



Insight by Zonal, Powered by CGA by NIQ

The new age of pub service

Exclusive Zonal and CGA by NIQ insights into consumers' changing ordering habits, use of technology and enduring love of pubs

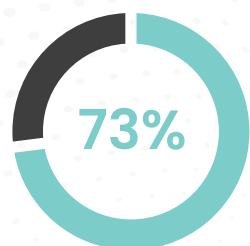
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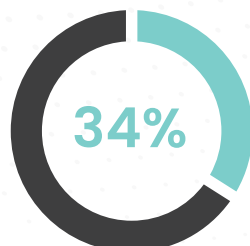
GO Technology Report, [December 2025](#)



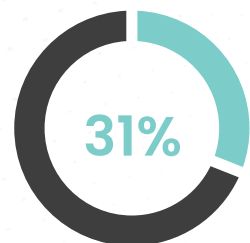
The new age of pub service: Key numbers



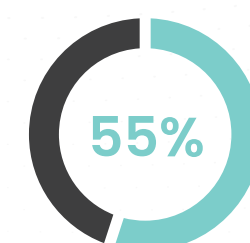
Of British adult consumers say they **visit pubs**



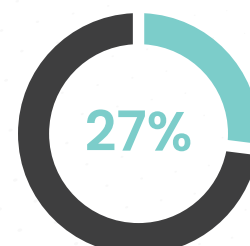
Prefer to **order and pay from their table via an app or website**, when in the pub, while **66% prefer to order at the bar**



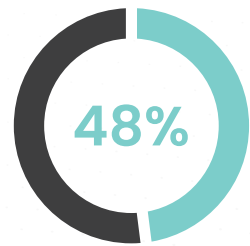
Prefer to **queue at a bar**, while **69% like to spread across the counter**



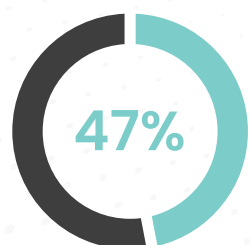
Of pub-goers want a **new style of service**—by booking tables, ordering digitally or queueing at the bar



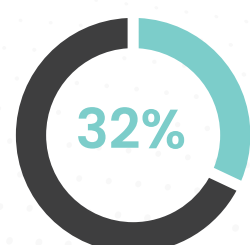
Like to **pre-book a table** in pubs, while **73% prefer spontaneous visits**



Say **locality is a main driver** of their visits to pubs—the top factor



Say the **chance to relax and unwind** is a key draw of pub visits



Of non-regular pub-goers say **noise and crowds** are the leading barrier to visiting more often



New order: How tech is changing service at three key stages

How do people visit pubs, and order when they do? For some, the common image is of spontaneous visits and a free-for-all as customers try to catch the eye of bar staff. But our latest research shows how technology and new preferences are changing things at three key stages.

1. Book it up

For a start, people are putting much more thought into their visits. While nearly three quarters (**73%**) say they prefer to spontaneously visit pubs, a significant minority of **27%**—increasing to **32%** of women—like to pre-book their tables. GO Technology research has tracked how bookings across hospitality have steadily risen in recent years, and been enabled by technology. In 2019, only **14%** of consumers said they were using their mobile devices to make bookings, but by 2024 well over half (**57%**) had made at least one advance booking in the previous six months.

New v traditional

27% Like to pre-book pub tables, while **73%** prefer to spontaneously visit



2. Tech transforms orders

Consumers' desire for ease and convenience is transforming their ordering habits too. Back in 2014, just 6% of consumers said they had used their mobile devices to pay for food and drink. Now, while two thirds (**66%**) of consumers still like to order at the bar, a third (**34%**) now prefer to do so from their table via an app or website.

One reason for this is the decline of cash in favour of cards. Another is the post-COVID rise of mobile-based ordering of food and drinks. Operators have stepped up their investment in digital ordering platforms, and they are now part and parcel of hospitality, achieving operational benefits like savings on payment times and the collection of guest data. They have substantially improved convenience for consumers—especially those who don't want to get up from their tables and wait their turn at a busy bar. This is particularly attractive for parents who don't want to leave their children, and they are **12 percentage points** more likely than average to prefer to order digitally.

New v traditional

34% Like to order at their table from an app or website, while **66%** prefer to order at the bar





3. To queue or not to queue?

Pub-goers who like to order in person have traditionally navigated their way through crowds at bar counters. But there's an emerging trend taking hold in pubs: orderly queues.

