

Lumina Intelligence

2026

Lumina Intelligence UK Pub & Bar Market Report

Brochure



Report Introduction

The **Lumina Intelligence UK Pub & Bar Market Report 2026** is the definitive, data-led overview of the UK pub and bar market.

Featuring market sizing with value and outlet forecasts to 2029, up-to-date consumer insight, and in-depth analysis of a rapidly evolving competitive landscape, this report identifies the key trends, performance benchmarks and growth opportunities shaping the sector.

This comprehensive report helps readers understand how consumer behaviour, operating costs and market dynamics are reshaping the pub and bar channel. It supports commercial and category decision-making by focusing on the most influential drivers of market performance.

Key themes in 2026 include the need for sharper pub propositions, rising demand for alcohol-free and functional drinks, growing investment in community-led experiences and the challenge of attracting new consumers. As operators continue to manage cost pressures and outlet decline, proposition clarity, drinks innovation and stronger local connections are becoming increasingly important growth levers.



How to use this report



Audience	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	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 or Wholesaler	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	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?

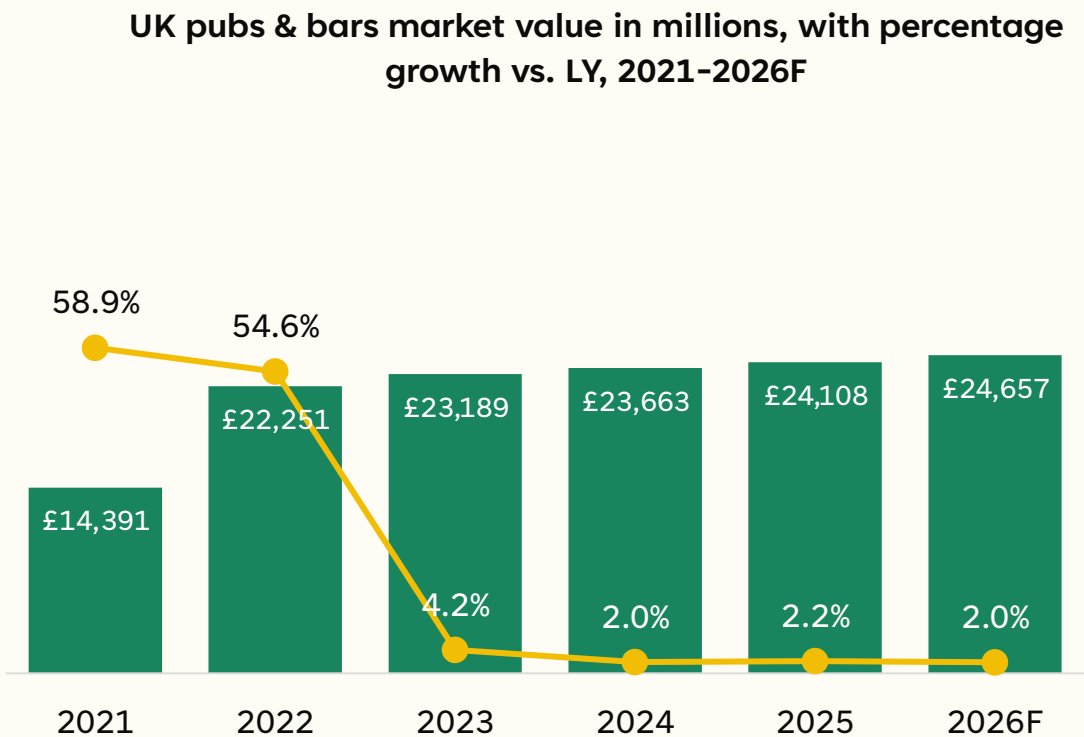
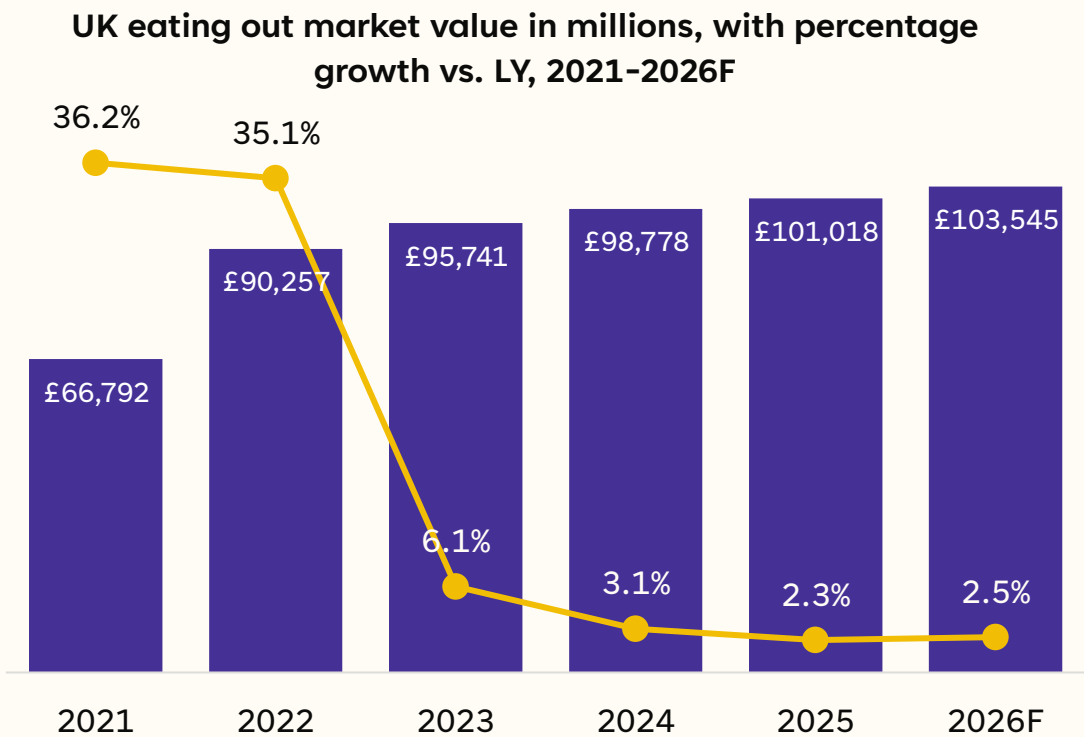
Source: Lumina Intelligence, July 2026

