

**coeliacuk**  
live well **gluten free**

# EATING OUT GLUTEN FREE UNITED KINGDOM

**2024**

Survey Results: Released January 2025



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## METHODOLOGY AND SOURCES

**In November 2023, Coeliac UK conducted a survey of its gluten free community on their experiences of eating out, receiving 4,538 responses. This report provides the results of the survey, and in some areas is supported by stats drawn from the wider market.**

The latest external market data from Statista, DEFRA, ONS and the Food Standards Agency were used to contextualise eating out gluten free within the wider UK market. Where available, data from 2022 and 2023 were used, otherwise 2019 data were referenced. Data from 2020 and 2021 were excluded due to the impact of the COVID-19 pandemic on eating out.

Superscript numerals refer to external data sources referenced at the end of the document. All other data comes from Coeliac UK's November 2023 survey.

# EXECUTIVE SUMMARY

Coeliac UK is dedicated to supporting people with coeliac disease and other gluten related conditions, and it's our aim to ensure coeliac disease is understood and catered for in any environment so that our community is able to easily access the only current treatment – a strict gluten free diet.

We asked our members to share their insights and experiences of eating out in the UK, and we've compiled the findings in this report.

## KEY FINDINGS

### Market size

Approximately **36.6 million** people in the UK, aged 15 and older, visited a restaurant more than once in 2019. And with around **8%** of 16–64 year-olds following a gluten free diet, this equates to an estimated market size of **2.9 million** people<sup>1,2</sup>.

Based on the total of **£40.8 billion** spent on food eaten out and non-alcoholic drinks in the UK in 2019-20, **8%** gives an estimated market expenditure of approximately **£3.3 billion**.<sup>3,4</sup>



### Venue choice

Venue choice is often made around the safe provision of gluten free food, and with **70% of gluten free diners eating out with two or more people**, this is significant for the food industry in terms of traffic, spend and loyalty.



### Confidence

The majority of the gluten free community reported increased confidence when eating at venues holding the Coeliac UK Gluten Free Accreditation (GFA), with **93% of respondents feeling more assured** when eating at these establishments.



### Trust and loyalty

The awareness of Coeliac UK's Gluten Free Accreditation' scheme is high, with **90% of gluten free diners more likely to eat at an accredited venue**. Venues that build trust will benefit from repeat business and positive word of mouth.



## Food on the go: more gluten free options needed

The gluten free community continues to face challenges with food on the go, as availability and choice remain limited - and often non-existent. Despite some improvements in recent years, **87% of respondents still report difficulty accessing gluten free food**, highlighting the urgent need for greater awareness and expanded options across the food-to-go, hospitality, and travel sectors. Travel and fast-food settings are particularly problematic, with over **80% of people struggling to find suitable options**.



## Opportunities for growth

There is a significant opportunity for food venues to expand their gluten free offerings and improve their services. Venues that prominently display gluten free options, maintain GF accreditation, and train their staff on the gluten free diet can attract a loyal customer base and increase overall spend.

**70% of our respondents said they would eat out more often if more venues were GF accredited.**



## Significant physical and emotional impact

Although gluten free options may be listed on menus, venues and staff might not fully understand the risks of cross-contamination. Diners often need to check at every stage, which can ruin the experience. If proper procedures aren't followed, it can lead to significant physical symptoms.

Unintentional consumption of gluten is often referred to as being 'glutened'. Among respondents who reported being glutened, **86% experienced moderate, severe or very severe symptoms** with **15%** needing to take time off work, and **1.3%** needing to attend A&E. A fear of being 'glutened' can lead to anxiety, self-consciousness and ultimately affect quality of life.

## KEY TAKEOUT

**This report highlights the need for the food service industry to adapt to the growing gluten free market by offering safe, accessible, and appealing gluten free options. By addressing the needs of this community and improving their eating out experience, venues can meet a significant market demand, grow their business, and promote inclusivity and support for people who need to live without gluten.**



# COELIAC DISEASE AND EATING OUT

Coeliac disease is a serious autoimmune condition where the body's immune system attacks its own tissues when gluten is eaten. Gluten is a protein found in wheat, barley and rye and some people are also sensitive to a similar protein found in oats.

**In the UK, about 1 in 100 people which is approximately 676,000 individuals are affected by coeliac disease and once diagnosed, the only treatment is a strict gluten free diet for life.**

Coeliac UK's Gluten Free Accreditation Scheme (GFA) represents commitment to customers on a gluten free diet and assurance that they can enjoy safe gluten free options.



Venues displaying Coeliac UK's unique GF trademark have been through a rigorous programme of training and auditing to meet the strict requirements of Coeliac UK's Gluten Free Standard. The GF symbol on menus and websites indicates they supply dishes that are gluten free, a term that is protected by law and means no more than 20 mg/kg gluten or 20 parts per million (ppm).

Coeliac UK collaborates with over **3,000 food venues** to create a safe and enjoyable gluten free dining experience and being part of the scheme helps establishments meet the increasing demand for gluten free options whilst also building customer trust.

While the wider gluten free community of about **2.9 million people may choose a gluten free diet** for various reasons, including personal lifestyle choices or different medical conditions, it is important for the food industry to be aware that a **gluten free diet is a medical necessity for people with coeliac disease, and not a choice.**



**1 in 100** people  
in the UK are affected by coeliac disease

Coeliac UK collaborates with over

**3,000** food venues



# INSIGHTS INTO EATING OUT GLUTEN FREE

Approximately 36.6 million people in the UK, aged 15 and older, visited a restaurant more than once in 2019. With around 8% of 16–64 year-olds following a gluten free diet, this equates to an estimated market size of 2.9 million people.<sup>1,2</sup>

**36.6 million**  
people visited a restaurant more than once in 2019

**8%**  
of 16-64 year-olds follow a gluten free diet

**2.9 million**  
people is the estimated size of the eating out gluten free market

People can be on a gluten free diet for a variety of reasons. While people with coeliac disease must adopt a gluten free diet as this is the only current treatment for their condition, others may choose to follow a gluten free diet for other medical or lifestyle reasons. Around **£40.8 billion** was spent on all types of eating away from the home in the UK in 2019, excluding alcoholic drinks. Considering that around **8%** of 16-64 year olds in 2019 were on a gluten free diet, and assuming they ate out to the same extent as the general population, the amount of money spent by people on gluten free diets would be around **£3.3 billion** per annum.<sup>3,4\*</sup>



**£40.8 billion**  
spent on eating out in 2019-2020

**£3.3 billion**  
is the potential annual spend on eating out gluten free



\*The sources are different for restaurants visits, expenditure and the percentage of people on gluten free diets so the market size in people isn't directly linked to expenditure. As eating out frequency varies, calculating an average spend per gluten free person from these figures would be inaccurate. Furthermore, The COVID-19 pandemic significantly impacted eating out, so the market size and expenditure calculations are based on 2019 data, which is the most recent available. The percentage of people following a gluten free diet is from December 2023, as this survey was not collected in 2019.

