successful expansion.

UK VS. US COMPARISON

UK		US
TECH READINESS		
54%	Tech stack is optimised to support their growth	48%
VENDOR CHALLENGES		
90%	Experienced challenges with their tech vendors as they grew over the last two years	79%

For any data not included in comparison chart, the difference is less than 4 percentage points.

Click here for full *US report*

CHAPTER 3

Operational Visibility: The Missing Link

"Digitalisation is a real challenge, and our real-time data was not very easy to access."

— Family/midscale operator, 20-49 locations

Visibility is a top priority for operators

85% say timely, accurate, and relevant data about their operation is crucial to informing their growth strategy and planning, while 83% rely on real-time data analytics to guide growth decisions. Notably, 77% are confident or extremely confident in the accuracy of their operational data.

28% said the impact of current tech systems enhances their decision-making capabilities, and 25% said the same for improved visibility into relevant performance metrics (31% for LSR).

Growth without visibility is risky

Real-time visibility is widely recognised as essential for operational control, yet many operators have blind spots. More than a quarter (28%) said access to real-time data and analytics to inform decision-making is a challenge during growth. There is also a noticeable gap between the importance of visibility and the actual level of visibility across many operational areas, as indicated in the table below. While real-time visibility is strongly desired, relatively few have it across critical areas.

THE VISIBILITY GAP

Operational Area		Say real-time visibility is extremely or somewhat important	Have complete real-time visibility
Task completion, audit scores, checklist adherence, and food safety compliance	Daily operational task completion	89%	ONLY 31%
	Audit scores and checklist adherence	84%	ONLY 42%
	Food safety compliance	88%	ONLY 52%

Operational Area

Food cost tracking, waste and variance monitoring, and inventory levels

Food cost tracking	88%	ONLY 30%
Waste and variance monitoring	88%	ONLY 32%
Inventory levels	83%	ONLY 36%

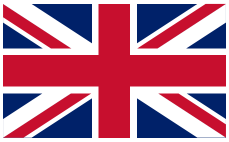
Operational Area

Labour management

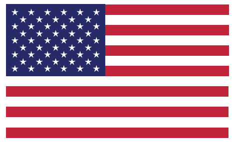
More on this in chapter 6

Staffing levels and shift adherence	88%	ONLY 28%
Forecasted vs. actual labour needs	87%	ONLY 33%
Labour costs relative to sales	85%	ONLY 32%
Overtime and compliance monitoring	83%	ONLY 28%

Poor visibility compromises performance, increases risk, and creates blind spots during expansion. Without the ability to monitor and manage operations in real time, it becomes difficult to maintain standards, manage costs, or scale consistently across multiple locations. Overall, the UK rates real-time visibility into key performance metrics as more important than the US does.



UK VS. US COMPARISON



IMPORTANCE OF REAL-TIME VISIBILITY

UK		US
87%	**Real-time visibility into forecasted vs. actual labour needs is extremely or somewhat important**	**80%**
89%	**Real-time visibility into daily operational task completion is extremely or somewhat important**	**80%**
88%	**Real-time visibility into waste and variance monitoring is extremely or somewhat important**	**81%**

For any data not included in comparison chart, the difference is less than 4 percentage points.

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CHAPTER 4

Forecasting: Widespread Use, Mixed Results

"Some franchises don't report accurately enough, so there are imbalances in stock takes, etc."

