



Insight by Zonal, Powered by CGA by NIQ

More Than a Meal

Exclusive Zonal and CGA by NIQ
insights into the best ways to
elevate guests' experiences
when they eat and drink out

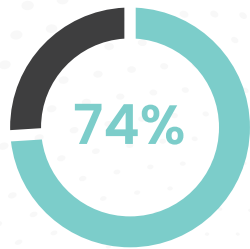
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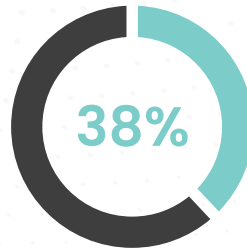
GO Technology Report, [August 2025](#)



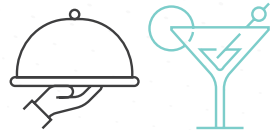
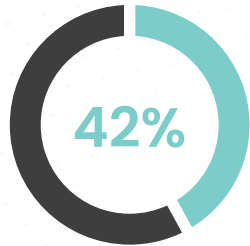
Exceeding expectations in drinking and dining: Key numbers



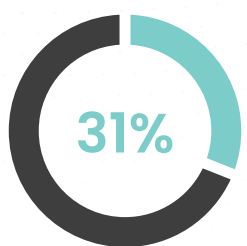
Of consumers say they would **visit a venue for an elevated experience**



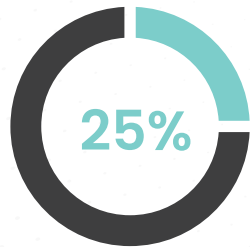
Say elevated experiences appeal because they like to **treat themselves**



Consider venues' **experience or atmosphere** when they choose where to eat or drink

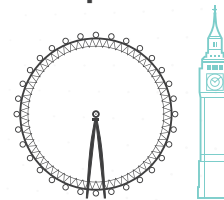


Would visit a venue for a **tasting menu—the top type of experience**

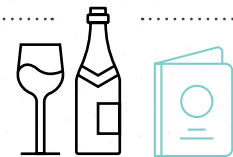
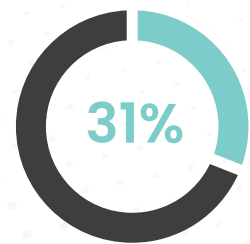


Would visit a venue for **games**

+10pp



London consumers are 10 percentage points more likely to visit a venue for an elevated experience



Are likely to **recommend** a venue to others after elevated experiences



What elevates an experience?

There are many ways to lift guests' dining and drinking experiences beyond the ordinary, and our GO Technology research reveals consumers' favourite options (see below).

These are topped by tasting menus, which can help guests feel they are getting something special. They provide much more than a standard meal, and the variety, quality and quantity of the food on multiple plates creates memorable experiences. Tasting menus can also demonstrate good value for money, even when premiums are paid.

Bottomless brunches, which have soared in popularity in recent years, are another leading option, thanks to their novelty and perceptions of good value. There is also strong interest in games like digital darts or pub quizzes, reflecting the rapid rise of competitive socialising and themed venues.

Ten top elevations

Which of these types of experience would you visit a venue for?

- | | |
|--|---|
| 1. Tasting menus (31%) | 6=. Attentive staff who remember me (19%) |
| 2. Games (25%) | 6=. Exclusive / limited-edition food (19%) |
| 3=. Bottomless brunches (24%) | 8. Personalised visits (14%) |
| 3=. A surprise from the venue (24%) | 9. Drinks masterclasses (13%) |
| 5. A well-curated atmosphere (23%) | 10. Cookery classes (12%) |

Elevations can also be achieved by tailoring experiences, including via surprises like a free dessert or drink on a special occasion, or personalised visits including seating preferences. Other popular aspects are related to fundamental parts of hospitality, like attentive service and atmosphere including décor and music. Events like drinks masterclasses or cookery classes have a part to play too, though their appeal is more limited.

Interest in food-led elevations reflects consumers' preferences for full-service restaurants when they want extra-special visits. Half (**49%**) of consumers say they would seek elevated experiences here, putting them comfortably ahead of food-led pubs (**40%**). Perhaps surprisingly, there is less interest on visits to higher tempo venues like bars (**33%**), drink-led pubs (**23%**) and nightclubs (**13%**).