# HIGH DEMAND BUT LOW AVAILABILITY

Spending on food and drink in UK restaurants, cafés, etc., increased by 25% between 2019 and 2023 (not adjusted for inflation).<sup>3,5,9</sup>

Those who ate out gluten free in the past month averaged one breakfast, two to three lunches and two to three dinners. The frequency across mealtimes is in line with the FSA's 'Food and You Survey' that describes the food landscape across England, Wales, and Northern Ireland.<sup>6</sup>

The average weekly eating out expenditure per person on food and drink across all diets in the UK was **£11.75** and **£15.26** including alcohol, in 2019<sup>3,5,9</sup> Gluten free options are typically more expensive than their gluten containing counterparts and therefore this is likely an underestimate for people on a gluten free diet.<sup>8</sup>

**80%**  
had difficulty  
accessing  
gluten free  
options when  
travelling



For people with coeliac disease, eating a gluten free diet is not a lifestyle choice, it is a medical necessity. However, up to **87%** of people reported having difficulty accessing gluten free food across a range of venues and settings.

Other key areas where accessing gluten free options was a problem are settings where people are potentially a 'captive consumer' and in some of these situations people may be less able to advocate for themselves e.g. hospital, school, university, or workplace.

Figure 3 on the following page shows the difficulty reported by our respondents of finding gluten free food across a number of settings, with notably limited availability for trains, airports, sports stadiums, fast food and service stations.

"I travel a lot for work and really struggle to pick up suitable lunch options like salads or sandwiches."

