

Evolving High Tempo Occasion Report 2026

Exploring the diverse types of High Tempo
occasions in the GB On Premise



Methodology

- 2000 sample consumer survey of High Tempo visitors in Great Britain
- Including proprietary data from:



Outlet Index



BrandTrack



OPUS

TRADING
INDEX

TradingIndex



What will you learn from the 2026 High Tempo report?

- Which **types of high tempo occasions** are most popular among consumers and what are their motivating factors?
- How has **frequency and choice of venue** for high tempo occasions changed compared to last year?
- How does consumers' **category consumption** over the course of a high tempo visit change? What is the **importance of discounts and promotions**?
- How have **daypart and weekday visitation** evolved? What is the length of a typical visit and what are the reasons for engagement with **pre- and post-drinking**?
- Deep-dive into consumers' most recent high tempo visit – reasons for visiting, **need states and decision-making process**



What's **New** in the latest edition?

- How consumers **decide** where to go out for high-tempo occasions – **influences** from friends, lifestyle and social media
- Popularity of **ticketed events** and their knock-on effect in the On Premise – a **threat or opportunity**?
- Emerging **competition of pubs as high tempo spaces**, shifting preference from late night bars – factors motivating venue choice
- What's the role played by **food** during a high-tempo occasion?
- **Alcohol moderation** and how this impacts **type** of occasion and **frequency**
- Which **dayparts** are seeing growth in visits and therefore sales?
- Which **categories are winning** by daypart? How **discounts and promotions** can be most effectively targeted to boost sales and visitation



Compare the diverse forms that high tempo occasions take in the On Premise.

Understand how and why consumers are making their decisions of timings, venue type and preferred atmosphere, **informing marketing and targeting practices to drive footfall**

Explore further with deep-dives into ticketed events, live music and the rise of pubs as a preferred space for high tempo occasions, as well as how the role of food could be **transformative to bringing incremental revenue to your venues**

Learn about what would encourage less-engaged consumers to go out for high tempo occasions and how visitation habits are changing. Insights into the effects of factors such as alcohol moderation, social media and lifestyle changes can help you **tailor your offer and build a successful growth strategy**

While most segments in the market have seen year-on-year site growth, losses among larger food-led segments and nightclubs bring the total market into net site loss

Latest
market
update

As of September 2025, there were

99,296

licensed sites in Great Britain.

Over the past year,

- 572

net sites have been lost,
seeing the market decline by

- 0.6%

Sector	QoQ % change	YoY % change
Bar Restaurant	3.6%	2.4%
Large Venue	-0.1%	1.3%
Bar	0.8%	1.3%
High Street Pub	0.5%	0.5%
Community Pub	-0.2%	0.2%
Casual Dining Restaurant	2.0%	-0.1%
Food Pub	-0.2%	-2.0%
Restaurant	2.2%	-2.7%
Nightclub	-2.9%	-4.2%

Latest
market
update

In 2025,

29%

of High Tempo visitors say
they are going out for this
occasion **more frequently**
than a year ago

In 2025,

22%

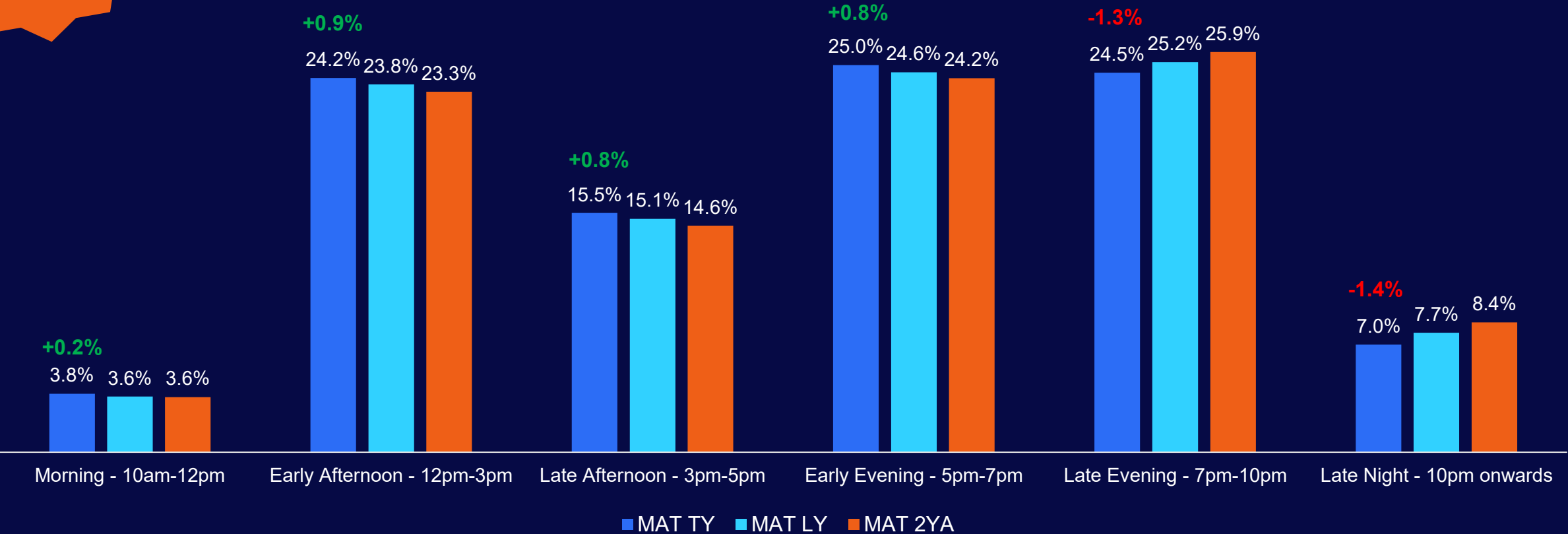
of High Tempo visitors go out
as early as **mid-afternoon**
for this occasion

