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STATE OF THE NATION 2026

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An edited treat, not an abandoned habit.

The UK's largest hospitality consumer report of 2026 - how Britain is trading down without quitting hospitality, and the four mindsets that will shape spend in the year ahead.

Research sample: 2 April – 5 May 2026 · 29,190 UK hospitality guests



Guest insights that **grow your business.**

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The headlines from 29,159 UK hospitality guests.

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Where operators should focus to protect frequency in 2026.

EXECUTIVE SUMMARY

The 2026 question is not 'will they pay more' - it's 'will they come back'.

Habits are changing.

Consumers are not quitting hospitality - they are editing it. The winning brands are leaning into personalisation, digital loyalty and experiential dining to protect frequency.

Frequency is the battleground.

Spend per visit is holding up. Visit frequency is where the commercial risk now sits.

No 'one-size-fits-all'.

Four very different guest mindsets emerged, each needing a different reason to walk through the door.

Consistency is king.

Consistently excellent service drives loyalty in this cautious market more often than any offer - with the exception of the younger demographic.

Trust is what converts.

Previous experience and personal recommendation motivates the majority of visits.

62%

of consumers expect their eating and drinking habits to stay the same over the next 12 months.

42%

now choose a venue based on a previous experience - the biggest single influence in 2026.

4

distinct guest mindsets shaping who comes back, how often, and what gets them there.

Reward RESEARCH



On average, **62%** of customers visiting a hospitality venue will only visit once per year - **that's 33% of sales.**

This is significantly more impactful for **restaurants**, with **73%** of customers only visiting once accounting for **50% of spend.**

29,190 voices. Active hospitality consumers. Cross-sector coverage.



RESEARCH SAMPLE

All responses came from active hospitality consumers, with at least 77% having visited a UK hospitality venue within the previous two months - making the data directly relevant for operators in 2026.

- All adult age brackets
- Household income bands £20k to £100k+
- Multi-site brand audiences for:
 - Fast, casual and premium dining
 - Pubs, bars and late night
 - Experiential leisure

THE HOSPITALITY LANDSCAPE

Economic pressure, global instability and the impact of AI on job security are stacking up to create a low-confidence consumer era.

At Peach 2020's Autumn 2025 event, Peter Martin flagged that the picture for guests is fragmented, generating a diverse range of preferences and behaviours. Our 2026 research confirms it.

Four very different mindsets are uncovered in this report - but every hospitality business has its own unique mix. Understanding that mix shapes everything: from menus, pricing and staff training to communication channels and design.

The big trends

Four macro shifts are reshaping how the UK is eating and drinking out in 2026.



01

An edited treat

Spend per visit is holding up.
Frequency is not.

02

The moment, not the meal

Consumers see going out as an occasion and increasingly plan in advance.

03

Trust drives venue choice

75% of decisions now ride on previous experience and personal recommendation.

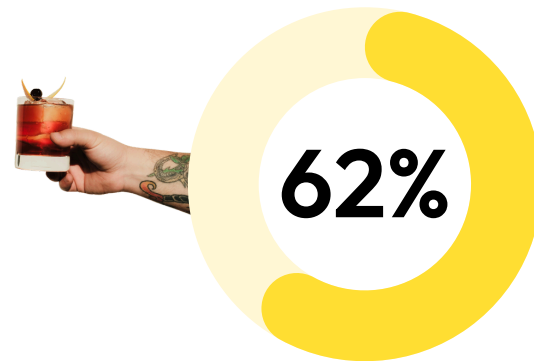
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Loyalty is fragmented

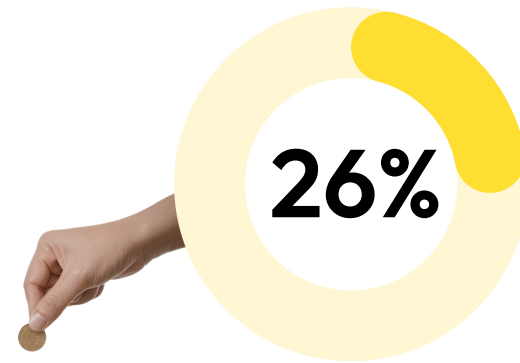
It's the brand relationship behind the connection, not the scheme itself, that drives repeat visits.

An edited treat, not an abandoned habit.