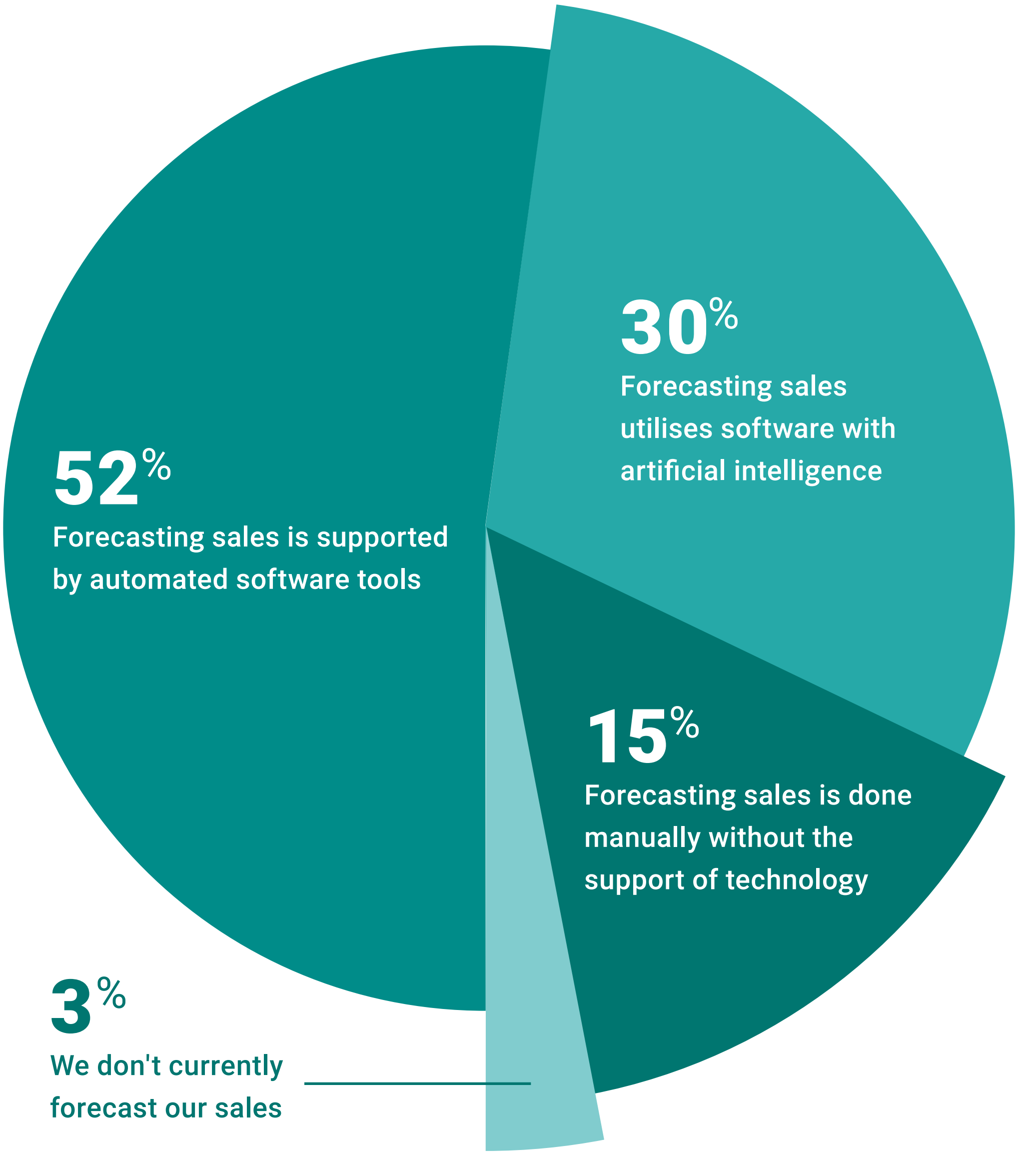
— Fast-casual operator, 20-49 locations

Forecasting tech is widely adopted

Forecasting is an essential part of profitable operations. Among UK operators, 82% use some form of tech-based forecasting tools to predict sales, labour needs, and inventory demand. Confidence in these systems is fairly high, with 67% saying they are confident or extremely confident in their forecasting ability.

CURRENT APPROACH TO SALES FORECASTING

How would you describe your organisation's current approach to sales forecasting?



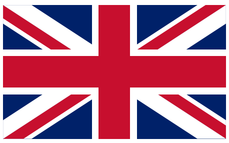
Forecasting accuracy falls shorts

On average, sales forecasting accuracy is only

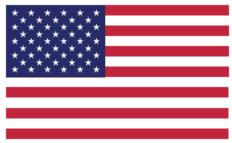
62%

However, there is a notable gap between perception and performance: on average, operators report that their sales forecasts are only 62% accurate. This inaccuracy represents a significant operational risk, especially in an unpredictable economic environment. Additionally, more accurate forecasting of food and labour costs was rated as the number one area where technology can be most helpful during economic uncertainty (39%).