For now, the queuers are outnumbered two to one. Three in ten (**31%**) say they would prefer a line away from the counter, while **69%** opt for finding space spread along the bar. Gender variations are in line with preferences for using tech, with **27%** of men but **34%** of women preferring a queue. Regular pub-goers are also much keener to spread out at a bar than occasional visitors. However, orderly lines are becoming a familiar sight—to the disappointment of some traditionalists—and growing demand for tech and convenience means they may become the norm in time.

New v traditional

31% Like to wait in a line away from the bar, while **69%** like to spread out at the bar



These three big shifts—from spontaneity to booking, from ordering at bars to tables, and from bar scrums to orderly lines—add up to wholesale change in pub behaviour. Already, more than half (**55%**) of pub-goers surveyed said they would prefer new styles of service like phone-based booking and ordering or queuing—more than the **45%** who still prefer to interact in more traditional ways. As more and more digital natives emerge into adulthood, demand for this new way of doing things is likely to grow further.

Busting the Gen Z pub myths

Consumers' expectations of pubs are changing fast, and pub operators need to adapt. The shifts extend well beyond approaches to service and ordering, and Gen Z in particular, have a new set of preferences—but they're not what some people think. Here are six common misconceptions.

1. They don't drink

A lot has been made of Gen Z's relative sobriety. But while CGA by NIQ's research shows slightly lower alcohol consumption, the differences may not be as great as some think. Among those who don't regularly visit pubs, fewer than a quarter (**23%**) of 18 to 24 year-olds say it's because they don't drink alcohol. This is in line with most other age groups and highlights the need for pubs to make more of their ranges of no and low alcohol alternatives.

2. They don't stay out late

As well as drinking less, media commentary has claimed young adults are going home earlier. However, Gen Z stay out later than most. One in five (**20%**) typically go out from 10pm onwards—more than double the average of 9% among other consumers. Pubs can step into this late-night, high-tempo space, but they need to deliver the environment Gen Z want (see box).

3. They like grimy pubs

There's no truth in the idea that younger adults—especially students—have lower standards of hygiene in hospitality. One in six (**16%**) 18 to 24 year olds say poor cleanliness stops them visiting pubs more often—far more than the cohorts of 55 to 64 year-olds (**2%**) and those aged 65+ (**4%**). Cleaner, tidier pubs would attract more Gen Zers.

4. They're spontaneous

Students have been reckoned to be unconstrained types who go where the flow takes them. However, while **62%** say they like to keep their pub visits spontaneous, **38%** prefer to pre-book—11 percentage points more than the non-student average (**27%**).

5. They're super-confident

Among 18 to 24 year-olds who don't regularly visit pubs, **13%** cite not feeling welcome as a barrier—nearly double the average among all consumers. Even more say it's because they don't have anyone to go with (**14%**) or aren't familiar with the environment (**14%**)—5 and 9 percentage points above average respectively. It shows the need for pubs to be inclusive and encourage solo visits.

6. They're more likely to queue at the bar

Some think that the people most recently introduced to pub life are the ones driving change in ordering habits. But there's no sign of that, the number who prefer to wait in line at the bar exactly the same in both the 18-to-24 65+ age groups at **33%**.



What Gen Z want from their pubs

Analysis of what Gen Z like about pubs emphasises their different approach. This generation is much more likely than others to like fun, lively and exciting pubs, while older people seem more willing to accept venues that are rough around the edges. Gen Z also over-indexes for things like music and diverse events, and they are particularly concerned about safety—highlighting the need for all pubs to ensure security and inclusivity for all guests.

Ten top descriptors of pubs that make consumers extremely likely to revisit

Gen Z

Good value
Cosy
Quiet
Cheap
Reliable
Fun
Community-focused
Welcoming
Lively
Exciting

1
2
3
4
5
6
7
8
9
10

Millennial and up

Cheap
Good value
Quiet
Downmarket
Dated
Reliable
Scruffy
Shabby
Traditional
Trustworthy



The wide appeal of pubs

Changing drinking habits, competing leisure options, high costs, taxes... the pressures on British pubs go on. Nevertheless, CGA by NIQ's data shows well over 35,000 remain, and they continue to sit at the heart of the country's communities.

Why do consumers love pubs so much? Food and drink are obviously important: asked about their main drivers for visiting, **32%** and **22%** cite these. But GO Technology's latest research shows there's a very broad range of other reasons.