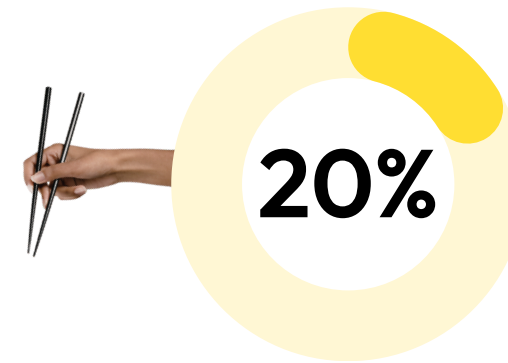
2025 → 2026 £2 price increase on a main was enough to push many diners to other brands. In 2026, responses to the economic squeeze are more fragmented.



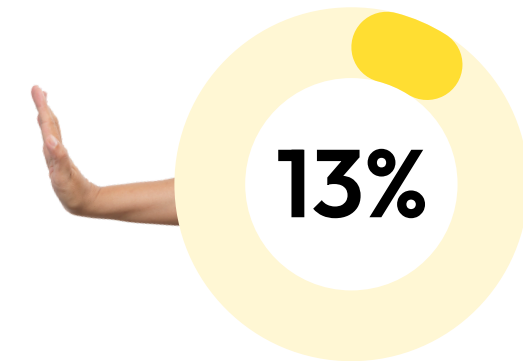
Expect their eating and drinking out habits to stay the same over the next 12 months



Would visit less often but spend the same per visit when money is tight



Would choose cheaper venues - driven hardest by students (42%) and under £20k earners (27%)



Would stop going out altogether if money was tight - only 1 in 10 of those with a household income of £100k+

Reward RESEARCH

2% of customers visit 20+ times per year. Those High frequency/Loyal Customers deliver **20% of spend**, with **pubs and bars** seeing this increase to **33% of spend**.

WHAT DOES THIS MEAN FOR OPERATORS?

Consumers aren't seeking the lowest price. They're seeking justification for their spend, and that comes primarily from brilliant in-venue experiences.

"Friendly" is the #1 descriptive word in the entire dataset - appearing in 14.2% of open responses. Recognition is the most cost-effective value lever in hospitality.

OPERATOR ACTION

Segment your value strategy: Premium audiences need occasion-led justifications on spend. Value-led audiences need accessible offers and clear affordability cues.

Hospitality isn't just the meal – it's the moment.

WHY PEOPLE GO OUT

63% Catching up with friends

43% Celebrations and special occasions

41% Family time

31% Treating yourself

HOW THE VISIT GETS TRIGGERED

50%

Planned
in advance

25%

Spontaneous

10%

Offer-led

Younger groups are the exception – Gen Z dines more spontaneously and reacts most strongly to peer prompts compared to other age demographics.

THE 2026 SHIFT

Visits are increasingly planned and intent-driven. Hospitality visits require more justification as spare cash is tight – making the occasion, not just the menu, is the thing operators need to sell.



45% of 18-24s visit weekly or more – **one of the highest** frequency audiences in the data.



When 43% of guests are visiting to celebrate something meaningful, and another 63% are catching up with people they care about, that context changes everything. **Operators who use visit occasion to shape the whole guest journey, not just the reservation, are the ones building the kind of loyalty that actually holds.**

OPERATOR ACTION

Design for the occasion, not just the menu. Capture more occasions beyond birthdays. Use advanced-booking campaigns for planners and urgency messaging for the spontaneous.

Previous experience drives 42% of venue choices.

Up from a story dominated by online reviews and discounts in 2025.

42% Previous experience

33% Recommendations from friends/family

10% Discounts

4% Social media

“We're always remembered, so we don't even have to really say what we want. Most of the time the staff remember what we order every week.”

UK pub guest, open response

75% OF VENUE CHOICES NOW RIDE ON TRUST

Previous experience plus personal recommendation account for three-quarters of how Britain now chooses where to eat and drink out.

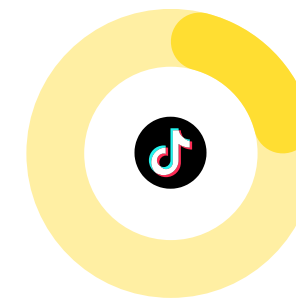
The competitive battleground in 2026 is far more about operations than promotions.

Recognition is the most cost-effective loyalty mechanic in hospitality, yet few brands nail it as a focus. Consumers repeatedly call out being remembered as a reason they come back.