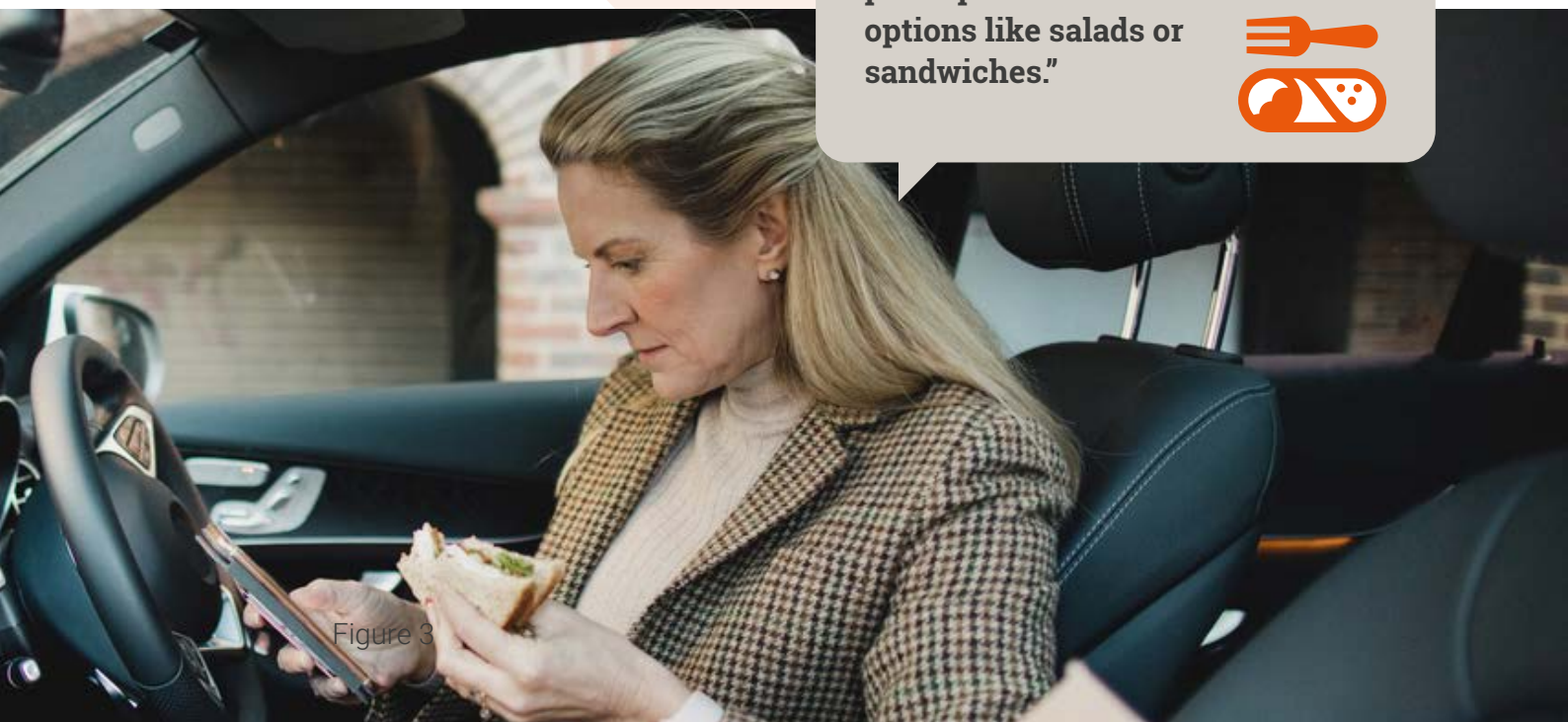


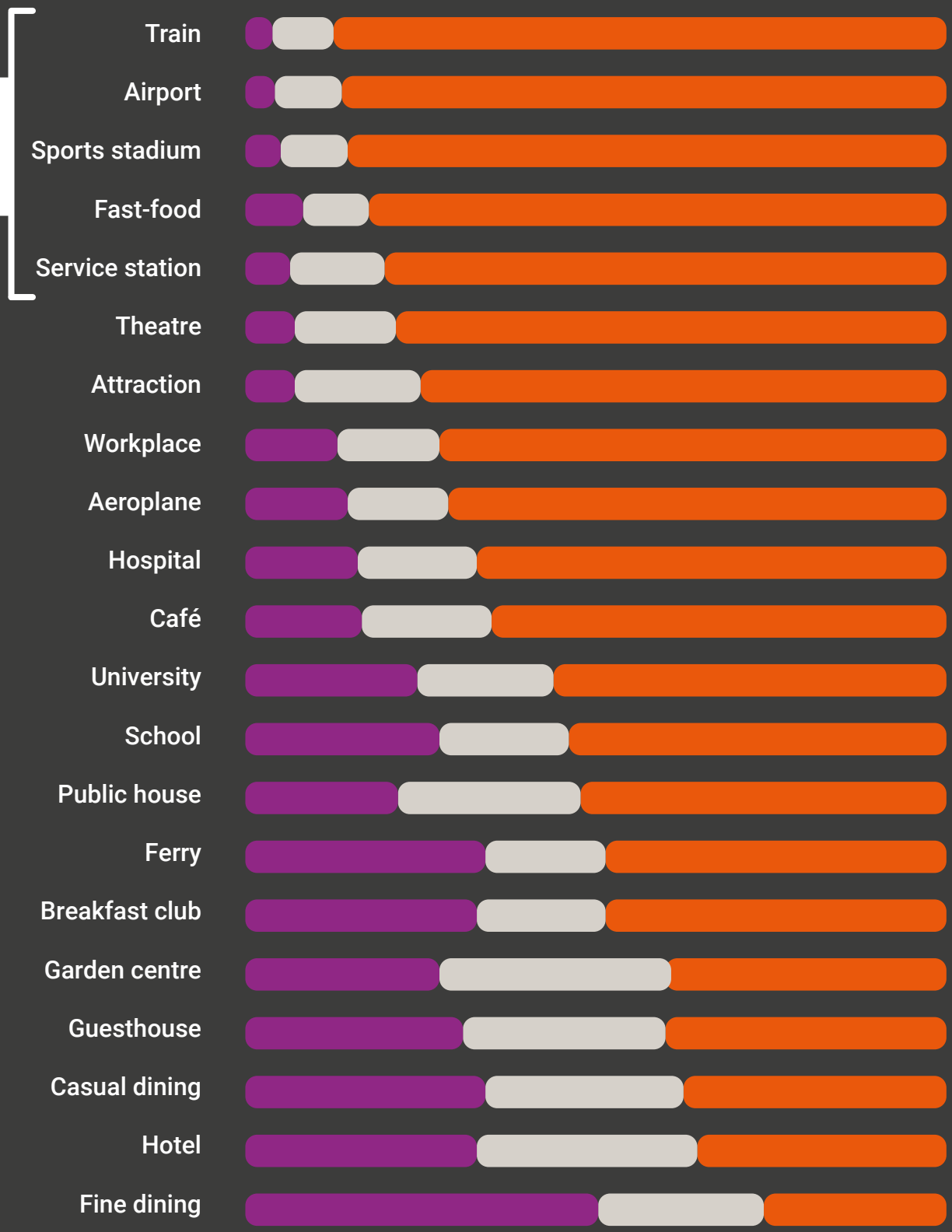
Figure 3

**Figure 1 - Opportunity to improve and expand gluten free options across multiple settings**

Respondents with experience (%)

0 10 20 30 40 50 60 70 80 90 100

**Top 5 areas of difficulty finding gluten free food**



Very easy or easy      Neither      Very difficult or difficult



# TRUST AND BETTER GLUTEN FREE OPTIONS NEEDED

Eating out gluten free has seen significant improvements, with 67% of people in 2023 reporting better experiences compared to 2018.

Eating out venues stand to gain further by making it easier for customers to find and enjoy a diverse range of gluten free foods. This not only reduces worries about cross-contamination and the risk of debilitating symptoms but also enhances overall dining satisfaction. Clearly labeled gluten free options and staff who are knowledgeable about coeliac disease and the gluten free diet are crucial in providing reassurance. These factors can transform the dining experience, making it more enjoyable and stress-free for the gluten free community.

## 93%

feel more confident or less anxious when eating out at GF accredited venues



## The need to build trust and customer loyalty

Being GF accredited provides a strong incentive for repeat visits, offering reassurance and trust for people living gluten free. In fact, more than half of people who are aware of Coeliac UK's Gluten Free Accreditation scheme (56%) visited an accredited venue at least once in the past month, highlighting the power of our accreditation in encouraging loyalty over other dining options.

## 95%

of people aware of the GF accreditation visited a GF accredited venue in the past year.

GF accredited venues can gain the expenditure of the entire party by catering for the needs of at least one person who follows a gluten free diet, even if that person does not make the booking.

## 90%

are aware of the Gluten Free Accreditation scheme



## 70%

would eat out more frequently if more venues were GF accredited

## 90%

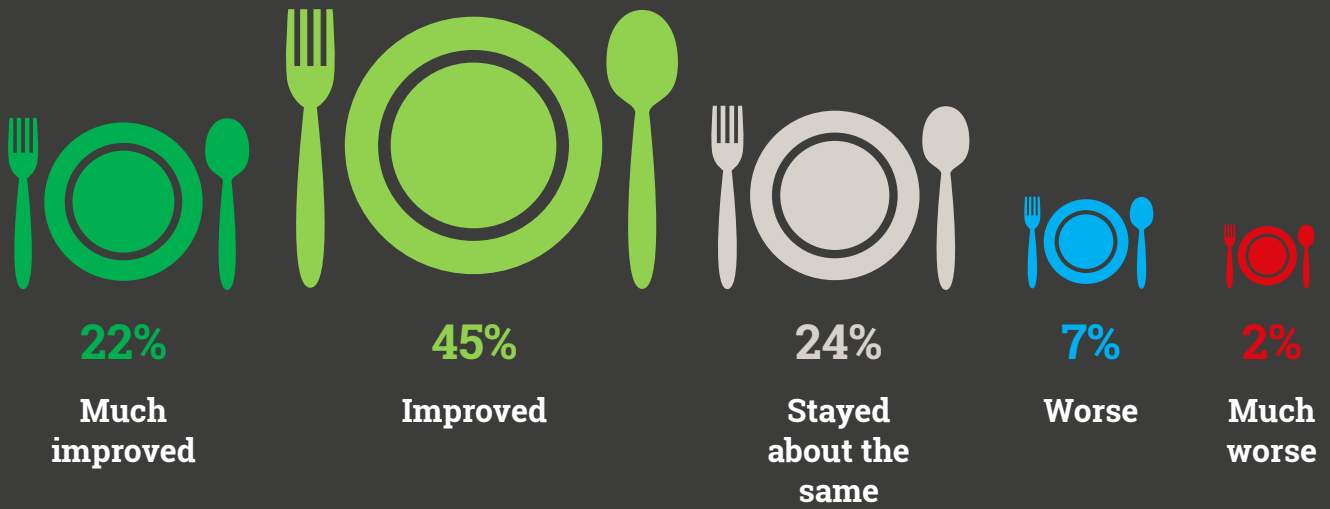
were more likely to eat at GF accredited venues than non-accredited ones



