



Insight by Zonal, Powered by CGA by NIQ

The social value of hospitality

Exclusive insights, produced by Zonal and CGA by NIQ in partnership with UKHospitality, into why pubs, bars and restaurants matter so much to Britain's consumers and high streets.

Zonal

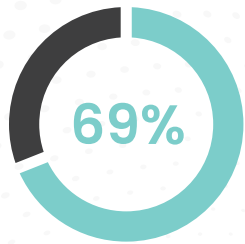
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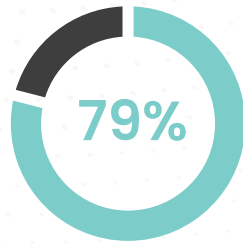
GO Technology Report, [October 2025](#)



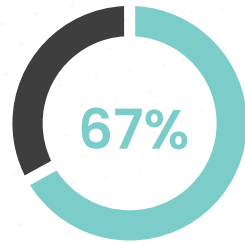
Hospitality at the heart of the community: Key numbers



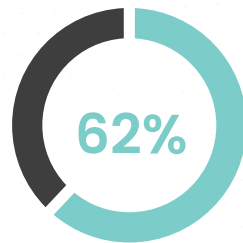
Say hospitality plays an **important role in their communities**



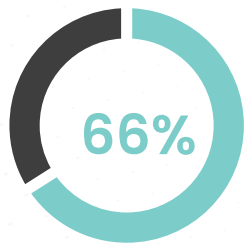
Of 25 to 34 year-olds say hospitality plays an **important role in their communities**—10 percentage points more than average



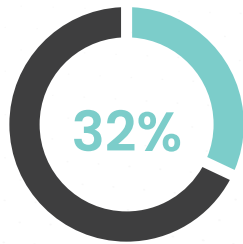
Say **eating and drinking out** is as important to their social life as it was a year ago



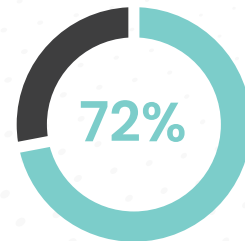
Of city centre residents say their local high street is **better than it was a year ago**—compared to only **21% of rural residents**



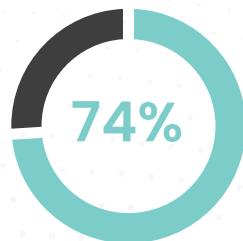
Of those with a favourite high street venue say it is a **pub, restaurant or other hospitality site**



Say being **remembered by staff** is the thing that makes a venue special—the top factor



Say that hospitality is a **good local employer**



Say hospitality **needs and deserves greater government support**



Five reasons hospitality matters

Despite economic challenges and changes in their leisure habits, Britain's consumers have an enduring passion for pubs, bars, and restaurants. These are the places where connections and memories are made and their value stretches far beyond the food on the plate and drink in the glass. These are five reasons why hospitality matters so much.

1. The heart of high streets

Tight consumer spending and competition from internet retailers have led to a steady stream of shop closures on Britain's high streets. It has damaged streets' vibrancy, and **43%** disagree that their local high street is now better than it was a year ago—notably more than the **31%** who agree. With the right support, hospitality can fill the gap.

2. Creators of jobs

Hospitality has major employment as well as social benefits. Nearly three quarters (**72%**) of consumers agree the sector is a good local employer. The industry is particularly important to younger adults, whether starting a long-term career or earning money in the short-term.

3. Central to our communities

Consumers know that pubs, bars and restaurants bring local people together. More than two thirds (**69%**) agree these places play an important role in their communities. Pubs and other hospitality venues are more than businesses—they're community hubs.

4. Familiar friends

Consumers' love for hospitality often centres around a favourite, trusted venue. Nearly two thirds (**64%**) of consumers say they have a favourite local business that holds special significance to them, with hospitality venues top among them (see page 4).

5. A core part of our social lives

Hospitality provides opportunities for socialising that no other sector can match. Our research shows its importance in connecting with friends and family is undimmed, and two thirds (**67%**) of consumers agree eating and drinking out is as important to their social life as it was a year ago. Only **11%** disagree—likely because tight spending has forced them to reduce their visits in recent times.