Tastes vary

There are some wide variations in the types of experiences preferred by different demographics. For example, bottomless brunches have a much greater appeal to 18 to 24 year-olds, who are 14 percentage points more likely to seek them. As they often go out in groups, this age group also over-indexes for interactive games by 11 percentage points. Meanwhile, older consumers tend to be more interested in things like extra-attentive service. Gender-wise, women over-index for almost all elevations, and they are 15 percentage points more likely to choose bottomless brunches.

Elevated experiences are particularly popular in London. Consumers in the capital are 10 percentage points more likely than average to visit a venue for an elevated experience, twice as likely to be attracted by things like cookery classes and drinks masterclasses, and 7 percentage points more likely to be interested in tasting menus, exclusive dishes and games.

Londoners tend to have higher disposable incomes, and they go out to eat and drink more often. It doesn't mean they are easy targets, because they have so many venues to choose from. But it's no coincidence that so many elevated elements of hospitality are incubated or most visible in the capital.

Why exceeding expectations matters

GO Technology research consistently shows the importance of delivering on the fundamentals of guests' meals and drinks out. In a competitive market where spending is tight and loyalty is hard-earned, taking these experiences even further is the key to earning more visits and higher spend.

CGA by NIQ's spending data highlights the difficulty of the market as we enter the second half of 2025. Managed groups' sales have been broadly flat this year, and the confidence of both consumers and leaders is patchy. But while people are going out less, they are spending more when they do (see box). This means millions are willing to pay extra for something that exceeds their expectations of a pub, bar or restaurant visit. Three quarters (74%) of consumers now say they would visit a venue for an elevated dining or drinking experience.

This has a direct impact on decision-making. More than two in five (42%) consumers say they consider the experience or atmosphere provided by a venue while choosing where to eat or drink. This makes it more significant than other big drivers like the level of service (34%) and the quality of drinks (31%)—albeit less influential than core factors like the quality of food (68%) and value for money (64%). Experiences are several points more important to people in other age groups like 25 to 34 year-olds (47%), and to people who visit pubs, bars and restaurants at least once per week (50%).

These consumers have an appetite for new experiences, treats and social activities, and they want their visits to enhance their celebrations and generate memories (see box). Over the following pages we dive deeper into what they want and how to deliver it.

Quality over quantity

COVID-19 and the cost of living crisis that followed have had significant impacts on footfall in hospitality. But while pressure on spending has cut back visits, consumers still want to go out.

Their solution is to preserve quality over frequency. When asked how they prioritise their budget for eating and drinking out, 44%, and nearly half (49%) of those aged 25 to 44, say they are taking a low-frequency but high-quality approach. This is four times the 11% who want high-frequency but lower-quality experiences.

This trend is echoed by operators. CGA by NIQ's latest Business Confidence Survey reveals 60% of leaders have seen footfall decrease year-on-year, with just 15% reporting an increase. Even more (66%) say guests are buying fewer drinks. However, 61% said people were buying higher quality drinks—far more than the 13% who were choosing lower quality ones. Dive deeper into what they want and how to deliver it.



Five reasons why elevated experiences appeal

Why do elevated dining and drinking experiences appeal to you?

1. I like to try new experiences (42%)
- 2=. I like to treat myself (38%)
- 2=. They're good activities to do with friends / family (38%)
4. I like to create a memorable experience (31%)
5. It enhances a special occasion (27%)

The commercial case for beating expectations

Delivering above-average dining and drinking experiences can boost bookings, inspire recommendations, drive repeat visits, build loyalty and generate more spend.

Those are among the major benefits revealed by our latest GO Technology research, which makes a very strong case for operators to deliver visits beyond the norm.

Endorsements are among the most effective—and cheapest—forms of venue marketing, and around three in ten consumers say they would recommend a venue to others or invite friends and family along too (see list). Similar numbers would return for a visit themselves and there is high demand for booking these trips—which provides venues with some certainty on forecasting and opportunities to pre-sell.