MOST INFLUENTIAL SOCIAL CHANNELS WHEN CHOOSING A VENUE:



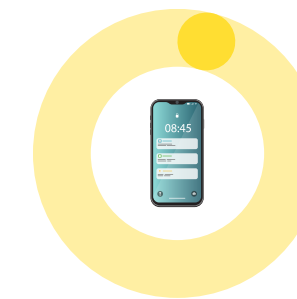
Instagram
44%



TikTok
25%



Facebook
13%



Multi-social
7%



Google
2%

OPERATOR ACTION

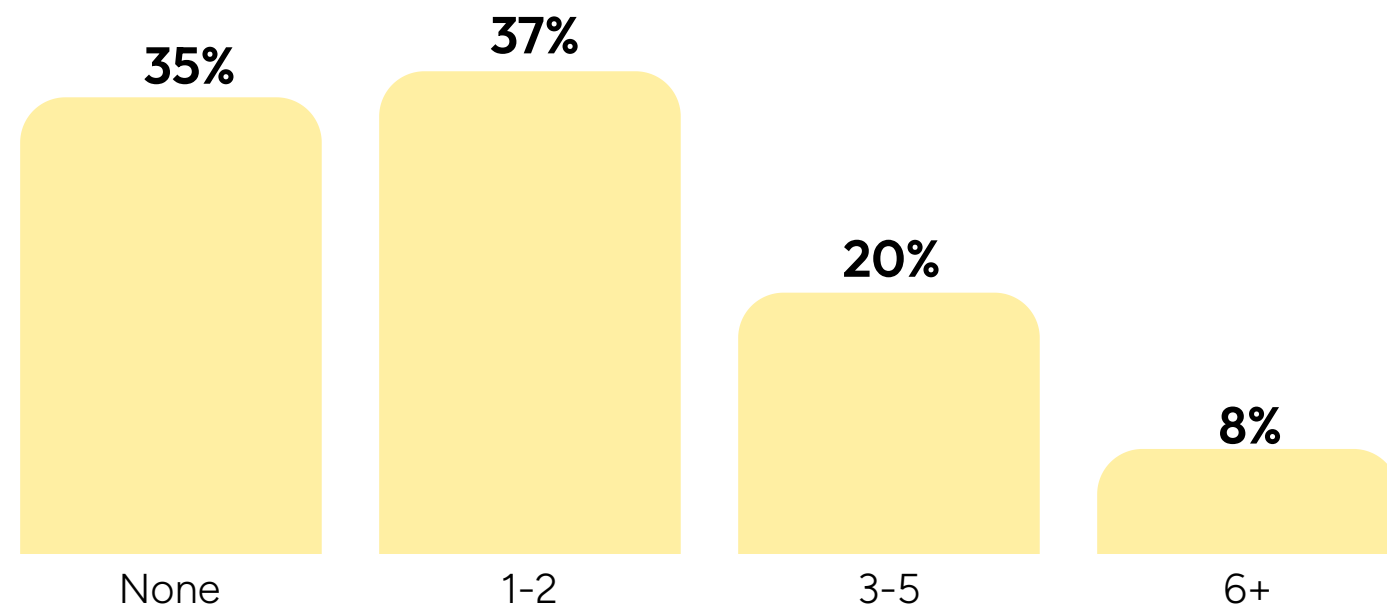
“If a guest had a brilliant time, we know it - the feedback score is sitting right there. So why are we sending them the same re-engagement email as everyone else? That guest is your most valuable acquisition channel. A well-timed reward, a referral mechanic, a personalised reason to come back - these aren't ‘nice to haves’. When every cover counts, turning your happiest guests into advocates is one of the highest-return things you can do.”

guestwise

Guest loyalty matters in 2026 - but is earned differently.

Brand-level engagement comes out on top more often than scheme points.

THE NUMBER OF LOYALTY SCHEMES UK GUESTS ACTUALLY USE:



2025 → 2026

In 2025, 62% said they'd visit more for a general discount vs 54% for loyalty incentives.

The 2026 research clarifies why - it's clear from the commentary that the brand relationship behind the scheme, not just the scheme itself, is what helps drives repeat visits.

65+ ARE THE MOST LOYALTY-ENGAGED GROUP

40% of over-55s engage with 1 to 2 schemes - the highest of any age group. But 37% still engage with none, leaving real headroom for growth in this age group.

