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Britain’s pubs drove September hospitality sales higher with a 3.8% gain

Like-for-like sales across the sector rose 2.7% for a fifth straight monthly increase, though revenue growth still lagged inflation

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Sales at Britain’s pubs, restaurants and bars rose again in September, with pubs posting the strongest gains, but the wider hospitality industry is still not growing fast enough to outpace inflation.

New figures from the NIQ RSM Hospitality Business Tracker showed like-for-like sales across the sector increased 2.7% from September 2025. That was a clear improvement from August, when comparable sales growth was 0.8%, and it marked the fifth straight month of year-over-year gains.

Pubs led the market. Their like-for-like sales climbed 3.8% in September from a year earlier, the best result among the main hospitality segments and their second strongest month of 2026. Only July was stronger, when trading was lifted by the men's soccer World Cup.

Managed restaurants also improved. Their sales rose 2.6%, which NIQ and RSM said was the category's best performance since November 2024. Bars remained the weakest part of the market, with like-for-like sales down 1.7% from a year earlier. Even so, that was their strongest comparative result since the start of 2025, suggesting that pressure in that segment may be easing even though sales are still falling.

Total sales, which include locations opened in the past 12 months and not just established sites, increased 6.2% year over year. Trading was slightly better outside London than inside it. Like-for-like sales rose 2.8% beyond the M25, the ring road that circles the capital, compared with 2.3% within it.

The September results offered some relief for operators after a difficult stretch, but they did not signal a full recovery. The tracker said hospitality businesses have still not recorded real sales growth since spring 2025 because revenue increases have continued to lag inflation. In practical terms, venues may be taking in more money than a year ago, but higher costs and price pressures mean that increase is not translating into stronger growth in real terms.

Karl Chessell, NIQ's director of hospitality operators and food, said September gave the industry a "much needed shot of confidence." He said the month's performance could help set up a stronger Christmas and New Year trading period, but only if the government's upcoming Budget supports confidence among businesses and consumers.

Saxon Moseley, head of leisure and hospitality at RSM UK, also said the data pointed to stronger momentum ahead of the holiday season. At the same time, he warned that whether the improvement continues will depend in part on what measures are announced in the Budget, underscoring how sensitive the sector remains to tax, wage, and consumer spending decisions.

The figures matter beyond food service and lodging groups because pubs, bars, and restaurants are a major route to market for beer, wine, spirits, and soft drinks. Stronger pub sales can point to firmer demand in the on-trade drinks market in the weeks ahead, while the continued weakness in bars suggests some parts of that channel are still under pressure. With operators now looking toward Christmas bookings and year-end celebrations, September's pattern is likely to shape purchasing plans across the beverage supply chain, from brewers and distillers to wine distributors and wholesalers.

The gap between pubs and bars was one of the clearest signals in the September data. Pubs benefited from a format that remains broad-based, serving drink-led customers as well as diners and local social traffic. Bars, by contrast, are more exposed to discretionary late-night spending, an area that has been more vulnerable as households continue to watch budgets closely.

Restaurants showed a steadier picture. Their 2.6% increase suggested consumers are still willing to spend on meals out, though not at a pace strong enough to offset broader inflationary pressure on the sector. For many operators, that means sales growth alone is not enough. Margins remain dependent on labor costs, energy bills, rent, food input prices, and any further tax or wage changes that may follow the Budget.

September is also an important month for the industry because it can indicate whether demand is holding after the summer and before the year's main festive trading period. A stronger result at that point in the calendar may encourage operators to add staff hours, increase stock orders, and invest more heavily in holiday marketing. For suppliers of beer, cider, wine, and spirits, improving pub performance may support expectations for higher seasonal volumes, though the fact that inflation is still running ahead of sector growth points to a market that remains fragile rather than fully recovered.

The data leaves hospitality businesses entering the final quarter of the year with firmer sales trends than they had in late summer, but still facing an environment in which consumer confidence, policy decisions, and cost inflation will shape whether that momentum can be sustained.