+9pp vs 1 year ago

Later dayparts are continuing to lose share to earlier slots – Early Evening is now the largest timeslot, surpassing Late Evening by half a percentage point

Latest market update

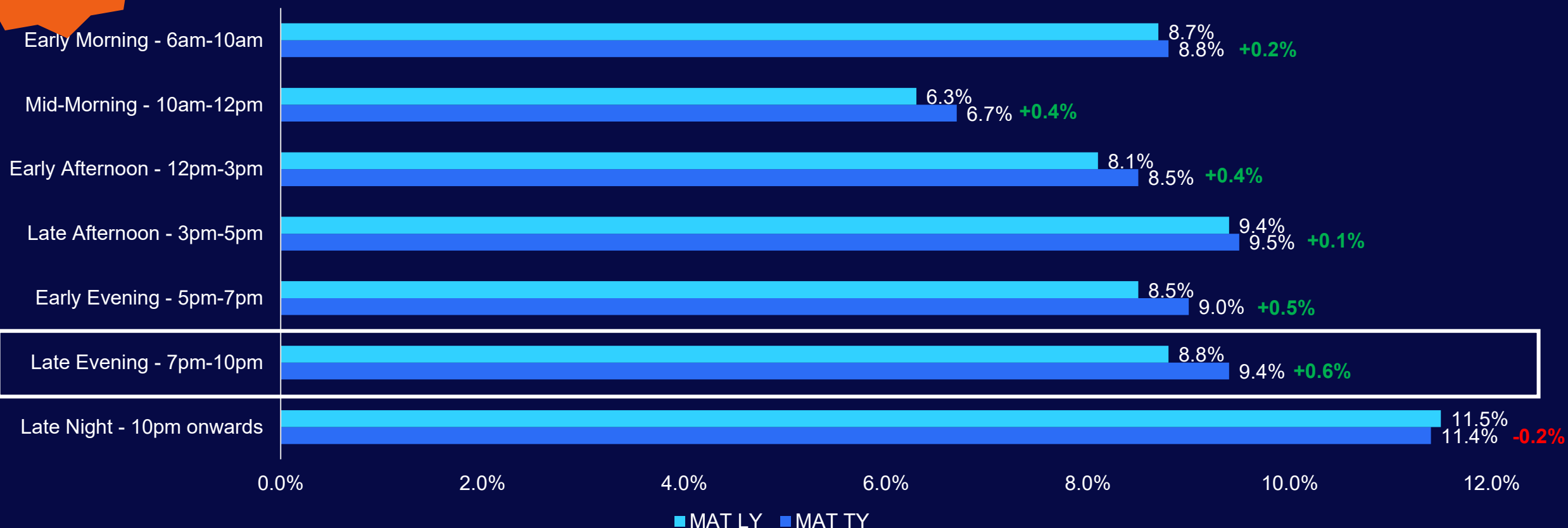
Wet & Dry Sales Share by Timeslot | 2YoY



