

2025

UK Pubs & Bars Market Report

Brochure



Report Introduction

The **Lumina Intelligence UK Pub & Bar Market Report 2025** is the definitive, data-led overview of the UK pub and bar market.

Featuring market sizing with value and outlet forecasts to 2028, up-to-date consumer insight, and in-depth analysis of a shifting competitive landscape, this report pinpoints key trends, performance benchmarks, and emerging opportunities. It is an essential source of intelligence for suppliers, operators, service providers, and investors.

This comprehensive report equips readers to understand the evolving shape of the market, highlighting where growth is occurring and where challenges remain. It supports commercial and category decision-making by focusing on the most influential dynamics across the pub and bar channel.

Key themes in 2025 include accelerated investment into community and premium-led pub formats, the scaling of hybrid and accommodation-led models, and a sector-wide drive for operational efficiency. Amid rising costs, confirmed April 2025 business rates relief reductions, and inflation forecast at 3.4%, loyalty, technology integration, and format innovation stand out as critical levers for sustainable growth.



How to use this report



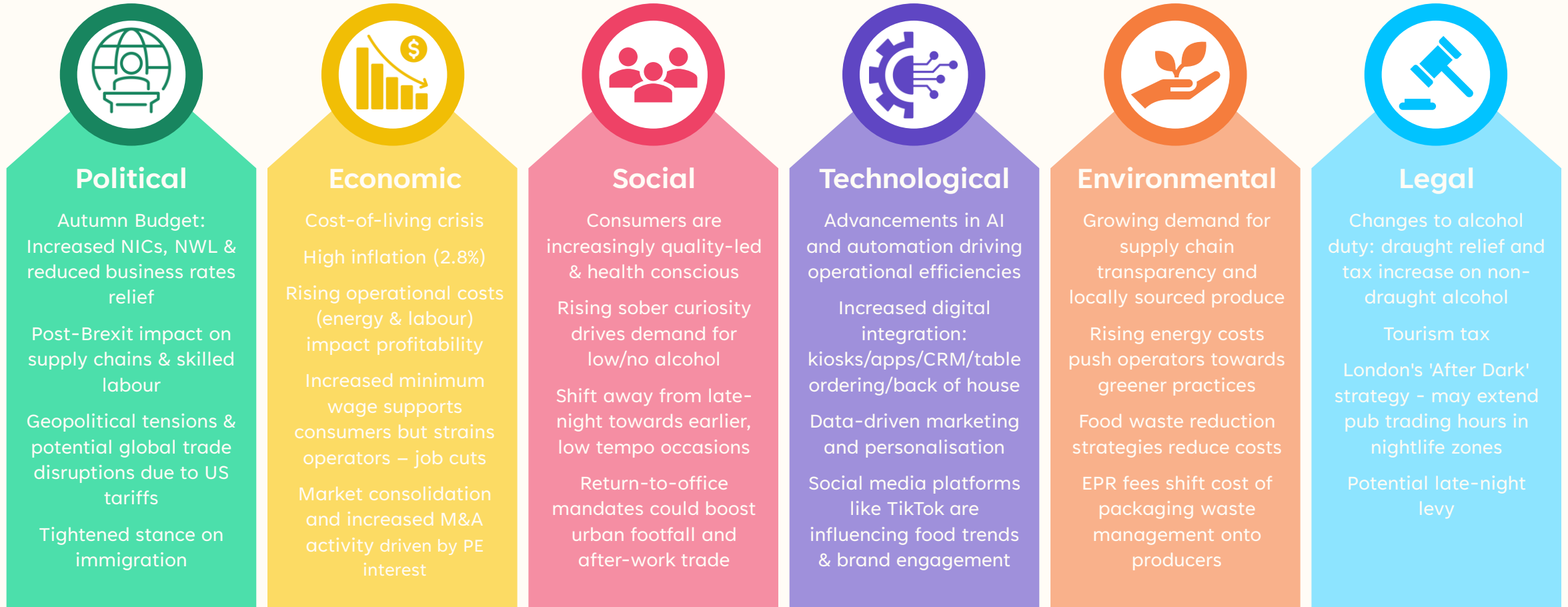
Report section:	Market Insight	Competitive Landscape	Consumer Insight	Future Outlook
Relevant teams	Commercial, finance, data and insight, holding company, board	Commercial, finance, data and insight, holding company, board	Brand, creative, data and insight and marketing	Commercial, finance, data and insight, holding company, board
Operator Questions answered	What does the market look like and how will changes impact my business case and forecast? What are possible gaps that can be capitalised on?	What can we learn from how operators are innovating? How are our business efforts impacting our market share?	How are consumers interacting with the market? What are their motivations? What are the opportunities to be exploited?	How will the market change across the next three years and what are the threats and opportunities?
Supplier/ Wholesale Questions answered	What does the market look like and how will changes impact my customers? What factors will need to be priorities for supporting customers?	Who are the winners and potential customers in the market?	How are operators having to adapt to deliver against changing consumer needs? What can we do to support our customers?	How will the market change across the next three years and what are the threats and opportunities?
Investor Questions answered	What is the landscape and the opportunity for growth in the market?	Who are the key players in the market and how are they performing?	What are key consumer behaviours and considerations that a prospect needs to be prioritising?	How will the market change across the next three years and what are the threats and opportunities?