While forecasting tools are in place to a larger extent in the UK compared to the US, they are not delivering the consistency or precision that operators require. As a result, many are turning their attention to improving inputs, data quality, and process integration to close the gap between forecast and outcome.



UK VS. US COMPARISON



UK	FORECASTING APPROACH	US
82%	Use some form of tech-based forecasting tools	72%

For any data not included in comparison chart, the difference is less than 4 percentage points.

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CHAPTER 5

Execution and Efficiency: Overlooked Growth Drivers

“As we got bigger, we needed more collaboration and scalability between locations.“

— Fast-casual operator, 20-49 locations

Improving ops execution offers tangible benefits

Daily SOPs, food safety checks, and brand standards may seem operational, but their impact is financial. 46% of operators say it would directly enhance staff productivity and increase sales margins, while 43% believe it would lead to a better customer experience and higher customer retention (53% for FSR/pubs), and 39% expect significant cost savings as an outcome.

27% said the impact of their current tech systems improved operational efficiency (35% for FSR/pubs) and increased staff productivity (18%). The data makes it clear that operational consistency is not just a maintenance task but a strategic growth driver.

IMPACT OF EFFICIENT TASK EXECUTION ON LONG-TERM GROWTH AND PROFITABILITY

If your locations could consistently execute operational tasks more efficiently, how would that impact your organisation's long-term growth and profitability? Select up to three.

	OVERALL	LSR	FSR/pubs
Improved staff productivity, resulting in higher sales and/or margins	**46%**	48%	42%
Improved guest experience, driving higher customer retention, satisfaction, and traffic	**43%**	37%	53%
Significant cost savings	**39%**	39%	39%
Enhanced brand reputation, leading to greater ability to compete	**30%**	27%	34%
Increased operational scalability without additional overhead	**28%**	26%	32%
Faster response or adaptation to market changes, promotions, or customer needs	**28%**	34%	18%
Reduced operational disruptions, leading to more reliable service and fewer customer complaints	**24%**	26%	21%
Enhanced team morale, resulting in lower turnover and reduced training costs	**22%**	24%	18%
Reduced compliance risks and associated fines or legal costs	**11%**	13%	8%

Operational lapses are undermining growth potential

Though operational discipline is a key growth enabler, many lower-performing sites suffer from lapses in execution that directly impact profitability. Common issues include incomplete daily tasks (23%), high food waste (30%), poor inventory accuracy and stockouts (20%), and failure to adapt to fluctuating food costs (25%). These problems are often compounded by limited visibility into site performance metrics (16%) and low staff productivity (19%).

» **Refer to page 16 for more detail about visibility**

UK VS. US COMPARISON

IMPACT OF EFFICIENCY

UK		US
46%	**report that consistently executing tasks more efficiently would directly enhance staff productivity and increase sales margins**	**42%**

For any data not included in comparison chart, the difference is less than 4 percentage points.

Click here for full *US report*

MOST COMMON ISSUES IN LOWER-PERFORMING SITES

To the best of your knowledge, what issues or challenges are consistent across the lower-performing sites in your organisation? Select up to five.

CHAPTER 6

Labour Strategy: Confidence vs. Complexity

> "The system cannot account for events in the local area; the same with the weather. The system sees a Saturday as a Saturday and that's it—lots of staff—whereas if it's a bank holiday weekend with lovely weather, we won't need that many staff."
>
> — Fast-casual operator, 50-100 locations