"I wish there were more accredited places to eat out with family and friends."

Figure 2 - How does eating out gluten free in 2023 compare to 2018?

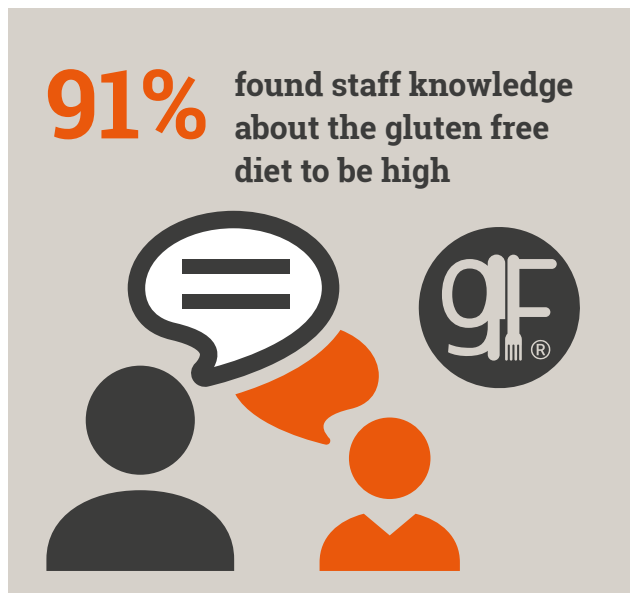
**67%** believed eating out gluten free improved 2023 vs 2018



### Staff can make or break the experience

People on gluten free diets trust GF accredited venues. **93%** of people on gluten free diets who completed the survey feel more confident or less anxious eating out at GF accredited venues.

**91%** of people who have eaten out at GF accredited venues found staff to be knowledgeable about the gluten free diet. This helps venues demonstrate the value of the training and staff development that are part of the Gluten Free Accreditation scheme.



### Greater variety of cuisines needed

Some of the UK’s most preferred cuisines are also among the most difficult to find as gluten free options. Around **17%** of people on gluten free diets said that Chinese and British cuisine, including fish and chips, were their most preferred and most difficult to find as gluten free options.

Italian cuisine, however, stands out, with several Italian chains being amongst the most preferred GF accredited venues. This reflects significant demand for such options across the UK, not just in larger cities and towns. Interestingly, 11% of respondents also identified Italian cuisine as both their most preferred and the hardest to find gluten free option, particularly when outside areas served by these major chains.

In general, it can be difficult to find gluten free options for some of the most preferred types of cuisine throughout the UK, and this is an opportunity for the food industry to expand their offering.



# INFLUENCING FACTORS FOR VENUE CHOICE

People on gluten free diets need to carefully choose where to eat out. Most prefer a variety of gluten free options that are easy to identify. To become a preferred venue for eating out, it's crucial to clearly label gluten free options on the menu or provide a separate gluten free menu.

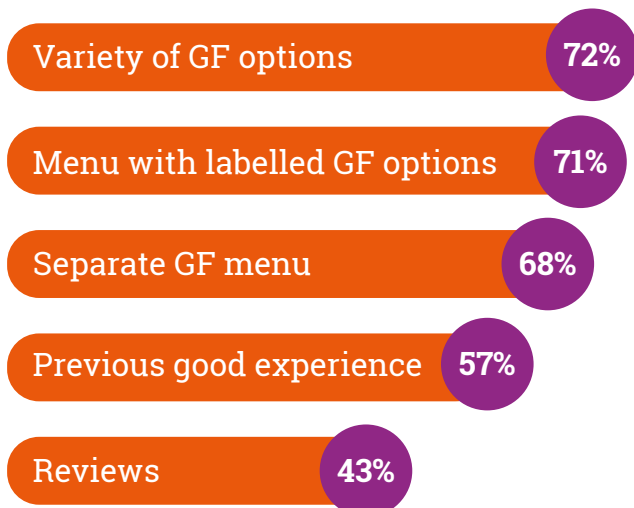
For parents of children who need a gluten free diet, having a children's menu with gluten free options is one of the top five factors in deciding where to eat out.

## Very few people on gluten free diets eat out alone

70% of gluten free diners were accompanied by two or more other diners in their party. With 90% of people on gluten free diets preferring to eat at a GF accredited venue, these venues benefit from the spend of a whole party when at least one of them eats gluten free. The true value of being GF accredited can be quantified as the entire bill for the table, not just the price of the gluten free dishes.

Having a separate gluten free menu is preferred by 68% of people on gluten free diets. Clearly differentiating gluten free food helps reassure customers that there is less chance of an error.

**Figure 3 - The most influential factors in choosing a venue to eat out**



Another important factor to note for venues when planning their gluten free and allergen menus is that 90% of people on gluten free diets prefer allergen information to be printed rather than digital.

**"I rarely trust any food venue that is not GF accredited."**

## More confidence, more repeat visits

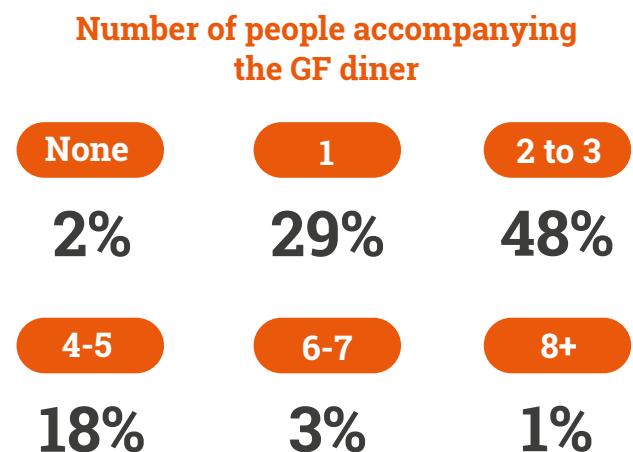
People on gluten free diets are motivated to eat out at venues with visible gluten free options where they feel confident about the following key factors.