Source: Lumina Intelligence, August 2025

Sample Slides



PESTEL Analysis: Pubs & Bars Market



Source: Lumina Intelligence, June 2025

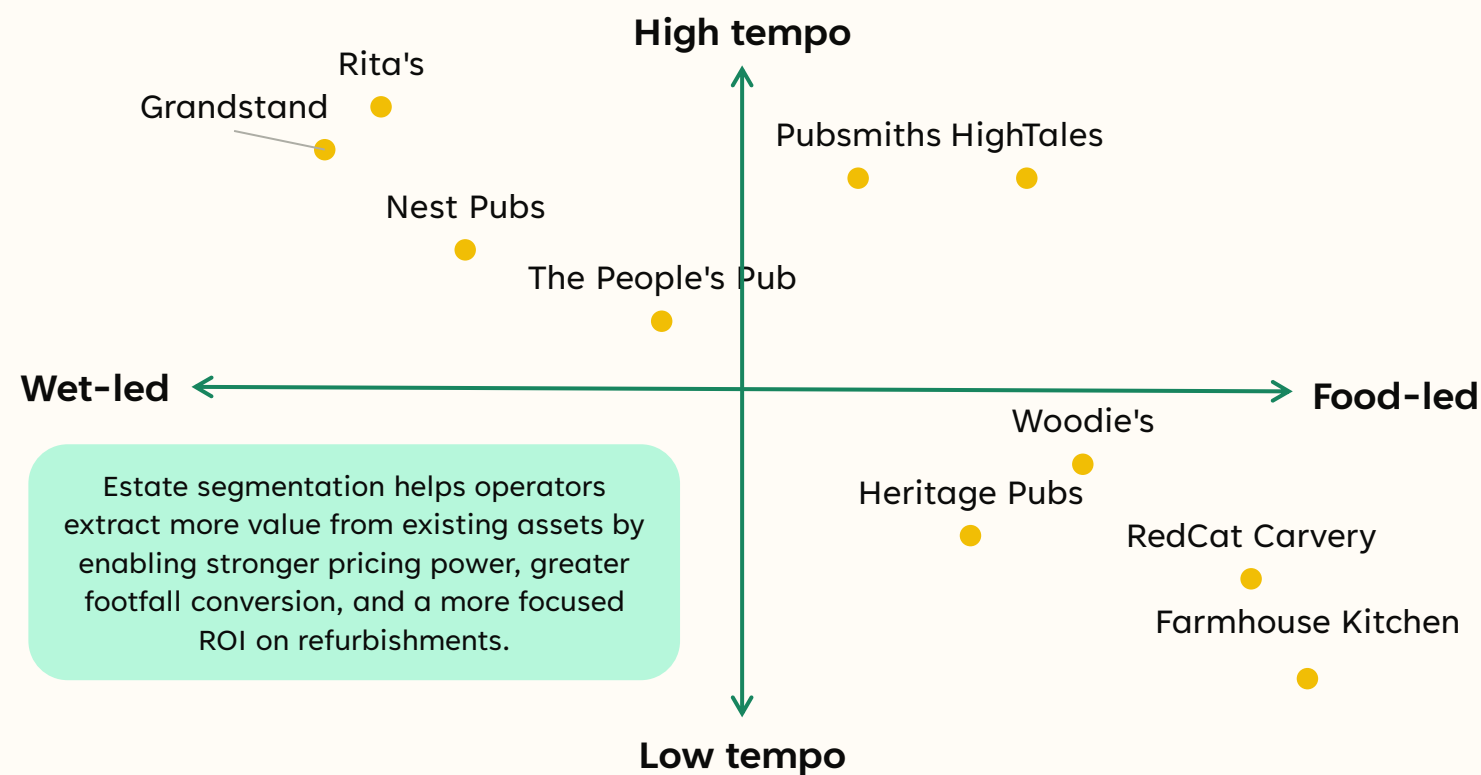
Leading pub groups are diversifying formats and exploring new concepts