Sample Slides



Slower growth reflects ongoing outlet decline and margin pressure

The UK pub and bar market is forecast to deliver modest growth of +2.0% in 2026F, continuing to underperform the wider eating out market. This gap reflects sustained outlet decline and ongoing cost pressures, which are constraining expansion and limiting operators’ ability to drive volume growth.



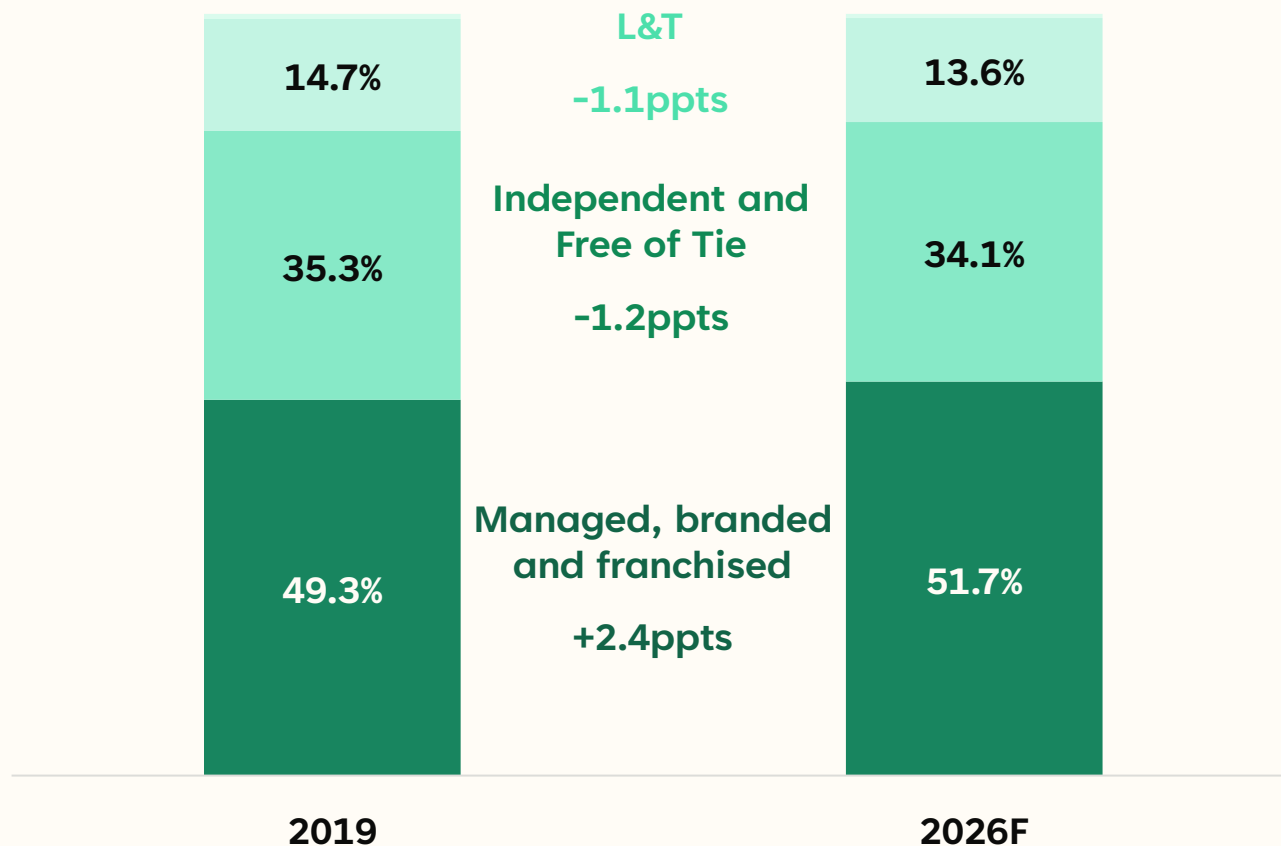
Managed pubs gain share as scale and investment become key growth advantages

Managed, branded and franchised pubs are forecast to grow turnover share by +2.4ppts, reaching 51.7% in 2026F, as scale and investment become increasingly important in a pressured market.

Stronger operators are better placed to absorb cost increases, invest in proposition quality and target higher-value drink-led and social occasions.

Meanwhile, independent/free-of-tie and leased & tenanted segments continue to lose share as margin pressure and estate rationalisation persist.

Pubs & bars market turnover share by segment, 2019-2026F



Source: Lumina Intelligence Market Sizing Insight & Analysis, July 2026

Well-capitalised pub groups drive M&A as weaker estates rationalise

Pub and bar M&A activity was notable between May 2025 and June 2026, as well-capitalised operators used distressed sales and portfolio rationalisation to acquire quality sites. Activity has centred on pubs with rooms, premium assets and community-led estates, while larger operators continue to recycle capital by selling non-core sites or shifting assets into lower-risk operating models.



Community-led experiences are becoming critical to driving footfall and relevance

Pubs are increasingly being used as local social hubs, with operators and community groups introducing accessible activities that give consumers new reasons to visit beyond drinking.

Creative examples such as **Knit Nunhead** and **Watercolour Wednesday** show how simple hobby-led activities can drive midweek participation, while **Chatty Patty** demonstrates the potential for pubs to tackle loneliness through low-cost community programming, delivering 80 attendees, 60% repeat visits and £0 running cost after first 14 weeks.

Learning-led formats are also gaining traction, with **Pints of Knowledge** bringing expert talks into pubs and **Pint of Science** scaling public science talks across hundreds of pub, café and community venues.