- There will not be cross-contamination
- Prices for gluten free options are fair
- There is a decent choice of gluten free options

Food security exists when all people, at all times, have physical and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life." 6



**Figure 4 - 70% eat out with 2 or more companions**



# EATING OUT SHOULDN'T BE STRESSFUL

The top 3 feelings towards eating out gluten free are all negative. They feel self-conscious about having to declare their dietary needs in front of others and they feel nervous and stressed about the risks of being served food that may result in significantly unpleasant and potentially damaging symptoms. On the other hand, 93% feel more confident or less anxious when eating out at GF accredited venues.

## A very real risk to health

By working closely with the catering and hospitality industry, Coeliac UK aims to significantly reduce the chances of being accidentally exposed to gluten while eating out, to support our community in maintaining their health and simplify eating out for them.

Unintentional consumption of gluten is often referred to as being 'glutened'. And in the case of some being given gluten containing or contaminated food by mistake, they may notice and avoid eating it – this is referenced as 'potentially glutened'.

The occurrence of ever being 'glutened' is high. 77% of people on a gluten free diet have either been 'glutened' or potentially 'glutened' when eating out. In the past month, 21% had been 'glutened' or 'potentially glutened' when eating out.

77%

have been 'glutened' or 'potentially glutened' at least once when eating out gluten free



21%

have been 'glutened' or potentially 'glutened' in the past month

Figure 5 - When asked about how they feel about eating out, the top 3 emotions were negative



Self-conscious  
37%

Nervous  
30%

Stressed  
22%



# EATING GLUTEN CAN CAUSE HARM AND HAVE DEBILITATING EFFECTS

When someone with coeliac disease eats gluten the majority will experience symptoms within a few hours and the effects can last from a few hours to several days. The effects vary from person to person - two thirds of people experience stomach pain, two thirds diarrhoea and one third vomiting, while others may experience non-gut related symptoms such as fatigue, aching and brain fog. There are many other symptoms reported, and most people experience several symptoms.

While a minority may not experience symptoms at all, inadvertent ingestion of gluten can still damage the lining of the gut so it's crucial that they are very careful with their eating habits.

## Accidental ingestion of gluten severely disrupts lives

Of those who have been 'glutened' while eating out, more than half needed to go to bed and 15% took time off work. Individuals experienced, not only uncomfortable physical symptoms, but also emotional distress and impact on their careers, their earnings, and their mental health. Employers are also impacted by the cost of lost workdays and the effect on employees' productivity and well-being when they have been 'glutened.'



Of those who had been 'glutened' while eating out:

**86%**  
experienced moderate, severe, or very severe symptoms

**1.3%**  
ended up in accident and emergency (A&E)

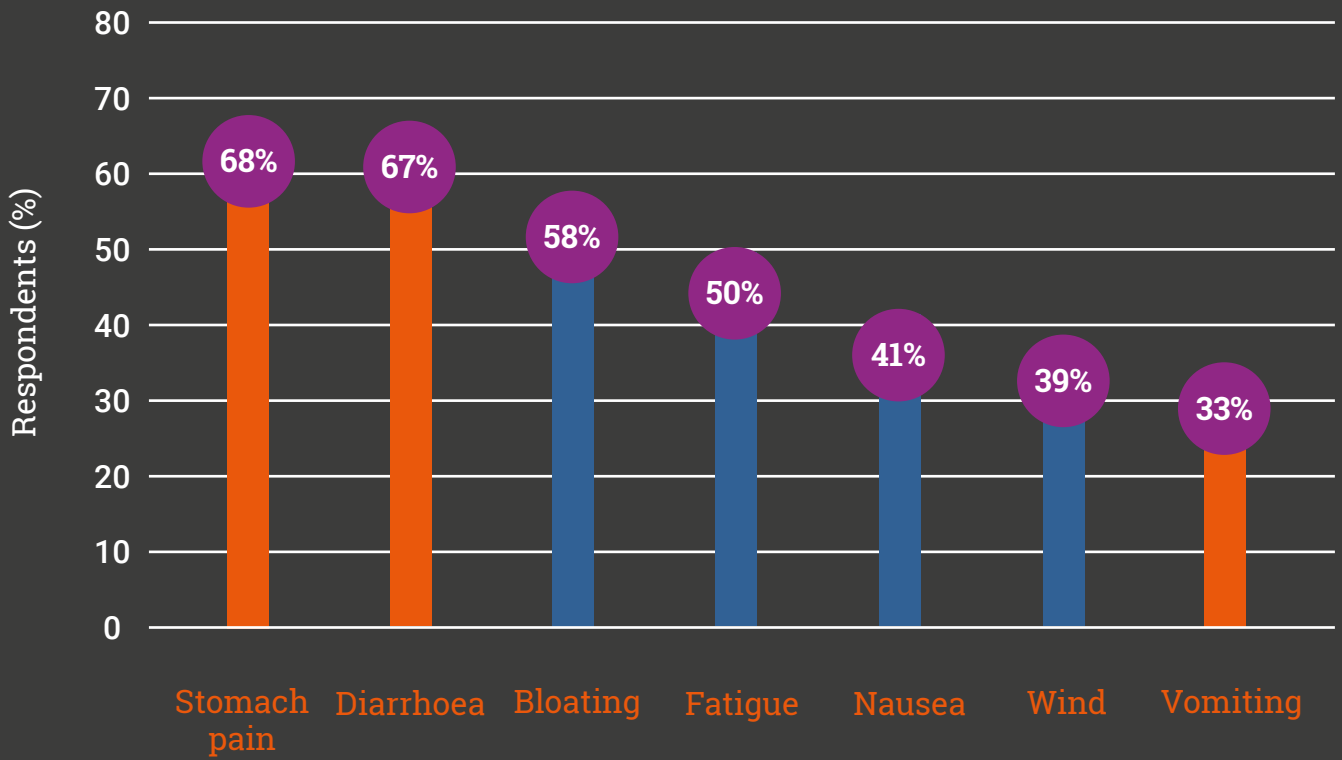


Of the people who said they had been 'glutened,' **46%** did not alert the venue. Many of them only experienced symptoms after leaving the venue and in 86% of cases, they had moderate to severe symptoms.