Younger adults are likelier than average to provide these positive outcomes—perhaps because they are more likely to look for elevated experiences in the first place, and more likely to visit in groups. However, the benefits drop off sharply with age.

Older guests, who are frequently more demanding about their hospitality experiences, are less ready to visit again or recommend a venue to others and tend to focus instead on value and the quality of food and drink.

Ten big benefits

Which of these are you likely to do after visiting venues with an elevated experience?

- 1= Recommend to others (31%)**
- 1= Book in advance (31%)**
- 3. Invite friends / family (30%)**
- 4. Go again for a general visit (28%)**
- 5. Go again for a different activity / event (20%)**
- 6. Spend more than usual on food and drink (18%)**
- 7. Feel more loyal (16%)**
- 8. Spend time there after an experience (15%)**
- 9= Share experience on social media (13%)**
- 9= Spend time there before an experience (13%)**



Five turn-offs

Not all consumers seek to heighten their experiences when they go out. Often, guests are happy with the basics of hospitality, done well and at a good price.

In some cases, this is motivated by money. Nearly a third of those to whom elevated experiences don't appeal say they aren't worth the cost, and one in seven says they don't have the spare cash to enjoy them. But it's not always about price. Well over a third say they prefer to eat and drink without the distractions of extra elements and, to some, meals and drinks are purely functional.

New experiential concepts have been embraced by millions of consumers, but many people clearly remain happy with no-frills trips delivered well. There is also a cohort who are not yet aware of these experiences—a reminder of the need for attention-grabbing marketing.

Five top elevations

Why don't elevated experiences appeal to you?

- 1. I prefer to eat and drink without distractions (37%)**
- 2. They aren't worth the cost (31%)**
- 3=. My visits are mostly functional (15%)**
- 3=. I'm not aware of these experiences (15%)**
- 5. I don't have the disposable income (14%)**



Five steps to lifting experiences

1. Targeting special occasions

Consumers' spending may be tight, but they still want to go out to mark special occasions. Birthdays, anniversaries and other milestones put guests in the mood to elevate their experiences and spend more.

2. Engaging groups

Many of consumers' favourite experiences happen in groups, like competitive socialising, bottomless brunches and classes. These are good opportunities to pre-sell at the booking stage and generate word of mouth.

3. Personalising visits

Tailoring experiences to personal preferences can be a quick and low-cost way to lift guests' satisfaction. Small extras, preferred seats and attentive service from staff who remember previous visits are some of the ways to build loyalty.

4. Making more of food

Visits for games and bottomless brunches often revolve around drinks. Making food a more central part of the experience isn't always easy, but it's a great opportunity for extra sales in some venues.

5. Mastering the fundamentals

While tasting menus, games, surprises and extras all have widespread appeal, most consumers are easiest pleased by the fundamentals of hospitality. High quality food, drinks and service, delivered consistently and at good value, remain the top reasons guests come back.





The view from CGA

"Patchy consumer confidence and rising costs have made for a tough first half of 2025 in hospitality, but it remains a vital and much-loved part of consumers' lives. In this challenging environment, elevating people's experiences out of the ordinary is one of the best ways to loosen their spending and keep them coming back. Identifying the best ways to help them celebrate, enjoy treats and create memories in extra-special ways will be a major competitive advantage in the months and years ahead."

Karl Chessell, Business Unit Director - Hospitality Operators and Food, EMEA, CGA by NIQ



The view from Zonal

"This new research makes it clear that offering consumers an experience that goes beyond just a meal will boost bookings, drive personal recommendations, increase return visits, and build loyalty. It is, therefore, key to success."

"While there are many and varied ways of delivering such experiences, this insight shows that food still leads the way. Tasting menus, bottomless brunches, exclusive or limited-edition menu items, and cooking or drinks masterclasses all make the top 10. However, other popular ideas include attentive service and atmosphere showing that getting the fundamentals of hospitality right remains vital."

Tim Chapman, Chief Commercial Officer, Zonal



About the report

This report is based on figures from Zonal and CGA by NIQ's exclusive GO Technology survey of 5,000 nationally representative British consumers in April 2025.

For more information about the research, please contact info@zonal.co.uk