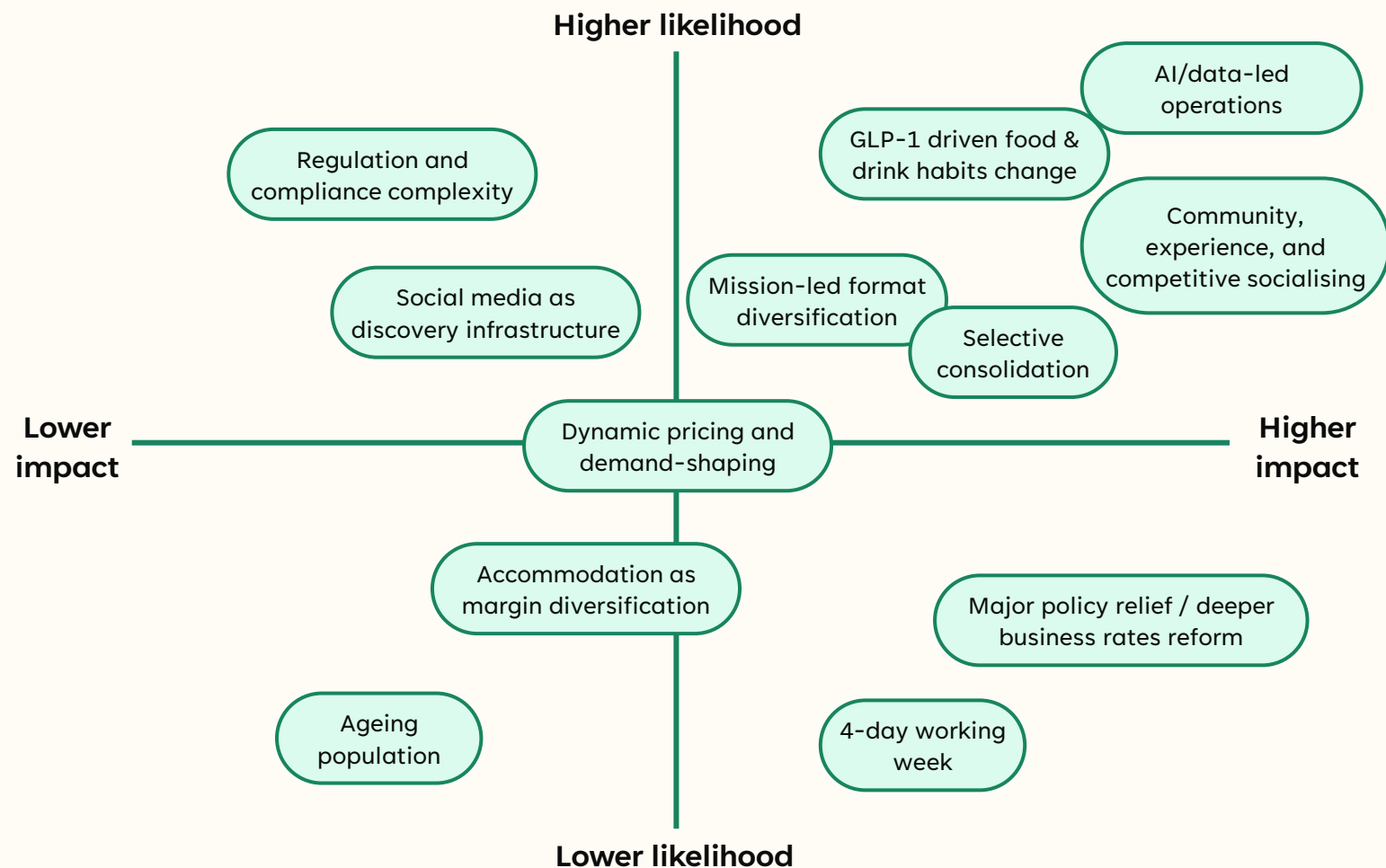


Source: Pint of Science, Pints of Knowledge, Prince of Peckham, King's Arms, The Ivy Head, Lumina Intelligence, July 2026

Future pub growth will depend on converting market shifts into productivity, resilience and spend per visit

Future pub growth will be shaped less by broad market recovery and more by how operators respond to structural shifts in technology, regulation and consumer behaviour. Winning operators will use AI/data, sharper formats, community-led experiences and diversified revenue streams to protect margins, build resilience and grow spend per visit.

Future trends and their impact and likelihood, 2026F-2029F



Source: Lumina Intelligence, July 2026

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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)

2020-2026

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

2018-2029F

Secondary external sources

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

Report Details



Format

Electronic PDF

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£3,450

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Access

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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