Since there is often a time delay before people feel well again, many 'glutening' incidents are not reported and venues are left unaware of the scale of impact on people's lives and the missed opportunity to better serve the needs of the gluten free community.

**"I am just too afraid. My reaction is so painful it's not worth the risk."**

Figure 6 - Symptoms reported from gluten ingestion





# MORE OPTIONS FOR FOOD ON THE GO NEEDED

Up to 95% of people on gluten free diets have needed to buy gluten free food on the go. However, nearly 40% never do because it's just not available. People with coeliac disease are known to travel with a range of gluten free snacks because options are so limited.

**95%**  
have needed to buy gluten free food on the go

**40%**  
never make a purchase



The challenge with lost sales is that they are difficult to identify and quantify unless they are known about. Here is a significant opportunity. Over **90%** of people who buy gluten free food on the go, had looked for it in the past month. However, success at finding something suitable varied substantially.

**15%**  
succeeded all the time



**18%**  
were successful only 50% of the time

**25%**  
had no success at all



## Gluten free food on the go costs more

Price is a huge concern for people who buy gluten free food on the go with 90% saying when it is available, it's more expensive than gluten containing equivalents. A balance needs to be found between the dietary needs of this community and the cost to businesses of upholding gluten free standards.

**90%**  
say gluten free food on the go costs more than gluten containing equivalents

**48%**  
have never been able to buy gluten free as part of meal deals, offers or discounts

Reasons for not buying gluten free food on the go:

**63%**  
limited availability

**49%**  
limited choice

**48%**  
take my own



## DELIVERY COMPANIES ARE NOT KEEPING UP WITH DEMAND

**Only 3% of surveyed individuals on a gluten free diet feel confident in third-party takeaway delivery services.**

Getting gluten free takeaways delivered is not as common as in the general population with only **27%** opting for this service. Among these individuals, half rely solely on the direct delivery service of the food provider. Only **20%** of people who use delivery services for gluten free takeaway food are confident that the correct processes are in place and consistently followed to ensure food is gluten free. Low levels of confidence in delivery services, especially third-party deliveries, limits access to the gluten free takeaway market.

**27%**  
get gluten free  
takeaways delivered



**50%**  
of them only use direct delivery

**Only 3%**  
of delivery service  
users are  
very confident  
in processes





# WHAT DOES 'GLUTEN FREE' MEAN?

To label food as gluten free, the law requires that the gluten content does not exceed 20 parts per million (ppm) of gluten, which is also referred to as 20 mg of gluten per kilogram.

There is significant misunderstanding around the term gluten free. In our survey, only **42%** of people on gluten free diets knew the correct threshold of no more than 20 ppm. Almost as many (**37%**) believed gluten free to be 0 ppm of gluten, which cannot be measured using current approved analytical techniques.

The current recommended test for analysing gluten in food is the R5 sandwich ELISA Mendez method. The limit of quantification is 5 ppm gluten and the R5 competitive ELISA is used for fermented and hydrolysed foods and has a limit of quantification of 10 ppm gluten.

There is still room for education, especially in terms of the danger of misleading claims. Several other terms may be seen when eating out, but only the term 'gluten free' is protected by law and means that the food does not contain more than 20 ppm of gluten and is suitable for someone with coeliac disease. However, it's



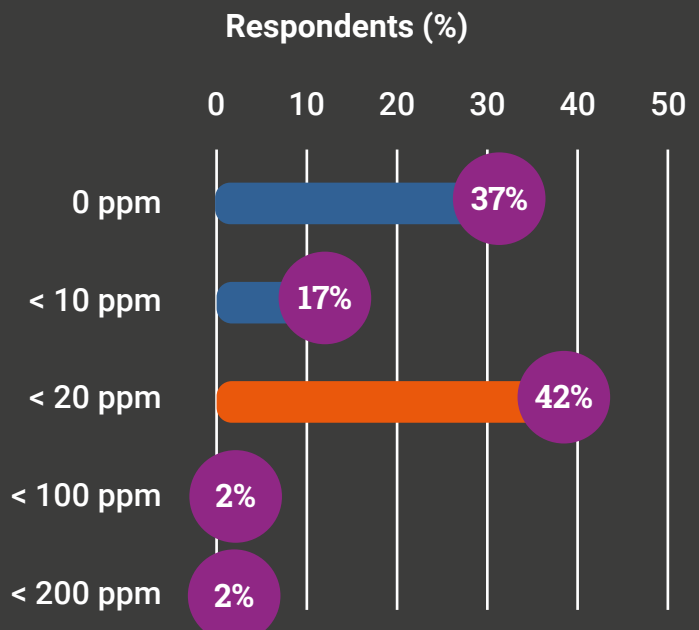
important to know that this does not necessarily mean it's safe for people with wheat allergies.

People with coeliac disease cannot safely eat food served under the following claims, and these claims will not be seen at any GFA venues:

- **Non gluten**
- **No gluten containing ingredients (NGCI)**
- **Low gluten**
- **Very low gluten**

It is safe to trust GF accredited venues because they have met the requirements of the Gluten Free Standard linked to Coeliac UK's Gluten Free Accreditation scheme.

Figure 7 - 42% know the correct threshold for the term gluten free is no more than 20 ppm gluten



# DO PEOPLE WITH COELIAC DISEASE HAVE ANY OTHER DIETARY NEEDS?

Nearly 80% of people on gluten free diets have no other dietary preferences beyond gluten free.

There is a medical reason for avoiding gluten - it is the **only** treatment for coeliac disease. Some people also have lactose intolerance when they are first diagnosed as the damaged caused to their gut is where lactase, the enzyme that breaks down lactose, is produced. However once diagnosed and on a gluten free diet, the gut begins to heal and for most the production of lactase returns, and the lactose intolerance is only temporary. Therefore, it's useful for venues to consider this when planning their gluten free menus.