Operators including **Stonegate**, **Greene King** and **Marston's** are accelerating investment in new managed pub concepts in response to rising consumer selectivity and cost pressures.

As consumer missions diversify, one-size-fits-all models are being replaced with targeted, format-led strategies. This enables sharper proposition alignment, clearer brand differentiation, and stronger guest loyalty - supporting both margin protection and growth in a highly competitive and cautious market.

New pub concept positioning by tempo and proposition focus



Source: Morning Advertiser, Stonegate, Marston's, Greene King, RedCat, Lumina Intelligence, July 2025

Pubcos prioritise loyalty integration

Major UK pub companies are increasingly investing in loyalty schemes. Greene King, Heartwood, Fuller's, Butcombe, and Stonegate are all trialling or expanding app-based programmes offering discounts, gamified rewards, and personalised offers.

Lumina Comment:

Loyalty is becoming a key growth lever and marketing tool, with operators aiming to boost customer retention and collect valuable behavioural data.

Source: The Financial Times, MCA, Lumina Intelligence, July 2025

Pubcos developing loyalty schemes

- Developing its first app-based loyalty scheme offering discounts on food, drink, and accommodation.

Greene King



- Invested £2mn in an app featuring gamified rewards like "spin to win" free pints.

Stonegate



- Offers 20% off drinks on Fridays and free pints via beer clubs; loyalty accounted for 22% of Q1 sales.

Butcombe Group



- Rolling out a two-tier loyalty app focusing on personalisation

Heartwood Collection



- Piloting loyalty across 30 pubs with personalised rewards like two-for-one meals or premium wine.

Fuller's



- Investing £180K in its Pub Perks loyalty card scheme for JAT operators. Led to 85% weekly repeat usage & increased spend during bonus hours