Strong confidence in labour strategies

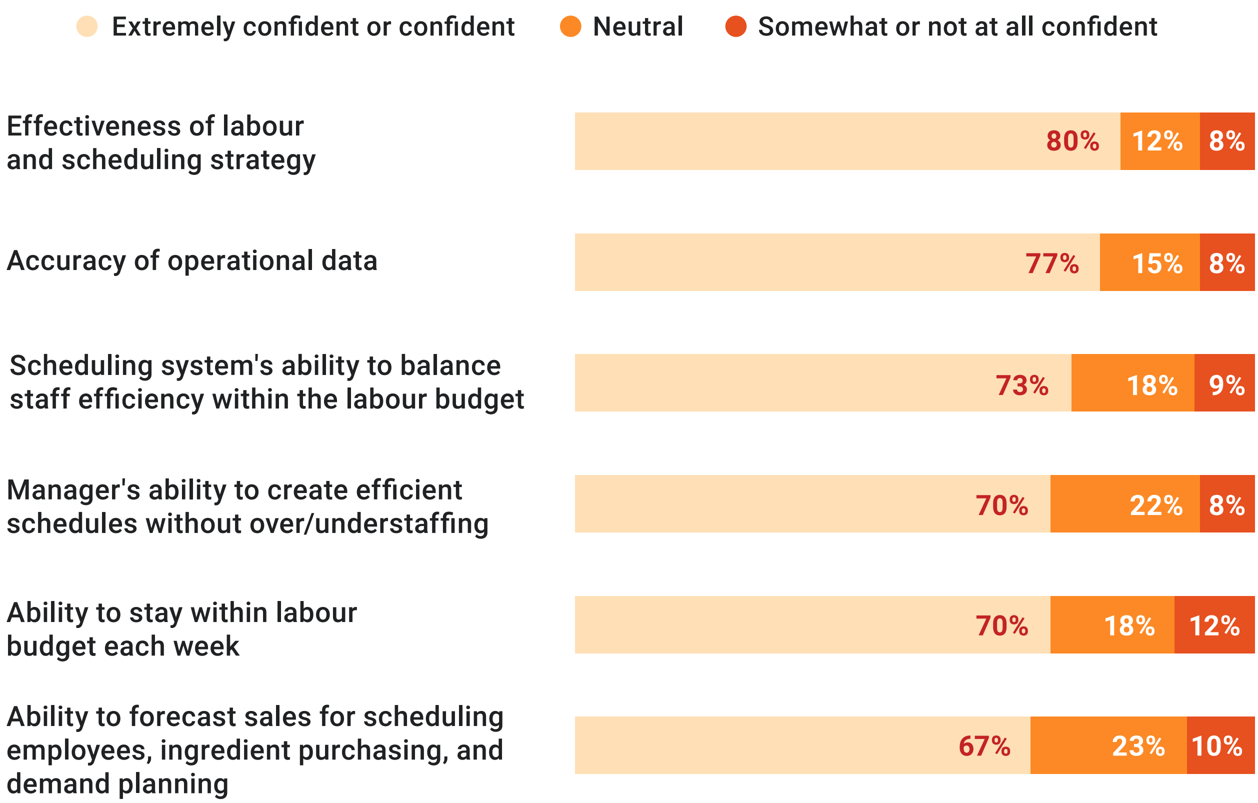
Confidence in labour and scheduling strategies remains strong across the board. 80% of operators say they are confident or extremely confident in the overall effectiveness of their labour and scheduling strategy. 73% said the same for their scheduling system's ability to balance staff efficiency within the labour budget (81% for franchise chains).

70% are confident or extremely confident in management's ability to create efficient schedules without over/understaffing and in their ability to stay within the labour budget each week. Those numbers jump to 74% and 76% respectively for FSR/pubs. When it comes to confidence in their ability to forecast sales for scheduling employees, ingredient purchasing, and demand planning, 67% are confident or extremely confident.

20% said the impact of current tech systems improved staffing/labour management (24% for FSR/pubs), and 18% said the same for reducing labour costs (20% for LSR).

CONFIDENCE LEVELS IN MANAGING OPERATIONAL AREAS

Please rate your level of confidence in your organisation's ability to manage the following operational areas.
Please use a scale of 1-5, where 1=not confident at all and 5=extremely confident.



Labour remains a barrier to scaling

Despite their confidence, labour management/employee scheduling is the top completed or planned tech investment to achieve growth goals (64% overall, 73% for FSR/pubs). Ongoing labour challenges suggest there's still significant opportunity to optimise. 59% said staffing and labour challenges impact their ability to expand operations, jumping to 65% for FSR/pubs.

Refer to page 12 for more information on tech investments

Top challenges during growth included managing labour costs and scheduling (28% overall, 33% for LSR), forecasting and demand planning for new locations (27%), and attracting and retaining qualified staff to support expansion (23%). The most common issue in lower-performing sites is difficulty hiring qualified management staff (32%), with labour scheduling inefficiencies (21% overall, jumping to 29% for FSR/pubs) and excessive overtime and labour cost overruns (17%) also listed as common issues.