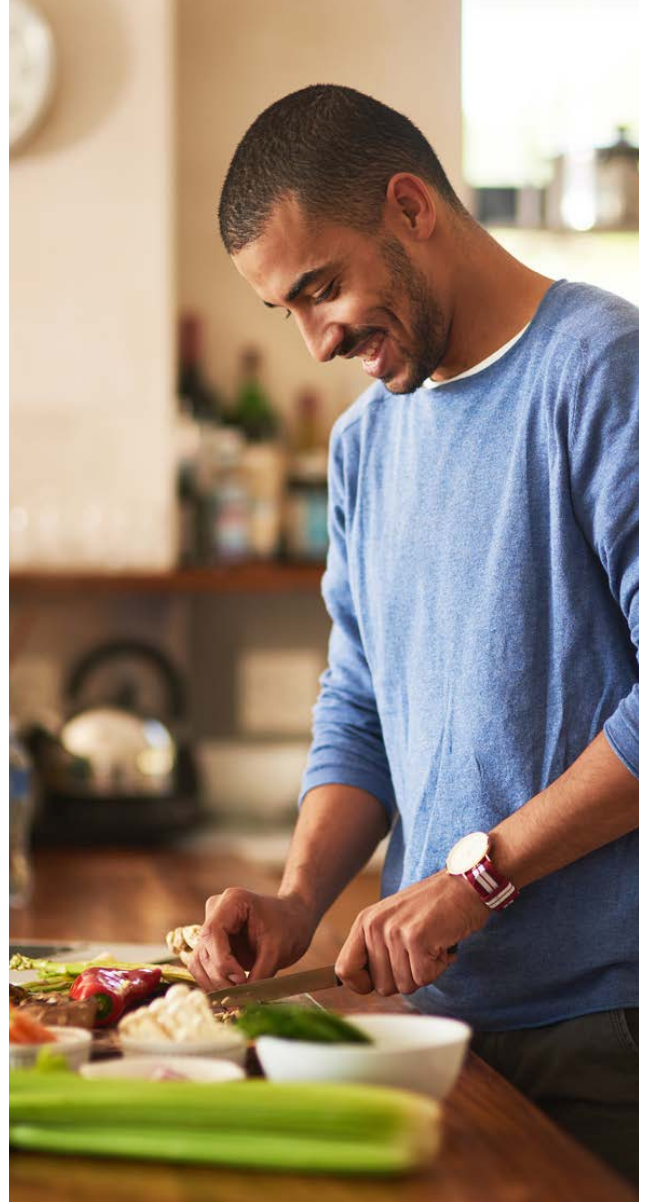
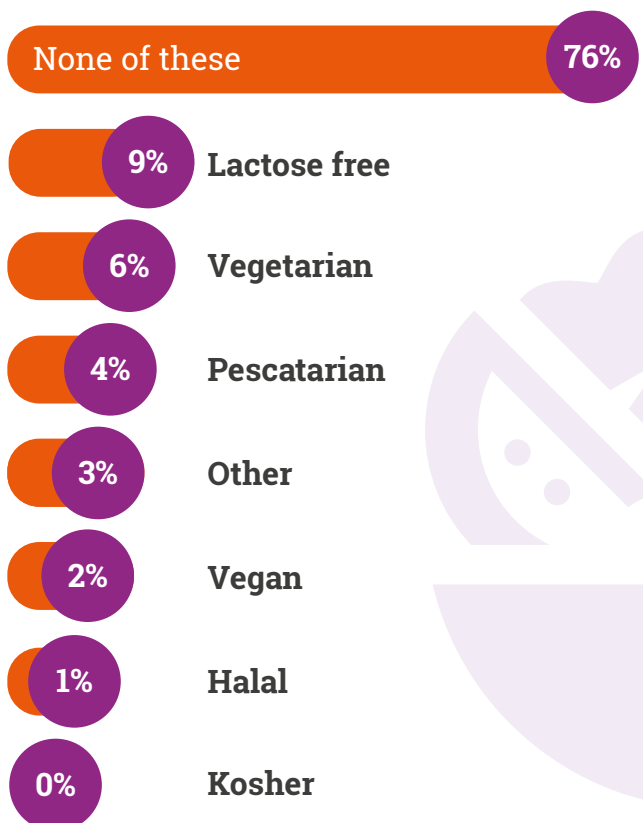


Figure 8 - 76% of respondents have no other dietary requirements



# SURVEY SAMPLE

In November 2023, Coeliac UK, sent a survey to its gluten free community, 4,538 people responded. The results contain valuable insights into their experiences of eating out gluten free in the United Kingdom.

The geographic distribution of the sample, in the main closely matched that of the UK population and devolved nations.