18-24S ARE THE LOYALTY WHITE-SPACE

43% of under-25s engage with no scheme at all - yet 45% dine out weekly or more. Brands with high penetration with Gen Z and Gen A could achieve cut-through with schemes designed to appeal specifically to them.

BRAND LOYALTY IS OMNICHANNEL

26% of highstreet brand-lovers over-index on loyalty scheme engagement, with Nando's and PizzaExpress as their "most visited" coming out on top.

KAM

"Hospitality brands can't rely on loyalty schemes alone to create superfans. Discounts and points may drive repeat visits, but emotional connection is what drives advocacy, spend and long-term loyalty. In fact **customers who feel emotionally connected to a brand have a 306% higher lifetime value than those who don't.**"



The four mindsets

Using response data alongside sentiment analysis, and bringing in the knowledge of our industry experts, we've set out four distinct guest mindsets that can be used to represent the diversity in the UK hospitality scene today.

42% of students switch venues when money is tight, versus 10% of retirees. However, targeting by age demographics alone risks oversimplifying, leaving money on the table.



01

Visual Explorers

Frequent • trend-led • low attachment

02

Instagram Planners

Higher income • occasion-led • visual planners

03

Experience Loyalists

Consistency • trust-led • retention sweet-spot

04

Value Hackers

Loyalty-responsive • deal-led • across age groups

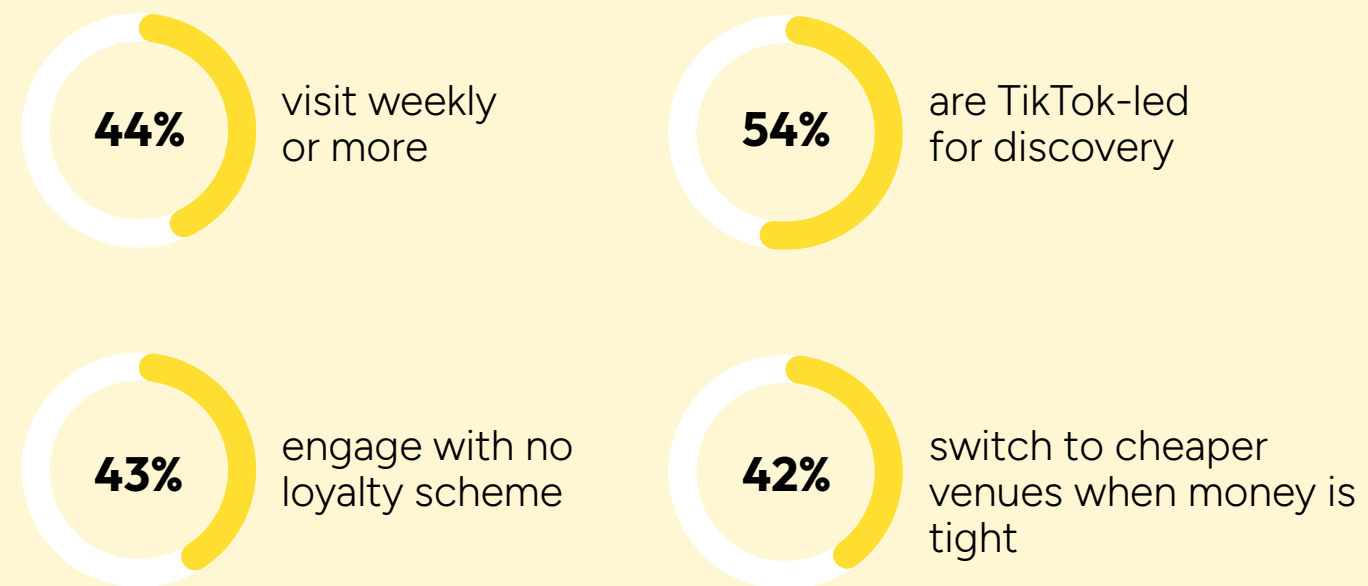
Visual Explorers

01

18-24 age range. High frequency. Low brand attachment.

Cultural relevance wins the repeat business. This 18-24 audience is highly active but lightly attached - the brands that stay culturally relevant and socially shareable will win.