Refer to page 24-25 for for more information on low-performing sites

Complex challenges in reducing labour costs

Labour remains one of the most complex and variable costs in multi-site operations. A wide range of factors put pressure on already high labour costs. The most commonly cited obstacle in reducing labour costs is accommodating employee schedule preferences and time-off requests, reported by 38% of operators (42% for FSR/pubs). Unpredictable demand fluctuations also pose a major challenge, affecting 33% of operators (37% for LSR). Core operational issues such as inaccurate labour forecasting (28%), compliance with labour regulations (28%), and task inefficiencies (26%) further compound the difficulty of cost control.

For many operators, internal misalignment is also part of the problem. 26% cite inconsistent labour cost goals across locations, while 22% say they encounter resistance to using forecasted or recommended schedules. A lack of visibility continues to undermine control, with 21% of operators and 26% of those in the FSR/pub segment reporting limited real-time insight into labour costs. Together, these challenges highlight that effective labour cost reduction requires not just better systems, but more adaptable strategies, stronger alignment, and improved operational discipline across sites.

TOP CHALLENGES IN REDUCING LABOUR COSTS

What are the biggest challenges to lowering your labour costs? Select up to five.

UK VS. US COMPARISON

UK		US
LABOUR CONFIDENCE		
80%	Confident or extremely confident in the overall effectiveness of their labour and scheduling strategy	73%
70%	Confident or extremely confident in management's ability to create efficient schedules without over/understaffing	75%
PLANNED TECH INVESTMENTS		
64%	Plan to or have invested in labour management/employee scheduling to achieve growth goals	50%
TOP CHALLENGES DURING GROWTH		
23%	Attracting and retaining qualified staff to support expansion is challenging during growth	37%
27%	Forecasting and demand planning for new locations is challenging during growth	21%
COMMON ISSUES IN LOW-PERFORMING SITES		
32%	Difficulty hiring qualified management staff is an issue in low-performing sites	21%

For any data not included in comparison chart, the difference is less than 4 percentage points.

Click here for full *US report*

CONCLUSION

Impact & Outcomes: What this Means for Growth

Growth isn't just about opening more locations—it's about building the operational infrastructure to sustain them.

KEY TAKEAWAYS

- Strong supplier partnerships are non-negotiable. Vendors unable to integrate, scale, or support are being replaced.
- Technology must deliver more than data. It must provide real-time insight into costs, compliance, staff performance, and operational tasks.
- Visibility is everything. Without it, execution falters, and profitable growth becomes guesswork.
- Forecasting is only as good as its output. Operators must pair AI tools with accurate, localised inputs to make better decisions.
- Labour inefficiencies compound at scale. Control requires better forecasting, scheduling tools, and site-level execution discipline.

TO ACHIEVE SUSTAINED GROWTH AND NAVIGATE ECONOMIC UNCERTAINTY, OPERATORS MUST:

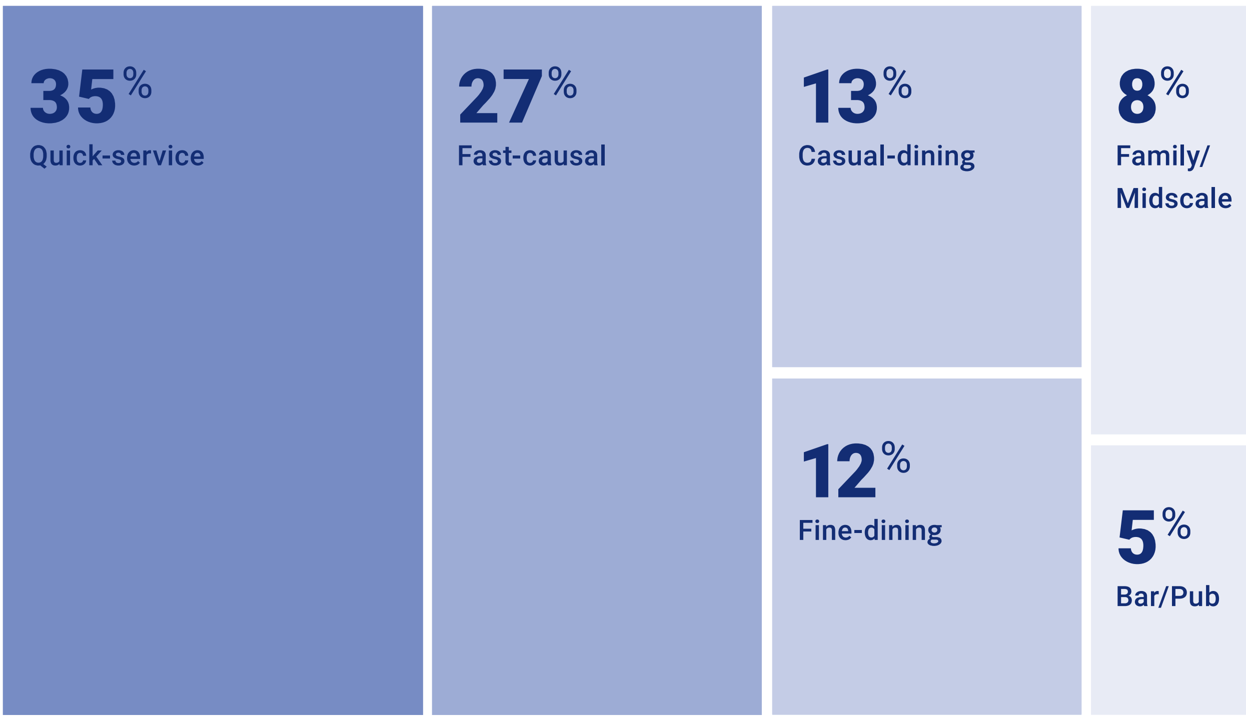
- [ ] Demand more from their tech partners
- [ ] Prioritise integrated, scalable systems
- [ ] Close the visibility gap across operations, labour, and forecasting
- [ ] Invest in execution as much as strategy

Operators who invest in strong systems, smarter forecasting, and consistent execution are best placed to thrive no matter the economic outlook. Sustainable expansion in today's climate hinges on strategic vendor partnerships, operational efficiency, and the right technology infrastructure. If you're planning your next wave of expansion, the message from your peers is clear: build visibility, align with the right partners, and leverage tech that delivers actionable, real-time insight.

Demographics and Methodology

To capture the current state of multi-site restaurant growth, we wanted to hear from operators themselves. Crunchtime commissioned a quantitative research study in partnership with Technomic. 100 multi-site restaurant operators with decision-making authority for systems and ops were anonymously surveyed in Spring 2025, each operating a minimum of 10 UK-based locations. Respondents consisted of owners, executives, and directors with decision-making authority or influence across quick-service, casual-dining, fast-casual, family/midscale, pub/bar, and fine-dining restaurants. All of the data and findings shared throughout this report have been verified for validity and accuracy by Technomic. *Please note, percentages may be rounded.*