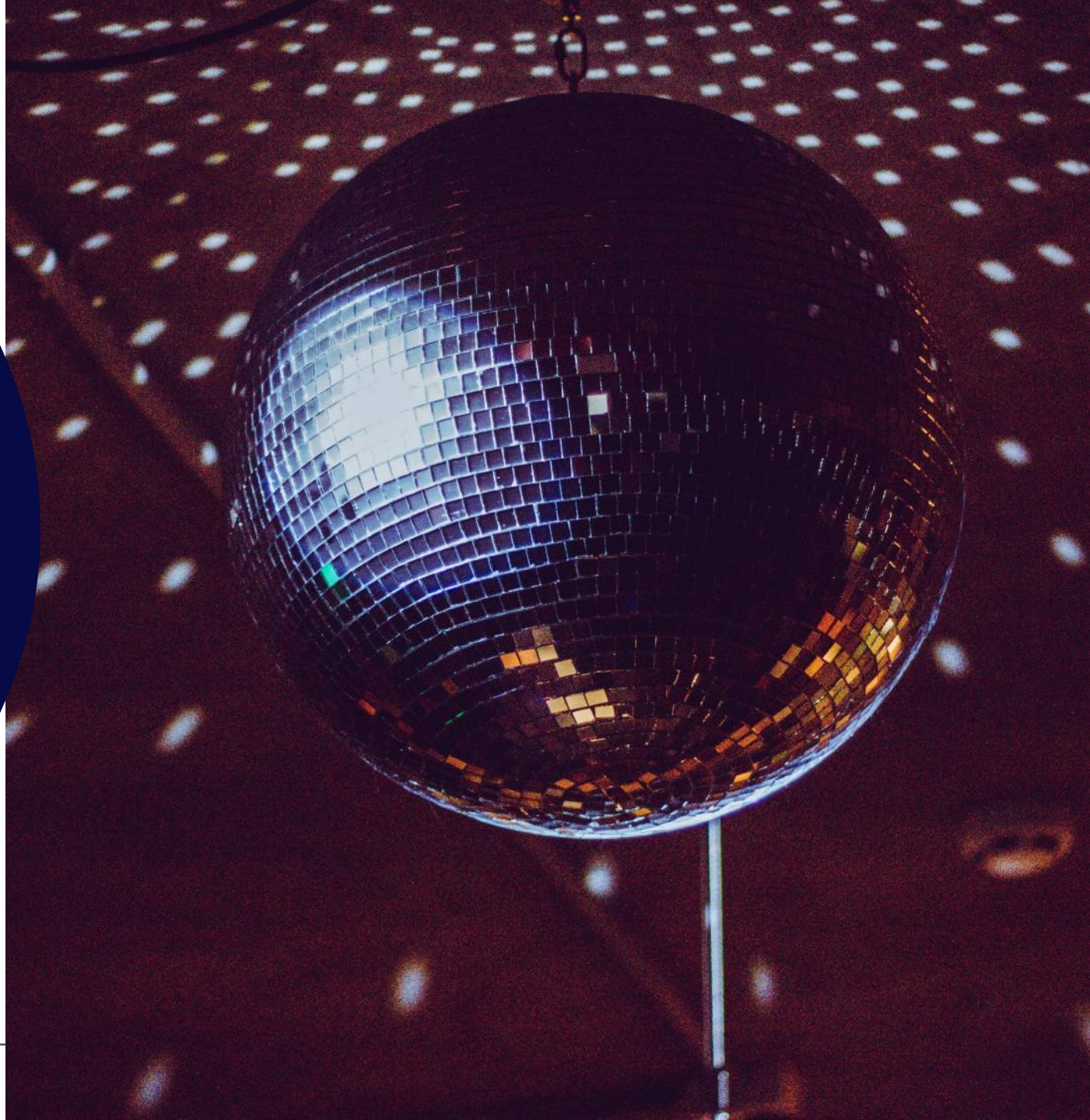
Operators are offering more promotions and discounts compared to a year ago, with an emphasis on Late Evening to boost footfall

Latest
market
update

Wet & Dry Sales Value (£) Share of Promotions & Discounts



Example report output



The high tempo occasion continues to move away from drinks-only events within the late-night scene

From last
year's
edition

Which of the following 'high tempo' occasions would you typically go out for?
Indexed vs last year



18-34 year olds over-indexes

University or college social events	11%
Socials (e.g. sports team socials)	4%
Pub golf	3%

35-54 year olds over-indexes

Drinks throughout the day	5%
Bottomless / boozy brunch	5%
Pub / bar crawl	4%

There are clear benefits to extending appeal earlier on in the day, such as increasing dwell time and spend – focus on appealing the extended visit to Gen Z to reap the biggest rewards

From last
year's
edition

Say you were to go out to eat or drink earlier than you typically would for a high tempo occasion, which of the following best describes what you are likely to do?

I would go out earlier and
stay out as late as I
typically would
(a longer visit)

56%



+7pp for Gen Z

I would go out earlier and go
home much earlier than I
typically would
(a shorter visit)

44%



Contact Us

To learn more or to purchase the report, please get in touch to speak to a member of the team.



Nik Xypolitos

Client Director

Nik.Xypolitos@nielseniq.com



Grete Ovaldaite

Client Business Partner

Grete.Ovaldaite.Consultant@nielseniq.com



Antonia Craven

Client Manager

Antonia.Craven@nielseniq.com