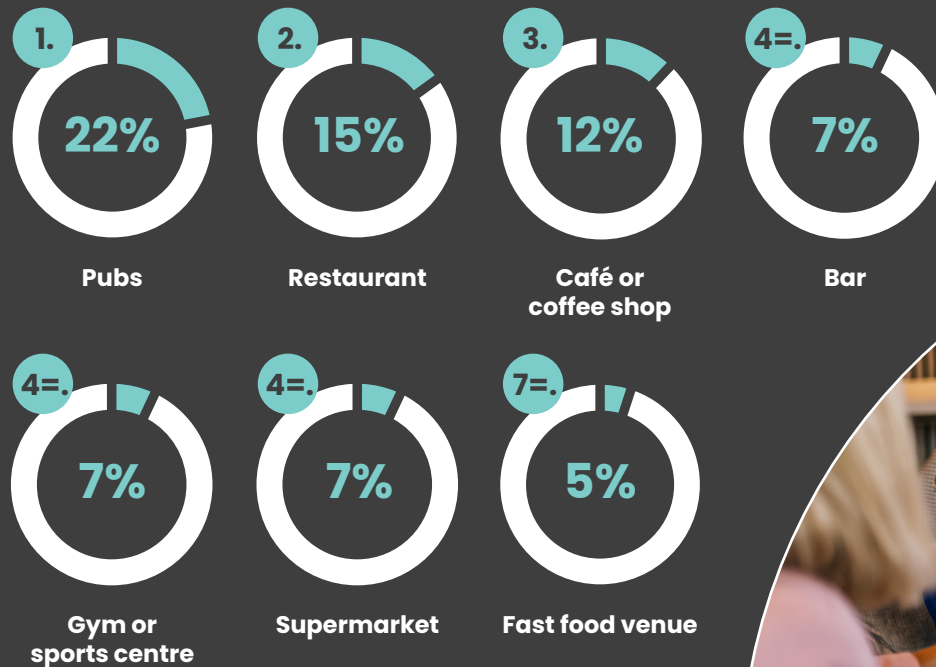


Britain's high street favourites

While Britain has a lot of affection for its local shops, it's the hospitality sector that makes up two thirds (66%) of consumers' favourite places on the high street.

When asked about their favourite local venues with special significance to them, more than a fifth (22%) name a pub. Another 15% cite a restaurant, and cafes or coffee shops (12%) and bars (7%) are important too. When other venues are added—including those that are favoured in particular by younger adults, like fast food venues and clubs—it's clear that hospitality matters most on the high street.

Which of these local venues holds the most significance to you?



How hospitality makes connections

What makes hospitality venues so special? There's no secret formula, but our research reveals some of the key elements of an offering that keeps people coming back (see box).

Those components are led by service. A third (32%) of consumers say being recognised or remembered by staff is the thing that makes a local venue special to them, making it the joint top factor. Inclusivity (26%) ranks high too—a reminder of the importance of providing a friendly welcome to everyone who comes through the door.

Memories from previous occasions are another big motivator. Just under a quarter (24%) say it's the special memories from past visits that makes a venue special. Even more (27%) say visiting has become a tradition with family and friends. Familiarity and nostalgia are built up over time, and loyalty can only be secured through consistently good experiences. It's no surprise that older people are far more likely than younger ones to feel special connections because of past visits.

Lifestyle-related factors are important too—especially to younger adults—and some consider a venue to be special because it welcomes their pet (14%), serves healthy food (13%), or is environmentally friendly (13%). A third (32%) prize the independence of a venue, which can sometimes give it a more distinct character than branded sites.

Perhaps the most striking finding is that food and drink—what might be considered the core components of hospitality—is some way down the list. Just under a quarter (24%) of consumers say their local venue is special because it serves their favourite dish or drink, putting it below factors like atmosphere and service. Eating and drinking matter, but it's obvious that pubs, bars and restaurants are much more than the sum of their parts.

What makes your favourite local venue feel special?

- 1= The staff remember me (32%)
- 1= It's independent (32%)
3. Visiting is a tradition with family and friends (27%)
4. It's inclusive to everyone (26%)
5. It has a great atmosphere / music I like (25%)
- 6=. I have special memories from visits (24%)
- 6=. It serves my favourite dish / drink (24%)
8. It's pet-friendly (14%)
- 9=. It serves healthy dishes (13%)
- 9=. It makes special occasions feel special (13%)
- 9=. It's environmentally friendly (13%)



Engage by age

People's engagement with pubs, bars and restaurants varies enormously by age, and our research reveals some very different attitudes to hospitality's role.