Star Pubs & Bars





Gen Z's 'sober' stereotype is changing

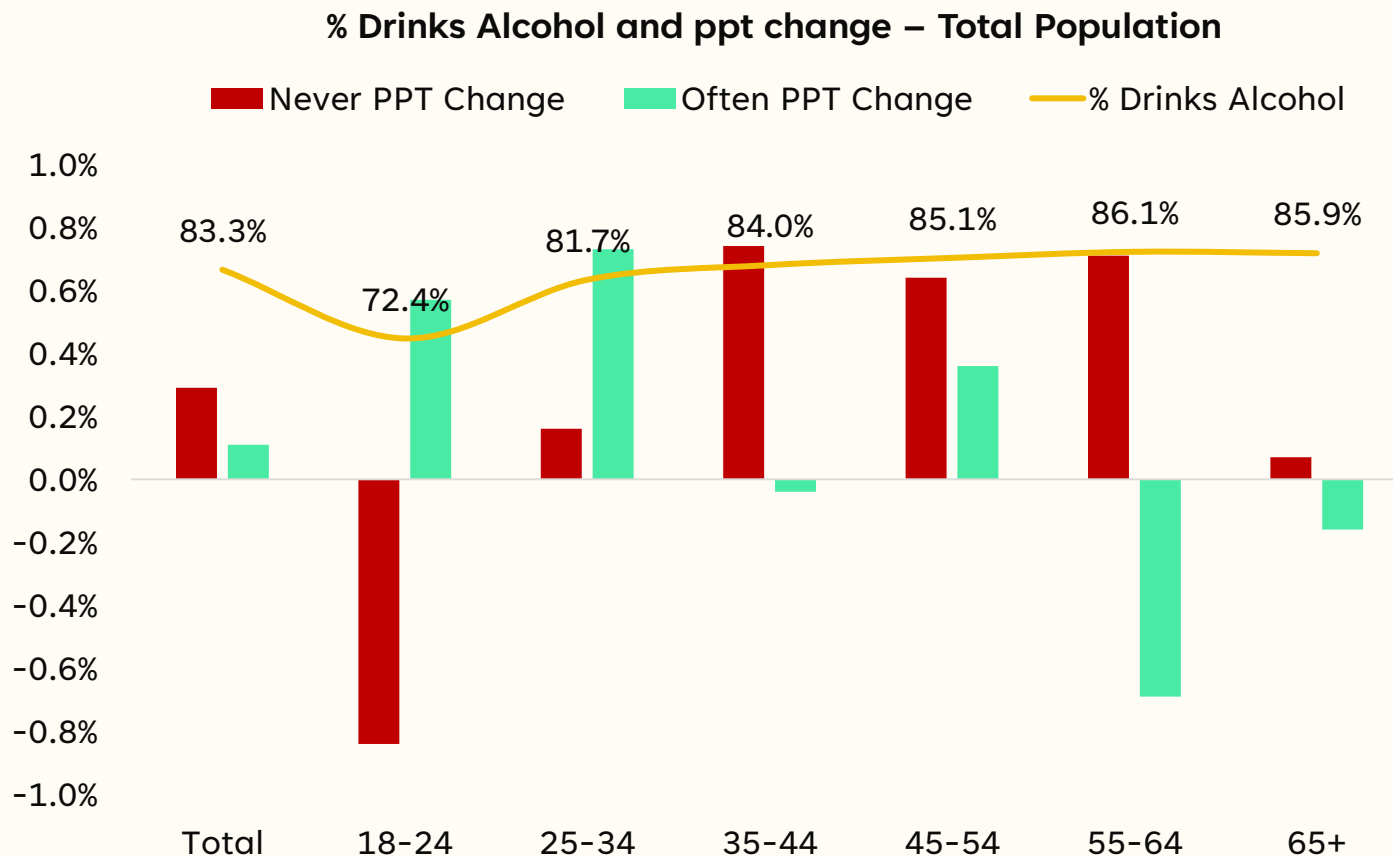
The conventional story is that Gen Z drinks less than older generations, and that alcohol consumption is on the decline.

While 18–24s are still less likely to drink than older groups, the past year has seen a clear shift: more young adults now drink 'often' or 'sometimes', with fewer opting out entirely.

This change is likely fuelled by improving finances and more tailored offerings that speak directly to their tastes.