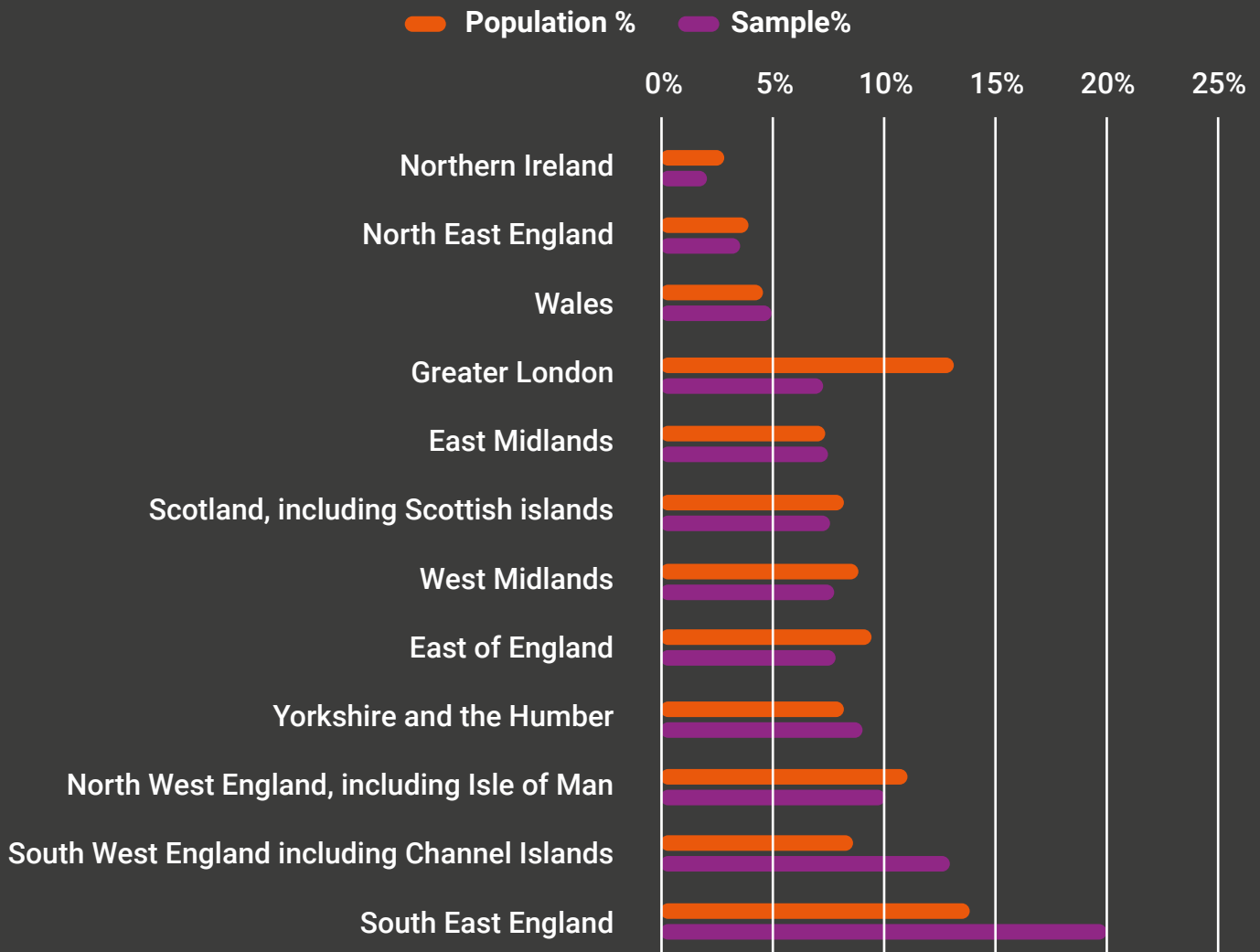
**94%** were members of Coeliac UK and either had coeliac disease or dermatitis herpetiformis - a skin condition linked to coeliac disease (**84%**);



caring for a friend, family member or child with a gluten related condition (**6%**); or following a gluten free diet for other reasons (**10%**).

In the Coeliac UK survey, **40%** had been on a gluten free diet for over 10 years.

## Comparison between geographic distribution of UK population and Coeliac UK survey sample



SOURCE: Office for National Statistics (UK) (2021)



## Survey – Coeliac UK, Eating Out Survey 2023

Total sample =

**4,538 adults**  
on a gluten free diet

All respondents were themselves on a gluten free diet, but their reasons differed:

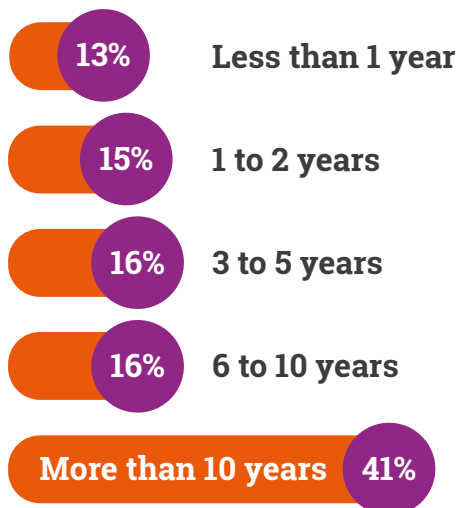
**3,807** of them were diagnosed with coeliac disease or dermatitis herpetiformis

**200** of them followed a gluten free diet because they were parents or carers of children (<18 years) on a gluten free diet

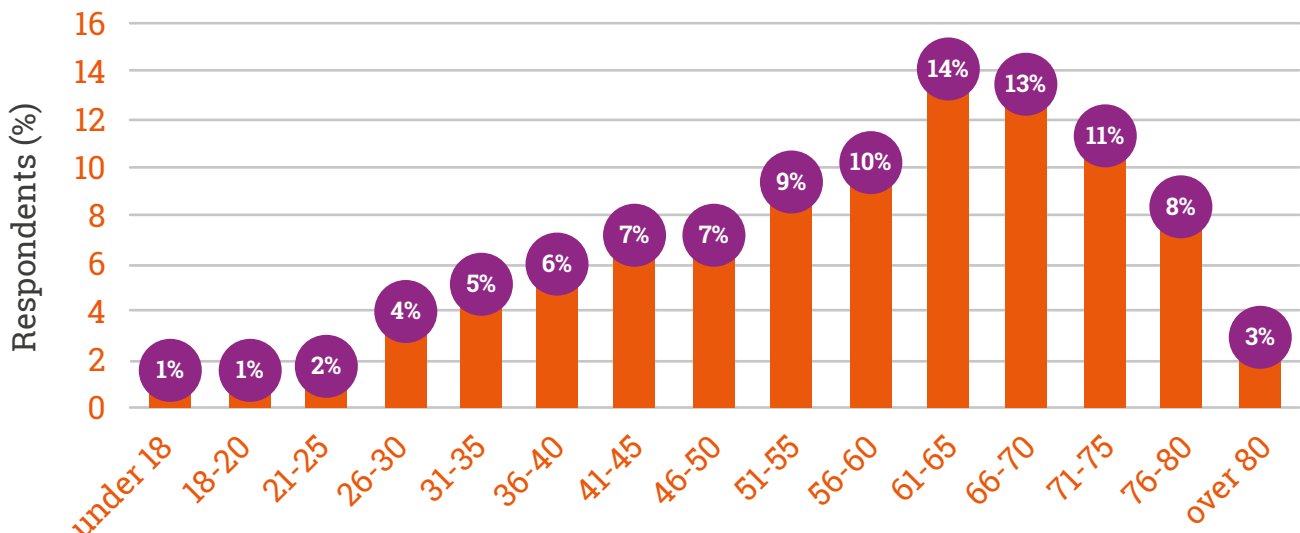
**65** of them followed a gluten free diet because they were carers, friends, or family members of someone with a gluten related condition

**466** were adults on a gluten free diet for another reason

Sample: 40% on gluten free diet for over 10 years



Sample: 60% aged over 55 with most diagnosed in 50s or 60s



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