THE SNAPSHOT



BEST CHANNELS

  #1 TikTok, #2 Instagram Reels, #3 Influencer / UGC, #4 Referral campaigns

WHAT DRIVES THEM

- > Trends, new openings and peer recommendations
- > Affordability without sacrificing the experience
- > Social proof - content they can share back
- > Flexible, instant rewards over points-based schemes

OPERATOR ACTION

Run referral-led, social-first campaigns designed to be shared.
Use time-limited trend activations rather than blanket discounting.

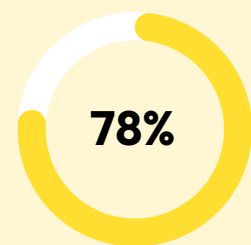
Instagram Planners

02

Mid-life, mid to high income. Monthly is the base - weekly potential.

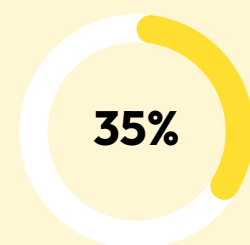
Visual premiumisation builds loyalty. A desirable audience for commercial opportunity - personalisation and perceived value drive frequency, not discounting.

THE SNAPSHOT

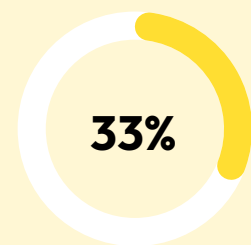


of £81k-99k* earners lean on Instagram for discovery

*Household income

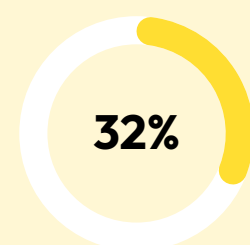


actively engage with 1-2 loyalty schemes (35-54 age range)



of £100k+* earners would visit less but maintain spend per visit

*Household income



of all guests expect a bill of £80-£150; correlating strongly with highest

BEST CHANNELS



#1 Instagram • #2 Email / CRM

#3 Paid social • #4 Personalised loyalty

WHAT DRIVES THEM

- > Catching up with friends and treating themselves
- > Planned social occasions and milestone moments
- > Choosing 'high value' - over going cheap
- > Premium, seasonal and limited-edition menu drops

OPERATOR ACTION

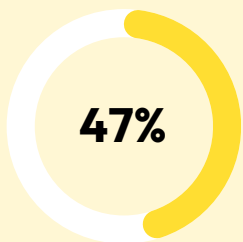
Personalise offers and reward repeat visits with tailored incentives. Promote occasion-led premium experiences and seasonal moments over discount-led messaging.

Experience Loyalists

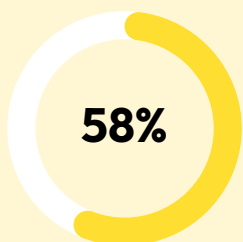
55+. Trust-led. Every visit counts.

Win them once and you could have them for life. This audience is highly valuable and highly retainable. Strong, consistent experiences and personal recognition outperform aggressive discounting.

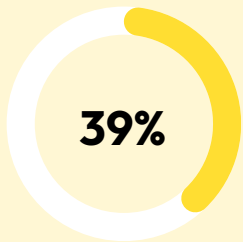
THE SNAPSHOT



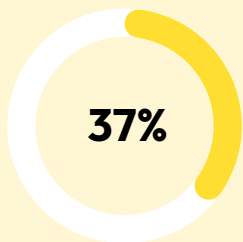
of over-55s dine out weekly or more



of retirees name previous experience as the #1 venue driver



of 55+ engage with 1-2 loyalty schemes - the highest of any age group



of 55+ engage with no scheme - significant untapped headroom

BEST CHANNELS



#1 Email / CRM • #2 Loyalty offers
#3 Instagram for the affluent slice

WHAT DRIVES THEM

- > Familiarity, trust and warmth
- > High quality memorable experiences
- > Planned occasions and family celebrations
- > Feeling personally recognised by staff

OPERATOR ACTION

Focus on service consistency and recognising guests' personal preferences. Target the 55+ untapped slice with an accessibly priced loyalty offer to drive frequency; a great deal could position your brand as a new 'favourite'.