It shows younger people are much more likely to recognise the sector's important role in communities. Four in five (79%) of those aged 25 to 34 do so—17 percentage points more than those aged 55+ (63%). They are also more positive about hospitality's role as an employer, and far more likely than average to have a favourite local venue. More than four in five (82%) of those aged 18 to 24 do so, compared to only 52% among those of retirement age.

This might seem counter-intuitive, as older consumers are seen to have more loyalty, but the difference probably reflects younger people's

enthusiasm for going out. They also tend to be more optimistic about their communities, with three in five (62%) of 25 to 34 year-olds agreeing that their local high street is better than it was a year ago—seven times more than the 9% of those aged 65+. This pessimism probably reflects older people's longer memories of high streets and regrets about their decline.

The research also flags some important variations by earnings. People in the ABC1 group are 10 percentage points more likely than C2DE consumers to agree that eating and drinking out is as important in their social lives as it was a year ago—an indication that lower-earners remain more impacted by the cost of living crisis. They are also much more likely to think their local high streets have declined in the last year.

Protecting hospitality's vital rural role

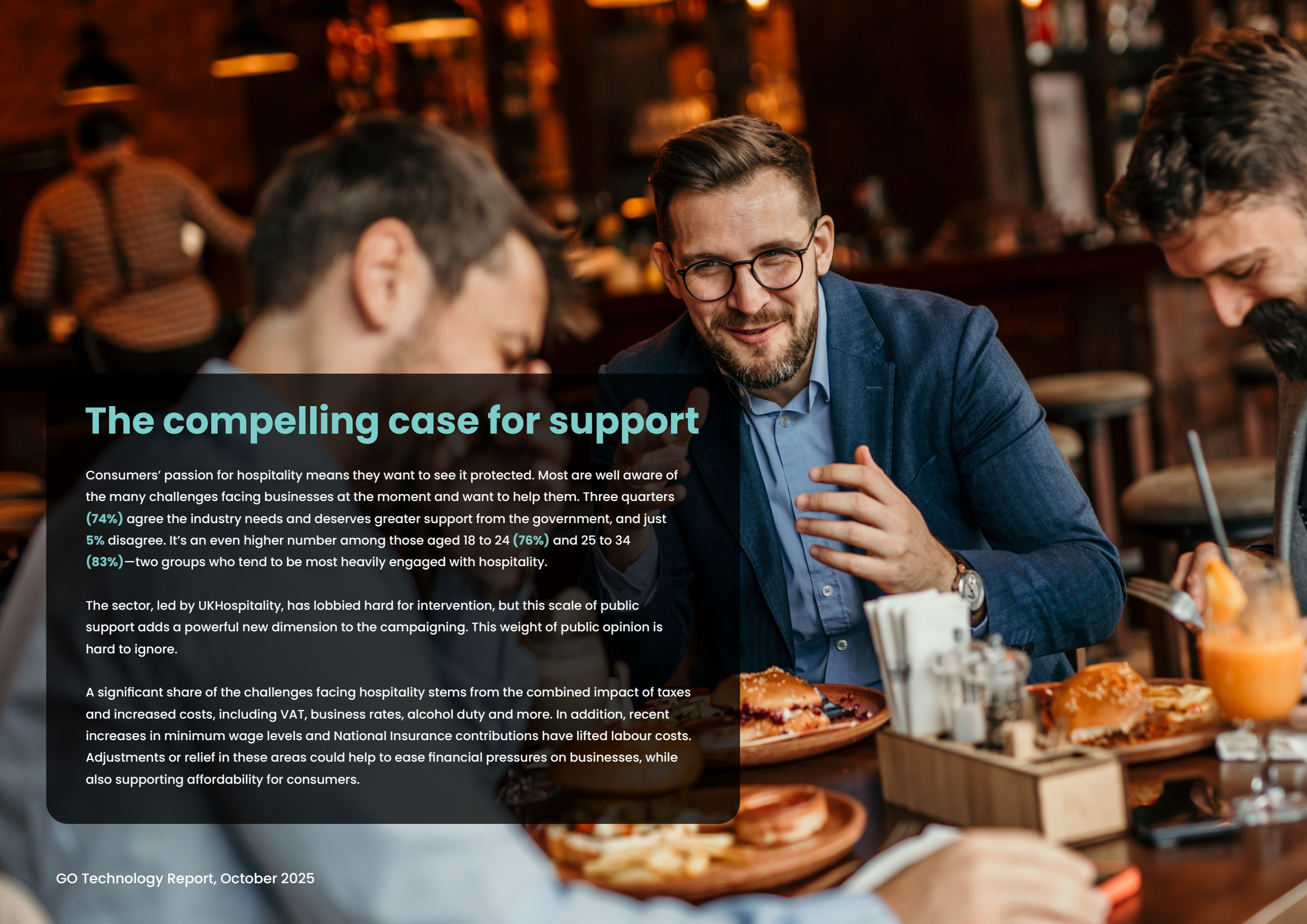
Hospitality is at the heart of all communities, but it's in rural areas where its role as a social connector is often most valuable. Pubs in particular can be vital in bringing villages or small towns together, and any closures risk weakening cohesion and increasing isolation.