Gen Z discovers thirst for booze as incomes rise – data

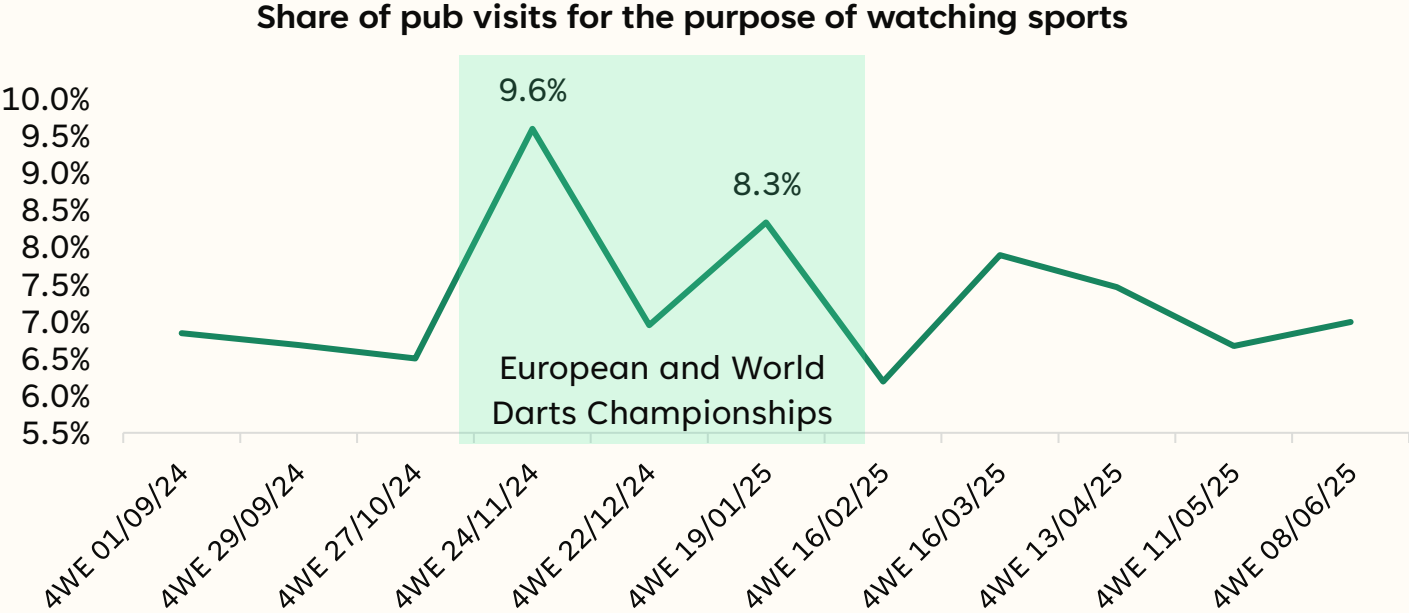
The Grocer



Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 09.06.2024 and 52WE 08.06.2025, The Grocer

Niche sports create an opportunity for pubs

Pubs should explore sporting opportunities outside traditional men’s football due to growing popularity and engagement with women’s sport and more niche sport, including darts. Sky sports data highlights the growing engagement in darts, with Luke Littler’s victory at the world championships, the second most watched non-football sporting event on sky sports ever. Pubs visits for watching sport peaked during the European and World Darts championships, indicating the opportunities outside football. Martston’s capitalised on this and launched the ‘Cool Hand Cup’ - a nationwide darts competition in over 700 pubs, where customers compete for a chance to face world No. 1 Luke Humphries – and win a grand prize of £5,000.



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Methodology



Eating & Drinking Out Panel

Lumina Intelligence's UK Eating & Drinking Out Panel tracks the behaviour of 1,500 nationally-representative consumers each week, building up to a sample of 78,000 every year, across all eating out channels and day-parts (including snacking)

2020-2025

Market Sizing & Operator Data Index

Market sizing data tracking the performance of hospitality and grocery operators, based on turnover and outlet numbers

Extracts from Operator Data Index and wider synthesis with total Eating Out market sizing

Lumina Intelligence Operator Data Index tracks and forecasts outlet and turnover information for over 400 brands across the eating out market

2018-2028F

Secondary external sources

Lumina Intelligence also uses external sources including desk research, ONS, GFK Consumer Confidence Index and EY Item Club economic indicators

Source: Lumina Intelligence, August 2025

Report Details



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Corporate Access

**To learn more about how Lumina Intelligence can support you,
please get in touch using the contact details provided below.**

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