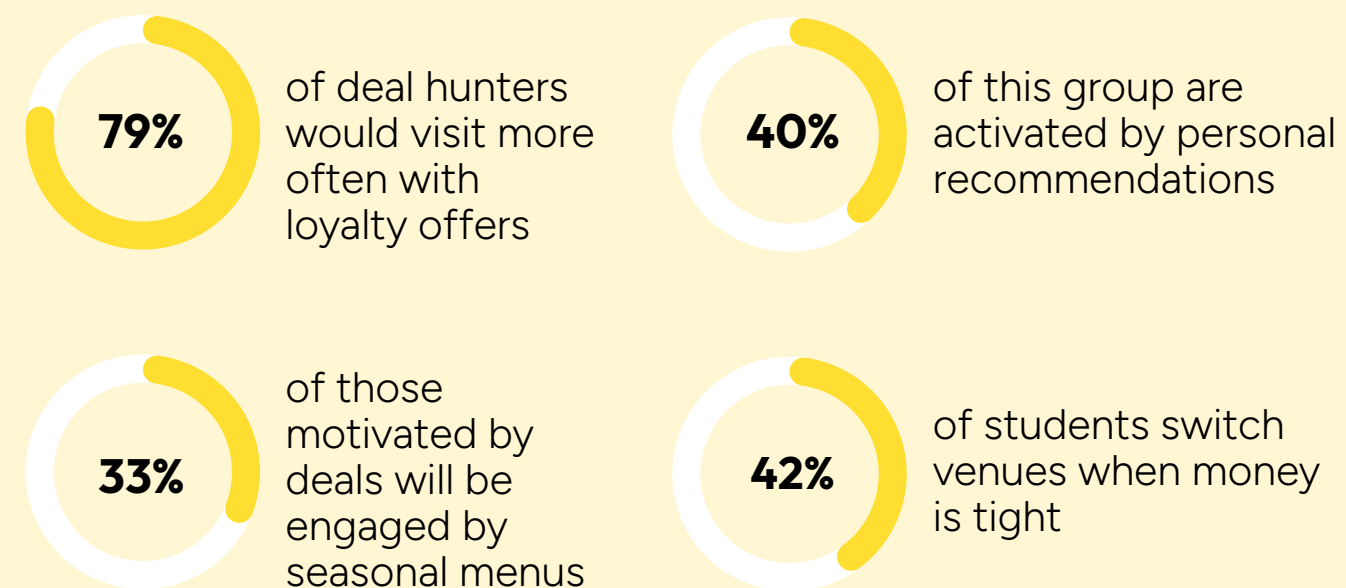
Value Hackers

04

Behaviour, not age. Lean, lower income and students. Deal-activated.

For the right deal, they'll come to you. Loyalty schemes with a clearly visible value mechanic unlock visits with this group - the offer needs to be the headline.

THE SNAPSHOT



BEST CHANNELS



#1 Email loyalty • #2 Push promotions
#3 Bundle messaging • #4 Discount creative

WHAT DRIVES THEM

- > Clear, visible offers and bundled value
- > Fixed price or set menus and pre-theatre style deals
- > Refer-a-friend mechanics with an instant reward
- > Seasonal hooks paired with a price cue

OPERATOR ACTION

Lead the message with the offer. Build clear loyalty schemes with visible value. Combine set menus, bundles and fixed prices with a low-friction redemption journey.

The winning formula for hospitality brands in 2026? **Value + experience.**



01

Consumers are still going out.

But they are becoming more selective, value-conscious and occasion-led.

02

Emotional value matters as much as financial value.

Warmth, recognition and consistency are what justify the spend.

03

Loyalty and CRM protect repeat visits.

Brand relationship matters more than scheme points - design for behaviour, not demographics alone.

04

Frequency is the biggest commercial risk.

Ensure your value proposition is right for your guests - focus on the in-venue experience, not just price.

05

Trust and previous experience outperform other triggers.

75% of venue decisions ride on previous experience and personal recommendation.

06

Marketing and Operations must collaborate.

TikTok for discovery. Instagram for aspiration. CRM for retention. A high-performing operational team to secure the next visit.

The 2026 challenge: create compelling reasons to return more often - not just reasons to spend more.

Turn the data into your 2026 plan.



Every business has its own mindset mix.
We help operators listen to guests and **take action**.

Talk to us about your 2026 guest strategy
www.125insights.com/contact-us/



To see how 125 Data & Insights can deliver
guest insights that grow your business, contact:
Luci Cunningham on luci.cunningham@125insights.com

01

Understand your guest

Listen to the trends in your customer feedback
and monitor your own competitor landscape.

02

Take action in real time

Empower your teams to take decisive
action with trustworthy insight to back it up.

03

Ops as your loyalty engine

Create operational consistency across sites with
holistic, measurable performance metrics.