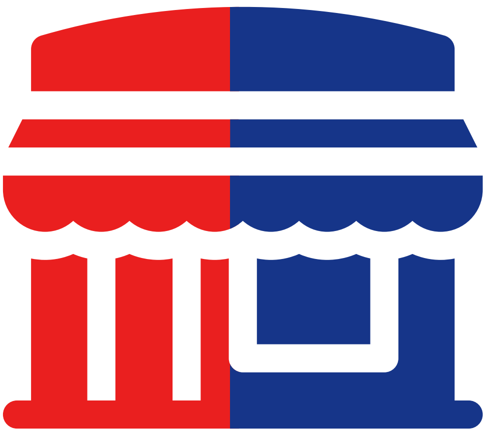
RESTAURANT SEGMENT



PRIMARY ROLE

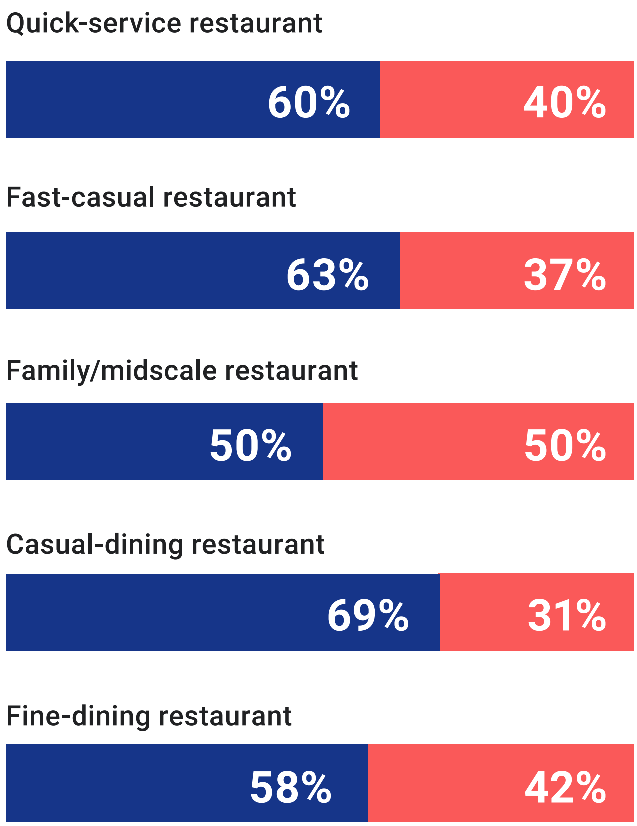
General manager/manager	22%
Operations VP/director/manager	15%
Owner/operator	13%
Food and beverage VP/ director/manager	12%
Information/technology officer/VP/director/manager	11%
Culinary/kitchen director/manager	9%
President/CEO	5%
Purchasing/procurement	4%
Human resources VP/director/manager	4%
Training & development VP/ director/manager	3%
Business strategy	2%