Our research highlights how damage is already being done. Nearly half (48%) of rural residents say their high street is worse than it was a year ago—well above the all-consumer average (31%), and far higher than

the figure of 19% among those who live in city centres. City-dwellers are also 20 percentage points more likely than rural residents to have a favourite local venue.

These are signs of the gulf in access to hospitality that is disadvantaging millions of people. When a city-centre pub or restaurant closes, residents have plenty more to choose from—but when they shut in rural areas there may be no alternatives for miles, and a community hub is lost.





The compelling case for support

Consumers' passion for hospitality means they want to see it protected. Most are well aware of the many challenges facing businesses at the moment and want to help them. Three quarters (74%) agree the industry needs and deserves greater support from the government, and just 5% disagree. It's an even higher number among those aged 18 to 24 (76%) and 25 to 34 (83%)—two groups who tend to be most heavily engaged with hospitality.

The sector, led by UKHospitality, has lobbied hard for intervention, but this scale of public support adds a powerful new dimension to the campaigning. This weight of public opinion is hard to ignore.

A significant share of the challenges facing hospitality stems from the combined impact of taxes and increased costs, including VAT, business rates, alcohol duty and more. In addition, recent increases in minimum wage levels and National Insurance contributions have lifted labour costs. Adjustments or relief in these areas could help to ease financial pressures on businesses, while also supporting affordability for consumers.



The view from Zonal

"The hospitality industry is well aware of the important role we play on our high streets, of the great community work we do, and that we are a fantastic employer and creator of jobs in every corner of the country. However, to see that reflected in consumer sentiment in this research is really encouraging and the sector should take heart from it."

"The report clearly demonstrates that what our pubs, bars, restaurants, cafes and hotels offer to people is so much more than just a plate of food and something to drink. That the majority of people are still prioritising going out, even as the cost of living crisis continues to bite, clearly demonstrates the true value of the hospitality sector."

Tim Chapman, Chief Commercial Officer, Zonal



The view from CGA

"Our research makes it very clear that pubs, bars and restaurants have a very special role in people's lives. They are where Britain socialises and celebrates, they create some of our happiest memories, and they bring communities together. Hospitality has a hugely important part to play in social cohesion, but that role is being compromised by the soaring costs of doing business. Consumers remain very enthusiastic about eating and drinking out, and their desire for their local venues to be protected adds extra weight to the industry's urgent calls for targeted support."

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



The view from UKHospitality

"This research confirms what we hear every day from our members: hospitality is more than just a business—it's a vital part of our communities, our social lives, and our high streets. Whether it's the local pub that brings people together, the café where you catch up with old friends, or the restaurant that's become a family tradition, these venues matter deeply to people across the country."

"It's clear that people of all ages and across our cities, towns, suburbs and rural communities value hospitality's role, yet they are all at risk of losing their local venues. That's why we urgently need targeted support to help businesses thrive, not just survive. The public is clear: hospitality deserves greater backing, and with the right action from Government, we can unlock its full potential to regenerate high streets and strengthen communities nationwide."

Allen Simpson, Chief Executive, UKHospitality



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