Convenience and community

'The pub' is often called 'the local' for good reason. Nearly half (**48%**) of consumers say locality is among the main drivers of their visits, making it the top factor. Previous GO Technology research has shown more than two thirds (**69%**) think pubs and other licensed premises play an important role in their communities, and with **16%** saying they visit because they want to support local businesses. There's a 'use it or lose it' attitude in many places.

Relaxation

Close to half (**47%**) of consumers say they visit pubs to relax and unwind, and the number peaks at more than half among 40- and 50-somethings. The pub is the third space away from home and work where British people take time out.

Culture and character

The long history of pubs is a major part of their appeal today, and **16%** of consumers cite culture and character as a main driver of their visits. These are even more important among older consumers and in city centres (see box).

Sport and games

Around one in six (**17%**) consumers say live sport is a top driver of visits—rising to **28%** of those who drink out weekly. This grows even further during big sporting occasions like football's World Cup, when pubs provide a special communal atmosphere that can't be recreated at home. A smaller number (**5%**) say pubs' own games, like pool and darts, are a factor in their visits.

Special occasions

Pub footfall is powered by habitual, casual visits. But these are also the places people go for special occasions, and **14%** cite parties and celebrations as a top driver. Pubs are where life's landmarks are marked and memories are made.

Beyond these reasons is a long tail of other visit motivators, like after-work drinks (**15%**), seeing other regulars (**13%**), events including quizzes and music (**11%**) and inclusivity (**7%**)—all part of the rich tapestry of pubs' appeal.



Pub-goers in their own words

"The pub's a reliable place where you always feel welcome—as an individual and as part of a community" Older consumer

"The pub is a community hub—the third space and a very important part of everyone's lives." – Gen Z consumer

"I'm not that old but crave the pub culture there used to be. Sitting at the bar, engaging staff—that's what keeps people there. Most are now too transactional." – Older consumer

"It's a place you can go with your friends or family to have fun and food and meet new people" – Gen Z consumer

Lifting the barriers

Pubs have a remarkably broad appeal, but significant numbers of people still don't visit. There are many reasons, led by atmospheres that some people find off-putting (see box). Noise and crowds have long been part of the pub experience, and finding quieter spaces often isn't easy, but operators that are able to create some may well be able to attract more people.

Reduction of alcohol intake is also putting a cap on pub visits, so more emphasis on soft or hot drinks or no and low alternatives may help to keep pubs relevant to moderators and abstainers. More concerning is the **7%** of consumers who say they don't visit more often because they don't feel welcome.

What stops you from regularly visiting pubs?

- 1. They can be noisy / crowded (32%)**
- 2. Don't like being around drunk people (24%)**
- 3=. Prefer other types of venues (23%)**
- 3=. Don't drink alcohol (23%)**
- 5. Don't enjoy the atmosphere (21%)**
- 6. Just haven't got round to it recently (11%)**
- 7=. Cleanliness standards (10%)**
- 7=. Don't have anyone to go with (10%)**
- 9. Don't like the food (9%)**
- 10=. Don't feel welcome (7%)**
- 10=. No pubs local to me (7%)**





The view from Zonal

"Every generation influences change and Gen Z are no different. This new report demonstrates how the pub habits of the younger generation, such as leading the way with tech-based preferences, differ from older generations.

"People's expectations of pubs are changing, and operators need to consider the needs of its customers and adapt to their preferences. This research shows that alongside adopting tech solutions, ensuring the security and inclusivity of their customers, offering more alcohol-free options, keeping their doors open later, and prioritising cleanliness, will help lure Gen Z through their doors."

Tim Chapman, Chief Commercial Officer, Zonal



The view from CGA

"The demise of the pub is easily overstated. CGA by NIQ's data shows long-term closures have slowed, and groups' sales have outpaced other parts of hospitality throughout 2025. Demand for pubs is still high, and they are core to the UK's social, economic and cultural lives.

But there's no doubt that this British institution is changing—perhaps faster than ever before. Evolving consumer habits are forcing it to adapt, and this latest research shows the way guests order and book is transforming. Operators also remain under enormous pressure from rising costs. Nevertheless, for businesses that respond nimbly to shifting behaviour and can broaden their appeal still further, the long-term outlook for pubs remains positive."

Karl Chessell, business unit director - hospitality operators and food, EMEA, CGA by NIQ



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 October 2025.

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