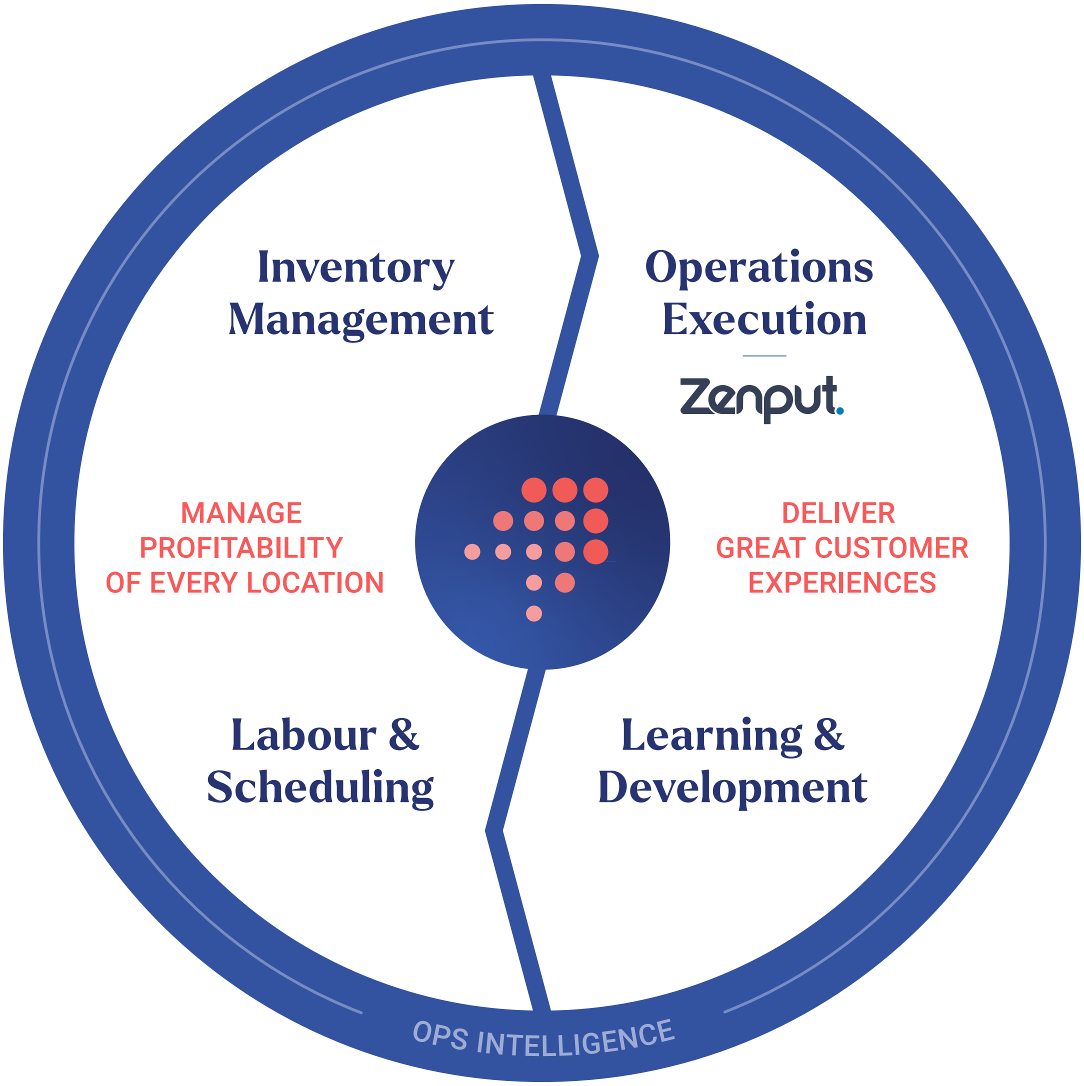
CHAIN TYPE



41% Franchised location of a chain

59% Part of a chain, corporate-operated





About Crunchtime

Crunchtime is how the world's top restaurant brands achieve ops excellence in every location. Crunchtime software is used in over 150,000 locations in 100+ countries to manage inventory, staff scheduling, learning and development, kitchen automation, food safety, operational tasks, and audits. Crunchtime enables customers, including Chipotle, Whitbread, Domino's, Dunkin', Five Guys, and P.F. Chang's to control food and labour costs, and deliver great guest experiences. For more information visit **www.crunchtime.com**.

Crunchtime Editorial Team

Dana Farese

Dana is Crunchtime's senior manager of content marketing, focused on amplifying the brand's presence in the restaurant technology space through impactful storytelling and multi-channel outreach. Dana joined Crunchtime via the acquisition of Zenput in 2022, and continues to bring a unique blend of strategic vision and hands-on execution to drive high-impact campaigns while championing Crunchtime's core values and culture.

Cindy Poulos

Cindy brings 30+ years of marketing and product management experience to Crunchtime. As senior director of marketing, she leads the team responsible for executing campaigns and content initiatives, leveraging her broad expertise in marketing products and services of fast-growing technology companies. Cindy joined Crunchtime via the acquisition of DiscoverLink in 2021, where she served as vice president of marketing for eight years.

About Technomic

Technomic Inc., an Informa Connect company, was founded as a management consulting firm in 1966. Since then, Technomic's services have grown to encompass cloud-based B2B research tools, consumer and menu trend tracking, and other leading strategic research and analytic capabilities, to prioritize and size business opportunities. Our clients include food manufacturers and distributors, restaurants, retailers and multiple other business verticals aligned with the food industry that are looking to make informed decisions to support their business growth. Visit Technomic at **www.technomic.com**.

Technomic Research Team

Donna Hood Crecca

Donna leads Technomic's adult beverage and convenience-store practices, founded its cannabis practice, and leads custom engagements for clients, including assessments of consumer, operator, and category assessments, providing actionable insights and recommendations. She began her career as a business journalist, first leveraging and then guiding industry research to identify emerging trends and drive compelling content, before joining Technomic more than a decade ago.

Anne Mills

Anne is a senior director of Research and Insights at Technomic, where she manages syndicated and custom projects leveraging a variety of quantitative and qualitative research methodologies. She began her career in the industry, focusing on consumer trends in foodservice, and has broadened her expertise to include industry research with operators and suppliers. Prior to joining Technomic, Anne conducted marketing research primarily in the healthcare industry.

John Williams

John is a Manager of Research and Insights at Technomic, where he has spent the past three years leading both custom and syndicated research initiatives. His work focuses on the foodservice industry, with expertise in c-store foodservice, distributor intelligence, and mixed-method consumer and operator storytelling. He brings a strategic lens to every project, blending qualitative and quantitative insights to help clients make smarter, faster decisions.

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